

Market Research Survey (July 2020)

“Covid19 is touted as an opportunity for radical reimagining, but are boards and funders ready to back that or will they push for more of the same?” (Survey respondent)

Summary

In July 2020, Clore Leadership contacted our alumni and the wider arts and culture sectors to request responses to a survey assessing the impact of Covid-19 on workforce development priorities in the short to medium term.

This research was conducted at the end of a period in which Clore Leadership have adapted our programmes of activity in response to Covid-19 and the Black Lives Matter movements. Between March and July 2020 residential programmes were placed on hold whilst the reality of a globe in lockdown made us all reassess priorities. In that time, Clore Leadership developed and delivered programming such as [Leading from a Distance](#), [Small Group Conversations](#), [Clore Leadership Experience](#) and [Brilliant Routes](#) as well as organising a number of webinars and other online interventions for the sector.

Running alongside the delivery of new activities, our challenge has been to try and conceptualise the ‘new normal’, blending the highly regarded and special Clore Leadership experiences with acute sensitivities around safety, alertness, responsiveness and enhanced flexibility. We are mindful of the need to ensure content of our training is responsive to the multi-dimensional challenges of current circumstances: financial hardships driven by the economic recession stemming from the Covid-19 pandemic; environmental sustainability; equity and diversity. Our research has therefore aspired to increase Clore Leadership’s understanding of how the sector have (or have struggled to) prioritise supporting cultural leadership and change-making. We seek to obtain a better understanding of the opportunities and pressures being experienced, including strains on planning, prioritising and financing professional development for leaders. We are clear that this is as, if not more, important for independent artists and leaders as it is for those working within organisations.

The survey was open from 22-28 July, advertised via existing Clore Leadership networks and social media channels as well as proactively shared with individual networks. 226 full responses were received providing a snapshot of the sector which included a diverse cross-section of art forms, freelance practitioners and size of organisations. We hope that this report will serve as a useful benchmark for asking the same questions in future years and continue to grow our understanding of needs and priorities. This will be particularly pertinent in the coming 12 months, once there is a better indication of the state of the sector following financial interventions from the Cultural Recovery Fund.

“Professional development and support has never been more important than it is now, but there are LOTS of us who are not in a financially strong place as a result of Covid.” (Survey respondent)

“The 'new normal' and indeed the new operating context that the cultural sector is having to rapidly define is already beginning to hit many organisations and individuals very hard - not least because of the intense economic challenges it presents, but also the challenges for people within organisations that require new, enhanced and advanced skillsets that may not have been viewed as essential to the workforce of the cultural sector previously.” (Survey respondent)

Headline Findings

- CV-19 has had a disproportionate impact on the ability of freelancers to afford and prioritise professional development;
- There is significant uncertainty in training budgets for all organisations, irrespective of size of organisation or turnover;
- 61% of respondents felt that the most important aspect of strong professional development is in helping organisations adapt business models to face current and future challenges;
- The sector retains an eagerness for training which helps bolster leaders’ ability to influence & impact;
- Diversity, equality and environmental sustainability remain high priorities as key content elements of leadership training programmes.

“Lack of investment and commitment in people/talent, which stifles diversity; we rely on people who are passionate and can "afford" to be passionate and therefore diversity in the sector is stifled.” (Survey respondent)

Analysis

Who responded?

We received responses from a wide cross-section of the arts and culture sectors, representing performing arts, heritage, film and libraries as well as sector support organisations, statutory funders and those involved with development of policy.

RESPONSES BY ARTFORM¹, ETHNICITY, DISABILITY & GENDER

Category	% of respondents
Music & Theatre	40%
Combined Arts	22%
Museums re	19%
Visual Arts	16%
Dance	4%
Heritage	12%
Literature, Libraries, Archives, Film & Policy	28%
Ethnic background other than White British or White European	12%
Disabled	11%
Female	76%
Male	20%
Non-binary or preferred not to say.	4%

¹ Respondents were able to select more than one art form or sector

The survey comprised both data-based and narrative-based questions. We were gratified to receive a particularly rich set of responses to free text questions – some of which are quoted through this report.

We were keen to ascertain whether organisational/freelance backgrounds had a bearing on approaches to workforce development and so collected quantitative data around budget sizes, numbers of staff and/or independent practitioners. A majority (67%) of survey responses came from those working in organisations. However, 74 (33%) responses came from freelancers. Overall survey responses represented fairly even geographical distribution across the UK (31% from London).



Responses also represented an even spread across budget sizes for organisations (and for income levels across independent practitioners and freelancers), although there was *slightly* lower representation from organisations with budgets between £250k-£1m (18%). Size of organisations responding as indicated by number of ‘employees’ was weighted to smaller organisations (43%) alongside 50 (22%) responses from organisations with 200+ staff. In alignment with the lower representation of mid-sized budget organisations there was proportionally less representation from organisations with 50-199 staff (12%).

“Culture and practical supporting of professional development is actually quite limited in arts orgs, usually because of limited capacity and budgets.” (Survey respondent)

Headline results

For the 2019/20 financial year, 42% of respondents have retained CPD/training budgets. This falls to 29% for 2020/21.

19.5% of respondents did not have any training budget allocation in 2019/20.

20% of respondents do not yet know what budget they have in 2019/20, rising to 40% in 2020/21.

A majority (60%) of respondents *have not* historically applied for funding to support professional development. Of those who did, funding is normally sourced from statutory funders or trusts & foundations.

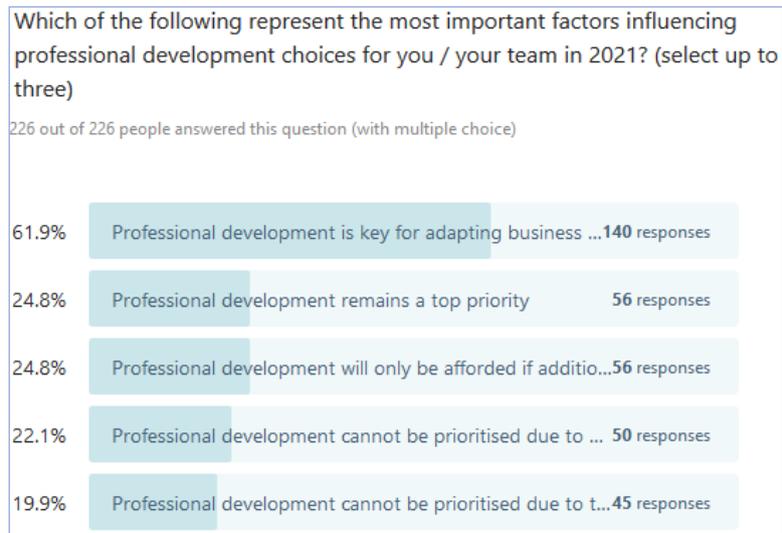


Value of leadership/training

99% of respondents are clear in their view of the importance of quality leadership in responding to current challenges.



Encouragingly, nearly two-thirds of respondents see training/CPD as key to facing challenges around business models. The ambition for sector leaders to be able to respond with agility is also mirrored in narrative responses to survey questions. Considered alongside ACE emergency funding criteria around adapting business models for post-March 2021, there is a strong rationale for continued investment in leadership training. That said, it is also worth bearing in mind that 25% of respondents state a need for additional resources in order to undertake training.



“One of the biggest challenges here is how the leadership of organisations will adapt. The post-COVID cultural sector will require a new 4-dimensional leadership that will demand new skills, new business models, new ways of engaging and much more... A critical enabler in this process is ensuring that talent development and progression pathways are securely in place, are relevant and remain visible and protected to ensure the sector can identify, train, access and ultimately benefit from talented leaders.” (Survey respondent)

Fee level responses

Respondents were asked to indicate manageable fee levels (per individual) for the following types of training: 1-Week residential course; a 1-day face-to-face programme; and a 1-day online programme. Whilst responses varied across size of organisation to some extent, there was a clear articulation of financial value being placed on in-person training across the sector at large. Meanwhile, responses erred towards the lower end of the proposed fee levels for online training. 73 (32%) of respondents gave a figure for indicative training budget in 2020/21. Average budget across these responses is around £4,750, though it should be noted this figure is skewed by a small number of responses from organisations with large workforces.

“Lack of experience or knowledge of the required time frames, costs and funding systems for access. Crisis and emergency-blamed agenda of 'looking after our own first' and sorting out access, diversity and equality later.” (Survey respondent)

CONCLUSIONS

Our survey of the sector has given clear indication of the impact which the global pandemic is having on the budgets and workforces of the arts and culture sector. Whilst there is a clear understanding of the **need for quality leadership** to help guide the sector through the turbulence caused by Covid-19 and ongoing issues such as diversity, equality and environmental sustainability, there is **limited resource** to invest in professional development.

As is evidenced from the responses of freelancers to this survey, there is a particular need for the sector to consider **how it best supports individual leaders** who are not necessarily themselves supported by organisations. Meanwhile, responses consistently show that the financial pressure on the sector at large is greater than ever, that it is difficult to prioritise training when confronting existential crisis and having to rapidly cut budgets.

In an economic environment where there is unprecedented demand on funders, there will likely be greater difficulty in securing funds specific to leadership development. There is consequently an imperative for Clore Leadership to advocate to statutory funders, trusts and foundations for ongoing allocation of resources for training. Alongside this, we see an essential need for us to find additional resources to help subsidise the costs of our leadership programmes through bursary funding.

Our response at Clore Leadership has been to explore ways of increasing the number of training bursaries available to course participants over the next 12 months. We are seeking to support 75% of participants with some or all of the fees associated with Clore Leadership training programmes. As we launch our adapted programming in autumn 2020, we will seek to respond to the issues, barriers and opportunities identified through this survey and help ensure a sector with resilient leaders who are equipped to lead effectively through the next decade.

“We recognise that individuals and organisations are operating under extreme financial pressures but the need for high quality and relevant leadership learning has never been greater as the sector navigates the next stage of the fallout from the pandemic. Therefore we have responded by broadening access to our programmes and being proactive in pushing forward on the diversity agenda.”

Hilary Carty, Executive Director, Clore Leadership

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