Impact Of Covid-19

on The CHEBEC PROJECT

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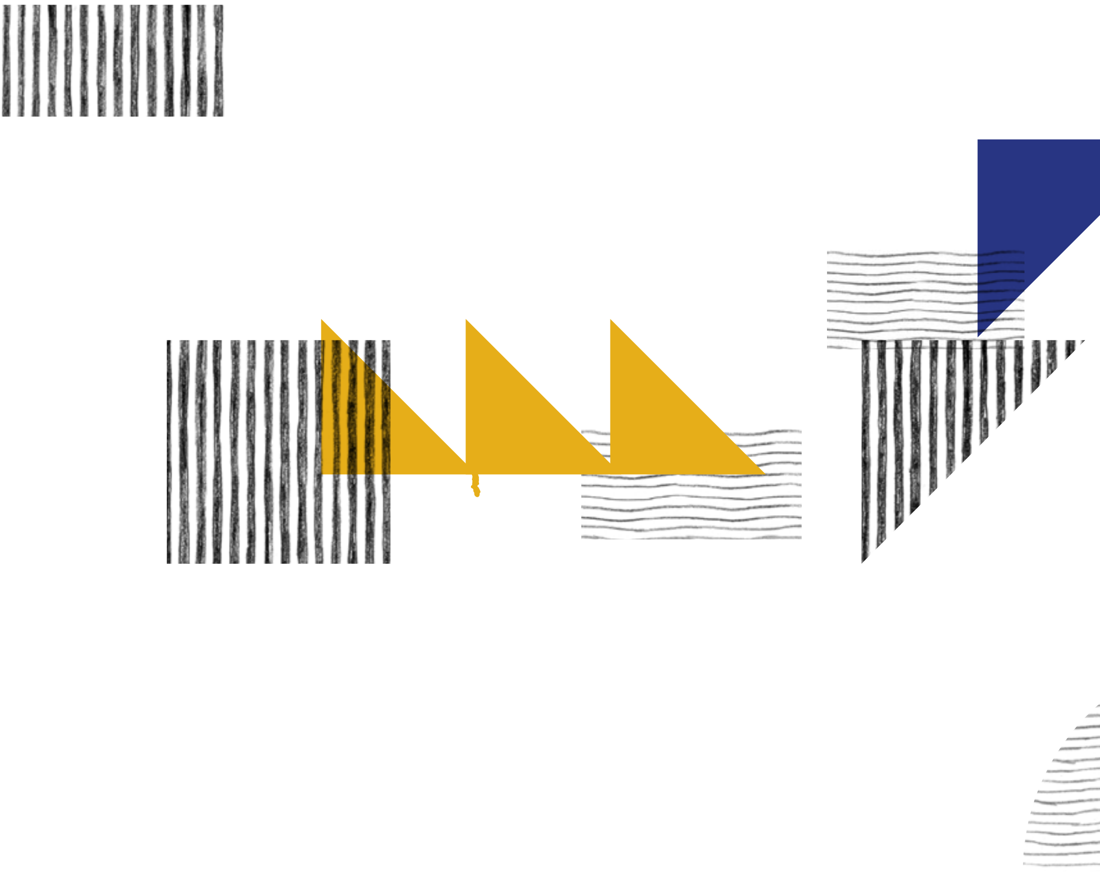

Report on Analysis of Covid-19 Impacts in Chebec Project

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1. INTRODUCTION

This report has three main objectives, namely to analyse the short and medium-term impact of the Covid-19 crisis on the beneficiary organisations of the Chebec project, look at the adaptation strategies they have used to respond to the situation of confinement and uncertainty and evaluate the support provided to the cultural sector by the governments of each of the countries involved in the Chebec partnership.

Although it was not originally included in the project's Application Form (AF), Econcult (University of Valencia) decided to produce this report because the team needed to understand the implications of the Covid-19 outbreak on the internationalisation plans of the beneficiary organisations. The initiative, which sits within the framework of the strategic evaluation activities that Econcult was already carrying out, was considered particularly relevant because the evaluation of Chebec could not be completed without taking into account how this exceptional situation has affected the organisations and the pilot projects they are participating in.

The Covid-19 crisis has led to the temporary suspension of the Chebec project, which was in the last phase of the regional pilot actions. Thus, the beneficiary organisations have seen their plans halted due to force majeure. In addition to the cancellation of the third mobility action, which was to be held in Bologna, most of the recipients of the Innovation Vouchers, meant to finance their internationalisation plans, have had to rethink their actions.

The impacts of the current crisis on the Chebec beneficiaries are similar to those being faced by other agents in the cultural sector: cancellations or postponement of events, reduction or cancellation of orders, closure of spaces and workshops, impacts on suppliers, etc. This crisis has worsened the already fragile and precarious situation of the cultural sectors, which have not yet recovered from the economic crisis caused by the bursting of the financial bubble in 2008.

The report is divided into three chapters, including a description of the methodology used, an analysis of the results of a survey carried out among the beneficiaries and final conclusions on the impact of Covid-19 on these organisations. The analysis of the survey results is divided into five sections, following the structure of the survey:

- Section A: Description of the organisations that have responded to the survey.
- Section B: Analysis of the strategies used to adapt to the Covid-19 outbreak and identification of specific needs.
- Section C: Assessment of the impact of Covid-19 in the short term.
- Section D: Evaluation of the long-term effects of Covid-19.
- Section E: Assessment of the effectiveness of public aid and proposals for improvement.

2. METHODOLOGY

The main source of information used to conduct an analysis of the current situation was a telematic survey carried out amongst the beneficiary organisations of the Chebec project. The design of the questionnaire was based on the knowledge accumulated by Econcult through its participation in various European cultural research and strategic evaluation projects (Sostenuto, CreativeMED, 3C4 Incubators, CreativeWear, etc). The structure of the questionnaire is the result of the combination of a series of analytical approaches, including the function of cultural production, the business model analysis (canvas model), and the value chain of the production process. These perspectives make it possible to organise the analysis of the production and management processes of cultural agents and organisations in a precise manner. The microeconomic approach was complemented with a macroeconomic perspective that uses the analysis of public policies and the paradigm of the relations between culture and territorial development as a baseline.

A review of various sources of qualitative information was then used to contextualise the data obtained through the questionnaire and increase their intelligibility. These sources included bibliography and background, a review of culture-related news pieces published during confinement, official reports on the situation of the sector in Europe, review of other reports that also analyse this crisis in the cultural sector and analysis of the demands made by the sector.

Table 1 summarises the survey's technical information, as well as the number and type of respondents. The survey template can be found in the Annex.

TABLE 1. SURVEY DATA SHEET

Survey universe	Chebec project beneficiaries (69 beneficiaries from 9 regions)
Sample size	50 answers (72.46% of beneficiaries)
Survey dates	April 15 to April 30, 2020
Collection of information	Telematic questionnaire designed and managed with the LimeSurvey tool.
Organisation responsible	Survey design, data collection and analysis of results carried out by ECONCULT at the University of Valencia.

Source: Own elaboration

The universe of this survey is the beneficiaries of the 9 pilot projects carried out in the 5 countries participating in Chebec: Portugal (Evora), Spain (Seville, Valencia and Barcelona), France (Marseille and Lyon), Italy (Rome and Bologna) and Bosnia & Herzegovina (Sarajevo). The total number of beneficiaries (cultural organisations and operators) who were still actively participating in the project in December 2019 was 69. The survey, which was carried out between the 15th and 30th of April 2020, had 50 responses. These 50 beneficiaries represent approximately 72% of the total number of beneficiaries who are still actively taking part in the project.
The survey was conducted through an online questionnaire. This telematic survey was designed and managed with the LimeSurvey tool. The organisation responsible for designing the questionnaire and carrying out the survey was Econcult (University of Valencia), in collaboration with the other partners of the Chebec project.
The following GANTT chart shows the process that was followed, from the design of the survey content to the dissemination of the report among the partners. This process began on the 3rd of April and concluded on the 18th of May 2020.

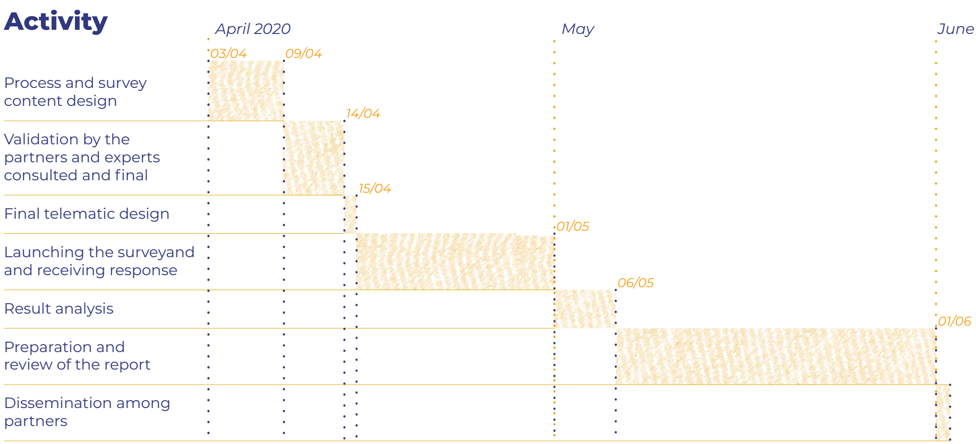


Figure 1. GANTT: Report on Analysis of Covid-19 Impacts in Chebec project

3.SURVEY RESULTS

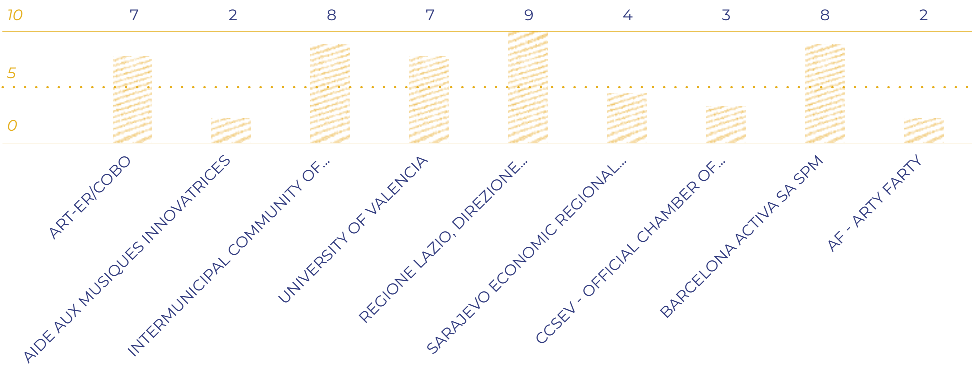
A telematic survey was carried out to ascertain the effects of the Covid-19 crisis on the organisations taking part in the Chebec project. This chapter presents the responses provided by the beneficiary organisations, followed by an analysis of the results for each section.
In addition to reflecting on the effects on their own organisations, survey respondents were also asked their opinion about the general situation of the cultural sector and the measures that should be considered to alleviate it.

Section A.
Profile of the organisations

This section describes the main characteristics of the survey sample, i.e. some of the beneficiary organisations of the Chebec project, including country of origin, subsector, professional situation, business size and turnover.

A.1 Beneficiary organisations by pilot and country

The survey was completed by the beneficiaries of the 9 pilots that make up the Chebec project. Graph 1 shows the number of respondents by pilot project.

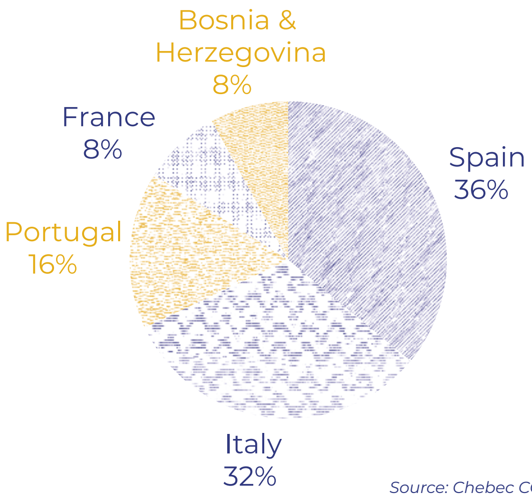


Source: Chebec COVID-19 Survey (2020)

The pilots with the highest number of respondents were Regione Lazio, with 9 answers, and Barcelona Activa and the Intermunicipal Community of Central Alentejo, with 8 answers each. This means that all of the beneficiaries that continue to actively participate in these three pilots completed the survey.

On the other hand, the pilots with the lowest number of respondents were AMI and Arty Farty, with 2 answers each. The main reason for this is that the number of organisations that are still involved in the project is much lower in these pilots. The number of beneficiaries actively participating in the AMI pilot in December 2019 was 7, while the Arty Farty pilot had 5.

In addition to the distribution by pilot, it is important to consider the distribution by country, as the characteristics of the sector or the availability of public aid may differ between countries. Graph 2 shows the distribution of the beneficiaries by country.



Graph 2. Survey participants by country

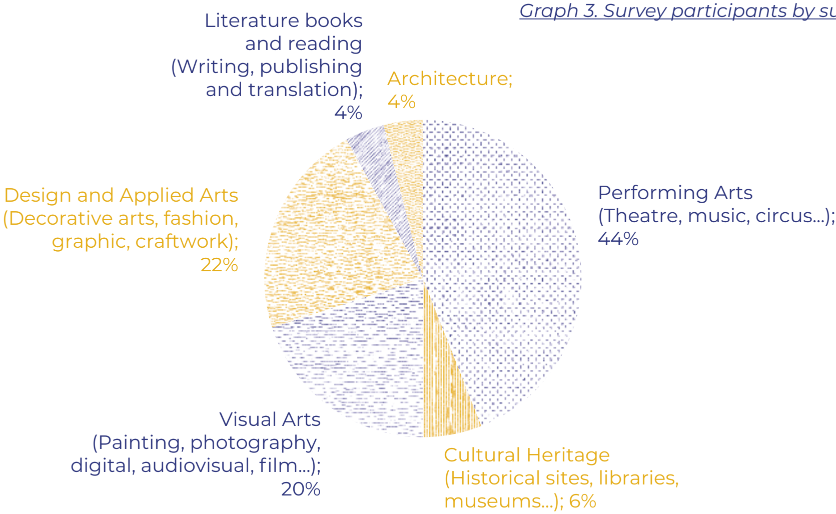
Spain and Italy stand out, as together they make up 70% of the total number of responses. This is due to the higher number of pilots being carried out in these countries, with three in Spain (Barcelona, Valencia and Seville) and two in Italy (ART-ER/CoBo and Rome). Many of these pilots also have a high number of beneficiaries.

Source: Chebec COVID-19 Survey (2020)

A.2 Subsectors

The distribution of the Chebec beneficiaries by subsectors conditions their response to the Covid-19 crisis. Depending on the characteristics of the sector, the impact may manifest itself differently. Graph 3 shows the distribution of respondents by subsector.

Graph 3. Survey participants by subsector



Source: Chebec COVID-19 Survey (2020)

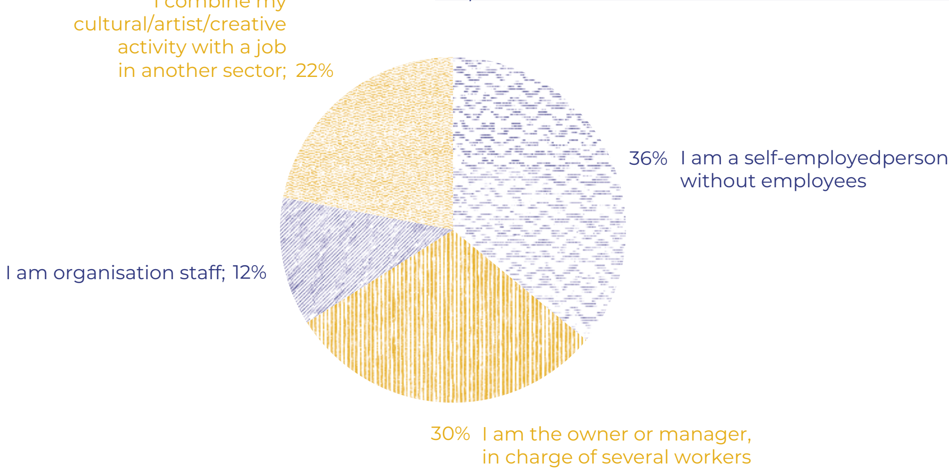
The **performing arts** subsector stands out, with 44% of respondents, followed by **design and applied arts** with 22% and **visual arts** with 20%. The analysis by sectors is relevant because the characteristics of the different productive processes determine both the specific impact of the crisis and the possibilities to adapt through remote working and digitalisation. In this sense, the performing arts are very different from design in terms of their capacity to adapt to the new ways of working that have been introduced as a result of confinement.

A.3 Professional situation

One of the most significant characteristics of the cultural labour market is the precariousness of its workers. According to Eurostat data (2019), one third (33%) of the cultural workforce was self-employed in 2018 across the EU-28, compared to an average of 14% for the whole of the economy. In 2018, there were more than two million artists and writers in the EU-28, which together accounted for almost a quarter (23%) of cultural employment. Almost half (48%) of all artists and writers in the EU-28 were self-employed. This percentage was much higher than the average for the whole economy (14%) and was also higher than the average for cultural employment (Eurostat, 2019). A sign of **the precarious nature of cultural employment is the temporary nature** of the employment contracts. In 2018, around 86% of employees in the EU-28 had a permanent employment contract, while the corresponding figure for artists and writers was 77% (Eurostat, 2019).

The objectives of the Chebec project have been set taking into account the impact of job instability on the design of the internationalisation plans of beneficiary organisations and the resources available to support these processes (time, information, administrative procedures or access to funding). To identify their profile and their level of vulnerability to the Covid-19 crisis, the beneficiaries were asked about their professional situation. The results are shown in Graph 4.

Graph 4. Professional situation of Chebec beneficiaries



Source: Chebec COVID-19 Survey (2020)

The fact that the Chebec programme is particularly focused on promoting the internationalisation of **small organisations and cultural agents** is reflected in the figures: 36% of respondents are self-employed, followed closely by 30% who own a company with employees in their care.

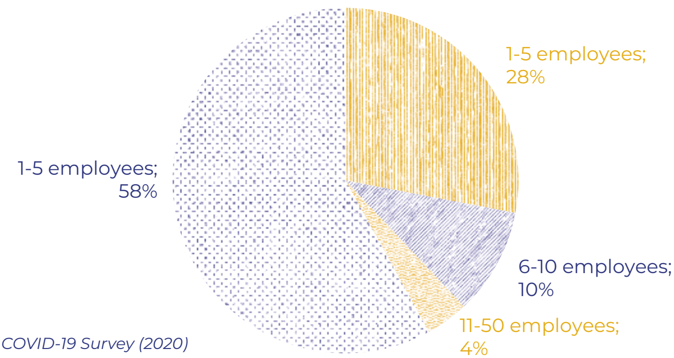
It is interesting to note that 22% of respondents combine their cultural or artistic activities with **a job in another sector**, a common situation in the Cultural and Creative Sectors (CCS). Another common occurrence in the CCS is workers who find themselves in irregular situations and carry out their activities in an informal way. This fact, combined with the temporary nature of many of their jobs, accentuates the precariousness of the cultural sector (Serafini & Banks, 2020).

A.4 Size and turnover

The market structure, size and number of companies carrying out cultural activities is another relevant characteristic that needs to be taken into account when considering the impact of Covid-19 on the sector. In 2016, 99.8% of cultural enterprises were SMEs and 93% of those were micro-SMEs (Eurostat, 2019). In fact, almost 60% of this "micro enterprises" only have between 1 and 3 employees. Although the number of large companies is marginal (less than 1%), they generate more than 40% of the annual turnover. (HKU, 2010).

Graph 5 shows the distribution of Chebec beneficiary organisations by size.

Graph 5. Size of Chebec beneficiary organisations

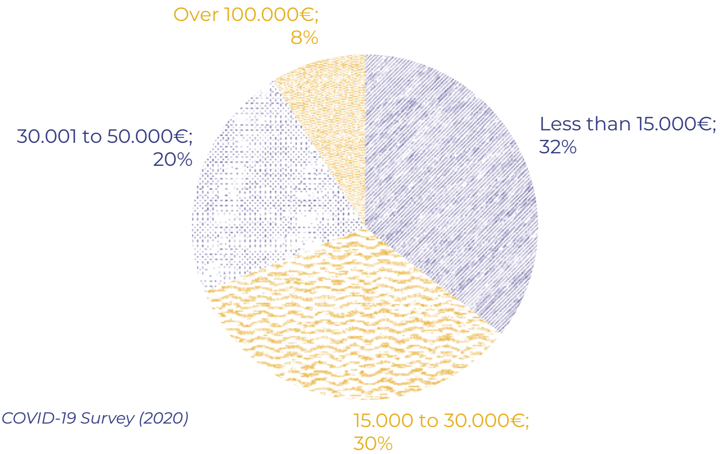


Source: Chebec COVID-19 Survey (2020)

Those who are self-employed or combine their activities with a job in another sector represent 58% of respondents. This reflects the nature of the beneficiaries and the structure of the cultural market noted above. Of those organisations with the capacity to recruit, 28% have between 1 and 5 employees. Companies with between 11 and 50 employees are the largest in the sample, representing 4% of the total.

Indeed, the tendency towards **business atomisation** that determines the majority presence of freelancers and micro-SMEs is reflected in the turnover data. Graph 6 shows the annual turnover of the organisations.

Graph 6. Annual turnover of Chebec beneficiary organisations



Source: Chebec COVID-19 Survey (2020)

According to the survey results, 32% of organisations have a turnover of less than 15.000 € per year, followed by 30% with a turnover between 15.000€ and 30.000€. Out of all beneficiaries surveyed, 20% report a turnover between 30.001€ and 50.000€ and only 8% exceed 100.000€ per year. Therefore, 62% of beneficiary organisations report a turnover of less than 30.000 €. These figures also have an impact on the capacity of Chebec beneficiaries to face the Covid-19 crisis, as they determine aspects such as the availability of funds and the investment capacity required to reorganise their productive processes (for example, in relation to digitalisation) and redesign their business model (new services, new audiences, etc).

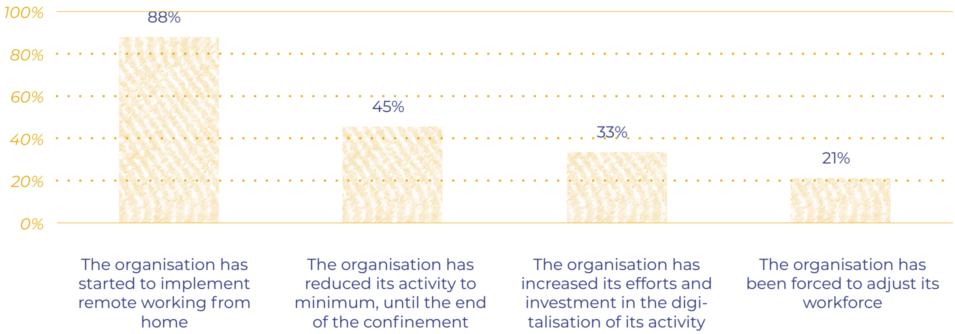
Section B.
Adaptation of beneficiary organisations to the crisis

Section B examines the types of activities carried out by Chebec beneficiary organisations during confinement. It covers the ways in which they have adapted to the new situation, their use of time (reorientation of activities) and their specific needs in relation to Covid-19.

B.1 Actions carried out by organisations

Graph 7 shows the kind of actions that beneficiaries have carried out in response to the Covid-19 crisis. Many of the organisations surveyed have implemented several actions simultaneously.

Graph 7. Actions taken by Chebec beneficiaries to adapt to the current situation



Source: Chebec COVID-19 Survey (2020)

Due to confinement, 88% of beneficiaries have started working from home. Most organisations have therefore opted for **remote working** where it has been possible. Although some of the beneficiaries indicated that they were already working remotely on a regular basis, they have noticed that activity has reduced (fewer projects) and that they have only been able to carry on with their regular activities partially (one of the beneficiaries notes that he has only been able to produce free online videos, therefore not receiving any remuneration).

Regardless of the implementation of remote working, the situation has forced 45% of respondents to **reduce their activities to a minimum** due to the cancellation of events, concerts, etc, which has obviously had a significant impact on their sources of income.

On the other hand, a third of the organisations surveyed (33%), mainly small organisations between 1 and 5 employees, have increased their investment in the digitalisation of their activities. The predominance of micro-SMEs in both the sector and the Chebec project itself may account for the fact that workforce adjustment is the option that was chosen the least (21%) out of all the possible actions, especially considering that most of the beneficiaries are entrepreneurs.

The survey also included an option to note actions that were not covered by the questionnaire. Some of the comments highlighted the impossibility of taking part in workshops or events due to travel limitations or cancellation/postponement. One of the respondents indicated that they had used the time in confinement to search for public projects, tenders and sources of funding. Another of the beneficiary organisations said that it had resorted to temporary layoff procedures (ERTE, in Spanish). It is also interesting to note that two of the beneficiaries reoriented their activities to support the health sector by manufacturing masks and other protective equipment against Covid-19.

B.2 Time spent on adaptation during confinement

As a result of confinement, organisations have found themselves in a scenario that has radically altered their production and management processes. Has the strategic adaptation of cultural organisations presented any particularly creative characteristics? How is this adaptation reflected in terms of the phases of their production process? The answers to these questions are shown in the following graph.

Graph 8. Tasks performed by beneficiaries during confinement

Source: Chebec COVID-19 Survey (2020)

The graph shows the amount of time reallocated to different productive tasks during confinement on a scale of 1 to 5, with 1 being the least amount of time and 5 being the most amount of time dedicated.

Despite the paralysis, the beneficiary organisations of the Chebec project have remained active. An initial approximation indicates that the differences between the time allocated to the different tasks are not very significant, as they range from an average value of 3.36 (highest value) to 2.87 (lowest value). Another general aspect worth noting is the dichotomy between **short-term operational actions** (administrative tasks and search for aid, catching up with postponed work) and **medium and long-term strategic actions**. The beneficiaries of Chebec have spent less time on tasks that require a medium to long-term vision (activities with a valuation between 3.04 and 2.87), such as rethinking the business model or adapting it to a scenario of normality with restrictions. Obviously, the urgency and unexpected nature of the situation means that immediate actions are temporarily biased towards the short term.

A more detailed analysis reveals that the three most developed activities on average have been the c**reation of new ideas** (3.36), **administration tasks and search for aid** (3.28) and **training actions** (3.11). This shows that the adaptation strategies of Chebec beneficiary organisations are biased towards creation and innovation, grant management and continued training.
On the other hand, the lowest values assigned on average are those that refer to **communication and online marketing actions** (2.87) and **market analysis actions** (2.89). This last aspect is in line with the limited business skills that characterise cultural organisations. Indeed, strategic planning, business management and project design are some of the skill shortfalls of cultural organisations, partly due to their small size, the nature of their activity and the precarious conditions in which they work (HKU, 2010).

The following table shows both the average value and the percentage distribution of the beneficiaries' responses. This allows us to analyse the question from a complementary perspective: the most frequent actions based on the amount of time allocated to each of them by the different organisations (1 being the minimum and 5 the maximum) and the number of beneficiaries with the same time allocation assessments for each of the tasks.

Table 2. Tasks performed by beneficiaries during confinement

Indicate from 1 to 5 the time you are allocating to the following activities during confinement	1	2	3	4	5	N/A	Average
Creation of new ideas and products or projects that I had no time to work on	10%	18%	22%	16%	28%	6%	3,36
Administration and management work, including search for aid	10%	10%	34%	24%	16%	6%	3,28
Training and acquiring new skills	10%	24%	18%	30%	12%	6%	3,11
Archive management, postponed work catch-up	10%	20%	26%	26%	10%	8%	3,07
Rethinking the business model and working processes	12%	20%	30%	16%	16%	6%	3,04
Adapting services/products to the new medium-term scenario	24%	12%	16%	26%	14%	8%	2,93
Market analysis (diagnosis of the situation, prospects for demand...)	20%	12%	30%	18%	12%	8%	2,89
Increased communication efforts: dissemination, online marketing	20%	14%	32%	14%	14%	6%	2,87

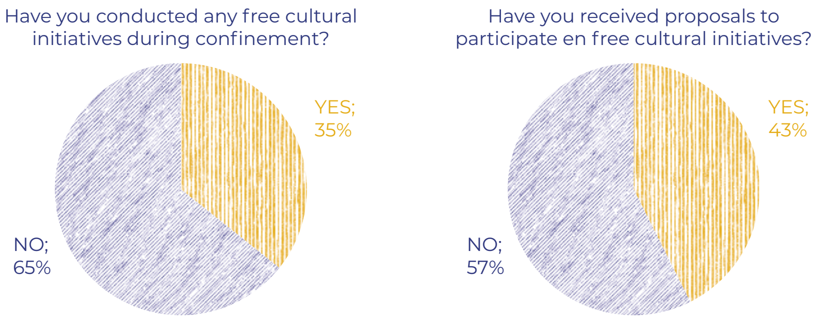
Source: Chebec COVID-19 Survey (2020)

The **creation of ideas and products** has the maximum frequency (28%) in relation to the maximum time allocation rating (5), followed by **training and knowledge acquisition** (30% frequency with a rating of 4). **Administration and management activities** has the highest frequency of responses in the intermediate range (3), while the **adaptation of services in the medium term** is assigned the minimum value (1) by 24% of respondents.

B.3 Confinement and offer of free activities

Numerous free activities, such as concerts and online events, have appeared on social networks during confinement, a phenomenon that is common to all countries and specific to the cultural sector. The following graphs show the percentage of beneficiaries who have carried out free activities and whether they have been invited to participate in this kind of initiatives.

Graph 9 and Graph 10. Free cultural initiatives during confinement



Source: Chebec COVID-19 Survey (2020)

The results indicate that more than a third of those surveyed (35%) have carried out free cultural initiatives, with up to 43% saying they received proposals to participate in such activities. Therefore, 7% of those surveyed declined invitations to take part in free cultural initiatives.

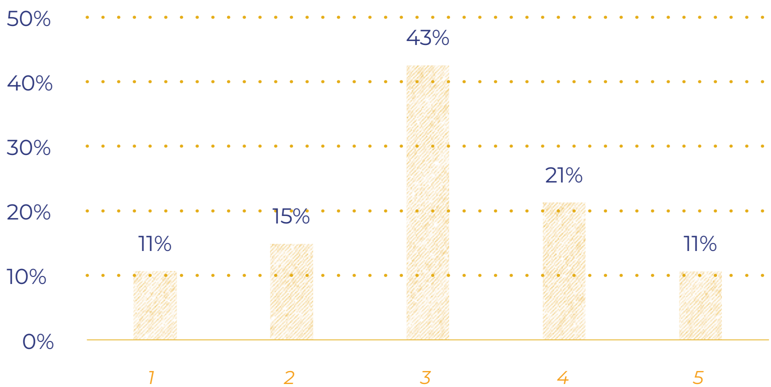
This is also connected with the significant amount of **voluntary work** carried out in the cultural sector and the fact that free content is both an indicator of the characteristics of cultural work (solidarity, not-for-profit) and a risk factor that can increase the **precariousness** of artists. This risk is even more evident if we consider a medium-term scenario in which the structural transformations that are currently in motion in the cultural market will be intensified by the Covid-19 crisis. Such transformations are generating a growing asymmetry of power between the two productive factors: capital and labour. The increasing digitalisation of cultural consumption patterns, together with the oligopolistic power of large multinational content distribution platforms, is a clear example. Moreover, if cultural workers do not have enough income to fund their careers in the medium term, they will be effectively expelled from the sector, making professional artistic activity only accessible to the elite.

B.4 Cultural consumption of Chebec beneficiaries during confinement

To complement the questions around the adaptation of the production of goods and services during confinement, the survey included two questions about the trend in cultural consumption of the beneficiary organisations. Restrictions on mobility have created a need for escape and entertainment, with cultural goods playing a decisive role in this regard. The impact of cultural consumption on the beneficiary organisations is relevant because as **prosumers**, the products they consume also become sources of inspiration and benchmarking.

Chebec beneficiaries were asked to what extent their consumption of cultural goods increased during the confinement on a scale of 1 to 5 (with 5 being the maximum). On average, the consumption levels increased moderately, with an assessment of 3.06. As shown in the graph below, the intermediate assessment stands out (43% of beneficiaries rated the increase in their cultural consumption at 3 out of 5).

Graph 11. Increase of cultural consumption during confinement

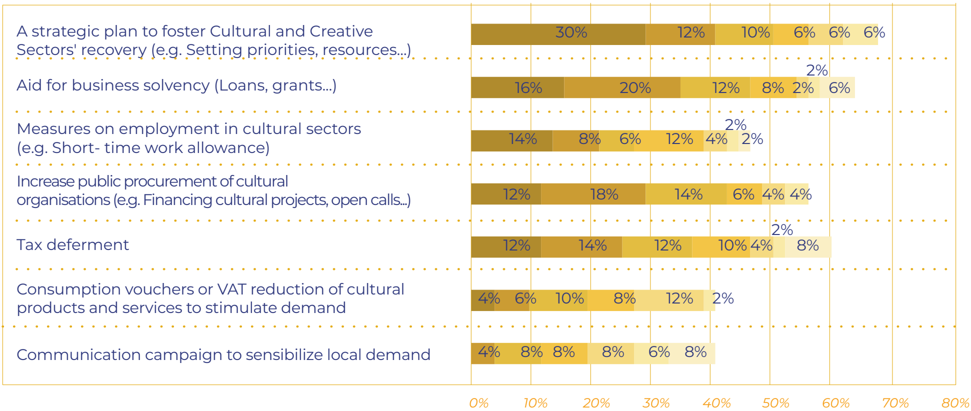


Source: Chebec COVID-19 Survey (2020)

The results also show a moderate (over 40%) or relatively high (20%) increase in the number of hours spent consuming cultural goods during confinement. It is important to note that the levels of cultural consumption are already higher on average for cultural agents than for the rest of the population.

The next question was around what kind of cultural goods have been most consumed during confinement. Respondents were asked to rate a series of cultural activities according to the amount of time they spent on them. The answers to this question are shown in the graph below.

Graph 12. Cultural activities during confinement



Source: Chebec COVID-19 Survey (2020)

The graph shows how many beneficiaries selected each variable and in which order. It should be noted that the first options (Options 1, 2 and 3) concentrate the highest number of responses, while Options 5 and 6 were left blank by 80% and 92% of respondents, respectively. This means that beneficiaries made an intensive use (or consumption) of the options selected.

As can be seen in the graph, the most popular activities were the **consumption of audiovisual content on online platforms, listening to music and reading books**. More than 60% of respondents chose these options, which exceeded other activities by far. In addition, these activities were selected as the main options (between 1st and 3rd options), which points to the need for a way to escape reality through entertainment. However, there is no explicit evidence to support this notion. The consumption of online audiovisual content was chosen as the first option by 26% of beneficiaries, followed by listening to music and reading books (both with 24%).

As previously noted, the Cultural and Creative Sectors (CCS) have had a spontaneous and supportive response to confinement, promoting **online cultural** initiatives, opening digital archives, and offering virtual museum tours to make the situation more bearable for society. Almost half (40%) of the beneficiaries surveyed have taken part in **online cultural initiatives** and have chosen them as a third option (12%) and fourth option (10%), while some respondents also selected them as their first or second option (8% respectively). Even though 30% of Chebec beneficiaries **visited online museum exhibitions** or sifted through **digital archives**, these activities were mainly seen as complementary options, placed in fourth (6%) and fifth place (8%). Some of the beneficiaries did choose online exhibitions and archives as their second option (8%). Finally, 24% of beneficiaries played video games during confinement, especially as a second option (12%).

B.5 Needs of Chebec beneficiaries to cope with the crisis

One of the keys to the adaptation of Chebec beneficiary organisations to Covid-19 is the need to overcome the mobility restrictions, which limit access to the workplace and attendance to meetings, and the paralysis of economic activity. Organisations were asked about their specific needs to increase their visibility so that they can be taken into account to design more effective support measures.

Graph 13 shows the degree of need for the various variables. A scale from 1 to 5 has been used for this purpose, with 1 being the minimum level of need and 5 being the maximum. Again, the differences between the variables are not significant (between 3.76 and 3.23), which indicates that the need for all the variables proposed is equally high.

Graph 13. Beneficiaries' needs

Source: Chebec COVID-19 Survey (2020)

ooking at the average values, there is a clear need for information on the aid available and guidance on how to access it (3.76). Beneficiaries also require information and knowledge that will allow them to reorganise their processes once economic activity starts
14
to gradually recover (3.74). As there is a great deal of uncertainty around the timeline for the reactivation of cultural events, precise information and clear guidance from public authorities stand out as major need.

Secondly, Chebec beneficiaries have expressed a need for liquidity (3.47) to mitigate the negative impact that confinement has had on their usual sources of income. This aspect will be covered in detail in the following section.

Finally, beneficiary organisations have expressed a moderate need to adapt to remote working. In this respect, the need to adapt their activities to the digital environment (3.29) and achieve work-life balance in a single space (3.23) are also considered important, albeit to a lesser extent.

The following table shows the percentage distribution of the beneficiaries' answers to the previous question. This allows us to analyse it from a complementary perspective: the most pressing needs (1 as the minimum and 5 as the maximum) and the number of respondents that attributed the same level of importance to the different needs.

Table 3. Beneficiaries' needs

Please indicate to what extent do you have needs regarding the following issues (where 1 is "Minimum need" and 5 is "Maximum need").	**1**	**2**	**3**	**4**	**5**	**N/A**	**Average**
Clear information about available aid and how to access it	10%	6%	16%	24%	36%	8%	3,76
Information to re-schedule the organisation activity	10%	4%	20%	24%	34%	8%	3,74
Liquidity (capability to meet economic obligations)	14%	10%	22%	14%	34%	6%	3,47
Adapting the organisation's activities to the digital environment	14%	12%	16%	30%	18%	10%	3,29
Making remote work compatible with home life	10%	10%	30%	26%	12%	12%	3,23

Source: Chebec COVID-19 Survey (2020)

Clear information on available aid is considered the most pressing need (5) by the highest number of respondents (36%), followed by **adaptation to the digital environment** (30% rated it at 4) and achieving work-life balance in the context of **remote working**, considered moderately important (3) by 30% of respondents.

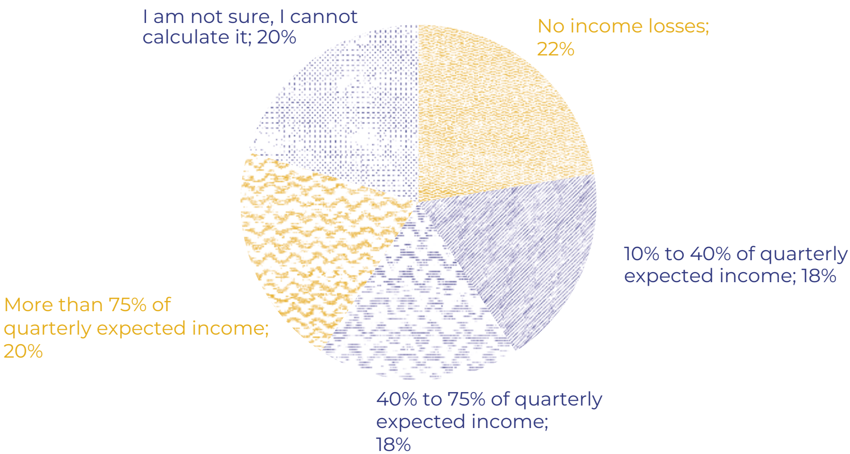
Section C.
Short-term impact of Covid-19

This section will look at the economic impact that confinement has had on the Chebec beneficiary organisations in the short term, trying to ascertain their expected revenue loss for the first two quarters of 2020.

C.1 Expected revenue loss

The following graph takes the first and second quarter of 2020 as reference to compare the impact caused by Covid-19. Although confinement measures were introduced at different times in each country, there are visible differences between both periods, mainly because the organisations were able to operate almost normally until March. In fact, according to the **comparative data for the first and second quarter** shown in both graphs, 22% of beneficiaries did not register losses in the first quarter, while the figure for the following quarter drops to 12%. It is also important to note that small organisations generally operate in a very short-term forecasting framework. This may have influenced the forecasts for the second quarter of 2020, with 27% of beneficiaries indicating that they did not have a clear estimate of the impact as opposed to 20% in the previous quarter.

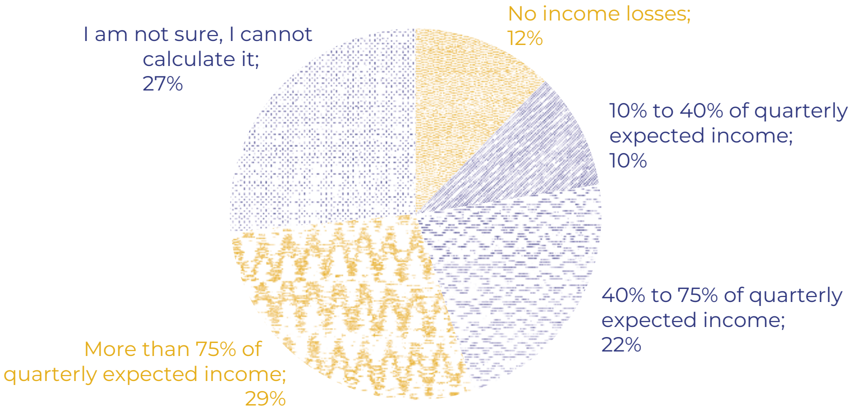
Graph 14. Income loss (January - March)



Source: Chebec COVID-19 Survey (2020)

If we focus on the first quarter, the above graph shows that 56% of beneficiaries claim to have had income losses, while 22% claim to not have recorded any losses. In addition, 20% of beneficiaries claim to have lost more than 75% of their expected income for this period, while 18% claim to have lost between 40% and 75% of their expected income and a further 18% claim to have lost between 10% and 40% of their expected income.

Graph 15. Income loss (April - June)



Source: Chebec COVID-19 Survey (2020)

As shown on the graph, the impact of confinement measures is concentrated on the second quarter. The number of beneficiaries who expect losses in their income forecast rises to 61%. In addition, the number of beneficiaries who estimate losses greater than 75% of their expected income increases to almost a third of respondents (29%). The percentage of beneficiaries who estimate losses between 40% and 75% of their expected income increases to 18%. Only 10% of beneficiaries expect losses between 10% and 40% in the second quarter.

In addition to income analysis, cost analysis must be considered. Indeed, many of the costs borne by beneficiary organisations (e.g. rent, social security contributions) are fixed, which aggravates the situation. A recent report on the graphics sector in Spain estimated the amount of these fixed costs during confinement at around 954 euros per month. [1]

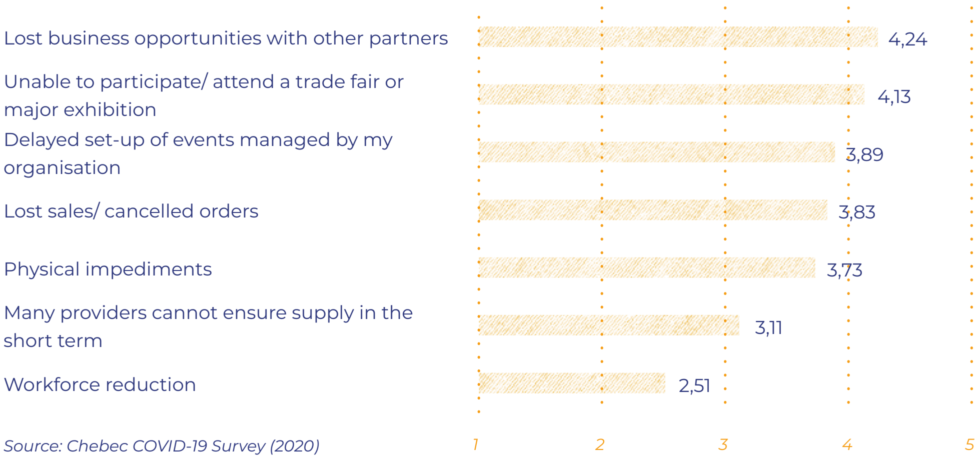
These results highlight the serious situation that these organisations face if they do not receive financial support during the second quarter of 2020. As they are mainly self- employed workers or micro-enterprises with a low turnover and precarious and irregular working conditions, it will be very difficult for them to cope with the situation. The Covid-19 crisis will increase the structural fragility of cultural organisations, making their survival and the sustainability of the cultural ecosystem even more difficult.

[1] The sectoral association SOS Sector Gráfico carried out a survey of the graphic design sector in April 2020. Available in the following link (Only in Spanish): https://sossectorgrafico.wordpress.com/encuesta/

C.2 Types of impacts on the organisations

As well as trying to ascertain the magnitude of the impact in quantitative and general terms, our questionnaire addressed the qualitative nature of the impact, identifying a series of incidences that could have possibly been caused by confinement. Graph 16 shows how Covid-19 has affected Chebec beneficiaries. A scale of 1 to 5 has been used, with 1 being «strongly disagree» and 5 being «strongly agree». In this case, there are greater differences in the assessment of the variables.

Graph 16. Impacts on the organisations



Source: Chebec COVID-19 Survey (2020)

This question is particularly relevant for the Chebec project, since Covid-19 has significantly affected the implementation of the beneficiaries' internationalisation plans through the Innovation Vouchers. As can be seen in the graph, the beneficiaries claim to have **lost business opportunities with other partners**, with an average rating of 4.24. This is not surprising given the travel restrictions in place, which have prevented technical visits to venues and face-to-face meetings. The funding scheme (Innovation Vouchers) has also been affected in this respect, as some of the initiatives were based on the collaboration between one or more partners. The **inability to participate in or attend fairs and exhibitions** has also had significant effects on beneficiaries, with an average rating of 4.13, as these events were one of the highlights of the internationalisation plans. In fact, the Covid-19 crisis led to the cancellation of the third mobility action in the framework of the Chebec pilot actions, originally planned for March 2020.

Confinement measures have also caused a **delay in the organisation of events**, valued at an average of 3.89, with a special impact on the performing arts. The **cancellation of orders and sales** has also affected many of the beneficiaries, with an average rating of 3.83. It should be noted that beneficiaries with the capacity to work remotely have been impacted to a lesser extent, which may explain the fact that 16% of respondents indicated that they were not affected by cancellations.

Similarly, **physical barriers and impediments** have affected beneficiaries in different ways, with an average rating of 3.73.

Finally, the variables that have had a lesser effect on Chebec beneficiaries are related to **short-term supplies**, with an average rating of 3.11, and **workforce reduction**, with a rating of 2.51.

The following table shows the percentage distribution of the beneficiaries' answers to the previous question. Again, this allows us to analyse the question from a complementary perspective: the areas where the organisations were most impacted and the number of beneficiaries that felt similar levels of impact (1 being the minimum and 5 the maximum) within each area.

Table 4. Impacts on beneficiary organisations

How has the current situation on COVID - 19 affected your organisation activity?	1	2	3	4	5	N/A	Average
Lost business opportunities with other partners	4%	4%	12%	18%	54%	8%	4,24
Unable to participate/ attend a trade fair or major exhibition	12%	4%	4%	12%	60%	8%	4,13
Delayed set -up of events managed by my organisation	10%	8%	10%	18%	46%	8%	3,89
Lost sales/ cancelled orders	16%	2%	18%	4%	54%	6%	3,83
Physical impediments	14%	6%	12%	24%	40%	4%	3,73
Many providers cannot ensure supply in the short term	22%	6%	20%	20%	20%	12%	3,11
Workforce reduction and staff cutting back	32%	14%	14%	6%	16%	18%	2,51

Source: Chebec COVID-19 Survey (2020)

The **impossibility of participating in fairs** was identified as the greatest impact (5) by the highest number of respondents (60%), followed by physical impediments (rated at 4 by 24% of beneficiaries). Difficulties with suppliers were considered a medium-level impact (3) by 20% of respondents. The area where beneficiaries seemed to have been least impacted is workforce, rated at 1 by 32% of respondents. However, this aspect is also the one that was left blank by the highest number of beneficiaries (18%), which could be due to a combination of the micro nature of these organisations and the uncertainty about the near future.

The questionnaire also included an open question that allowed beneficiaries to share their views. Most of the responses to this question highlight the **difficulty to estimate losses** and forecast the effects that this crisis will have in the long term. Since they do not know when or how they will be able to resume their operations, it is impossible for them to reorganise their activities and schedule events in the near future.

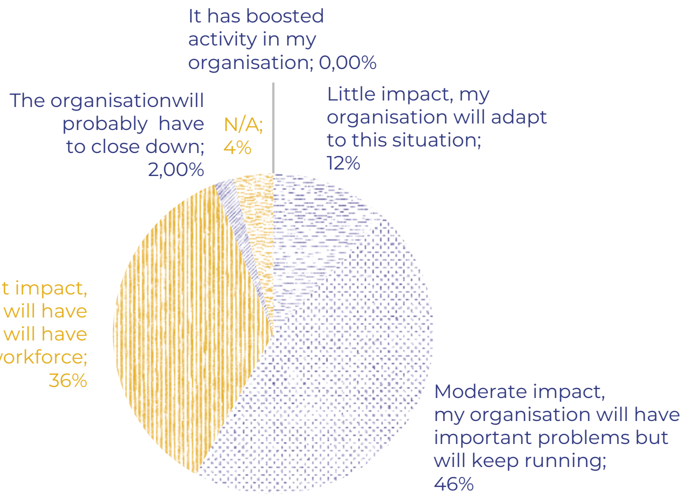
Section D.
Long-term impact of Covid-19

In addition to the direct short-term impacts that are already being experienced by beneficiary organisations, Covid-19 is expected to lead to significant medium-term transformations in cultural production and consumption patterns. This section analyses how these changes will affect Chebec beneficiaries and identifies their expectations around the main changes they anticipate in the cultural market. Issues such as the acceleration of digitalisation, globalisation or job insecurity are particularly relevant in this regard.

D.1 Estimation of the long-term impact of the crisis on beneficiary organisations

The halting of the activities of Chebec beneficiaries due to confinement will have both short and long-term impacts. The following graph shows their assessment of these impacts.

Graph 17. Long-term impact of confinement measures



Source: Chebec COVID-19 Survey (2020)

Almost all (88%) of the beneficiaries believe that they will be affected by the confinement measures in the long term. Only 12% of respondents think that the impact will be limited and that they will be able to easily adapt to social distancing. Nearly half of the organisations surveyed (46%) rate the impact as moderate, highlighting the problems they will face in the medium and long term. On the other hand, more than a third of those surveyed (36%) believe that the significant impact that they will experience will force them to reduce their workforce in order to survive. One of the respondents from the most affected group (2%) stated that the organisation will likely have to close because of the crisis. None of the organisations have benefitted from the situation in any way.

What lies behind the **82%** of Chebec beneficiaries who believe that they will face **moderate or significant difficulties in the long term** is the structural precariousness of the sector and the impact of the 2008 financial crisis, which led to substantial budget cuts in the area of cultural policies.

The halting of cultural activities resulting from the Covid-19 crisis, the consequent loss of income and the expectations of changes in the market (impossibility of holding events in the previous conditions, limitations on public cultural budgets, etc.) represent a serious setback for the cultural and creative sector and will also hinder its recovery despite its notorious capacity for resilience (Bustamante, 2013).

D.2 Expectations of long-term changes in CCS

In addition to the impacts on individual organisations, the Covid-19 crisis will also cause long-term changes in the cultural and creative sectors as a whole. The following graph shows the main changes that beneficiaries expect to see in the sector and their assessment of the probability (1 being the minimum and 5 the maximum) of a series of trends identified as possible or desirable in the medium and long term.

Graph 18. Major changes expected in the cultural and creative markets after Covid-19

Source: Chebec COVID-19 Survey (2020)

The main change that most Chebec beneficiary organisations expect is an **intensification of the precarisation** (4 out of 5) that already characterises the sector at a structural level along with the irregularity and the temporary nature of cultural work. In the other extreme, we find the support to the sector through public policies, which is considered the least likely.

In the context of the complex scenario defined by these two extremes (increased precariousness and **reduced public support**) we can highlight a series of issues in order of importance. The emergence of **new business models** is the item with the second highest probability rating (3.83 out of 5). The cultural organisations involved in Chebec believe that in the wake of the crisis, they will need to adapt their business models to a new environment defined by the digitalisation of cultural production and consumption (with a probability rating of 3,78 out of 5). The social economy (e.g. worker cooperatives) emerges as a key model due to its philosophy and business models: social purpose, solidarity, precedence of labour resources over capital, democratic modus operandi and autonomy from the authorities.

Another one of the expected long-term changes is the **need for internationalisation**. This issue is at the heart of the training strategies promoted by the pilot actions of the Chebec project. The increase in long-term internationalisation needs ranks fourth and has been given a rating of 3.57 out of 5. According to the beneficiary organisations, internationalisation will become a key mechanism to guarantee their survival in the near future.

In addition, they anticipate that the implications of the crisis will lead to the **reorganisation and restructuring of the sector** (3.33). This issue is particularly important, as the challenges faced by the CCS are compounded by the deficient associative structure that characterises the sector. This deficiency is the result of several factors, including business atomisation and the diversity of disciplines and subsectors.

The aspects that beneficiaries valued the least were those related to the **public sector**. The expectation of an «increase in public-private partnerships» was rated at 3.33 on average, while the «increase in support for the CSS through public policies» received a rating of 3.11 out of 5. Therefore, respondents believe that the solution to the crisis is to be found within the sector itself rather than in public bodies. An optimistic note in this respect is the assessment of the increased perception of the economic and social value of culture (3.33 out of 5), which could act as a lever for change. Awareness of this issue is essential to highlight the centrality of culture as an engine for territorial development.

The following table shows the average and the percentage distribution of the beneficiaries' responses. These values largely confirm the analysis shared above.

Table 5. Major changes expected in CCS after Covid-19

Which major changes in the cultural and creative market do you foresee after the COVID-19 outbreak?	1	2	3	4	5	N/A	Average
Increasing precariousness of work in the cultural and creative sectors	2%	12%	4%	44%	34%	4%	4,00
Emerging new business models in the cultural and creative sectors	2%	12%	12%	42%	26%	6%	3,83
Changes in consumption patterns towards digital models	4%	8%	18%	36%	26%	8%	3,78
Increased need for CCS internationalization strategies after recovery (long term)	6%	16%	18%	26%	28%	6%	3,57
Improving the perception of the economic and social value of cultural and creative activities	6%	12%	30%	30%	12%	10%	3,33
Improved vision and sectoral structuring of CCS, creation of sectoral networks and territorial creativity hubs	4%	18%	28%	28%	14%	8%	3,33
Increased public-private partnerships and collaboration	10%	22%	20%	28%	12%	8%	3,11
Increased support from public policies to CCSs	14%	22%	24%	20%	12%	8%	2,93

Source: Chebec COVID-19 Survey (2020)

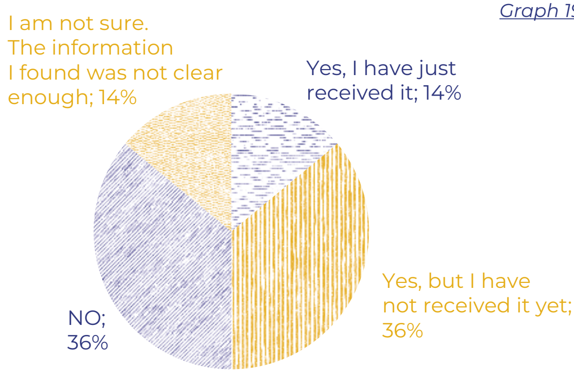
Section E.
Support for the Cultural and Creative Sectors

In this last section, we analyse the aid received by Chebec beneficiaries and its usefulness. We also look at what measures they think would be most useful to tackle the crisis in the cultural and creative sectors.

E.1 Access to support measures

In a situation where most beneficiaries have seen their income significantly reduced (as seen in section C1 of this report), access to public aid is essential to ensure economic sustainability. The following graph shows how many of the beneficiaries have had access to aid.

Graph 19. Access to aid



Source: Chebec COVID-19 Survey (2020)

The first issue worth noting here is the slowness of the aid distribution process, which is common to all sectors: only 14% of beneficiaries had received it at the time of the survey. However, 36% of respondents stated that their requests for aid had been approved. At the time of the survey, 14% of respondents were not clear as to whether they could have access to financial assistance. In addition, **36% of those surveyed did not have access to any help at all.** As it has already been noted throughout this report, **the irregular and temporary working conditions** in the cultural sector aggravate the difficulties to access aid, as these conditions often mean that the prerequisites cannot be met.

The fact that between 36% and 50% of beneficiary organisations have not had access to any kind of financial support only exacerbates the difficult situation they face as a result of the significant reduction of their income caused by the Covid-19 pandemic. These situations could lead to debt and even cessation of activity.

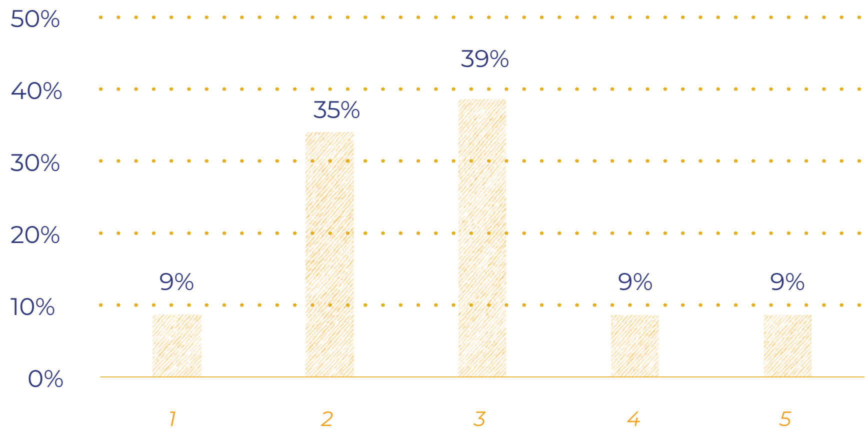
The **types of financial support** that the beneficiaries have had access to varies depending on the country in which each organisation operates. They include general support for all economic sectors such as temporary layoffs (ERTEs, in Spain), benefits for self-employed workers that have been forced to cease their activities and support for workers who have had to stay at home to look after their children. In some cases, there has also been specific support for the cultural sector. In Portugal, some of the beneficiaries have had access to an emergency fund from the Ministry of Culture.

In other cases, aid has taken the form of access to loans or tax deferrals. Although this type of aid can provide a temporary short-term solution, organisations that are unable to recover will not be in a position to fulfill such long-term financial obligations.

E.2 Perceived usefulness of the aid received (by those who have had access)

The beneficiaries who claimed to have had access to support measures were asked about the usefulness of such aid. The following graph shows the answers on a scale of 1 to 5.

Graph 20. Perceived usefulness of the aid received



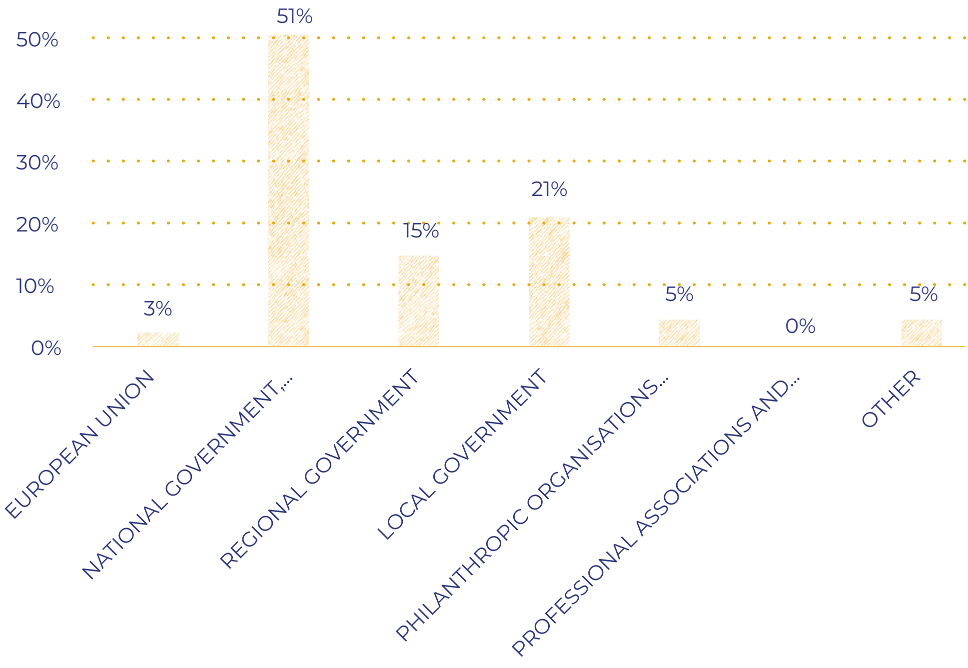
Source: Chebec COVID-19 Survey (2020)

In general, the organisations that had received support at the time of the survey (only 14% of those surveyed) rated the usefulness at an average of 2.74 out of 5. If we look at the distribution of the responses, almost 40% of rated the usefulness with a score of 3 out of 5 and 35% rated it with a score of 2. Therefore, beneficiaries think that the aid received is only moderately useful and insufficient to cope with the situation.

E.3 Source of the support measures

Those who stated that they had had access to financial assistance were asked about the source of such support. The following graph shows the percentage distribution by type of institution.

Graph 21. Institutions offering assistance

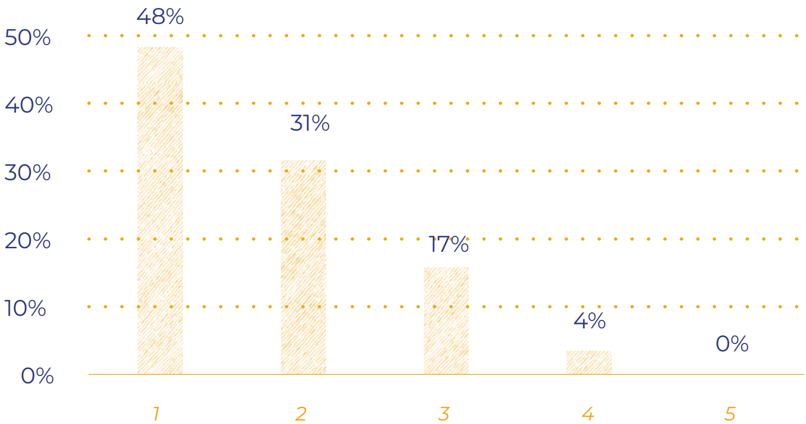


Source: Chebec COVID-19 Survey (2020)

As shown in the graph, most of the support received by Chebec organisations has come from national governments (51%). Next in importance are local governments, which account for 21% of the support, followed by regional governments (15%).
It should be noted that only 3% of the aid received came from the European Union.

E.4 Will the aid deployed in your country be sufficient to deal with the crisis?
In terms of the aid that cultural organisations have been able to access in each country, it is important to ascertain whether it will be enough to underpin the sector's recovery. The following graph shows the assessment made by Chebec beneficiaries on a scale of 1 to 5.

Graph 22. Will the aid deployed be enough?



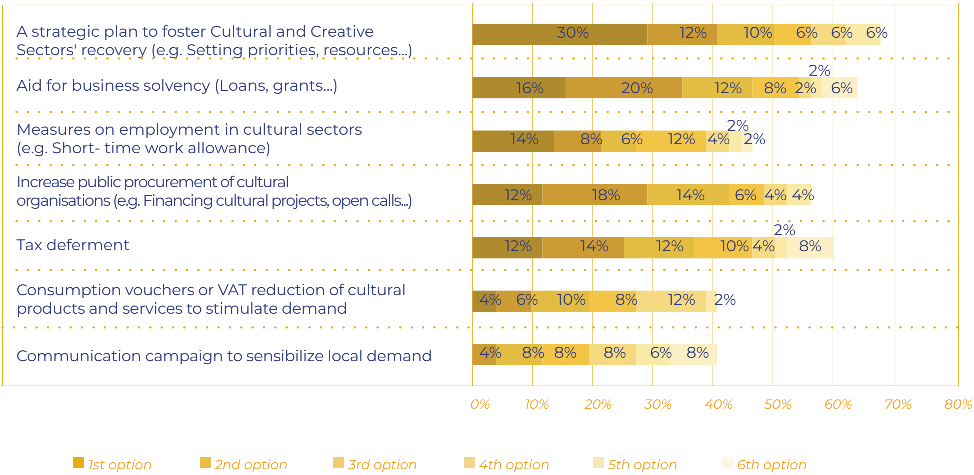
Source: Chebec COVID-19 Survey (2020)

On average, beneficiaries consider **public support** clearly **insufficient**, with a score of 1.77 out of 5. Almost half of the beneficiaries chose the lowest rating (1). It should be noted that no organisation sees the aid provided by governments as completely sufficient (5) and only 15% consider it moderately sufficient.

E.5 Assessment of the most effective measures to deal with the crisis
Based on the scenario outlined above, the next question included in the survey was what measures would be most effective to tackle the crisis. The questionnaire asked beneficiary organisations to rank a series of proposed measures to counteract the effects of the crisis from highest to lowest effectiveness.

The following graph shows the percentage of respondents who selected each option from the first to the seventh most effective option. Some respondents did not select all 7 options, which means that they did not think all the proposed measures were relevant.

Graph 23. Most effective measures to deal with the crisis



Source: Chebec COVID-19 Survey (2020)

According to the graph, the measure preferred by Chebec beneficiaries is comprehensive and systematic action through the creation of a **strategic plan** to promote the recovery of the cultural and creative sectors. Almost a third (30%) of beneficiaries chose it as the first option and none of them left it at the last (least effective). In essence, the sector is demanding to be taken into account and to be included in a strategy that considers its specific characteristics and allows it to remain viable in the long term.

The second most effective measure would be the provision of **loans or grants** to ensure solvency (16% chose it as the most effective measure and 20% as the second). This shows the organizations' need for liquidity, linked to their loss of income.

Other effective measures include support **to maintain cultural employment** (e.g. subsidies), enhancement of **public procurement or tax deferral**. Of those surveyed, 14% highlighted aid to employment as the most effective. Public procurement was considered the most effective by 12% and the second most effective by 18% of respondents. From a combined perspective, tax deferment stands out, as it was chosen as the first option by 12% and seen as the second best by 14% of respondents.

Another issue worth highlighting is the emphasis placed on the need for **public policies on the supply side** as opposed to policies aimed at stimulating demand. Chebec beneficiaries do not seem to think that consumer vouchers or the reduction of VAT on cultural products and services to stimulate demand would be particularly useful, with only 4% stating that it would be the most effective measure and 6% choosing it as the second most effective option. According to the organisations surveyed, the least effective measure would be the creation of communication campaigns to raise awareness of local demand, as none of them chose it as the first option and only 4% and 8% saw it as the second and third option, respectively.

Beneficiary organisations also suggested alternative measures. Some respondents stated that they would welcome support for the **restructuring** of their organisations. Other proposals included promoting outdoor events where social distancing could be maintained and encouraging the digitalisation of organisations and their events.

In addition to the measures included in the survey, there are others that could be implemented in the form of cultural policies. The Covid-19 pandemic has opened a global debate about the need to introduce a universal basic income to ensure the survival of the cultural ecosystem. Given the precariousness of the cultural sector, this basic income would allow those who engage in cultural practices to have minimum living conditions. In addition to improving the conditions of cultural agents, the **universal basic income** would also have a positive effect on the democratisation of cultural consumption. An example of how this measure could be beneficial is a manifesto signed by cultural professionals in Spain in which the measure is recognised as necessary for the sector . If a minimum universal quality of life is not guaranteed, only those who can afford it will have access to culture, which will then become an elitist resource. The universal basic income would allow society to have access to culture as a right for all, thus preserving the social and strategic value of culture as a key to social identity and cohesion.

[2] Available in the following link: https://nativa.cat/2020/04/gent-que-treballa-en-cultura-per-una-renda-basica- univer-sal-i-incondicional/#castella

4. CONCLUSIONS AND FINAL REMARKS

The results of the survey show that in the context of the Covid-19 pandemic, Chebec beneficiary organisations have concentrated their efforts on operational activities to enable their short-term survival. This is a logical response given the timing of the survey, carried out in the middle of confinement, and the urgency dictated by the extreme nature of this situation.

The implementation of remote working has been one of the main changes introduced by 88% of the organisations surveyed in response to the pandemic. As we have seen, this way of working is here to stay. The acceleration of digitalisation that this crisis has brought about will generate important structural transformations in the cultural production and consumption patterns in the medium and long term.

The creative and cognitive nature of the cultural sector is reflected in its response to the crisis: the adaptation strategies put in place by the majority of Chebec beneficiaries are based on the creation of new ideas and innovation in products and services, as well as continued training and aid management.

Another specific feature of the CCS during confinement is the significant and widespread development of **free online content**. This trend, determined by the particularities of cultural and artistic work (social purpose, solidarity, not-for-profit) could have an impact on the already precarious employment conditions of cultural workers.

As for the needs highlighted by Chebec beneficiary organisations as a priority, those related to information (availability of aid, guidance on procedures, ways to reorganise their processes) stand out. Clear and precise guidance from the authorities is seen as one of the keys to overcoming the crisis. **Liquidity needs** were also prioritised.

In terms of expected revenue losses, the results show an intensification of the impact during the second quarter of 2020 in comparison with the first quarter, during which organisations were able to operate almost normally. It is also important to note that small organisations generally operate in a very short-term forecasting framework, which explains the uncertainty around their expectations for the second quarter.
The amount of expected losses is very significant: almost one third of beneficiary organisations estimate losses of more than 75% of their income during the second quarter. In a productive and management context where the fixed costs borne by the organisations are substantial (around € 1,000 on average due to rent, social security contributions, taxes, etc), the structural fragility of cultural organisations is notably exacerbated, thus threatening their survival and the sustainability of the cultural ecosystem.

Beyond the economic losses, the survey results also reveal the consequences of confinement on the activities planned by the Chebec beneficiary organisations as part of their internationalisation plans. The pandemic has meant the **loss of business opportunities with other partners and the inability to participate in or attend fairs and exhibitions, as well as delays or cancellation of events and loss of sales**.

The majority of Chebec beneficiary organisations (88%) believe that they will be affected by the Covid-19 crisis in the long term. More than a third of those surveyed

(36%) expect that they will be forced to reduce their workforce. Underlying issues such as the structural precariousness of the sector or the significant budget cuts in culture as a result of austerity policies will also make it very difficult for the cultural sector to survive in decent conditions despite its notorious capacity for resilience.

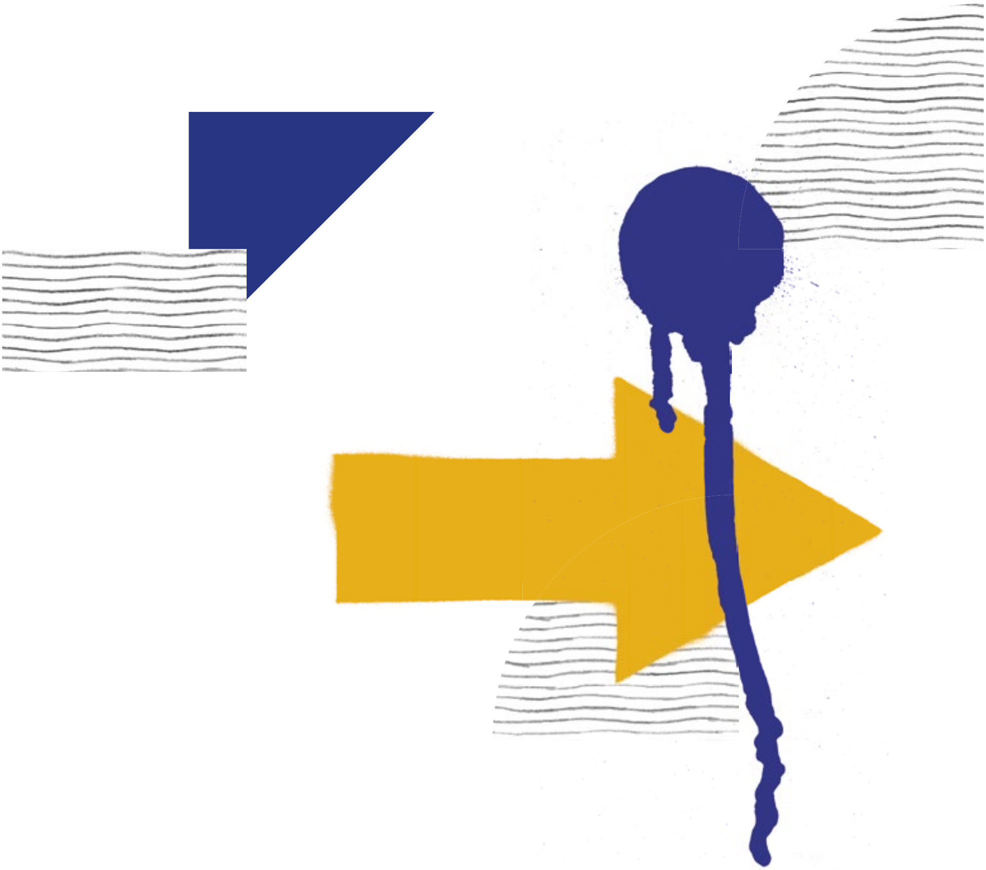
This issue is linked to the **slow access to public aid and its low value**. At the time of the survey, only 14% of Chebec beneficiaries had had access to this type of support and up to 36% had not received any support at all. Those who did receive financial assistance did not consider it particularly useful and thought it was insufficient. Most of the aid came from the central government (51%), followed by local administrations (21%).

Finally, in relation to the possible proposals and measures to tackle the crisis, beneficiaries see a greater need for supply-side approaches, i.e. **business-oriented public policies**. The need for comprehensive action through a strategic plan to promote the recovery of the cultural and creative sectors is highlighted as the first option. Some of the other issues highlighted include tax deferrals and subsidies. On the demand side, respondents focus on the need to promote public procurement, since they do not believe that measures such as «consumer vouchers or reduction of VAT on cultural products and services to stimulate demand» or «campaigns to promote local cultural production» would help them overcome the crisis.

In this context, we can consider **two futures (probable and possible scenarios)**. The likelihood of one or the other will depend on several variables such as the social value, the priority and support that citizens give to the sector; the capacity of cultural agents to organise themselves and mobilise, and the articulation of decisive and innovative public policies with sufficient resources. One of the combinations would lead us to an unfavourable scenario in the medium term. This scenario would be characterised by the loss of autonomy of the cultural sector due to its precariousness and irregularity, its business atomisation and the difficulties to access financing. There would also be a growing instrumentalisation by both the market (global oligopolistic structures, digitalisation of contents and processes) and the State (dependence on public funding, political discretion, populist tendencies, curtailing of cultural rights). In this scenario, culture would be a luxury only reserved for certain elites.

The alternative would be based on the notion of culture as a basic right. This scenario would be characterised by the deployment of the potential of the centrality of culture to achieve human and sustainable development in line with the principles and guidelines of the Agenda 21 for Culture. In this approach, the social value of culture, the dignity of cultural work, strategic governance actions, the improvement of the structure of the cultural sector and the implementation of social economy principles and strategies would play a vital role in the development of a thriving cultural ecosystem.

Obviously, reality is diverse and complex, so future evolution will not lead us to either of these two extremes. However, we can create a third scenario that operates within a grey area between the two and seeks an intermediate «equalization». Whether the grey is brighter or darker will depend largely on our willingness to increase the visibility of this issue, position ourselves and commit to contribute to the solution with our respective capabilities, skills and resources.



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Audiovisual production

CreativeWear Strategic Evaluation Video
https://www.youtube.com/watch?v=ZtTvg0O2rj4&t=5s

6. ANNEX: Survey template

The current crisis of the COVID-19 is greatly affecting the organizations of the Cultural and Creative Sectors (CCSs). Help us to understand how public policies should be deployed to alleviate the effects of the crisis in the first place, and how to boost recovery once the containment measures are over.

Section A: SECTION A. ORGANISATION DATA

A1. Please select which of the Chebec project partners you are collaborating with?

- ART-ER S. Cons. P. A. ☐
- AIDE aux Musiques Innovatrices ☐
- Municipality of Bologna ☐
- Intermunicipal Community of Central Alentejo ☐
- University of Valencia ☐
- Regione Lazio, Direzione regionale cultura e politiche giovanili ☐
- Sarajevo economic regional development agency ☐
- CCSEV - Official Chamber of commerce, industry and shipping of Seville ☐
- Barcelona Activa SA SPM ☐
- AF - Arty Farty ☐
- Other ☐

Other

A2. Within the Cultural and Creative Sectors (CCSs), to what sub-sector does your organisation belong?

- Performing Arts (Theatre, music, circus...) ☐
- Cultural Heritage (Historical sites, libraries, museums...) ☐
- Visual Arts (Painting, photography, digital, audiovisual, film...) ☐
- Design and Applied Arts (Decorative arts, fashion, graphic, craftwork) ☐
- Literature books and reading (Writing, publishing and translation) ☐
- Architecture ☐
- Other ☐

Other

A3. Which is your professional situation?

- I am a self-employed person without employees ☐
- I am the owner or manager, in charge of several workers ☐
- I am organisation staff ☐
- I combine my cultural/artist/creative activity with a job in another sector ☐

A4. How big is your organisation? (Number of workers, including yourself)

- 1-5 employees ☐
- 6-10 employees ☐
- 11-50 employees ☐
- Over 50 employees ☐

A5. Which is the approximate annual turnover of your organisation?

Turnover: The amount of money that an organisation gets from sales during a particular period.

- Less than 15.000€ ☐
- 15.000 to 30.000€ ☐
- 30.001 to 50.000€ ☐
- 50.001 to 100.000€ ☐
- Over 100.000€ ☐

Section B: SECTION B. ACTIONS DEPLOYED BY ORGANISATIONS

B1. Please indicate which actions has taken your organisation to adapt the current situation caused by Covid-19?

(You can choose more than one option)

- The organisation has started to implement remote work from home ☐
- The organisation has reduced its activity to minimum, until the end of the confinement ☐
- The organisation has increased its efforts and investment in the digitalization of its activity (e.g. online campaigns, increasing presence on networks, website improvement...) ☐
- The organisation has been forced to adjust its workforce (e.g. reduction of staff, reduction of hours) ☐
- Other ☐

Other

B2. Please indicate from 1 to 5 the time you are allocating to the following activities during confinement (where 1 is minimum time and 5 is maximum time).

	1	2	3	4	5
Administration and management work, including location of available aids	☐	☐	☐	☐	☐
Training and acquiring new skills	☐	☐	☐	☐	☐
Increased communication efforts: dissemination, online marketing	☐	☐	☐	☐	☐
Creation of new ideas and products or projects that I had no time to work on	☐	☐	☐	☐	☐
Adapting services/products to the new medium-term scenario (e.g. online concerts, use of proximity/local products...)	☐	☐	☐	☐	☐
Market analysis (diagnosis of the situation, prospects for demand...)	☐	☐	☐	☐	☐
Archive management, postponed work catch-up	☐	☐	☐	☐	☐
Rethinking the business model and working processes	☐	☐	☐	☐	☐

B3. Regarding free cultural initiatives...

	Yes	No
Have you conducted any free cultural initiatives during confinement?	☐	☐
Have you received proposals to participate in free cultural initiatives?	☐	☐

B4. Please indicate the extent to which your cultural consumption has increased during confinement (where 1 is minimum time and 5 is maximum time)

- 1 ☐
- 2 ☐
- 3 ☐
- 4 ☐
- 5 ☐

B5. If you have consumed cultural goods, order the following goods according to the hours spent on each one:

Virtual visits to museums and online exhibitions / digital libraries / archives	☐
View audiovisual content through an online platform	☐
Visit online cultural initiatives emerging as a response to confinement situation	☐
Playing video games	☐
Reading books	☐
Listen to music	☐

B6. Please indicate to what extent do you have needs regarding the following issues (where 1 is "Minimum need" and 5 is "Maximum need").

	1	2	3	4	5
Information to re-schedule the organisation activity (e.g. events, concerts, meetings)	☐	☐	☐	☐	☐
Adapting the organisation activity to digital environment	☐	☐	☐	☐	☐
Clear information about available aids and how to access them	☐	☐	☐	☐	☐
Liquidity (capability to meet economic obligations)	☐	☐	☐	☐	☐
Making remote work compatible with home life (e.g. Technical requirements, conciliation, availability of working space...)	☐	☐	☐	☐	☐

Section C: SECTION C. CURRENT ECONOMIC EFFECTS OF COVID19 IN ORGANISATIONS

C1. What is the economic impact of COVID-19 on your organization? (in approximate terms)

	No income losses	10% to 40% of quarterly expected income	40% to 75% of quarterly expected income	More than 75% of quarterly expected income	I am not sure, I cannot calculate it
To what extent have you experienced income losses in the January-March quarter?	☐	☐	☐	☐	☐
To what extent do you anticipate income losses in the April-June quarter?	☐	☐	☐	☐	☐

C2. **How has the current situation on COVID-19 affected your organisation activity?**

Please indicate from 1 to 5 your degree of agreement or disagreement on the following statements (where 1 means "strongly disagree" and 5 "strongly agree").

	1	2	3	4	5
Lost sales/ cancelled orders	☐	☐	☐	☐	☐
Delayed set-up of events managed by my organisation	☐	☐	☐	☐	☐
Unable to participate/ attend a trade fair or major exhibition	☐	☐	☐	☐	☐
Lost business opportunities with other partners (e.g. ongoing negotiations, scheduled meetings...)	☐	☐	☐	☐	☐
Physical impediments (e.g. to produce artworks, practice performance, go to the workshop...)	☐	☐	☐	☐	☐
Many providers cannot ensure supply in the short term	☐	☐	☐	☐	☐
Workforce reduction and staff cutting back	☐	☐	☐	☐	☐

C3. **If this situation has affected you in some other way, please describe it shortly (50 words).**

Section D: SECTION D. EXPECTED LONG TERM ECONOMIC EFFECTS OF COVID19 IN ORGANISATIONS

D1. **To what extent do you think the confinement and social distance measures will affect your organisation this year?**

- It has boosted activity in my organisation ☐
- Llittle impact, my organisation will adapt to this situation ☐
- Moderate impact, my organisation will have important problems but will keep running ☐
- Significant impact, my organisation will have solvency problems and will have to adjust the workforce ☐
- The organisation will probably have to close down ☐

D2. Which major changes in the cultural and creative market do you foresee after the COVID-19 outbreak?

Please indicate from 1 to 5 your degree of agreement or disagreement on the following statements (where 1 means "strongly disagree" and 5 "strongly agree").

	1	2	3	4	5
Changes in consumption patterns towards digital models	☐	☐	☐	☐	☐
Improving the perception of the economic and social value of cultural and creative activities	☐	☐	☐	☐	☐
Increasing precariousness of work in the cultural and creative sectors	☐	☐	☐	☐	☐
Emerging new business models in the cultural and creative sectors	☐	☐	☐	☐	☐
Improved vision and sectorial structuring of CCSs, creation of sectorial networks and territorial hubs of creativity	☐	☐	☐	☐	☐
Increased public-private partnerships and collaboration	☐	☐	☐	☐	☐
Increased support from public policies to CCSs	☐	☐	☐	☐	☐
Increased need for CCS internationalization strategies after recovery (long term)	☐	☐	☐	☐	☐

Section E: SECTION E. AVAILABILITY OF PUBLIC/PRIVATE ASSISTANCE & MEASURES

E1. Has your organization access to assistance measures of any kind?

If so, please provide a short description of the measure(s) or assistance you received/will receive (2 to 4 sentences).

- Yes, I have just received it ☐
- Yes, but I have not received it yet ☐
- No ☐
- I am not sure. The information I found was not clear enough. ☐

E2. Please rate from 1 to 5 the utility of the received assistance measure(s) you received (where 1 means minimum and 5 maximum).

- 1 ☐
- 2 ☐
- 3 ☐
- 4 ☐
- 5 ☐

E3. Please indicate which of the following institutions have offered assistance:

Note that information and counseling regarding the current situation may be considered as assistance

- European Union ☐
- National Government, Ministries ☐
- Regional Government ☐
- Local Government ☐

Philanthropic organisations (foundations, private endowments etc.)

Professional associations and NGOs

Other

Other

E4. **Do you think that the measures deployed in your country will be enough to deal with problems caused by COVID-19 in the Cultural and Creative Sectors?**

Please indicate from 1 to 5 (where 1 means "No, surely" and 5 "Yes, surely").

1

2

3

4

5

E5. **Which measures do you think would be the most effective to counter the effects of the COVID-19 on Cultural and Creative sectors (CCSs)?**

Aid for business solvency (Loans, grants...)

Tax deferment

Measures on employment in cultural sectors (e.g. Short-time work allowance)

Increase public procurement of cultural organisations (e.g. Financing cultural projects, open calls...)

Consumption vouchers or VAT reduction of cultural products and services to stimulate demand

Communication campaign to sensibilize local demand

A strategic plan to foster Cultural and Creative Sectors' recovery (e.g. Setting priorities, resources...)

E6. **Would you propose any specific measure for your organisation sub-sector?**

Measures to deal with confinement and social distance situation

Measures to recover activity after confinement and social distance situation

Thank you for your participation

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LA MAJOR, *from Marseille with love.*