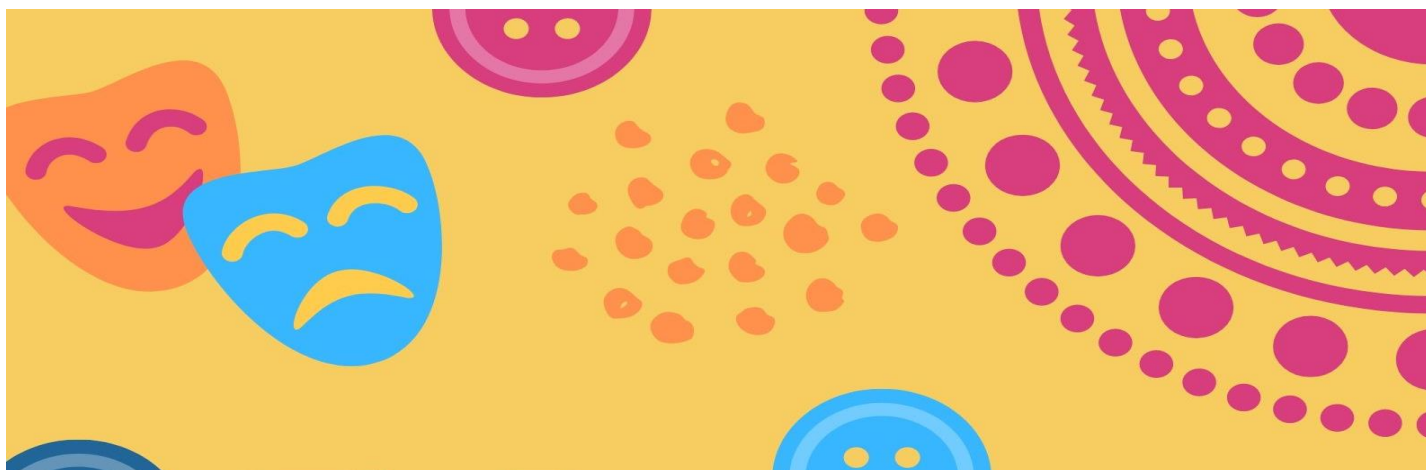


The impact of Covid-19 on arts organisations and how to help



November 2020

research.reading.ac.uk/community-based-research

Reading Place of Culture:

The impact of Covid-19 on arts organisations and how to help

A questionnaire was circulated amongst Reading's arts organisations, producers and individual artists by Reading Place of Culture. The aim was to record how the arts sector has been impacted by the pandemic and to find out what would be of most help in this situation.

30¹ art, culture and heritage (ACH) organisations responded to the questionnaire. The responses were gathered via Survey Monkey between 26th October 2020 and 7th November 2020 – almost all in the days preceding the second Covid lockdown in England. Dr Lorna Zischka from the University of Reading then compiled this report of the findings.

Respondent profile

Of the 30 respondents involved in Reading's arts scene:

- 12 were charities
- 6 were limited companies
- 5 were individuals or sole traders
- 7 were other community organisations, including not-for profit or voluntary groups, organisations overseen by the Local Authorities, and one CIC.

The survey participants categorised their involvement with Reading's cultural sector before the pandemic in the following ways.

- 47% (14 of the respondents) represented organisations which organised cultural events without being practicing artists themselves. (Most of these were organisations, but one individual facilitator fell into this category).
- 30% (9 respondents) were artists/performers (be it individually or as a group). Two thirds of these (6 of the 9) also organised events. This left one third (3 respondents) as pure artists/performers (2 groups and one individual).
- 20% (6 respondents) offered cultural and artistic *venues*. 4 respondents offered a dedicated arts venue, and 2 offered a venue that supported the arts without being the venue's primary focus.
- 13% (4 respondents) categorised themselves as *individual* producers, teachers or facilitators - and most of them were artists as well.
- 10% (3 respondents) also mentioned that they had a role in supporting artists and charities (for example through research or funding).²

In terms of what the various organisations offered prior to the pandemic (and note that the offer of many organisations fell into multiple categories):

¹ This total excludes a charity with multiple local programmes and a weekly community dance group that did not answer any questions beyond the description of their organisation.

² Note that the percentages do not add up to 100 because the activities of some respondents fitted into more than one category.

- 63% (17) offered creative workshops/ lessons/ activities of all kinds (from dance classes to digital media to Lego builds...)
- 57% (17) offered ticketed events
 - 23% (7) offered theatre performances
 - 20% (6) offered music gigs
 - 17% (5) offered festivals
 - 17% (5) offered other live events that were *not* theatrical performances, music gigs or festivals or workshops (for example, culinary competitions or guided walks of Reading or comedy clubs).
 - 10% (3) offered lectures
- 17% (5) offered exhibitions

Note that nearly all of this offer involved **live events** and bringing people together, which is the sort of activity that is hardest to sustain under social distancing rules.

In terms of who the activities were targeted towards, 73% of the respondents had some or all of their activities open to anyone. Over half of these also targeted some of their activities towards specific social groups. The remaining 27% *exclusively* targeted their activities towards specific social groups. The social groups targeted are listed below:

40% (12 of the 30 organisations) ran some activities targeting children and youth
 37% ran activities targeting adults aged 18-65
 20% ran activities targeting adults over the age of 65

23% ran activities targeting people with a physical or mental health condition
 7% ran activities targeting the materially disadvantaged
 7% ran activities for specific viewpoint groups (one religious group and one for LGBT)

17% had primary beneficiaries who were from a specific locality within Reading
 13% had primary beneficiaries who were from BAMER (Black, Asian, Minority Ethnic and Refugee) groups

Staff and beneficiaries, before the pandemic and now

Respondents provided the following information about their staff and beneficiaries, before the pandemic and now. These figures give an indication of the scale-back of activities.

	Numbers at the beginning of March 2020	Numbers now	Difference
Number of employees in total (whether full or part time, but not including any employees now in furlough or part-time furlough)	Range: 0-17 14 orgs recorded having employees, with an average of 3.4 employees/org	Range: 0-17 These 14 now have an average of 3.2 employees/org	Range: lost 1 to gain 2 Average difference: minus 0.1

Number of self-employed working with you	Range: 0-20 9 recorded having self-employed collaborators, with an average of 9.1 collaborators/org	Range: 0-11 These 9 now have an average of 4 collaborators/org	Range: lost 18 to gain 2 Average: minus 5.1
Number of volunteers working with you	Range: 0-100 19 recorded having volunteers, with an average of 27.7 volunteers/org	Range: 0-60 These 19 now have an average of 14.9 volunteers/org	Range: lost 90 to gain 4 Average difference: minus 12.8
Number of beneficiaries in an average month (e.g. audience figures, participants)	Range: 0-5483 21 recorded having beneficiaries, with an average of 578.5 beneficiaries /org	Range: 0-3874 These 21 now have an average of 255.1 beneficiaries /org	Range: lost 2500 to gain 156 Average difference: minus 323.4

Almost all organisations had reduced in reach but there were 3 or 4 exceptions in which beneficiaries have increased and/or more staff and helpers were engaged.

Employment has been minimally affected so far, but there have been important losses to collaborations with self-employed people and with volunteers. 9 organisations reported having worked with self-employed collaborators and out of these, an average of 5.1 self-employed collaborators were lost per organisation. 19 organisations reported working having worked with volunteers, and on average 12.8 volunteers were lost per organisation. Approximately half the volunteers and collaborators remain.

There has also been an important loss to the public. 21 organisations reported on the number of beneficiaries they had and, on average, 323.4 less people benefited per organisation. Less than half the number of pre-Covid beneficiaries remain.

The reduction in staff and beneficiaries mirrors a reduction in the activities the organisation is able to offer.

Range of activities on offer and future outlook

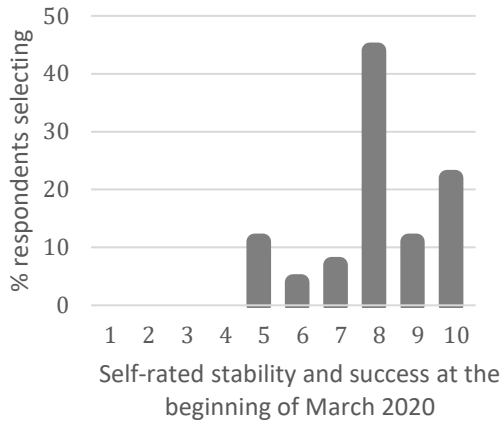
Respondents were asked what best describes their activities now, and this is how they responded:

Closed permanently	1
Closed temporarily	10
Limited offer	17
Extensive offer	3
Full offer	<u>0</u>
Total:	30 organisations

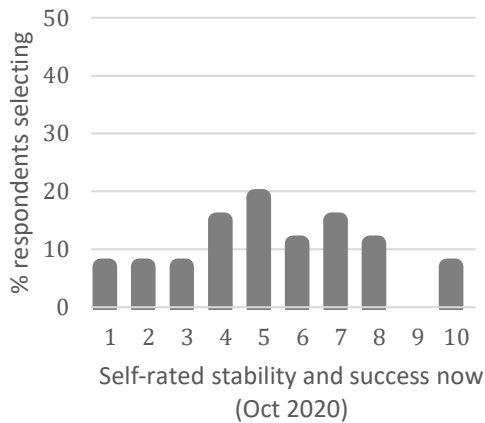
None of the organisations was up to full offer. Most had a limited offer and a third were not offering anything.

Charities and community organisations tended to be offering more than individuals and businesses. Organisations involved in exhibitions (which can be visited in a socially distanced manner) or holding workshops (anything that can be taken online) were more likely to be putting forward an offer than shows like music gigs and theatre.

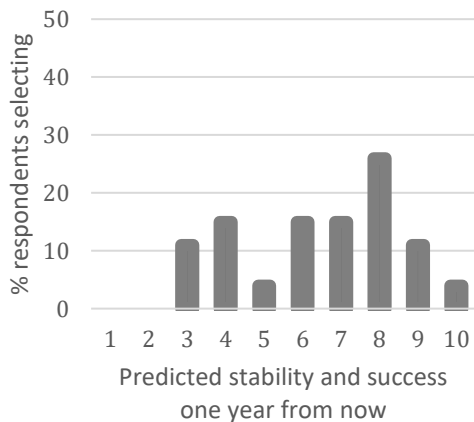
The organisations were then asked to rate how positive they were about the future of their work. They were given a scale of 1-10 with 1 being not at all positive and 10 being extremely positive. The charts below show the distribution of their responses:



Average stability and success rating at the beginning of March 2020 (Pre-Covid): **8.1** out of 10



Average stability and success rating during social distancing restrictions (Oct 2020): **5.3** out of 10



Average outlook rating one year from now: **6.5** out of 10

These ratings show that stability and success have taken a severe knock since the pandemic began with a 28-percentage point fall in stability and success ratings. There is hope that things will improve, borne out by the 12-percentage point expected increase in stability and success one year from now. However, the future improvements are not expected to be as great as the damage and the situation 1 year from now is projected to be worse than the pre-Covid situation by 16 percentage points on average.

Big differences in outlook are expressed by different organisations:

- 30% of the organisations indicated that things were bad now and expected no recovery or even a worsening of the situation by next year.
- 30% felt that things were bad now but hoped for an improvement, although not to pre-March 2020 levels.
- 19% expected to recover to (or maintain) pre-March 2020 success levels.
- 7% expected to be in a better place one year from now than they were prior to March 2020, even though the current situation had set them back.
- 15% were positive about their current position and expected things to get *even* better in the future

This data revealed no obvious distinction between the different types of organisation or service provider in terms of optimism for the future. All providers to all types of people, and whether currently opened or shut for activities seemed to be similarly affected.

The only factor associated with more optimism was funding. Groups that had accessed new funds since the pandemic were significantly more positive about their future outlook than those who had not accessed new funds. Those accessing funds were also more likely to be currently active. However, the data does not reveal whether the funding played a part in making people more optimistic or whether it was being active and positive that had precipitated an access to funding. In general, lack of financial concerns was not linked to greater optimism for the future. However, a couple of upbeat comments from those who received funding can be seen below:

“Our future stability has been secured thanks to an ACE Culture Recovery Grant.”

“With an Arts Council England grant for organisational development, we hope to secure time, space and money to adapt, develop and move to a more sustainable position. Lockdown has heightened the need to pursue organisation development so we can generate an ongoing income stream to cover core work and overheads.”

When asked for more detail about how activities have changed and the outlook for the future, it was clear amongst those who had paused activities that the social distancing rules made it impossible to continue as before.

“The cleaning requirements due to Covid do not make it possible for events to take place, also the rule of 6.”

“Forced closure, we’re a pub. The capacity of the venue reduced to 23 people max, so live music when we are allowed to be open (using the Gov guidelines) is a pretty much a non-starter.”

“Live music and venues are basically closed.”

“All physical activities have been put on hold.”

Any continuance of activities relied heavily on organisations being able to adapt their offer to online transmission:

“We are unable to offer anything face to face so have moved online and are offering events that way.”

“The bulk of our activities is teaching which has now moved online.”

“Most of our activities are online and we have one workshop programme in person in a school. The choreographic process for making work has now changed to being remote and online.”

“Took much of our work online with physically distanced rehearsals and workshops.”

“No onsite visits or tours possible. Virtual online exhibition only.”

Some organisations were quite innovative and upbeat; for example:

“Working on radio play adaptations of live work, we’ve run some socially-distanced workshops and connected with specific groups in a socially-distanced 'driveway exchange’”

“We are digitalising our offer with online workshops, a TV station via YouTube, podcasts and a social media marketing strategy.”

“We are constantly striving to adapt and we are working with schools and venues all the time to enable them to find safe ways of returning to normal teaching activities.”

“We have had to professionalise due to Covid.”

“I had returned to studios in September with more classes on offer than pre-Covid as it had given me time to reflect. I spent lockdown offering online classes which weren’t as popular as studio classes but enough to keep running ... These online classes continued until present day So as a result of Covid-19 I have ... created an extra line of work.”

However, many more commented that they found adaptation difficult or “*slow progress*” and that it is “*difficult to say*” whether further adaptation is possible. It came out clearly that the live experience was difficult to re-capture online. Multiple difficulties were mentioned:

- The offer was more limited since not everything can be adapted:

“You can’t adapt getting 80 people in a room together. No online activity will ever be a successful adaptation of this.”

“Rehearsals via Zoom with no performance possible. Charitable fundraising and activities on pause.”

“No performances are planned for the foreseeable future.”

“Our offer is limited now as all company members are working remotely.”

“We can’t travel and practise floor patterns.”

“We have been able to adapt some events, but a large part of our face to face operation has had to temporary close and we will probably remain closed into 2021.”

- Although some aspects of engagement can be taken online, the online experience was often felt to be inferior to /less effective than face-to-face settings.

“We have been performing online but it is not the same.”

“Films are online but can't compete with Netflix and other streaming services.” – Reading Film Theatre

“The [online] experience not up to the standards we would like.”

“The main reason to join a choir is to perform. Secondary benefits are mixing with good people and the joy of shared singing. All 3 aspects have gone.”

“Having to run our community outreach and campaigning has limited impact on social media. A physical event cannot be silenced by an "algorithm" and provides a safe space that cannot be replaced at home online.”

- Attendance was compromised. (The reduction in beneficiaries is also seen in the section, 'Staff and beneficiaries, before the pandemic and now.')
- "We moved to Zoom-based performances for a few months after lockdown. However, the audience numbers were very low..."*
- "Local groups have cancelled guided tour bookings but we are continuing to give talks, via Zoom."*
- "I'm limited to how many students I can have in a venue, which meant a big dip in my second biggest class of the week."*
- "We had to find a new venue and are now operating at half capacity."*
- Besides reductions in the *number* of beneficiaries, there have also been changes in the *sort* of people engaging online. It seems that some social groups are harder to reach in this way, such as the young and the marginalised.
- "[Moving online] hasn't suited everyone..."*
- "Very restricted youth activities."*
- "Created online projects but this doesn't reach our targeted groups, the digital divide has become wider."*

For many of the respondents, there was a sense of just waiting it out until things get better. It was hoped that activities could resume in full force once live performances are allowed and are safe:

- "Online projects only. Not starting again until test and trace is sorted and R below 1."*
- "As soon as we are allowed to perform in person we would like to be back."*
- "We will likely resume when we can return to live performances."*
- "We will reopen once it deemed safe to sing in an enclosed space."*
- "I plan to re-start when Covid 19 is under control or gone away sufficiently to be safe to re-start."*
- "I hope to be able to return to schools and do workshops with children as soon as Covid is back to low levels."*
- "As soon as dance classes can return, I will be back in the studio. I can imagine I'll be offering online options alongside studio classes when I can return at least until the end of next year ... but at some point, my time will be needed in the face-to-face settings which are more profitable."*

The outlook ratings and further comments show that there are clearly concerns about how quickly and easily the sector might recover. Finances were one issue, but of even greater concern was the loss of connection with people, volunteers as well as participants in activities. Once people drift away, it is hard to reassemble activities. This brings us onto a more detailed look at concerns for the future.

Concerns for the future

When asked to select their biggest concerns for the future out of a number of options, the following responses were received (now ordered by importance):

- 78% selected, 'Difficulty engaging people because of ongoing social distancing restrictions'
- 70% selected, 'Uncertainty – changing times making it difficult to plan.'
- 67% selected, 'Difficulty engaging people because of changes in what people are willing to do.'
- 41% selected, 'Loss of work space.'

- 33% selected, 'Depletion of reserves - meeting overheads without income.'
- 30% selected, 'Reduction in funding streams.'
- 26% selected, 'Breakdown of social networks through which information is passed.'
- 26% selected, 'Loss of professional collaborators.'
- 19% (5 organisations) mentioned loss /strain on staff as a problem.

A loss of engagement with the public due to Covid restrictions and/or Covid fears was the most widespread problem, mentioned by 89% of respondents altogether. Covid restrictions are the primary problem but changes in what people are willing to do was another widespread barrier to engagement and one that is potentially a lot harder to reverse.

"Older supporters are isolated because of justifiable concerns about vulnerability."

"Limited capacity and people not wanting to go out in a pandemic is a real restriction."

"Public confidence in mixing with others out of doors is vital."

It is hard to re-mobilise custom once it has drifted away, and this is what worries many organisers the most. The longer the social distancing restrictions are maintained, the harder it will be to keep people engaged.

"Choir members are maintaining stability at the moment by continuing to pay subscriptions. It's not known how long that can be sustained... It all depends on opportunity to return to live music making."

"My business is just over a year old and so very much growing still. Every time we lockdown and I have to start up again it requires a new push of marketing to gather new customers and they seem to lose interest after a long gap in time."

"Choirs on-line are not rewarding for existing members. For new members it is doubly difficult and even less rewarding. We need to keep the choir members enthusiastic. Once they drift away, it is very difficult to get them back, and recruitment is always hard."

"[We] plan to reopen but turnout may be so low we can't continue."

"I fear volunteers and drop in enthusiasm may close us."

Uncertainty due to the fast-changing times and regulations was another very widespread problem – more commonly cited than financial concerns or any other issue apart from public engagement due to the lockdown restrictions.

"When we be able to present concerts again? When will be able to even rehearse again?"

"Mental health likely to be affected by uncertainty."

Uncertainty was also said to make planning difficult:

"Planning is difficult as things keep changing."

"Social distancing makes things very difficult as well as the rules to plan or do anything."

"Financial model is based around the festival, local lockdowns put financial risk very high which makes long term planning difficult."

Funding concerns (depletion of reserves and/or lack of funding streams) affected 44% of respondents altogether:

“Given the money currently being spent there is likely to be less around in the future- we are also being hit by Brexit as previously part of several EU funded projects.”

“Budgets are a real problem. Cuts are likely. Hope to develop digital offer, but investment needed for equipment and lack of onsite working together prevents this.”

“Find way to get some funding.”

“Given we have had no reduction in rent - the reduction in income will start to bite soon. We have a strong financial footing, but outgoings are currently exceeding income.”

“More support needed for local performance groups.”

“Finance is a challenge.”

“Funding support - as a LA we are constrained and not able to apply for a lot of things geared towards charities.”

However, it is notable that money-matters are much *less* of a widespread issue than the problems of maintaining engagement with people and uncertainty. Some organisations commented that they were not dependent on (or even seeking) external sources of funding. For example:

“Luckily we didn’t feel the need to ask.”

“Financial stability fine as we have very few costs beyond performing an actual assembly.”

“Financially stable.”

“Financially, I’m OK.”

24% (7 of 30 respondents) said that they had been successful in attracting funding (apart from furlough payments) since the lockdown. These were predominantly groups involved in organising events. 4 of the 7 were willing to name their sources of funding, and furlough pay was also mentioned:

- Culture Recovery Grant, Berkshire Community Foundation, Greenham Trust, The Foyle Foundation, The Earley Charity, plus private donations.
- Culture Recovery Fund
- The launch of Reading Culture Live. The rest of our income has come from organisations i.e.: Brighter Futures for Children and Geoffrey Field Junior School.
- Arts Council Development Grant

Loss of workspace is a problem for a large minority, some of whom depend on certain outlets for their activities which are currently unavailable due to Covid concerns. For example:

“We teach in schools across the county - if those schools decide not to allow external organisations in then we have to accept their decision.”

“One of my classes still hasn’t returned and I had to move one class completely due to the venues not reopening. Finding replacement venues became impossible due to the free-for-all at the moment for space as so many hirers are in the same situation.”

Organisational networks: So far, a majority of organisations were maintaining their staff and collaborators and social networks, but some concerns were expressed in this area, especially when it came to continuing to pay self-employed collaborators and keeping volunteers. Volunteers, “*in the 60 plus age group*” were given a special mention. “*Also, ways to keep self-employed musicians employed before they are lost forever.*” These concerns were also evident from the staff and beneficiary statistics.

A further staff-related problem mentioned was, *“Fatigue of staff providing onsite services under Covid-secure conditions.”*

What might help

Finally, respondents were asked which of several options might help them the most. The options are now ordered in terms of interest:

- 62% selected, ‘Funding support.’
- 46% selected, ‘Shared marketing resource (publicity).’
- 42% selected, ‘Business Engagement resource (a person who engages with businesses on behalf of the cultural sector).’
- 42% selected, ‘Venues for meeting (rehearsals, performance).’
- 35% selected, ‘Opportunities to collaborate with other organisations.’
- 12% selected, ‘Admin support.’
- 8% selected, ‘Office space.’
- No one selected, ‘List of preferred suppliers (infrastructure for events delivery).’

Clearly different organisations have different needs and tailoring the offer to the organisation is necessary.

Financial support is most broadly welcome, although not required by all (for example, some community organisations said that they operate with very little external funding).

It is notable that although funding support was the most popular selection on the list, the more pressing *concern* (which was *not* on the list because of difficulties in addressing the issue) was that of keeping people engaged through the crisis. This was the top concern of the previous section, and may be coupled with the finding that many organisations have struggled to adapt and are just waiting things out. However, there were concerns that once an organisation folds or people drift away, it is a lot harder to start up again. So besides getting subsidies to tide people through, ongoing adaptation may also be necessary. Some of the additional comments made in this section revolved around seeking ways to maintain engagement:

“A way of allowing and supporting performance in Covid conditions would be enormously helpful.”

“Ways to do things semi-virtually. To do more live performances which get better engagement than recorded materials.”

It was also felt that offering as much clarity as possible would help with planning:

“Greater clarity.”

“I realise that plans may not be ready yet but it would be really helpful to learn what the council's plans are beyond the Great Place Scheme Award so that individuals and organisations can know how to fit into them.”

Publicity is the next most popular request and particularly amongst artists – there is a need to get back in touch with people following public engagement loss due to Covid.

“Promotion once this is over.”

“General promotion of activities.”

“The potential is there; we just need marketing help.”

“Local councillors attend our events and then write in the local news and on social media about how good they are. It would be great to have support marketing events to the Black and Asian communities in Reading. I want to make my show a more diverse space but I don't have the links to these communities to make it welcoming to them.”

“Facebook used to be effective for free marketing. Now I'm not so convinced as posts get drowned. With no marketing budget for other marketing means, and it not proving so effective anyway, I've had to give up and wait for word of mouth - this can't be the only way?”

It was also suggested that, *“Some kind of marketing training for local freelancers would be great.”*

Linked to the publicity is the request for a someone to engage with *businesses* on behalf of the cultural sector. All parts of the arts sector seek advocates at this time, both towards the general public and towards stakeholders. Two thirds of organisations expressed interest in one or another form of networking (that is, publicity, business links and/or collaboration with other arts organisations).

Venues for rehearsals and performance were another popular request, particularly amongst artists. The requests included provision of physical space and a reduction in rents for the spaces available. Space for running activities was in much greater demand than office space.

“The best support Reading Place of Culture could offer is creating a network of accessible rehearsal/activity spaces that could be utilised for arts engagement/ cultural sector work.”

“Make the Concert Hall in Reading available at an affordable rate, as a rehearsal/workshop venue as well as a concert venue.”

“Live space is a challenge.”

“Rent reduction by Reading Borough Council.”

“Perhaps [assistance] in finding less expensive venues to help with finances of putting on performance.”

“What are the unoccupied spaces in Reading? What offices are currently waiting to be leased that we could fill with life for a fixed term? What levy does the council have in opening up spaces from local businesses and large corporations?”

One third of respondents (venue providers and organisers more than artists) wanted opportunities to collaborate with other organisations. It was said that,

“We see improved partnership working as being key to continuing to be successful in the future.”

“Perhaps we can build relationships now so we can plan for shared events in the future.”

“Regular meetings with the sector to discuss how individuals and organisations can help one another during the crisis.”

Admin support was of interest for very few and no one was interested in lists of preferred suppliers.

Summary of findings and conclusions

30 organisations involved in Reading's art, culture and heritage scene were interviewed; a mixture of charities and other community organisations, limited companies and individuals. Some were artists and some were organising events or providing venues and support. The vast majority of these organisations were involved in putting on live events, which have been severely constrained by social distancing regulations.

The current situation and outlook

Very few cultural organisations were thriving at this time. Whilst there had been some adaptation to the times, most felt that what could be offered online or under Covid restrictions was inferior to the pre-Covid experience. The online experience did not have the same appeal, it reached a more limited range of people, and it lacked the vital ingredient of getting-people-together. From the comments made, it could be seen that many organisations were unlikely to survive unless it became possible to engage people face-to-face again.

Engagement with the public and with volunteers had already been significantly impacted. Organisations normally engaging volunteers had lost, on average, 13 volunteers less per organisation (retaining just over half the pre-Covid figure). Likewise, public engagement had fallen by 323 people per organisation (retaining less than half the number of pre-Covid beneficiaries). To date, permanent staff had mostly been retained, although the number of collaborations with self-employed people was less than half the pre-Covid figure.

There was a sense that many were just waiting things out until the restrictions ease, with a third of organisations temporarily closed (plus one permanently closed), and the rest having only a limited offer. Charities and community organisations tended to be offering more than individuals and businesses. The offer was mainly determined by its adaptability to socially distanced transmission (especially online transmission).

Whether or not the organisation was currently running activities, opinions on future outlook were very varied. Some hoped for complete recovery and even progress, but more foresaw continued difficulties or at best, slow recovery. On average across all organisations interviewed, there was a 28-percentage point fall in stability and success ratings pre-Covid to now, with a hope for recovery one year on but this was still expected to be below the pre-Covid situation by 16 percentage points.

Problems and what might help

The most critical problem was felt to be the loss of engagement with people (a problem selected by almost 90% of respondents). The social distancing rules were the chief issue but also the public's personal fears for safety. Concerns were expressed that the longer social distancing goes on, the harder it will be to re-mobilise people who have drifted away (and to retain staff).

The problem is compounded by uncertainty and changing rules, which makes planning difficult and stressful. Uncertainty was selected as problematic by 70% of respondents.

Although the large majority of organisations had lost clients, it was notable that 3 or 4 of 30 had retained or even grown their circle of contacts during the pandemic. There were some positive comments about adaptation to social distancing restrictions and what still works (for example, running workshops online seemed to work better than online performances). If a return to widespread face-to-face contact seems unlikely any time soon, then creating a forum in which experiences of and ideas for adaptation may be exchanged amongst peers may be of value to the many who expressed difficulties in finding ways to adapt and connect, since these will not be able to wait things out indefinitely. Likewise, providing as much clarity as possible (including about future funding streams), could be an aid to planning and adaptation.

In terms of other assistance, funding was the most widespread request. Two thirds of respondents requested funding support, and 44% of respondents were already under financial pressure due to income reduction and/or depletion of reserves.

Facilitating networking was wanted by two thirds of organisations interviewed. In order of popularity, this included helping artists connect to the public, helping event organisers to connect with businesses, and helping organisations collaborate with one another.

Loss of workspace had affected 41% of organisations interviewed, and a similar proportion requested help in this area. Many outlets for the arts were currently unavailable due to Covid concerns. Providing physical space and providing rent subsidies were both requested.

It is notable that although organisations varied widely in their current situation and optimism for the future, there was no evidence within this data that one particular *type* of arts organisation or arts offer suffered or progressed more than another. Nor could it be seen that any beneficiary group was disadvantaged significantly more than others. This implies that no specific part of the ACH sector need be singled out for special attention over any another. Having said that, every organisation has different needs, so tailoring the offer to the individual organisation is important.