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Evaluation of the Wales Cultural Recovery Fund 2020-2021

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Evaluation of the Wales Cultural Recovery Fund 2020-2021

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Views expressed in this report are those of the researcher and not necessarily those of the Welsh Government

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Glossary

Acronym/Key word	Definition
ACW	Arts Council of Wales
BAS	Business Accounts System
BBLs	Bounce Back Loan Scheme
BICS	Business Impact of COVID-19 survey
CJRS	Coronavirus Job Retention Scheme
CRF	Wales Cultural Recovery Fund
CWBLs	Coronavirus Wales Business Loan Scheme
ERS	Economic Resilience Fund
FTE	Full-Time Equivalent
SEISS	Self-Employment Income Support Scheme

1. Introduction

- 1.0 This report details the findings of the process and impact evaluation of the Wales Cultural Recovery Fund (CRF) 2020-2021. The evaluation examines the implementation and impact of the grants which have been administered and assesses the extent to which the outputs and outcomes experienced by organisations and individuals can be attributed directly to the grant. The report also explores whether wider anticipated or unanticipated effects have been realised.

Background and evaluation objectives

- 1.1 Since the lockdown on the 23rd of March 2020, organisations and individuals working in the culture sector have been severely impacted by the effects of COVID-19. Venues and businesses across Wales closed abruptly and events were cancelled or postponed, and staff have been furloughed, with an immediate loss of income. Along with the tourism sector, cultural and creative sectors are among the most affected by the current crisis.¹ Primary research conducted by Creative Cardiff has highlighted the similarly negative position for the self-employed. Their survey of freelancers in the creative industries in Wales found that 60 per cent of respondents report that their work had completely dried up.²
- 1.2 The UK Government announced on the 5th of July 2020 a package of £1.57 billion to protect cultural, arts and heritage institutions across the UK. Following this, on the 30th of July the Welsh Government announced the CRF, a £53m fund to help Wales' diverse culture sector deal with the impact of the coronavirus pandemic. On the 11th of November 2020, due to high demand for the funding support across the arts and cultural sector, the Welsh Government announced a further £10.7m would be made available to support organisations and individuals.³ This announcement took the total funding package available through the CRF at that time to £63.7m.⁴

¹ OECD (2020)- 'Culture shock: COVID-19 and the Cultural and Creative Sectors'. OECD Policy Responses to Coronavirus (COVID-19). 7 September 2020.

² Creative Cardiff (2020)- 'COVID-19 Self-employment Income Support Scheme: How will it help freelancers in the creative industries in Wales?'

³ Welsh Government (2020)- 'Written Statement: Cultural Recovery Fund- additional funding'. 11 November 2020.

⁴ As the programme has not fully closed, the financial figures are subject to change, and stated figures are based on analysis of BAS at a static point in time (Dec 21).

- 1.3 In recognition of the ongoing challenges facing many organisations, in January 2022 a £15.4 million fund was announced to support Wales' arts and cultural sectors as part of the third round of the Cultural Recovery Fund.
- 1.4 The Welsh Government commissioned Wavehill to undertake an independent process and impact evaluation of the CRF. Ultimately the evaluation sought to provide a judgement on the extent to which the grant aid has supported the cultural and creative sectors in Wales to survive the negative economic effects resulting from COVID-19. Specific objectives to be addressed through the evaluation included:
- Examining the impact of the fund on improving business survivability and reducing redundancies in supported cultural and creative organisations.
 - Assessing the effects of the outbreak on the turnover and employment levels of cultural and creative organisations and the impact of financial support in mitigating negative effects of the pandemic.
 - Considering whether the fund effectively targets the most at-risk organisations and sectors, and whether groups have missed support.
 - Exploring variations in realised impacts between different regions of Wales, art providers (e.g. theatres, music venues etc.) and organisation sizes.
 - Examining the wider social and cultural impacts of the funds resulting from Cultural Contract commitments.
 - Examining how those provided with financial support compare with similar organisations who applied, but did not receive support, and consider whether any differences can be attributed to the support received.
 - Examining programme management and monitoring processes and provide assessment of whether they adequately support Programme delivery.
 - Evaluating grant recipient, and stakeholders' perceptions and satisfaction of the appropriateness and effectiveness of the Programme delivery.
 - Identifying any key lessons learnt relevant to this and potential future COVID-19 support Programmes.
 - Examining the characteristics of supported creative freelancers and consider how the Freelancer Pledge can be used effectively to support this group.

1.5 In communicating the findings of the evaluation and in considering their implications for policy, the report is structured as follows:

- Chapter 2 presents the methodology for the evaluation, including acknowledged limitations.
- Chapter 3 provides an overview of the impact of COVID-19 on the creative and cultural sectors in Wales, including first-hand experience from grant recipients.
- Chapter 4 reviews the Fund design and delivery mechanisms, drawing on feedback from delivery staff, sector stakeholders and grant recipients across all three strands.
- Chapter 5 provides profile detail of grant applicants and recipients for both rounds of CRF and the Freelancer Fund.
- Chapter 6 explores grant recipients' response to the pandemic, including how the funding was used, changes to cultural organisations and freelancer's services and activities and evidence of innovation.
- Chapter 7 presents an assessment of the impact of the CRF funding on grant recipients, specifically with regards to the performance of the programme in supporting the survival of cultural organisations and protecting jobs and volunteer roles.
- Chapter 8 draws together key lessons based on the findings of the evaluation.
- Chapter 9 provides the final conclusions of the evaluation.
- Chapter 10 presents several focused policy considerations.
- Annex A provides the research method.
- Annex B provides the stakeholder discussion guide.
- Annex C provides the list of stakeholder organisations consulted.
- Annex D provides the CRF Applicant Survey.
- Annex E provides the Freelancer Fund Recipient Survey.
- Annex F provides the CRF Applicant Discussion Guide.
- Annex G provides the Freelancer Fund Recipient Discussion Guide.
- Annex H provides an overview of the eligibility criteria for CRF1 and 2.

2. Methodology

- 2.1 The evaluation team used a mixed methods approach to support a review of the process and delivery aspects of the fund as well as its impact on supported organisations and individuals. This has underpinned an assessment of the extent to which the core aims of the CRF have been met, namely, to improve business survivability and protect jobs. The evaluation was also designed to identify any wider, unanticipated impacts, innovation, and transformational change.
- 2.2 The evaluation took place between April 2021 and April 2022 and included the following activities:
- Semi-structured interviews with key stakeholders, agreed with Welsh Government and selected based on their ability to comment on the delivery of the CRF and to provide wider context on the challenges facing the cultural sector across Wales due to the pandemic.
 - A review of key policy and guidance documents underpinning the delivery of the CRF and wider published evidence on the impact of the pandemic on the creative and cultural sectors in Wales.
 - Analysis of administrative and monitoring data associated with the CRF, including the Welsh Government's Administrative Business Accounts System (BAS) data, analysis of all Freelancer Fund recipients and information from Arts Council of Wales Grant Management System.
 - An online survey of CRF Round 1 applicants, which secured 159 responses.
 - In-depth interviews with a sample of 213 CRF Round 1 and Round 2 recipients.
 - An online survey of Freelancer Fund Round 1 and Round 2 recipients, which secured 435 responses.
 - In-depth interviews with 97 freelancers in receipt of funding through the CRF, drawn from the online survey responses.
- 2.3 An overview of the methodology is presented in this section with further detail provided in Annex A.

Stakeholder interviews

- 2.4 Semi-structured interviews were offered to 40 stakeholders and conducted in July and August 2021 with 23 individuals and organisations able to comment on the delivery and impact of the CRF. These interviews were directed by a discussion guide which is provided in Annex B and the list of stakeholder organisations consulted is provided in Annex C.
- 2.5 Due to the COVID-19 pandemic, all research activities and presentations were held remotely. Where primary stakeholder research was conducted, this was carried out using Microsoft Teams.

Administrative and monitoring data

- 2.6 Monitoring data has been provided through three main sources. Data relating to the fund delivered by the Culture, Sport, and Tourism Directorate in Welsh Government has been accessed via BAS and within the case tracker data managed by sector leads. This data is drawn from the information provided by applicants in the application forms. For the fund administered by Arts Council of Wales, data has been provided through their Grants Management System. Finally, information around the awards made by local authorities for the Freelancer Fund has been collated by Welsh Government using a standard monitoring template and provided to the evaluation team.
- 2.7 The data fields used by Welsh Government and the Arts Council of Wales in the CRF application forms were aligned but not totally consistent. This has limited the ability to present a fund wide position for a small number of fields. This is acknowledged within the analysis represented in this report.

Survey responses

- 2.8 Online survey tools were developed in collaboration with Welsh Government and Arts Council of Wales, copies are provided in Annex D and E.
- 2.9 The online survey of the CRF grant applicants was disseminated by Welsh Government and Arts Council of Wales to all applicants. The survey, which was sent to CRF Round 1 applicants, was launched on the 29th of July 2021 and closed on the 1st of September 2021.

- 2.10 The survey achieved a total of 159 responses, including 144 organisations that secured an award and 15 that did not. For context, 1,195 organisations applied for funding in CRF Round 1, 59 per cent who were successful and 41 per cent who were unsuccessful. It is important to note that survey responses represent a higher proportion of businesses from the Creative and Arts sector compared to applications as a whole (48 per cent of survey responses compared to 26 per cent of applicants) and a smaller proportion of survey responses came from Museums, Archives and Libraries (10 per cent of survey responses compared to 33 per cent of applications). Otherwise, the sample is broadly representative in terms of sector and geography.
- 2.11 The online survey of recipients of funding for the Freelancer Fund was disseminated by local authority leads via Welsh Government. The survey, which was sent to Round 1 and Round 2 recipients, was launched on the 21st of November 2021 and closed on the 4th of January 2022. The survey achieved a total of 435 responses. Based on the total unique number of freelancers in receipt of grant funding, this equates to a response rate of 12 per cent based on 3,783 unique freelancers supported with responses received across all but one local authority area (Isle of Anglesey). Aside from the lack of responses from Anglesey, 50–64-year-olds were over-represented in the survey sample (37 per cent of survey responses vs 23 per cent of applicants) as were freelancers with a disability (16 per cent of survey responses vs 4.4 per cent of applicants). The survey was broadly representative in terms of sector and geography.
- 2.12 Given the administrative process used for the dissemination of the Freelancer Fund, namely an allocation of funds on a first come basis, it has not been possible to engage freelancers who were eligible for funding but did not secure a grant as this information was not made available to the evaluation team.

Depth interviews with CRF Fund recipients

- 2.13 The evaluation team undertook in-depth interviews with a sample of 213 successful CRF Round 1 and Round 2 applicants, with contact details drawn from BAS data and the Arts Council of Wales grants management system. These interviews were directed by a discussion guide which is provided in Annex F.

Depth interviews with Freelancer Fund recipients

- 2.14 The evaluation team used the online survey to secure consent from fund recipients to take part in in-depth interviews. All individuals who provided consent were contacted by the evaluation team. A total of 97 in-depth interviews were completed. As such there is an element of self-selection bias in the in-depth interview sample. These interviews were directed by a discussion guide which is provided in Annex G.

Scope and limitations of the evaluation

- 2.15 The main acknowledged limitation on the evaluation is the absence of a control group of cultural organisations or freelancers that either didn't apply for or didn't receive funding through either round of the CRF.
- 2.16 To ensure compliance with GDPR regulations governing the administration of the fund, the evaluation team have not had access to contact details for organisations that applied for funding but did not receive an award. Consequently, the counterfactual position has been constructed based on the feedback from applicants and grant recipients that have responded to the surveys disseminated by Welsh Government and Arts Council of Wales.
- 2.17 Given the range of different COVID-19 relief and support funds active over the timeframe of CRF, establishing a true counterfactual would have been highly challenging and beyond the scope of this evaluation.
- 2.18 A further limitation relates to an understanding of the status of organisations that applied for funding but were not provided an award, in particular the reason for their non-award. This reason has not been captured consistently within the case tracker system overseen by sector leads within Welsh Government or by Arts Council of Wales. As such, it is not possible to exactly determine the level of unmet need for support across the cultural sector in Wales.
- 2.19 However, feedback from sector leads has indicated that the organisations that were not provided with an award were assessed as being ineligible, with some directed towards other funds such as the COVID-19 Economic Resilience Fund which provided support in the form of cash grants for businesses, social enterprises, charities and associated supply chain businesses that have experienced a material negative impact as a result of ongoing COVID-19 restrictions.

2.20 However, the data captured by sector leads within Welsh Government suggests that in most cases organisations that did not receive an award was due to them failing to meet the eligibility criteria or due to due diligence issues highlighted in the assessment process.

3. Impact of COVID-19 on creative and cultural sectors in Wales

- 3.1 This section of the report provides an overview of the impact of the pandemic on the creative and cultural sectors in Wales. Drawing on research evidence, feedback from CRF grant recipients and a review of secondary evidence sources, it outlines the immediate and medium-term impacts on organisations and individuals across the sectors. This provides relevant context for the launch and delivery of the Cultural Recovery Fund across 2020 and 2021.

Summary of literature on the impact of the pandemic

- 3.2 One of the many insidious characteristics of the COVID-19 pandemic has been the disproportionate impact on specific groups and sectors within the economy. Diverse activities from live performance and theatre productions to exhibitions and galleries, have seen their revenues fall dramatically as venues have closed their doors and gatherings have been prohibited to maintain social distancing. Official data shows that the arts and entertainment industry within the UK saw a 44.5 per cent reduction in monthly gross domestic product output,⁵ making it one of the sectors worst hit by the crisis.⁶
- 3.3 The impact on creative industries alone in Wales has been estimated at £100 million for 2020.⁷ Creative and cultural sectors are also characterised by relatively higher proportions of micro-businesses and self-employed professionals, employment groups hardest hit by the economic effects of COVID-19.⁸ The impact of COVID-19 has come on the back of emerging evidence of increasing reliance on private revenue streams which may have left creative and cultural organisations and venues particularly exposed to the loss of income caused by the pandemic.⁹ In the Welsh context these findings are concerning. The creative industries and cultural sectors play an increasingly important role in the Welsh economy, contributing around £1.5 billion¹⁰ and 85,000 jobs annually.¹¹

⁵ According to gross value added in the three months up to June 2020 compared with the three months earlier

⁶ Office for National Statistics, 'Monthly gross domestic product by gross value added', 12 August 2020. Note: Statistics should be read in accordance with caveats provided in the original dataset.

⁷ Oxford Economics (16 July 2020) *The Projected Economic Impact of COVID-19 on the UK Creative Industries*, page 21.

⁸ Ibid.

⁹ Arts Index (2020) published by The National Campaign for the Arts (NCA).

¹⁰ DCMS Sectors Economic Estimates 2018: Regional GVA.

¹¹ DCMS Sectors Economic Estimates 2019: Employment.

- 3.4 The Culture, Welsh Language and Communications Committee's report on the impact of the pandemic on the creative industries in Wales¹² acknowledged that the sudden and detrimental effects were felt not only by those directly employed but across the whole supply chain, such as electricians, carpenters, hair and make-up artists and others working from project to project.
- 3.5 Lockdowns have had a dramatic effect on commercial incomes streams across the sector. In the heritage, museums and archives sectors, a further report by the Culture, Welsh Language and Communications Committee¹³ reported on an estimated budget shortfall across the National Trust of £200 million, a loss of around £600,000 in commercial income by The National Library of Wales during 2020-2021 and £1.8 million by the National Museum Wales. The report outlines that many funders in the sector had chosen to prioritise organisations that do not receive government funding, thus exacerbating funding pressures for many national cultural institutions.
- 3.6 The Committee's report also highlights that the cash flow crisis resulting from the pandemic has disproportionately hit organisations that are most reliant on earned income, which are usually smaller, often independent, organisations such as within the museums sector.
- 3.7 According to the Film and TV Charity's survey, 93 per cent of industry freelancers in Wales were not working due to the crisis and 74 per cent did not expect to receive any support as they were ineligible for the Self-Employment Income Support Scheme (SEISS) and the Coronavirus Job Retention Scheme (CJRS).¹⁴
- 3.8 The negative impact of the pandemic has continued beyond the lifting of lockdown restrictions, with influences on the confidence of consumers to return to venues and events, as well as limits on audience capacity constraining revenue streams. For example, The Institute of Theatre Consultants has outlined that social distancing rules significantly reduced theatre capacity, well below levels that would make the reopening of many theatres economically viable.¹⁵

¹² Welsh Parliament (2020)- 'Impact of the COVID-19 outbreak on the creative industries.' Culture, Welsh Language and Communications Committee. July 2020.

¹³ Welsh Parliament (2020)- 'Impact of the COVID-19 outbreak on heritage, museums and archives.' Culture, Welsh Language and Communications Committee. August 2020.

¹⁴ Welsh Parliament (2020)- 'Impact of the COVID-19 outbreak on the creative industries.' Welsh Parliament Culture, Welsh Language and Communications Committee. July 2020.

¹⁵ Ibid.

- 3.9 Research commissioned by Visit Wales in late 2020 exploring the impact of the pandemic on the events industry¹⁶ reported that 75 per cent of businesses who responded to a sector survey,¹⁷ and who employ staff, needed to put staff on furlough. About half (52 per cent) who employ staff have either made redundancies, issued notice of, or intend to make redundancies, or anticipate having to make redundancies. Some 58 per cent have taken on no or fewer temporary workers compared to normal, with this directly impacting on the livelihoods of creative freelancers. About half (48 per cent) of those who have lost revenue have lost over 80 per cent of their annual turnover.
- 3.10 A report by the Audience Agency into the challenges facing the arts, culture and heritage sector in Wales in response to COVID-19, has highlighted several challenges, which suggests that the sector's recovery may be slower in Wales than across the UK.¹⁸ They base this on the fact that levels of arts and cultural engagement dropped further in Wales since March 2020 than the UK average and that a lower proportion of people report to be ready to start attending in person than the UK average.¹⁹
- 3.11 A recent publication by the Centre for Cultural Value²⁰ found that the Coronavirus Job Retention Scheme (CJRS) was vital to protect jobs and that at the start of the pandemic almost 70 per cent of performing and visual arts organisations reported staff on furlough. There are however key differences across the creative industries, with sectors such as publishing having much lower levels of furloughed workers compared with film and television or the performing arts. The authors conclude that although the high take-up of the furlough scheme by creative businesses suggests a policy success, the complexities of employment and work in the creative sector, especially the high numbers of freelancers who were not protected by the furlough scheme, will require tailored and specific support in the future.

¹⁶ Visit Wales (2020)- 'Events industry and supply chain business COVID-19 impact survey: 12 November to 8 December 2020'.

¹⁷ Online survey with businesses in Wales who work in the events industry and the wider supply chain for events, held between the 12 November to 8 December 2020.

¹⁸ View [Audience Agency research](#).

¹⁹ Only 21 per cent of Welsh had attended any arts/heritage since Mar 2020. This was well below the overall UK average of 34 per cent, reflecting the fact that restrictions were not lifted to the same extent in Wales as elsewhere. This lower engagement was especially true for heritage sites.

²⁰ Brook, O. O'Brien, D. & M. Taylor (2022)- 'Covid, furlough and creative businesses.' Centre for Cultural Value.

- 3.12 Research published by Creative Cardiff exploring the use of the Self Employment Income Support Scheme (SEISS) estimated that there are 40,000 freelancers working in the Welsh creative industries. Drawing on responses to an online survey of creative industry freelancers, the report authors highlight that 85 per cent reported a significant decrease in business, with a majority (60 per cent) stating that their work had dried up completely.²¹
- 3.13 The authors point to the fact that impact of the pandemic is not restricted to affected freelance businesses, with many experiencing significant hardship, but also impacts on the wider economy given that many freelancers were considering abandoning the creative industries all together, a sector which prior to the pandemic has been one of the UK's most buoyant and fastest growing.
- 3.14 Combined, the growing evidence base around the impact of the pandemic highlights the disproportionate negative impact it has had on the arts and creative industries. This has directly affected a sector that is characterised by higher proportions of micro-businesses and self-employed professionals, but also a much wider supply chain. These negative impacts have continued beyond the lifting of public health restrictions across Wales, highlighting that not all organisations in the sector have moved fully into a recovery and rebuild phase, with many still facing immediate threats to their survival and long-term viability.

Feedback from grant recipients

- 3.15 Feedback from cultural organisations and freelancers engaged through the evaluation presents compelling evidence on the significant challenges facing the cultural sector as a direct consequence of the pandemic and the impact this has had on lives and livelihoods across Wales.

Cultural organisations

- 3.16 Cultural organisations in receipt of CRF funds highlighted both the immediate and accumulative impacts of the pandemic. Impacts varied dependent on which sector the organisation was operating within and was also influenced by the nature of their delivery, staff structure, use of volunteers, security of order book and income streams.

²¹ Creative Cardiff (2020)- 'The COVID-19 Self Employment Income Support Scheme: How will it help freelancers in the creative industries in Wales?'.

- 3.17 For example, businesses that are more seasonally orientated for their work and income and those reliant on overseas visitors experienced different pressures to businesses that were not.
- 3.18 As the duration of the pandemic extended, the ability of many organisations to manage the crisis diminished, with real concerns around survivability exacerbated by a lack of foresight on how long restrictions may be in place and the impact on future income streams. In other words, for many their business plans were not just put on hold but were also more fundamentally challenged as to their future viability.
- 3.19 The pandemic affected all cultural organisations, including those that had been recently established with potentially less resources and financial reserves to survive without financial support.
- 3.20 Many organisations had already invested resources in developing events and performances at the point that the pandemic hit, which substantially curtailed or closed off their income streams leaving them in a precarious financial position.

‘We had just started our film festival in March and had literally run the open weekend, on the Tuesday we had to close the whole event down, we'd spent all the money but had no income, that put us right back to square one, no money in the bank. With cinemas closing and being closed for a long period, there was no prospect for us to move into a healthier position.’ (CRF Round 1 and 2 recipient, Event Sector).

- 3.21 Where cultural organisations regularly used freelancers (both within and outside of the cultural sector), these opportunities were also halted leading to concerns around the level of support and protection available for the freelancer sector and what this could mean for the pool of freelancers across Wales beyond the pandemic.

‘The pandemic and the lockdowns cut off the main bulk of our income. We provide private music lessons and provide music services and support to live productions, and these just stopped completely. I am the only employee of the business. Most of our staff are freelancers.’ (Round 1 and 2 CRF recipient, Culture and Creative: Supply Chain)

- 3.22 The provision of emergency funding shortly following the introduction of public health measures in March 2020 was valued, although the breadth of the cultural sector covering a range of sub-sectors and comprising of organisations of different

sizes and legal status generated a degree of uncertainty around eligibility. This exacerbated anxieties for many organisations. The introduction of the CJRS, whilst welcomed, did create some initial capacity challenges for organisations seeking to submit applications to multiple funding sources.

- 3.23 What is evident in the feedback from cultural organisations is the real human cost of the impact. Behind every business and organisation was a team of staff, contractors and volunteers struggling to deal with the implications of the pandemic on their work whilst also balancing their personal lives.
- 3.24 Navigating the various public health guidelines, legal requirements, funding conditions alongside the management of non-work commitments such as childcare or supporting shielding relatives has exerted significant pressure on the sector. This is important context to understand the sector and societal landscape into which CRF was launched and the level of fatigue and burn-out evident as the UK slowly emerges from the worst of the pandemic into a recovery phase.

Freelancers

- 3.25 The restrictions put in place across Wales to manage the spread and impact of the pandemic led to either the cancellation or postponement of booked work for most freelancers. With venues closed, public gatherings limited and considerable uncertainty around any timescale for gradual reopening of the economy and wider society, many freelancers faced a catastrophic reduction in their earnings and income.
- 3.26 The diversity of work and freelancer roles across the cultural sector has resulted in different impacts for individual freelancers, often dependent on the number of contracts they held, the specific sub-sectors they were operating in and their trading position or cashflow at the point that the pandemic struck.
- 3.27 For freelancers with overheads such as rental for studio space or lease agreements for equipment, the loss of income was compounded by continued outgoings which eroded their savings and pushed many towards the point of bankruptcy.
- 3.28 Freelancers spoke about taking steps to actively seek work outside of the sector to ensure that they could stay afloat. However, for those with care responsibilities the closure of schools and resultant need to home school and closure of many respite

services meant that they were having to juggle care commitments around their availability for work.

- 3.29 Combined, the feedback from cultural organisations and freelancers across Wales demonstrates the severity of the challenges facing the sector. The pandemic served to immediately cut off income streams, whilst at the same time leading to many organisations and freelancers to question the viability of their work given uncertainty about future demand and the length of any recovery or rebuilding phase. The Cultural Recovery Fund was regarded by many as a bridge, helping grant recipients to navigate their way through the worst of the pandemic to a point where relatively normal trading and operating conditions could be resumed.

Cultural Recovery Fund Support Strands

- 3.30 The cultural and creative sectors stretch across and impact many aspects of Welsh life. The parts of the sector eligible for the fund has included music venues, heritage organisations and sites, museums, archives, libraries, the arts, independent cinemas, and events and suppliers. The sector is largely made up of charities, community interest companies, social enterprises, and freelancers which presents an added dynamic in understanding the pressures and impacts associated with managing the pandemic.
- 3.31 At the outset of the pandemic in April 2020, the Welsh Government announced an £18m package of support. This included: the £7.1m Arts Resilience Fund led by the ACW supporting artists and arts organisations; the £1.3m Creative Wales fund for grassroots music venues and TV sector; the £1m Cultural Resilience Fund for museums, collections, conservation services, and libraries; the £750k Emergency Relief Fund to support organisation led by the Federation of Museums and Galleries of Wales and Sport Wales; and the £250k for Digital Library Resources. These funds are outside the scope of analysis for this evaluation.
- 3.32 Up until the announcement of the CRF, the main sources of support had been from the UK Government in the form of the CJRS and SEISS. Funding has also been made available to support businesses and organisations, including for parts of the culture sector, by the Welsh Government via the Economic Resilience Fund (ERS).
- 3.33 The UK Government announced on the 5th of July 2020 a package of £1.57 billion to protect cultural, arts and heritage institutions across the UK. Following this, on

the 30th of July the Welsh Government announced the CRF, a £53m fund to help Wales' diverse culture sector deal with the impact of the coronavirus pandemic. The fund is split into three components of support:

- A CRF fund delivered by the Culture, Sport, and Tourism Directorate in Welsh Government. This support is available to creative, cultural, events and their technical suppliers, and heritage organisations.
- The Arts Council of Wales (ACW) received funds to deliver similar support to organisations operating in the disciplines of music, dance, theatre, literature, visual and applied arts, combined arts, digital art.
- A dedicated Freelancer Fund was also created to support individuals in the sector who have been impacted by the pandemic. The fund is open to freelancers in the sub sectors of arts, creative industries, arts and heritage events, culture and heritage, whose work has direct creative/cultural outcomes. This has been administered through local authorities in Wales.

- 3.34 On the 11th of November 2020, due to high demand for the funding support across the arts and cultural sector and continuing pressures associated with the pandemic, the Welsh Government announced a further £10.7m of financial support for organisations and individuals. This announcement took the total funding package available through the CRF fund at that time to £63.7m.
- 3.35 In recognition of the ongoing challenges facing many organisations, in January 2022 a further £15.4 million fund was announced to support Wales' arts and cultural sectors, as part of the third round of the Cultural Recovery Fund. The fund aims to specifically support organisations impacted by the Alert Level 2 measures Ministers put in place in late December to help control the rapid spread of the omicron variant.²²
- 3.36 The funding also provides support for eligible businesses and organisations which have not received support via CRF to date and who meet the fund criteria.

²² View [Welsh Government funding announcement](#).

4. Fund design and delivery mechanisms

4.0 The CRF fund was launched in July 2020, around five months after schools and some businesses in Wales were closed²³ and the first case in Wales was detected. The usual timeline for designing and launching a dedicated sector support fund was considerably compressed in recognition of the immediate threat to jobs and the survival of organisations across the cultural sector.

4.1 The following sections present an overview of the design and delivery mechanisms used to administer the fund drawing on perspectives from staff from within the Culture, Sport and Tourism Directorate, Arts Council of Wales, sector bodies and grant applicants across the three strands of the programme.

Fund design and development

4.2 A consideration in the design, development, and delivery of the CRF fund was to ensure that support funding was made available as swiftly as possible to eligible organisations whilst at the same time ensuring effective governance and due diligence to protect the public purse.

4.3 The level of work required to get CRF Round 1 up and running only a few months following the onset of the pandemic should not be underestimated and the speed of response across the three strands of the programme has been broadly recognised and welcomed across the sector. It is also important to recognise that staff involved in the design and administration of the funding streams were also themselves affected by the restrictions imposed by the pandemic.

4.4 The Culture, Sport and Tourism Directorate undertook an internal light touch review²⁴ of CRF Round 1 to inform the delivery and management of any future CRF funding rounds. The review, which was based on a workshop with Welsh Government delivery staff, a questionnaire distributed to a sample of grant recipients, and additional feedback from delivery staff and stakeholders, focused on examining:

- Whether the policy needed to remain the same and the support effectively targets at risk groups

²³ View [Senedd Research Coronavirus timeline](#).

²⁴ Welsh Government (2021)- 'Internal Review: Lessons Learned from the Cultural Recovery Fund'. 9th March 2021.

- Whether amendments to the application process or eligibility and selection criteria were required, and
- What aspects of the process and governance have worked well to date.

- 4.5 The review found that there was consensus that the CRF delivery structure worked well and that the commitment and dedication of the teams involved in the delivery of the CRF were widely cited as critical to the effective delivery of the scheme. No notable changes were recommended although areas for improvement of the process were identified to relieve pressure from the inherent speed at which decisions were required to be made as well as allowing time to effectively engage with stakeholders prior to the scheme being delivered.
- 4.6 Given the multiple COVID-19 relief and support funding streams operating concurrently at various stages throughout the pandemic, one of the challenges across the three strands was to ensure that CRF funding was aligned with other funds and that duplication was avoided. Through the application process, responsibility for this was shared between delivery staff involved in the assessment process and applicant organisations in their declaration (both in their initial application and then subsequently in their completion reports).
- 4.7 Review of the case tracker management information system used by the Culture, Sport and Tourism Directorate and Arts Council of Wales demonstrates the multi-stage administration, assessment and eligibility checks used, including cross-referencing with Companies House and CIFAS,²⁵ prior to the final recommendation at approval stage which led to the funding offer to applications.
- 4.8 It is evident that from the analysis of the management information system that combined across CRF Rounds 1 and 2, a proportion of applications were not progressed through the assessment and approval process due to their ineligibility.
- 4.9 A total of 2,103 applications were received across both rounds of funding, for the Welsh Government and Arts Council of Wales strands, of which 1,211 (60 per cent) received a funding award.
- 4.10 This not only demonstrates the effectiveness of the administration and assessment processes in ensuring that resources were directed towards eligible organisations

²⁵ CIFAS is the UK's largest cross-sector fraud sharing organisation.

with the greatest support needs, but also the sheer volume of applications requiring review as part of the multi-stage assessment and due diligence process.

- 4.11 Whilst the case tracker management information system does not enable a full and consistent assessment of where applications that did not receive an award were directed to, feedback from sector leads suggests that many were redirected towards alternative sources of funding to which they would be eligible including the Economic Resilience Fund or Business Rates Grant. This process also happened in reverse with some organisations redirected into CRF from other funding sources, demonstrating important cross-referencing to support efforts to direct the right resources to the right organisations in an expedient manner.
- 4.12 The design and delivery of the Fund has had to achieve an appropriate balance between ensuring that support can be provided at pace given the financial crisis facing many organisations whilst also protecting the public purse. Achieving this, whilst also ensuring that the application form and process remains as light touch as possible, has necessitated a pragmatic approach by the Culture, Sport and Tourism Directorate and Arts Council of Wales.
- 4.13 Applications were directed into the relevant sector teams for review and assessment. This enabled the process to benefit from the respective team's sector expertise and knowledge, informing the subsequent decision making and award steps.
- 4.14 Whilst there have been small areas of inconsistency in how the assessment and approval process has operated within the sector teams and between Welsh Government and Arts Council of Wales, these have mainly been attributed to differing levels of staff capacity, volume of applications and the nature and composition of applicant organisations across the different creative and cultural sectors.
- 4.15 The funds have been subject to internal audit and no issues have been raised, albeit at the time of writing full analysis of the completion reports submitted by grant recipients has yet to be undertaken by Welsh Government or Arts Council of Wales.

Fund promotion and reach

Cultural organisations

- 4.16 Responses to the online survey of applicants shows that the Fund was promoted through a range of channels and was not reliant on a single route. Whilst almost a third (29 per cent) of applicants indicated that they became aware of the Fund via a membership group or affiliation, word of mouth (26 per cent) and correspondence from their local authority (25 per cent) were also key channels.
- 4.17 In response to a statement around the Fund being well promoted and organisations being made aware of it promptly, survey respondents scored an average of 3.8 out of 5 (where 1 is strongly disagree and 5 is strongly agree). Only a small proportion (15 per cent) of survey respondents disagreed with the statement (providing a score of 1 or 2). The online eligibility checker, which is a tool to help organisations to find out if they are eligible for support, secured an average score of 4 out of 5 indicating that most applicants felt that this was clear and helpful.
- 4.18 Given the importance of responding swiftly to the pandemic and distributing funding to support cultural organisations across Wales, the survey responses suggests that the Fund was promoted effectively through a coordinated approach between Welsh Government, Arts Council of Wales, cultural infrastructure bodies or membership groups (e.g. Federation of Museums and Galleries in Wales), local authorities and by word of mouth across the sector.
- 4.19 This is consistent with feedback provided through the stakeholder consultations with the majority stating that they felt that the Fund was well promoted and as a result there was no evidence that significant numbers of eligible organisations had missed out. Although stakeholders indicated that every effort was made to promote the Fund, the pandemic had served to disrupt some communication channels, for example with staff from eligible organisations being placed on furlough or some local authority staff being unable to access their work emails for a period whilst working remotely.

Freelancers

- 4.20 The most common response from freelancers responding to the online survey was that they heard about the fund via word of mouth (four in 10) or through their local authority (one in six). Around one in eight heard via a membership group or

affiliation. However, promotion of the Fund was the lowest scored aspect of the application process. In some local authority areas, a higher proportion of freelancers heard about the fund via direct contact from their local authority, suggesting existing lines of communication with their local freelancer community.

4.21 Feedback from freelancers from depth interviews indicated that around a quarter (23 per cent) were aware of colleagues who were not able to access support through the fund, either because they weren't eligible or because the funds had been fully committed by the time they became aware of it.

4.22 Consequently, freelancers that had secured support raised concerns that some colleagues had faced considerable financial hardship or had been forced to leave the sector to secure alternative employment as a result.

'Quite a fair few didn't know anything about it...I found out through an email from Equity, but many still hadn't found out about it even in Round 3.' (Freelancer Fund Grant Recipient 2021)

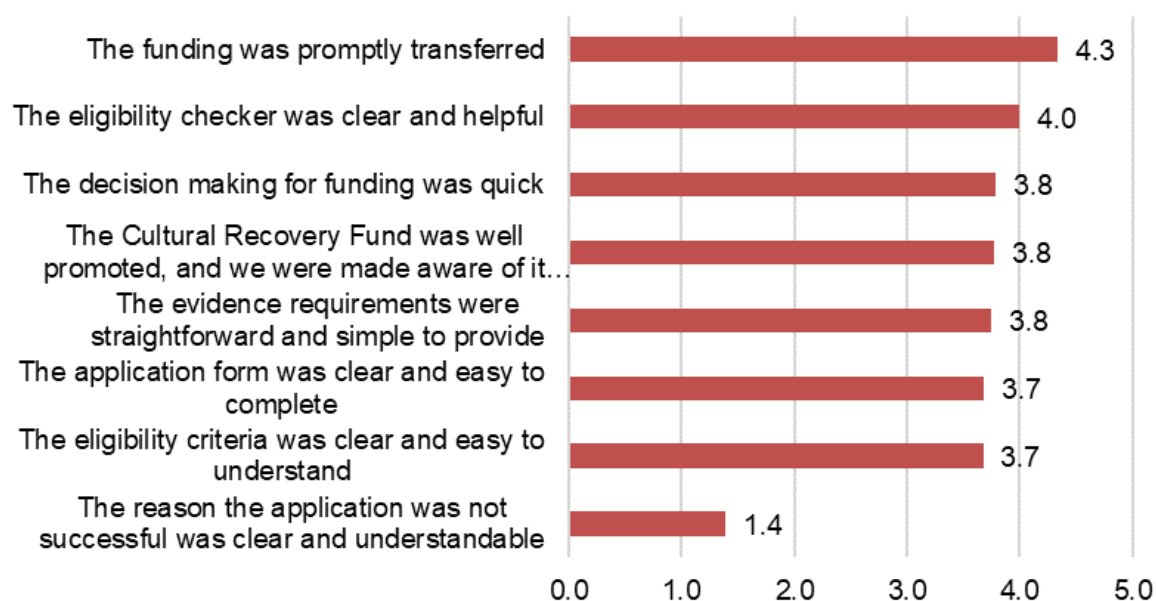
4.23 This should be investigated further by local authorities, membership groups and sector bodies to determine how many freelancers may have been missed by the Fund and have left the sector. This is important and it has a direct impact on freelancer capacity and ability of many cultural organisations to return to pre-pandemic operating levels.

Feedback on the application process

Cultural organisations

4.24 Fund applicants were asked to rate different aspects of the application process by giving their level of agreement to a range of statements (Figure 4.1 over page). The promptness by which the grant funding was transferred secured the highest rating at 4.3 out of 5.

Figure 4.1 Organisations' rating of the fund application process



Source: Wavehill survey of CRF grant applicants 2021. N=159

- 4.25 The statement that achieved the lowest score was the statement 'The reason the application was not successful was clear and understandable' which suggests that feedback from the teams may not have always been as detailed as unsuccessful applicants expected. However, it is recognised that there is a degree of skew in the responses from organisations that did not receive an award and this score relates to responses from only 14 organisations (eight per cent of total responses).
- 4.26 Furthermore, the feedback process is likely to have been impacted by the high volume of applications to the fund and the desire of staff to process applications as quickly as they could.
- 4.27 Stakeholders broadly held the same view as applicants with the Fund generally thought to have been well designed, providing clarity and ease of access. The speed with which the funding had been delivered was felt to have been a key strength. Moreover, the engagement between the sector, public bodies and the Government was thought to have been a further, unforeseen but positive outcome.
- 'I've never seen the public sector move so quickly. It can move quickly when it has to. Any government or public body knows that accountability is important [and consequently move slower]. But I've never seen a public body move so quickly.' (Stakeholder Interview, 2021)

‘The amazing part of the application was the open dialogue we have had with the people working at the Welsh Cultural Recovery Fund who are willing to help us with the applications rather than just say yes or no. This has been the best part of the experience.’ (CRF1 Grant Recipient, 2021)

- 4.28 Whilst consensus was that the Fund has been well promoted, some applicants received details closer to the deadline for applications than others, which generated capacity pressures. The diversity of applicants also meant that some were more confident and experienced in applying for funding than others. This, combined with the stress and anxiety associated with managing organisations through the pandemic, meant that the process was overwhelming for some regardless of their outcome.

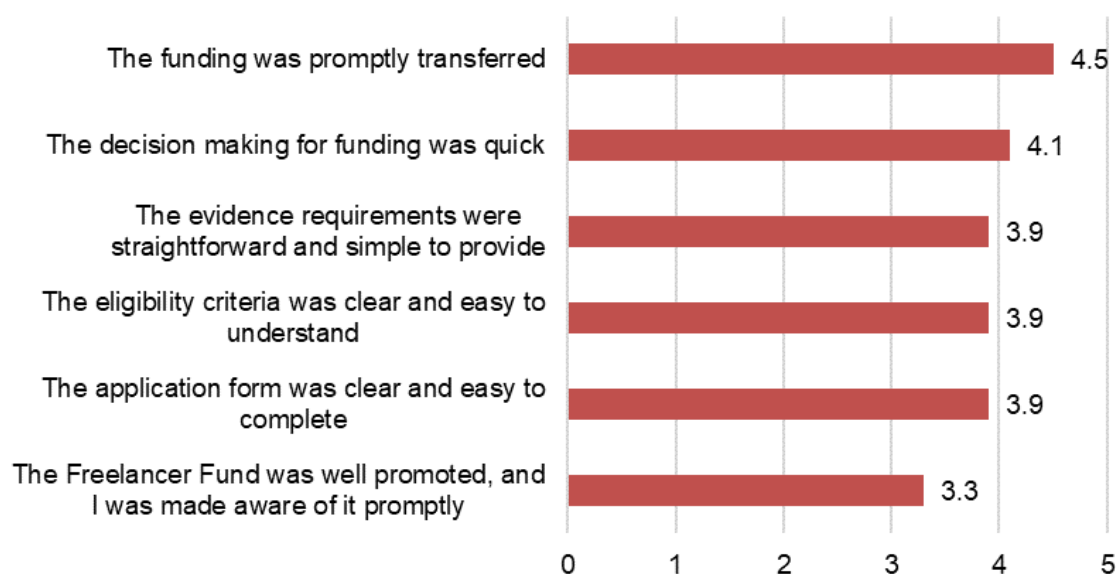
‘The CRF was a challenging application for us as an independent museum with a small team. We only have an Accounts Administrator for one day a week so often we found that we were unable to respond quickly to CRF queries from Welsh Government. At times, it was really overwhelming especially because I had only taken on a managerial role at the museum at the beginning of the COVID closure. (CRF1 and 2 Grant Recipient, 2021)

‘There’s a sense that the release of the fund was a little slow [in relation to the] application and assessment process, and that too much information was required, often by organisations with limited experience of applying for funding- this is a sector development issue.’ (Stakeholder Interview, 2021)

Freelancers

- 4.29 Freelancers responding to the survey were asked to rate aspects of the application process on a scale from 1 to 5 (where 5 is strongly agree and 1 strongly disagree). The results highlight that key elements of the application process that were scored highly by freelancers including the prompt transfer of funds following award (rating of 4.5 out of 5) and the speed of the decision making (rating of 4.1 out of 5). Table 4.2 below.

Figure 4.2 Freelancers' rating of the fund application processes



Source: Wavehill survey of freelancers 2021 n=435

4.30 Whilst no aspect of the application process was rated below 3.3, the application process that secured the lowest rating was the promotion of the fund. Where freelancers had experience of applying for other support funds, the Freelancer Fund was regarded as straightforward and accessible in comparison.

4.31 Given the financial pressures facing freelancers because of the pandemic this provides evidence that the administration of the funds was sufficiently responsive to address this immediate need.

'I can only speak for myself, personally I didn't benefit from the Self-Employed Government Grant. I thought the CRF fund was very good, very useful that it came in a lump sum to think about how you were going to spend it. It really was a lifeline in all aspects, it took a bit of the pressure off, the stress and anxiety at that time was huge. Very forward thinking of the Welsh government to support freelancers.' (Film and TV, Theatre)

4.32 Given the immediate financial pressures facing freelancers, the prompt transfer of funding has been critical in supporting livelihoods and protecting individuals from hardship.

4.33 Despite the Freelancer Fund application process being perceived as more straightforward than those for other support funds, almost one in four freelancers (23 per cent) indicated that having an easier to submit application form was one of

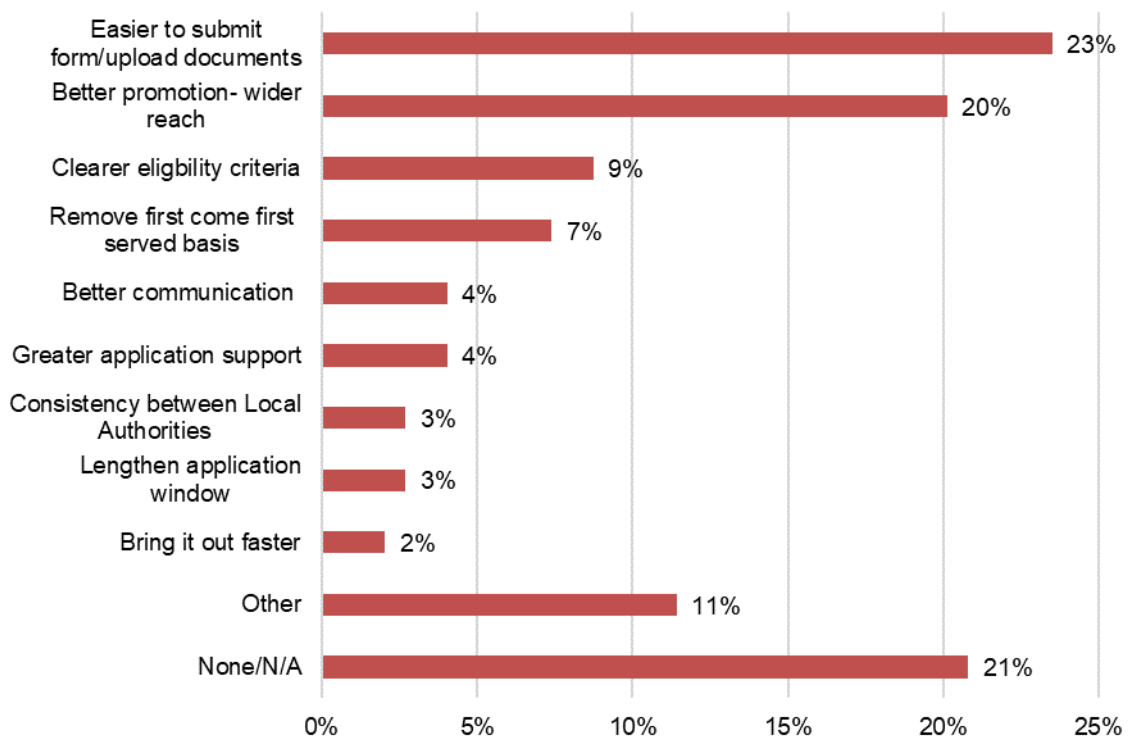
the improvements they would suggest to the application process (Figure 4.3 over page). One in 10 freelancers also suggested that having clearer eligibility criteria would have been helpful.

- 4.34 Several freelancers stated that they needed to pull together a range of information for their application but that the online system didn't enable them to save a partially completed application to return to at a later stage. This particularly affected the first round of the Freelancer Fund with technical issues addressed by the second round.

'There was a lot of paperwork which needed to be found and while doing that you couldn't save the work and come back to it...so a save option would be useful.' (Music)

- 4.35 However, it is positive to note that one in five freelancers in receipt of a grant had no suggested improvements to the fund as they were satisfied with the application and administration process.

Figure 4.3 Suggested improvements to Freelancer Fund application process



Source: Wavehill survey of freelancers 2021. N=160

Eligibility

Cultural organisations

- 4.36 Most stakeholders praised the eligibility checker for its accessibility and ease of use. This was broadly mirrored by applicants who agreed that the eligibility criteria were clear and easy to understand. Further guidance was available from the Culture, Sport and Tourism Directorate, the Arts Council of Wales and relevant sector bodies as required, which was acknowledged as creating capacity pressures on staff administering the scheme and supporting a specific sector.
- 4.37 Stakeholders suggested that the Fund was sufficiently flexible to enable organisations to access the funds they needed. Nonetheless, several drew attention to weaknesses within the sector and the lack of administrative capacity and experience of many organisations in engaging with government or funding applications. This may also be further exacerbated by the high proportions of micro firms within the cultural sector in Wales.
- 4.38 A few stakeholders suggested that clearer eligibility criteria were needed, though these concerns related largely to CRF Round 1 and were subsequently addressed by CRF Round 2 in recognition of some sub-sectors that were not eligible for support when the fund was initially launched. For example, supply chain businesses within the arts and creative sectors were included in the second round of CRF funding and freelancers from the wedding and events industries included in Freelancer Fund 2 (see Annex H for further detail on the eligibility criteria for CRF Rounds 1 and 2).
- 4.39 This suggests, along with feedback from sector bodies, that very few cultural organisations missed out on the support made available through CRF and, at the same time, that the eligibility criteria combined with the assessment process limited duplication with other relief funding and the fund's exposure to fraud.
- 4.40 The pandemic has served to highlight the interdependencies between the cultural sector and other sectors whose work supports and enables many events and cultural activities to go ahead. This includes for example, security, logistics, transport, and retail.

‘The pandemic and delivery of the Fund has highlighted the interconnections between different cultural institutions and also the place of culture in the economy, supply chains and regeneration plans.’ (Stakeholder Interview, 2021)

- 4.41 As such the effectiveness of the Fund in enabling the creative and cultural sectors to survive and rebound from the pandemic is reliant on the survival and recovery of a much wider range of organisations that have not been eligible for grants through CRF. Whilst event suppliers were eligible for funding across CRF Rounds 1 and 2, Culture & Creative Supply chain businesses were not eligible in CRF Round 1. This was identified as a gap in CRF Round 1 and resultant steps were taken to broaden the eligibility criteria for supply chain businesses in Round 2.
- 4.42 Analysis of BAS data and sector leads Case Tracker spreadsheets indicates that in the majority (90 per cent) of applications that did not secure an award was because they did not meet the eligibility criteria. Within the data set, other reasons for applications being logged as rejected was due to duplication, being withdrawn by the applicant or due to suspected fraud.
- 4.43 In CRF Round 2 there were also cases where the award funding was assessed as not being needed, for example due to the fact that the applicant organisation had high levels of reserves, a healthy turnover, a proportionally smaller reduction in their turnover due to the pandemic or because they had already been in receipt of substantial grant funding.

Freelancers

- 4.44 Whilst survey responses and interviews demonstrate that freelancers were generally satisfied with the eligibility criteria, with many not suggesting any changes, the main area where changes were suggested related to the first come basis approach adopted which was regarded as stressful and potentially meant that funds were not targeted at freelancers with the greatest need for support.
- 4.45 Although the Freelancer Fund has provided welcome support, the first come basis has meant that some freelancers have likely missed out, exacerbating existing challenges associated with their eligibility for support through other schemes

including SEISS.²⁶ This issue was addressed by the second round of funding with larger budgets provided to the local authorities that had the greatest demand based on the first round of funding. This helped to ensure that freelancers that required support did not miss out.

4.46 As the fund was able to support both full and part-time freelancers and the same flat grant of £2,500 awarded in both cases, some freelancers fed back that the eligibility criteria should have taken income from non-freelancer roles into account.

4.47 Another area raised by a small number of freelancers was in relation to the financial information required, which it was felt by some did not reflect the reality of work in the sector, didn't account for variation of income levels from year to year or an individual's personal circumstances.

'I know married couples who both work in the industry so they could both claim... I also know people who probably didn't need to claim that money, meaning someone who really needed it lost out. I know it was all done quite quickly but maybe there's not the scrutiny to make sure it's going to people who really needed it.' (Film and TV, Theatre)

4.48 Analysis of the monitoring data submitted by local authorities across both rounds of the Freelancer Fund suggests that 18 per cent of applications did not receive an award. However, detail on the reason for this has not been consistently captured. This would be valuable to collate in the context of understanding whether the fund's eligibility criteria served to exclude certain groups of freelancers from support.

Alignment with other support funds

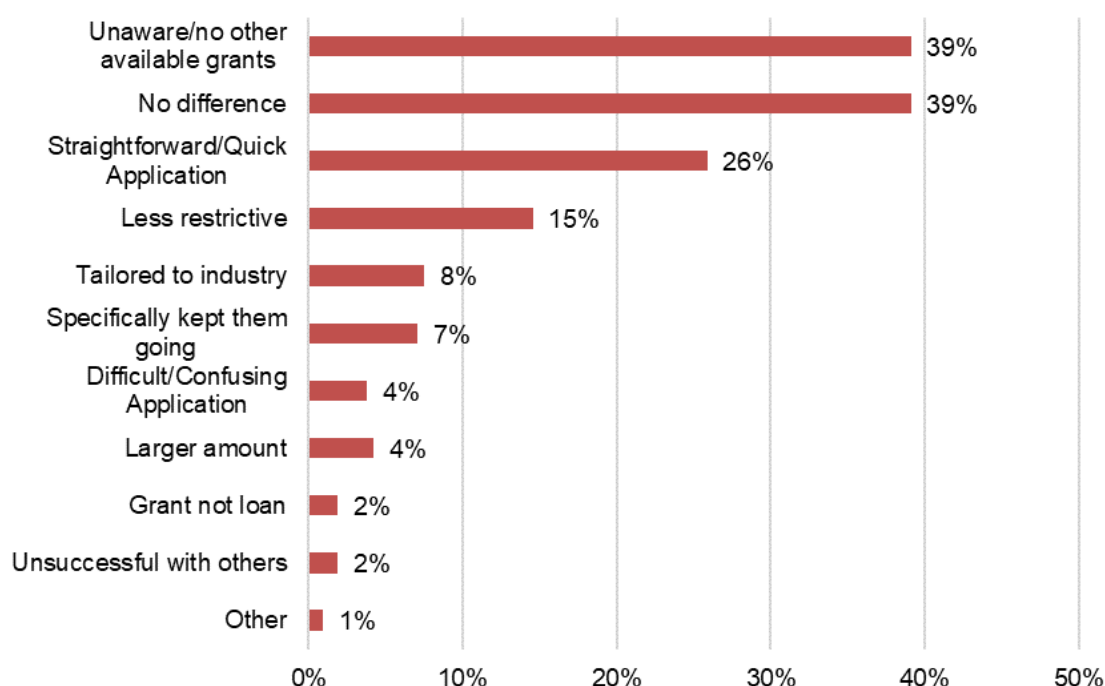
4.49 The Cultural Recovery Fund was one of several emergency and support funds delivered in response to the pandemic. Cultural organisations and freelancers were asked how the CRF programme compared with other grants or funds that were available.

²⁶ Many freelancers, whilst operating as self-employed freelancers, are registered as a Limited Company, including Personal Service Companies, and consequently are not covered by SEISS. Others have faced eligibility problems because they had recently embarked on a freelance career, or because, like many in the creative industries, they had recently switched from a PAYE job to working freelance.

Cultural Organisations

- 4.50 Responses from cultural organisations in receipt of CRF funds highlight that just over a third were unaware of what other grants or funds that were available to them and thus not able to comment (Figure 4.4 below) and a same proportion of respondents felt that there was no difference between the support funds.

Figure 4.4 How did the fund compare to other grants or funds that were available



Source: Wavehill interviews with CRF1 and 2 grant recipients. N=213

- 4.51 Where respondents identified differences between the CRF fund and other grants or funds that were available, their feedback was largely positive. Just over a quarter of respondents in the in-depth interviews (26 per cent) felt that CRF was more straightforward than other grants or funds and/or, as has been highlighted elsewhere, that it was a quick application.

‘With most of the grants there are lots of outcomes that you have to deliver, so this is effectively allocated money. The CRF didn’t have this rigid delivery structure of what you needed the fund for, it was more generalised which was good for us.’ (CRF Round 1 Grant Recipient, Creative sector)

‘It was easy to access and complete, and the overall sector was very well looked after and that made it very different from any other funding much less about an

agenda but looked at the sector as a whole and what we were able to include for example insurance payment in the application which you could not have had from other funders.’ (CRF Round 1 & 2 Grant Recipient, Culture sector)

- 4.52 The level of funding available through CRF was also welcomed by recipients, including those that had received support through our sources including CJRS.

‘They [CRF grants] are larger in size. We've received funding from trusts, foundations, donations, and some additional assistance from Arts Council Wales. Before CRF came along, we used furlough as well. The CRF is by far the biggest area of a grant for us. We're very thankful for it, we wouldn't exist without it.’ (CRF Round 1 & 2 Grant Recipient, Culture sector)

- 4.53 Analysis of BAS data reveals that nearly two thirds (63 per cent) of Round 1 grant recipients had applied to other funds, rising slightly for Round 2 (68 per cent) with cultural organisations having further opportunity to review the funding support landscape and support applications to meet their needs. For many organisations CRF was the only funding they applied for. Analysis of BAS data indicated that just over half of CRF applicants applied to other funds in each round (Table 4.1).

Table 4.1 Proportion of applicants who applied to other funds

	All who applied		All successful	
	N	%	N	%
CRF1	1085	94%	400	63%
CRF2	556	64%	328	68%

Source: Welsh Government BAS data

Freelancers

- 4.54 Just over one third (38 per cent) of freelancers reported that they did not receive any support from SEISS.²⁷ Many freelancers indicated that they weren't either eligible for, or aware of, other support funding. In this regard, the CRF fund has supported a sector that may otherwise have fallen between other relief funding provision whilst at the same time potentially highlighting a need for greater coordination to raise awareness amongst freelancers of the financial support available to them.

²⁷ Source: Local Authority Freelancer Fund data.; n=1,298

‘It was the best one available I had only been self-employed for two years and the self-employed scheme wasn’t appropriate for me.’ (Round 1 and 2 Grant Recipient)

‘It seemed to be the only one really that directly responded to somebody like me who is isn’t making something clearly saleable’. (Round 2 Grant Recipient)

- 4.55 Where freelancers had received support through other grants and funds, the additional support provided through the Freelancer Fund was welcomed, in particular the fact that this was paid as a flat rate grant as opposed to a sliding scale based on income and profit levels. This helped to reduce the stress associated with applying for support as well as speeding up the whole process. The level of funding was also cited as being generous and pitched at a level which helped to protect livelihoods.

‘Help Musicians gave me a small grant, SEISS a small amount, but it was CRF that gave a generous amount of money, and it was very useful.’ (Round 1 Grant Recipient)

Cultural Contract and the Freelancer Pledge

- 4.56 Organisations applying to the Fund were encouraged to sign up to the Cultural Contract, to help ensure that the public investment by Welsh Government is deployed with a cultural and social purpose. The contract aims to support inclusive growth and improve well-being in the cultural and creative industries by reflecting the kind of behaviours that responsible and successful organisations undertake.
- 4.57 For example, the contract has been designed to encourage organisations to transform the future reach and impact of their activities, improve the diversity of their management board and workforce, provide new opportunities for freelance artists, commit to fair rates of pay, and improve the environmental impact of what they do.²⁸
- 4.58 The Freelancer Pledge was established by Welsh Government in recognition that freelance professionals are often active participants in their community, making a positive contribution to a range of social, cultural, environmental, and economic wellbeing goals. It is intended to help to forge a partnership between creative

²⁸ The Cultural Contract includes areas such as: Fair Work; Sector Board diversity and inclusion; Retained staff to support wider initiatives; Social prescribing; Supporting health & arts initiatives; and Climate Resilience.

freelancers and public bodies to support The Well-being of Future Generations Act and to assist the public sector in leveraging the key skills of freelancers in the cultural sector to bring creativity and imagination into all areas of public life. Signing up to the Freelancer Pledge was not a mandatory part of the Freelancer Fund and has not formed part of the assessment process.

- 4.59 Stakeholders expressed low confidence in their awareness and understanding of the Cultural Contract or the Freelancer Pledge. Stakeholders who had been involved in some capacity with their development, also suggested that generally, there was a lack of understanding and that some organisations who were signing up to the Contract or Pledge, were unaware of the details; assuming it was a prerequisite to receiving funding.

‘This requires a huge amount of work... [it’s] worried us because we’ve still not seen a list of those employed to do work on cultural contract transparency and we would have liked to see it go via the Arts Council and Government, but we understand capacity issue... There was confusion between what [the] Arts Council had on their website and [what] Welsh Government [had on theirs]... It is something the Government and Arts Council need to pick up and offer clarity to help people feel that it’s not a tick box thing, and [clarify] how will organisations be held accountable. Are we talking about do you do, like a Fairtrade symbol for it?’ (Stakeholder Interview, 2021)

- 4.60 Whilst stakeholders and applicants supported the aspirations behind both the Cultural Contract and Freelancer Pledge, feedback has highlighted a need for further guidance and support. Several applicants expressed confusion as to whether signing up to the Contract or Pledge was a mandatory condition of funding or not.

‘Although we support the Cultural Contract, we felt that at the time of CRF the balance on crisis management vs creating a completed contract was incorrect and more time should have been given to the Cultural Contract after funding was awarded, rather than during the application process.’ (CRF1 Fund Applicant, 2021)

‘The Cultural Contract comes from a good place and is needed but the blanket approach to applying it means that some of the requirements are excessive for small organisations and/or will be applied in a tokenistic way. More advice on

how small organisations can meet Cultural Contract requirements would be useful.’ (CRF1 Fund Applicant, 2021)

- 4.61 However, it is evident in feedback from organisations in receipt of CRF funds that the support, along with the details of the Contract and its wider objectives, is influencing some to review their business model and make changes to support inclusive growth, wellbeing, and environmental objectives.

‘We had time to look at the business and stand back and see what changes could be made for the better. We overhauled all our promotional materials and now everything is made from recycled paper. We are looking at our supply chains to ensure more local sources. Our digital output increased through online and social media so that we could connect more with the community, which also covered keeping a link to people during lockdown. (CRF Round 1 & 2 Recipient)

‘There are two very important areas of the contract that impact on us which is the promotion of wellbeing and health and the other initiatives involving reducing the carbon footprint, but we are looking at future changes and initiatives to involve more people in our work.’ (CRF Round 1 & 2 Recipient)

- 4.62 Whilst many organisations reported that they were already operating in a way which was consistent with the objectives outlined in the Cultural Contract, incorporating it within the grant programme has provided an opportunity for some to revisit their operational systems.

‘It’s all things we do anyway although we have made a stronger effort to include Welsh Language learning among our staff.’ (CRF Round 2 Recipient)

‘We were already developing those areas of our work anyway and it has made us more aware, we are always looking at gender balance and diverse cultures and Welsh language, but we are now pushing it more.’ (CRF Round 2 Recipient)

- 4.63 Feedback from cultural organisations highlights numerous good practice examples across the sector, which may be harnessed by Welsh Government to engage, inspire, and inform others to adopt the desired behaviours outlined in the Contract. This is particularly relevant as the sector slowly returns to becoming fully operational and where capacity can be directed towards organisational development and away from immediate crisis management.

4.64 With regards to the Freelancer Pledge, based on survey responses, the majority (71 per cent) of freelancers who received funding through the Freelancer Fund reported to have opted in to supporting it.

‘The Freelancer Pledge; people have signed up to it, but I don’t think people really know what they’ve signed up to. If they signed up in October last year, they’ll think it’s gone away because there isn’t much communication around it... [I]t became more blurry.’ (Stakeholder Interview, 2021)

4.65 Most freelancers when asked to comment on the rationale for the Freelancer Pledge were unclear or didn’t have sufficient understanding to comment. For freelancers who had a greater understanding, they commonly associated the Pledge with a commitment to give back to the community and to support wider policy objectives.

‘As I understand it, in return for the support I had, I would be supporting practice within the area. Rather than just taking the money and announcing I was moving to another area of the country, I would in return be supporting the idea which I’ve always done anyway of local practice, not second-rate practice.’ (Visual Arts and Crafts)

‘I have taken it, but I have not heard any more about it. I felt by signing it I was in some way paying back what I had been granted so to speak, so happy to go along with it but don’t really know any more or what to do and I haven’t heard any more.’ (Music, Performing Arts)

4.66 Where freelancers felt able to comment about the Pledge, around half were unsure what they expected its impact to be for them. For some, the Pledge had the potential to help them develop their network and increase the profile of their (and the sectors) work.

4.67 One impact raised during feedback from some freelancers was that the Pledge had made them consider focusing more of their work in Wales, specifically to support inclusive practice within communities. Generally, the feedback from freelancers on the concept of the Pledge was very positive with many commending the Welsh Government for driving this forward.

‘I agree with it and think more people should be moving forward with this idea.’
(Entertainment)

‘I think if you are given some help then it's right to give something back and I totally agree with it and give back to the local community where I can.’ (Design, Events, Photography, Publishing)

- 4.68 Further guidance and support are required to enable the benefits of partnership working between cultural organisations, creative freelancers, and public bodies to be realised and the objectives of both the Cultural Contract and Freelancer Pledge to be achieved.
- 4.69 Given that feedback from fund recipients has highlighted that some organisations and freelancers have already taken practical steps to amend their organisational or professional practice to support the underlying inclusive growth and well-being objectives, this suggests that incorporating the Cultural Contract and Freelancer Pledge within the application process for the CRF and Freelancer Funds has helped to raise their profile, building a degree of momentum and buy-in that can facilitate the future development and operationalisation of the contract and Pledge across Wales.

5. Profile of grant applicants and recipients

- 5.0 This section of the report presents detail on the profile of all grant applicants and recipients from the programme based on analysis of the Welsh Government's (BAS) data, the Arts Council of Wales Grants Management System and Freelancer Fund Tracker data submitted by all 22 local authorities in Wales.

Cultural Organisations

- 5.1 Across CRF Rounds 1 and 2 there were 2,013 applications in total of which 1,211 organisations (60 per cent) secured grant funding support (Table 5.1). The applications were made by 1,517 individual organisations, 871 of whom were approved. Some 503 businesses made repeat applications, 242 of whom secured funding in both rounds.

Table 5.1 Total number of applications and awards by CRF Round

Round	Applied	Approved Awards	% Awarded
CRF1	1,195	683	57.2%
CRF2	818	528	64.5%
TOTAL	2,013	1,211	60%

Source: Welsh Government BAS data & Arts Council of Wales Grant Management Data

- 5.2 Across CRF Round 1, 49 per cent of applications were for grant support of up to £10k, 47 per cent for up to £150k and four per cent for over £500k. This profile changed slightly for CRF Round 2 with 47 per cent of applications for support of up to £10k, 52 per cent of applications for up to £150k and two per cent up to £500k.
- 5.3 Analysis of the proportion of approved awards by grant size reveals that across both rounds, applications for larger grant sizes had a higher award rate than smaller grants. The proportion of approved awards for grants up to £10k had increased, with a higher award rate in CRF Round 2 than Round 1 (Table 5.2)

Table 5.2 Number of applications and awards by CRF Round and Grant Size

Round	Grant size	Applied	Approved Awards	% Awarded
CRF1	CRF1 Up to £10k	588	251	42.7%
	CRF1 Up to £150k	388	244	70.8%
	CRF1 Up to £500k	49	37	75.5%
CRF2	CRF2 Up to £10k	382	192	50.3%
	CRF2 Up to £150k	426	326	76.5%
	CRF2 Up to £500k	10	10	100%

Source: Welsh Government BAS data & Arts Council of Wales Grant Management Data

- 5.4 A total of £71.6 million has been awarded across CRF Rounds 1 and 2 from £100.5 million applied for by cultural organisations. The average grant award for CRF Round 1 was £39,191, slightly higher than the average for CRF Round 2 at £20,374 (Table 5.3)

Table 5.3 Amount of grant funding applied for and awarded by round

	Applied for		Awarded		Average % awarded ²⁹
	Total	Average	Total	Average	
CRF 1	£69,513,128.00	£58,169.98	£46,834,246.25	£39,191.84	75.4%
CRF 2	£30,992,909.00	£37,888.64	£24,846,093.94	£30,374.20	72.7%
Total	£100,506,037.00	£49,928.48	£71,680,340.19	£35,608.71346	74.0%

Source: Welsh Government BAS data & Arts Council of Wales Grant Management Data

- 5.5 Reflecting the higher proportions of micro-businesses within the creative and cultural sectors in Wales, 90 per cent of approved applications across both rounds were awarded to micro-businesses,³⁰ with seven per cent to small businesses and the remaining three per cent to medium businesses.³¹ This profile is consistent across both CRF Rounds. Micro-businesses accounted for 70 per cent of total funding awarded. A higher proportion of CRF Round 2 funding awarded to micro-businesses compared with CRF Round 1 (Table 5.4).

Table 5.4 Funding award by business size

	CRF1				CRF2			
	Approved applications	%	Funding awarded	%	Approved applications	%	Funding awarded	%
Micro	414	88%	£16,892,447	64%	344	91%	£13,487,287	78%
Small	37	8%	£6,488,539	25%	26	7%	£3,186,417	18%
Medium	19	4%	£3,019,005	11%	6	2%	£618,210	4%

Source: Welsh Government BAS data

- 5.6 Analysis of the total number of applications and awards by cultural sector reveals that 39 per cent of the total investment awarded across both rounds was to organisations within the Arts sector, followed by the Events sector (24 per cent).

²⁹ Excluding where the offer had exceeded the original request.

³⁰ A micro-business employs up to nine people, small businesses have 10-49 employees and medium-sized businesses employ 50-249 people. Source: Economic Intelligence Wales (2019)- 'Medium-sized businesses and Welsh business structure'.

³¹ Relates to BAS data only and business size data was not captured by Arts Council of Wales.

The Culture: Museums, Archives and Libraries sector received the lowest proportion of total investment across both rounds at three per cent (Table 5.5 over page).

- 5.7 The proportion of funding allocated to organisations within the Culture & Creative: Supply Chain increased considerably between rounds, rising from 1.3 per cent in CRF Round 1 to 17 per cent in Round 2, reflecting a gap in support identified by Welsh Government and sector bodies. Part of this increase reflects that the eligibility for CRF Round 2 was expanded to include businesses providing technical and support services to independent cinemas, grassroots music venues and the arts sector.
- 5.8 The Arts sector secured the highest average award across both rounds at £81,640 and the Culture: Museums, Archives and Libraries sector the lowest at £29,978. The Events sector submitted the highest number of applications combined across both rounds at 691 with the Culture: Museums, Archives and Libraries sector the lowest at 110.

Table 5.5 Applications and awards by sector

	Applied	Awarded	% of awarded	Total awarded	% Total £ award	Average awarded
CRF Round 1						
Events	436	158	36%	£12,105,091	26%	£76,615
Heritage	134	105	78%	£5,344,416	11%	£50,899
Creative	321	162	50%	£6,627,667	14%	£40,912
Culture	66	50	76%	£1,713,319	4%	£34,266
Culture & Creative: Supply Chain	5	2	40%	£609,500	1.3%	£304,750
Arts	233	206	88%	£20,434,254	44%	£87,701
CRF Round 2						
Events	255	126	49%	£5,455,004	22%	£43,294
Heritage	78	65	83%	£3,430,479	14%	£52,777
Creative	130	87	67%	£3,756,610	15%	£43,179
Culture: Museums, Archives and Libraries	44	23	52%	£475,117	2%	£20,657
Culture & Creative: Supply Chain	183	100	55%	£4,174,705	17%	£41,747
Arts	128	127	99%	£7,554,179	30%	£59,017
Combined						
Events	691	284	41%	£17,560,095	24%	£61,831
Heritage	212	170	80%	£8,774,895	12%	£51,617
Creative	451	249	55%	£10,384,277	14%	£41,703
Culture: Museums, Archives and Libraries	110	73	66%	£2,188,436	3%	£29,978
Culture and Creative: Supply Chain	188	102	54%	£4,784,205	7%	£46,903
Arts	361	333	92%	£27,988,433	39%	£81,640

Source: Welsh Government BAS data & Arts Council of Wales Grant Management Data

- 5.9 Whilst the average award across both rounds given to organisations in the Events sector was the second highest at £61,831, the sector also had the lowest ratio of applications to awards across the creative and cultural sectors at 41 per cent, compared with 92 per cent in the Arts sector. This is largely due to the assessment process finding that a higher proportion of applications were ineligible for support through CRF.
- 5.10 Analysis of the distribution of funds by local authority reveals that Cardiff secured the largest share of CRF funds at £22.8 million, equating to 19 per cent of total funding allocated (Table 5.6 over page). The next largest shares were allocated to Powys and Gwynedd at 10 per cent and seven per cent respectively.
- 5.11 The distribution of Full-Time Equivalent (FTE) roles supported through the fund presents a similar but not identical picture (FTE roles are self-reported as part of the application process). Cardiff accounts for the highest number of FTE roles supported at 1,152 followed by Gwynedd (511) and Ceredigion (348). The grant award per FTE role supported differs considerably across all local authorities ranging from Flintshire equating to £4,477 per FTE role supported to Newport at £30,711.

Table 5.6 Total CRF awards by local authority

Total	Applications	Awarded	Total awarded	% Total award	Average award	FTE Supported
Blaenau Gwent	32	19	£582,252	2%	£30,644	25
Bridgend	36	21	£1,048,444	2%	£49,925	156
Caerphilly	71	28	£1,379,354	2%	£49,262	101
Cardiff	356	231	£22,787,783	19%	£98,648	1152
Carmarthenshire	110	61	£2,706,967	5%	£44,376	328
Ceredigion	89	63	£4,292,193	5%	£68,130	348
Conwy	78	53	£1,683,358	4%	£31,761	88
Denbighshire	51	34	£1,595,252	3%	£46,919	70
Flintshire	62	32	£1,555,402	3%	£48,606	347
Gwynedd	119	85	£5,520,113	7%	£64,942	511
Isle of Anglesey	38	29	£1,459,378	2%	£50,323	124
Merthyr Tydfil	16	10	£469,814	1%	£46,981	98
Monmouthshire	48	33	£1,058,192	3%	£32,066	61
Neath Port Talbot	67	35	£2,008,921	3%	£57,397	118
Newport	83	44	£3,915,741	4%	£88,994	128
Pembrokeshire	106	62	£3,604,773	5%	£58,141	186
Powys	154	124	£5,415,894	10%	£43,676	329
Rhondda Cynon Taf	108	60	£2,180,613	5%	£36,343	102
Swansea	146	75	£4,498,921	6%	£59,985	216
Torfaen	43	17	£519,613	1%	£30,565	27
Vale of Glamorgan	101	55	£1,654,884	5%	£30,088	91
Wrexham	71	35	£1,639,184	3%	£46,833	177
Unknown	28	5	£103,290	0%	£20,658	4

Source: Welsh Government BAS data & Arts Council of Wales Grant Management Data

- 5.12 At the point that organisations were awarded their funding, for CRF1 a quarter (25 per cent) were not in operation rising to just under a third (31 per cent) for CRF2 (Table 5.7).³² This highlights the ongoing and evolving nature of the challenges facing the creative and cultural sector and as such the importance of the second round of funding in continuing to support eligible organisations supported during the first round.

Table 5.7 Operational status of grant recipient at point of award

	CRF1			CRF2		
	N	%	Funding awarded	N	%	Funding awarded
Not in operation	119	25%	£7,528,034	118	31%	£5,762,462
Partially operating	281	60%	£14,798,494	220	59%	£9,709,224
Fully operating	70	15%	£4,073,463	38	10%	£1,820,228
	470			376		

Source: Welsh Government BAS data

- 5.13 Although the BAS application has captured basic demographic data, this relates solely to the named contact within the organisation as opposed to the profile of the organisation's workforce, volunteer base, audiences, or visitors. As such this is of limited value in supporting a review of the Equality, Diversity, and Inclusion (EDI) of the Fund.
- 5.14 Future funding programmes managed by the Culture, Sport, and Tourism Directorate in Welsh Government could consider requesting applicants to determine whether they are a diversity-led organisation, an approach already used by the Arts Council of Wales.³³
- 5.15 Generally, stakeholders did not feel that the fund duplicated wider or alternative relief funds, but rather complemented the wider offer by plugging gaps. Whilst some frustration was expressed at the lack of timeline alignment with the CJRS, necessitating in some instances, a reassessment of applications, this was outside the control of the Welsh Government with the anticipated end date for CJRS changing across the UK mid-delivery of CRF Round 1.

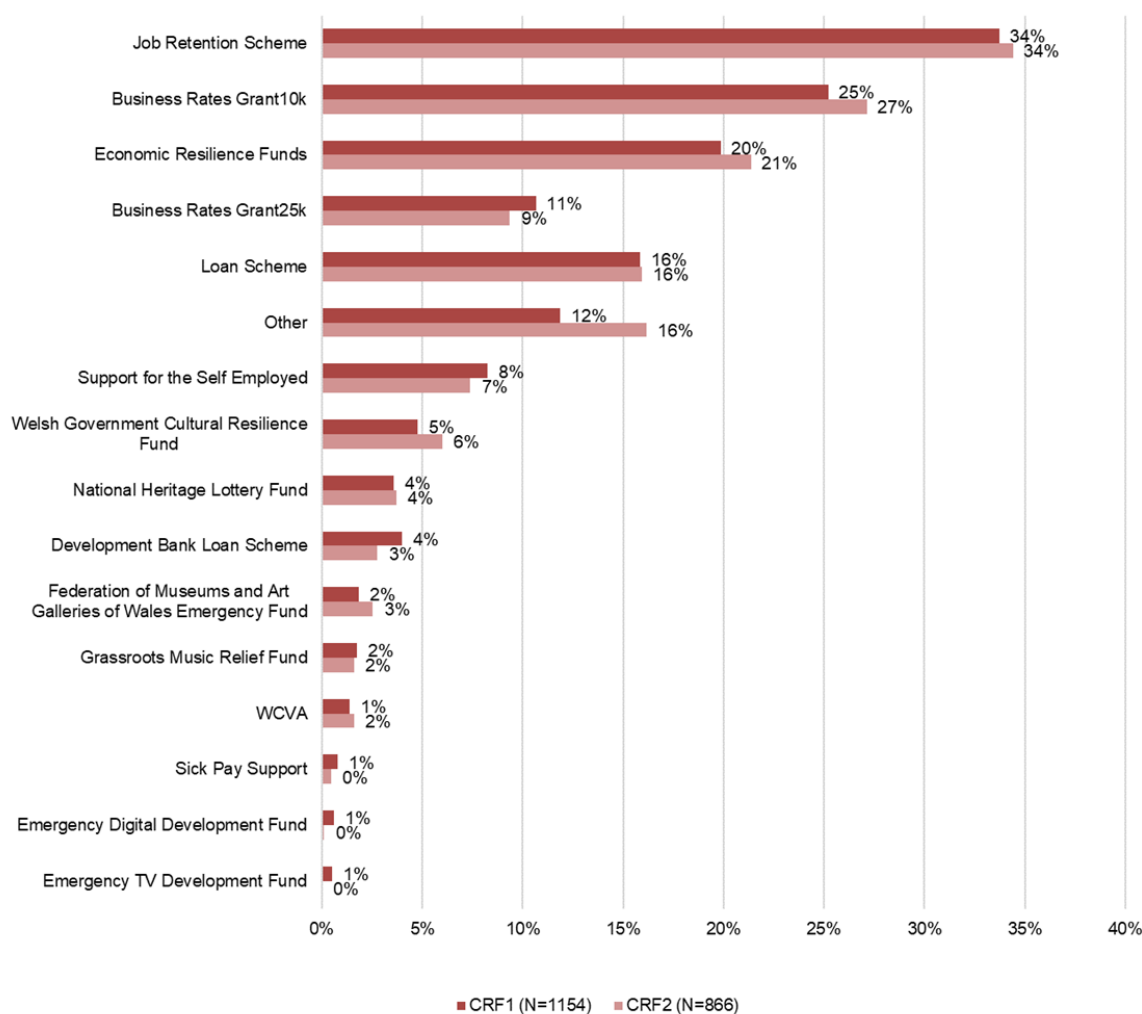
³² BAS data only. Does not include the status of arts organisations funded through the Arts Council of Wales strand.

³³ Arts Council of Wales (2020)- 'Strategic Equality Objectives 2020-24'.

‘This was for people who couldn’t get the other grants... the money was a big thing in what the fund was offering. But the hope as well, that was important. People felt that the Welsh Government, more so than the UK Government, appreciated creative people. That was an important message [author’s translation].’ (Stakeholder Interview, 2021)

- 5.16 Around one in six (16 per cent) of applicants stated that they hadn’t applied to any other COVID-19 relief funds (Figure 5.1). Whilst just over one third (35 per cent) of applicants had applied to the Economic Resilience Fund, conversely two thirds had not and overall, 32 per cent (288/666) of successful organisations on the BAS system had not been in receipt of other funds.

Figure 5.1 Applications to other COVID-19 relief funds



Source: Welsh Government BAS data

- 5.17 What this demonstrates is the complexity of the COVID-19 funding landscape both for funders and for cultural organisations across Wales. This highlights a need for the learning and insight derived from the delivery of CRF to be considered alongside forthcoming review and evaluation exercises conducted across other relief funds.

Freelancer Fund

- 5.18 The administrative data from both rounds of the Freelancer Fund that was delivered by local authorities shows that 4,157 freelancers were supported with the total value of the grants awarded amounting to £10.39 million (3,425 in Round 1 and 732 in Round 2). Analysis of the data also indicates that 995 freelancers received funding support across both rounds of funding. The MI data shows that there were 3,783 unique freelancers supported.³⁴
- 5.19 The data also indicates that 924 freelancers that applied for the second round of the Freelancer Fund did not receive an award (this data was not captured for the first round). The reason for this is not consistently captured across the monitoring returns provided by local authorities but where it is this is due to their ineligibility for support through CRF.
- 5.20 The data submitted by the 22 local authorities in Wales³⁵ (Table 5.8) reveals considerable variation in the number of grants awarded, ranging from 934 grants (22 per cent of total grants) in Cardiff to 34 grants in Merthyr Tydfil (0.8 per cent of total grants).

³⁴ Freelancer Fund Round 2 data not provided by Torfaen.

³⁵ Freelancer Fund Round 2 data not provided by Torfaen.

Table 5.8 Distribution of Freelancer Fund awards by local authority

Local Authority	Number of grants	% of total grant	Total grant value
Cardiff	934	22%	£2,335,000
Vale of Glamorgan	272	7%	£680,000
Swansea	268	6%	£670,000
Gwynedd	267	6%	£667,500
Rhondda Cynon Taf	226	5%	£565,000
Powys	211	5%	£527,500
Carmarthenshire	196	5%	£490,000
Pembrokeshire	190	5%	£475,000
Caerphilly	189	5%	£472,500
Conwy	163	4%	£407,500
Newport	160	4%	£400,000
Local Authority	Number of grants	% of total grant	Total grant value
Bridgend	130	3%	£325,000
Denbighshire	121	3%	£302,500
Ceredigion	121	3%	£302,500
Flintshire	118	3%	£295,000
Neath Port Talbot	107	3%	£267,500
Wrexham	103	2%	£257,500
Blaenau Gwent	101	2%	£252,500
Monmouthshire	100	2%	£250,000
Anglesey	82	2%	£205,000
Torfaen	64	2%	£160,000
Merthyr Tydfil	34	1%	£85,000
Total	4,157		£10,392,500.

Source: Local Authority Freelancer Fund data

- 5.21 Freelancers working in the music sector were more represented in the profile of those supported compared to all other subsectors, accounting for 25 per cent of the total funding awards. Freelancers working in the visual arts and crafts, theatre and performing arts, and film, TV and radio sectors also received a large proportion of the overall funding at over £1 million each (Table 5.9).

Table 5.9 Profile of Freelancer Fund awards by subsector

Subsector	Number of grants	% of total grant	Total grant value
Music	930	25%	£2,325,000
Visual Arts and Crafts	717	20%	£1,792,500
Theatre and Performing Arts	574	16%	£1,435,000
Film, TV and Radio	418	11%	£1,045,000
Events	240	7%	£600,000
Entertainment	172	5%	£430,000
Museums, Libraries, Galleries and Heritage	75	2%	£187,500
Publishing	72	2%	£180,000
Design	42	1%	£105,000
Not specified	423	12%	£1,057,500
Total	3,663		£9,157,500

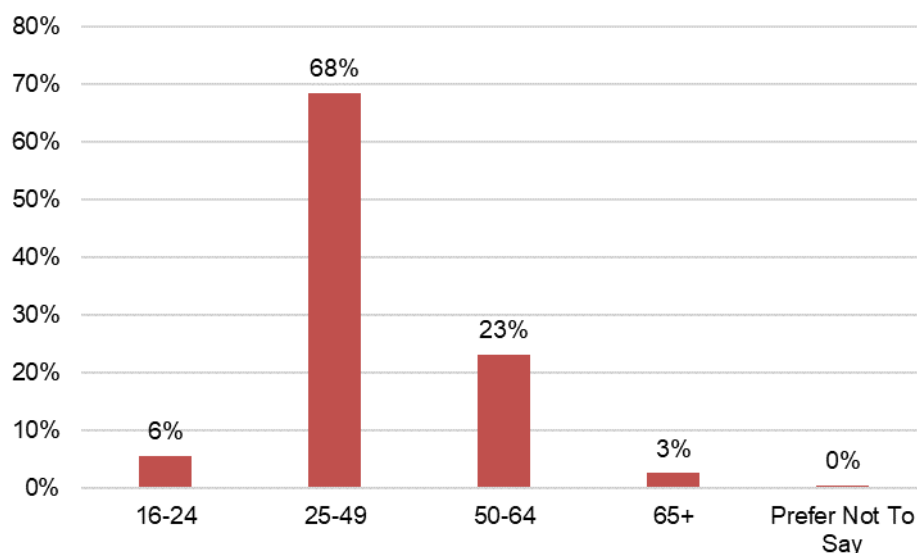
Source: Local Authority Freelancer Fund data

- 5.22 Individuals working in design industries received the fewest number of grants. However, the eligibility criteria outlined that a freelancer was not entitled to receive funding if they were able to continue with usual work activity, which may have applied to a greater proportion of freelancers in the design sector compared with other sectors.
- 5.23 Four hundred and twenty-three applicants (12 per cent) did not specify or provide information on their area of work, therefore it is unknown what subsectors just over £1 million worth of funds were awarded to.
- 5.24 The basic profile information captured by local authorities across both rounds of funding reveals that 42 per cent of grant recipients were female and 57 per cent were male.³⁶ Three per cent of grant recipients reported that they were from black and minority ethnic groups. Only a small proportion (four per cent) of grant recipients described themselves as disabled. Around a quarter (28 per cent) of freelancers supported through the funding reported to be Welsh speakers.

³⁶ One per cent of freelancers preferred not to state their gender.

- 5.25 The majority (68 per cent) of freelancers were aged between 25-49 followed by those aged 50-64 years (Figure 5.2).

Figure 5.2 Age profile of Freelancer Fund grant recipients



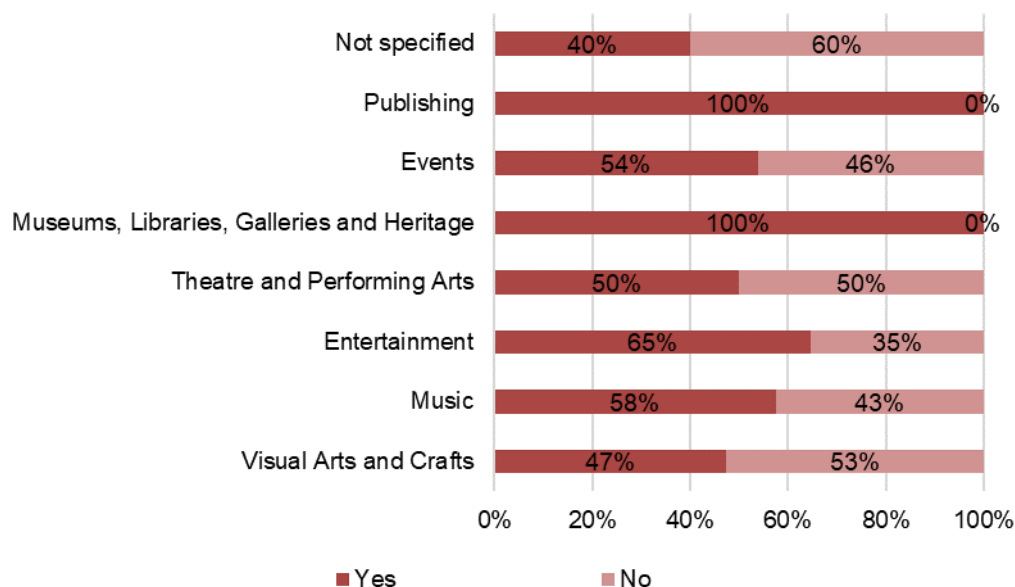
Source: Local Authority Freelancer Fund data

- 5.26 Responses to the freelancer survey suggests that for the majority (80 per cent, n=343), their freelancer practice was full time. This has implications for their ability to offset their loss of income from any salary or income obtained from non-cultural sector work. In other words, most freelancers were unable to rely on other sources of supporting themselves through the pandemic. As such, it is important to highlight that for the most of the 3,783 freelancers supported through the Freelancer Fund, the support has not only protected them but also others in their household. The true number of beneficiaries of the grant aid is therefore likely to be a much higher figure.
- 5.27 Based on the data captured by local authorities for the second round of funding, only 62 per cent of freelancers indicated that they receive income support through SEISS³⁷. Responses to the freelancer survey suggests that this figure is likely to be similar for the first round. This indicates the important role that the Freelancer Fund has played in protecting livelihoods across Wales.
- 5.28 Analysis of the proportions of freelancers receiving SEISS support by subsector demonstrates considerable variation with all those in the Museums, Libraries,

³⁷ This is nearly the same proportion of 61 per cent as captured in the survey of freelancers (n=253).

Galleries and Heritage sector and Publishing sector receiving SEISS compared with only around half of those in the Visual Arts and Crafts sector (Figure 5.3).³⁸

Figure 5.3 Receipt of SEISS support by subsector



Source: Local Authority Freelancer Fund data

- 5.29 Male freelancers were more likely to have received SEISS support (66 per cent) than female freelancers (44 per cent). Only 15 per cent of freelancers aged between 16-24 years received SEISS support compared with 62 per cent of those aged 50-64 years.
- 5.30 Given the absence of any reliable profile data on the freelancer workforce across the cultural sector in Wales it is not possible to determine whether any specific groups are underrepresented in the profile of grant recipients.
- 5.31 Welsh Government and relevant sector bodies may consider undertaking work to map and profile the size and composition of the freelancer community across Wales as part of ongoing work to support and engage a workforce that is integral to the operation of many cultural organisations.

³⁸ The figures for Publishing (n=3) and Museums, Libraries, Galleries and Heritage (n=2) reflects small numbers of freelancers.

6. Grant recipients' response to the pandemic

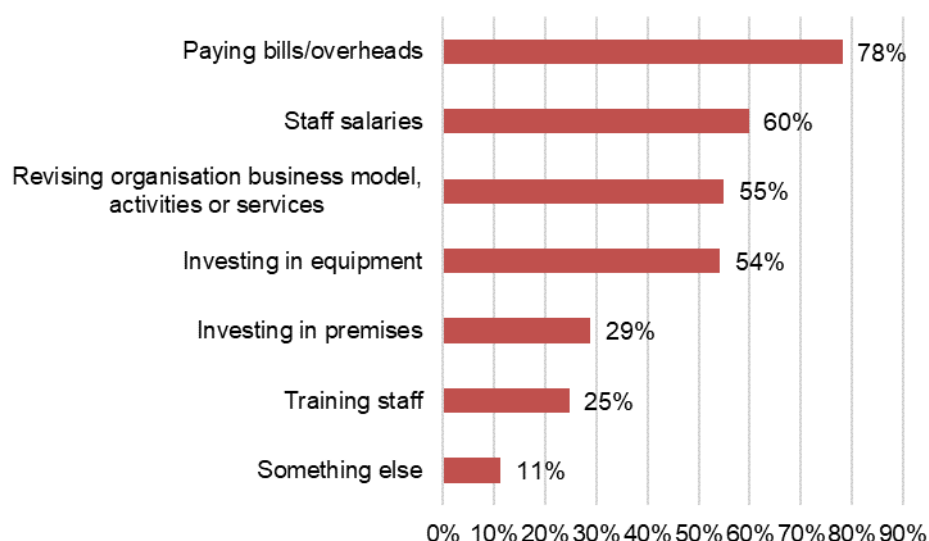
- 6.1 To establish a picture of the impact of the pandemic on cultural and creative organisations and freelancers across Wales, grant recipients were asked a range of questions designed to explore how service delivery had been affected and how cultural organisations and freelancers had responded.

Cultural organisations

Use of CRF funding

- 6.2 Stakeholders largely saw the CRF as a means of safeguarding jobs, organisations, and the sector. For a few, safeguarding assets and buildings was closely linked to the wider rationale, whilst others also saw the fund as a means of supporting communities by extension.
- 6.3 When asked to state how they had used their funding, organisations responding to the survey most frequently reported they used their grant to pay bills and cover overheads (78 per cent) followed by staff salaries (60 per cent) (Figure 6.1). However just over half of recipient organisations also used the funding they received to revise their business model or services (55 per cent) or invest in equipment (54 per cent).

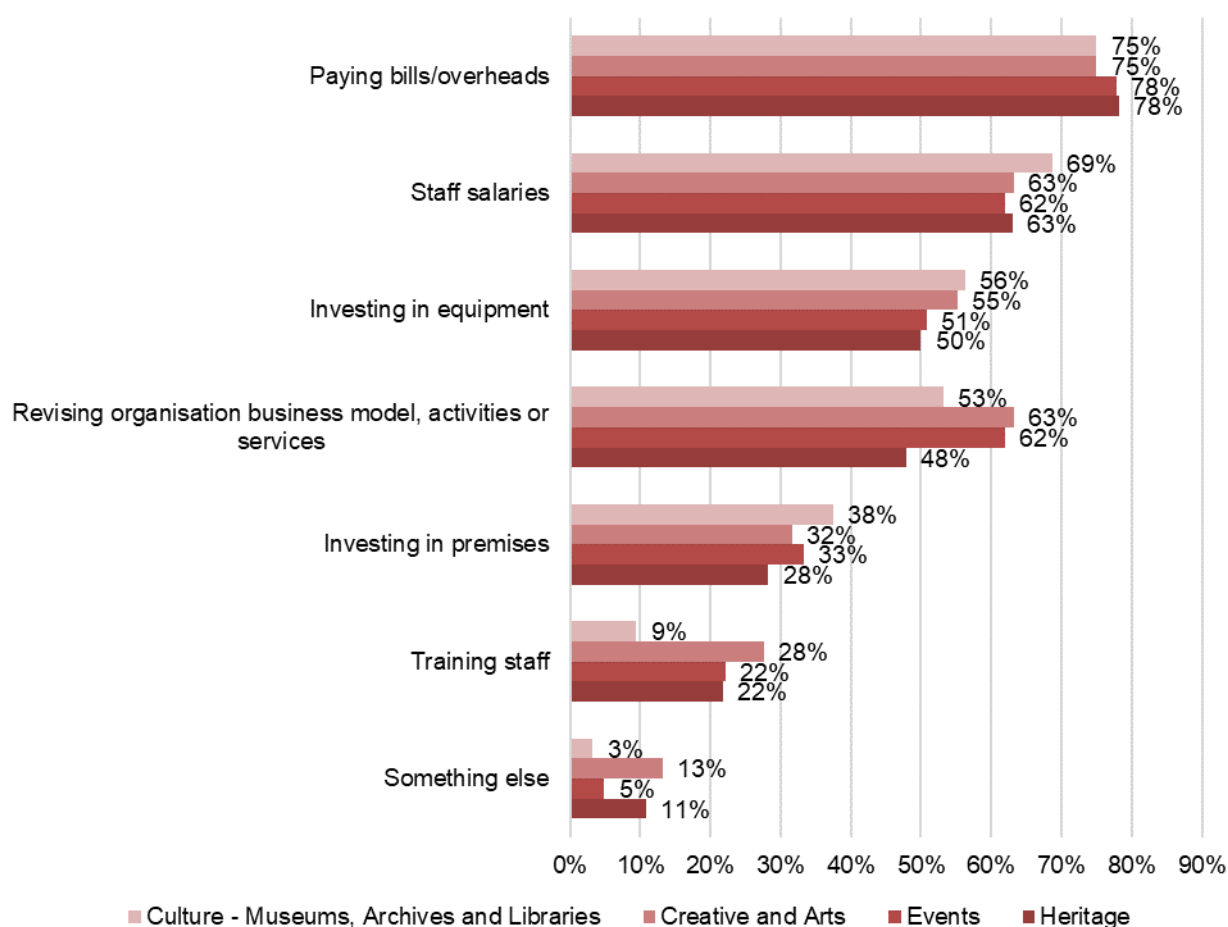
Figure 6.1 Use of Cultural Recovery Funding



Source: Wavehill survey of CRF grant applicants 2021. N=159

6.4 More detailed analysis of the use of the grant funding by sector highlights some variation including the investment in premises which was more prevalent in the cultural sector compared to using the funding to train staff; a use that was more prevalent in the creative and arts sector (Figure 6.2). Organisations in the Creative and Arts and Events sectors were more likely to use the funding to revise their organisation business model, activities, or services. However generally there isn't much difference in how organisations chose to use the funding across sectors, reflecting common challenges and responses.

Figure 6.2 Use of Cultural Recovery Funding by Sector

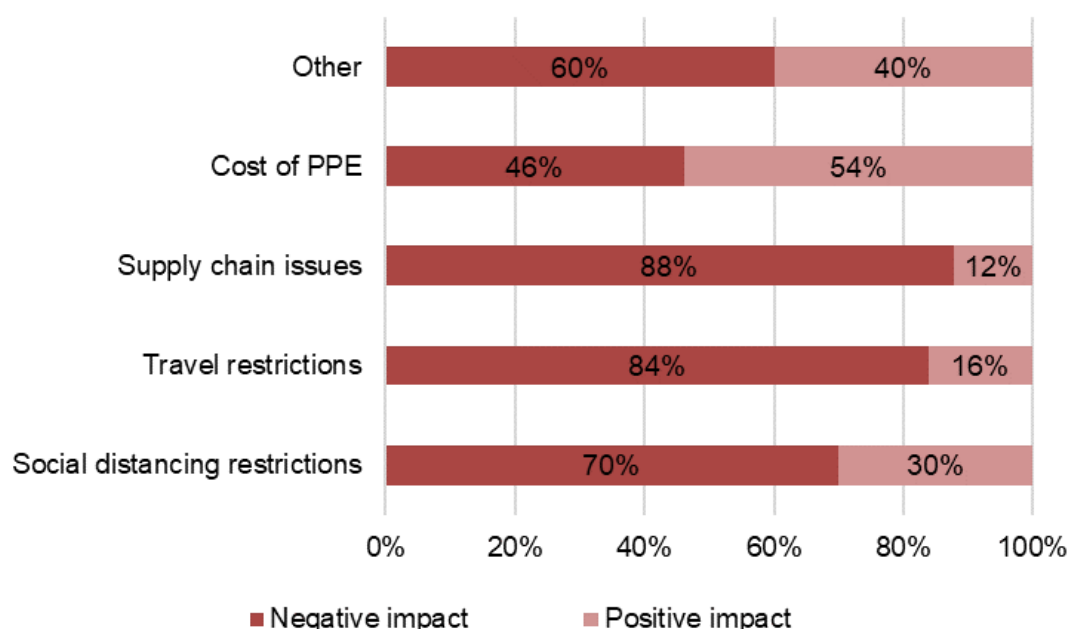


Source: Wavehill survey of CRF grant applicants 2021. N=159

6.5 What is evident in the responses from grant recipients is that the funding in most cases made a direct contribution to keeping organisations afloat, paying bills, covering their overheads (which in turn supported a wider range of organisations such as landlords) and staff salaries. In other words, the funding provided a bridge for organisations through the pandemic.

- 6.6 The key factors cited by cultural organisations which impacted negatively on the ability of the fund to help with their immediate survival were supply chain issues and travel restrictions (Figure 6.3).

Figure 6.3 Factors affecting the ability of the fund to support immediate survival



Source: Wavehill interviews with CRF1 and 2 grant recipients. N=213

Freelancers

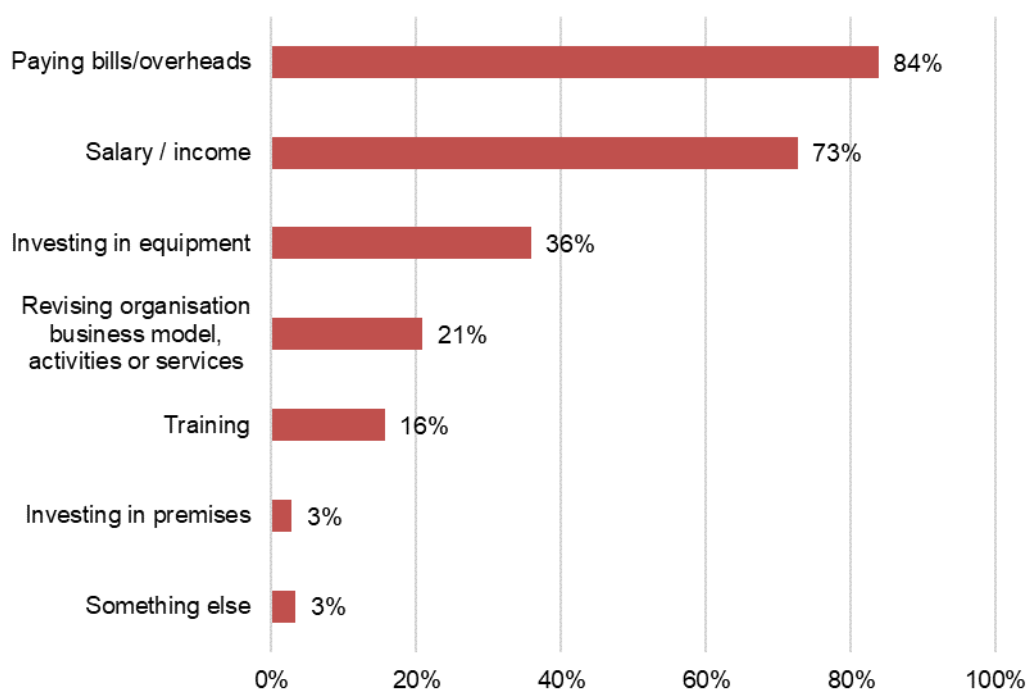
- 6.7 Freelancers who engaged through in-depth interviews recognised the primary objective of the fund was to ensure the survival of the sector, which would be critical to the future operation of many cultural organisations across Wales.

‘Freelancers are dependent on people being around and going places, like many that door was slammed in my face when COVID came along. Whether it’s someone who performs regularly...we were all in the same boat, lifeline essentially.’ (Photography, Publishing)

‘I think it was to keep freelancers in place to stay in the cultural sector, to stop them reskilling and moving out into a world away from the arts - possibly not coming back - it was to save culture.’ (Dance, Performing Arts, Theatre)

- 6.8 Consistent with the feedback from cultural organisations, the main uses of the funding were to pay bills and overheads (84 per cent) and for salary and income (73 per cent). Around one third invested in equipment, one in five in revising their business model, activities or services and one in six in training (Figure 6.4).

Figure 6.4 Use of Freelancer Fund



Source: Wavehill survey of freelancers 2021. N=402

‘I had no other choice really, either give up freelancing and claim universal credit or put in the claim and use that time productively.’ (Photography, Publishing)

‘I thought it was relevant to me, I had been affected by the pandemic, things had been cancelled, commissions taken out from under my feet. Thought it could help see me through, bit like a bridging loan, even if its part-time its good.’ (Visual Arts and Crafts)

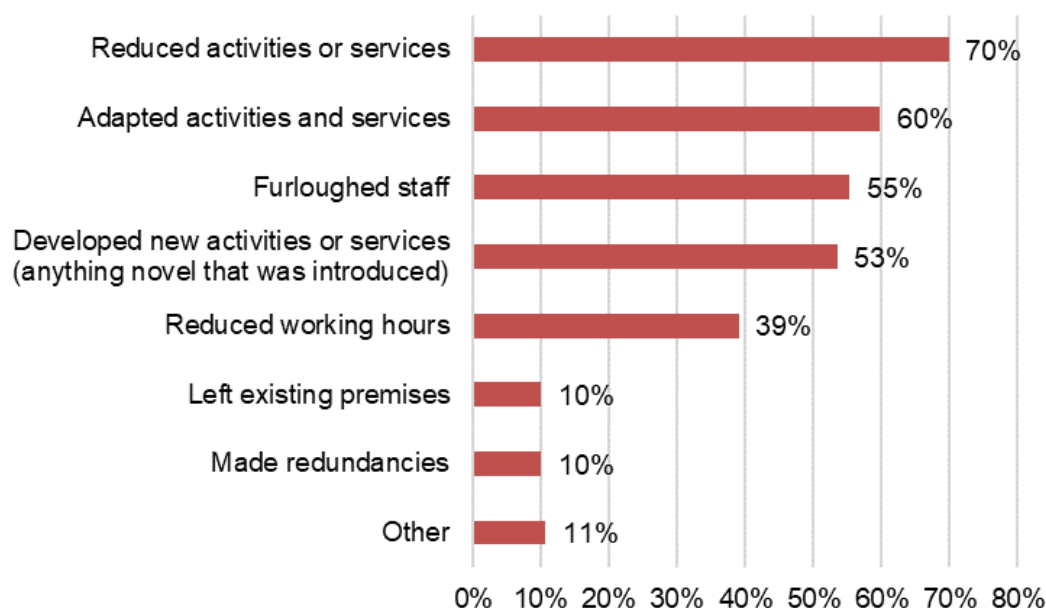
Changes to services and activities

Cultural organisations

- 6.9 Fund applicants responding to the survey of grant applicants were asked to provide detail on what actions were taken by their organisation in response to the pandemic (Figure 6.5 over page). The most common responses were that organisations had reduced (70 per cent) or adapted (60 per cent) their activities or services.

6.10 Just over half (55 per cent) of respondents had furloughed staff or reduced working hours (39 per cent), which in turn had reduced their capacity to deliver activities or services. One in 10 respondents had been forced to make redundancies and the same proportion had left their premises because of the pandemic. These findings highlight the impacts on both the job retention objectives of Welsh Government and wider ramifications for the economy and towns and city centres.

Figure 6.5 Actions taken by organisations in response to the pandemic



Source: Wavehill survey of CRF grant applicants 2021. N=159

6.11 Just over half (53 per cent) of creative and cultural organisations indicated that they had developed new activities or services in response to the pandemic. This provides emerging evidence that the Fund has supported and enabled cultural organisations to innovate thus potentially developing new areas of business and revenue streams and improving resilience to manage future disruption and operational restriction associated with the pandemic.

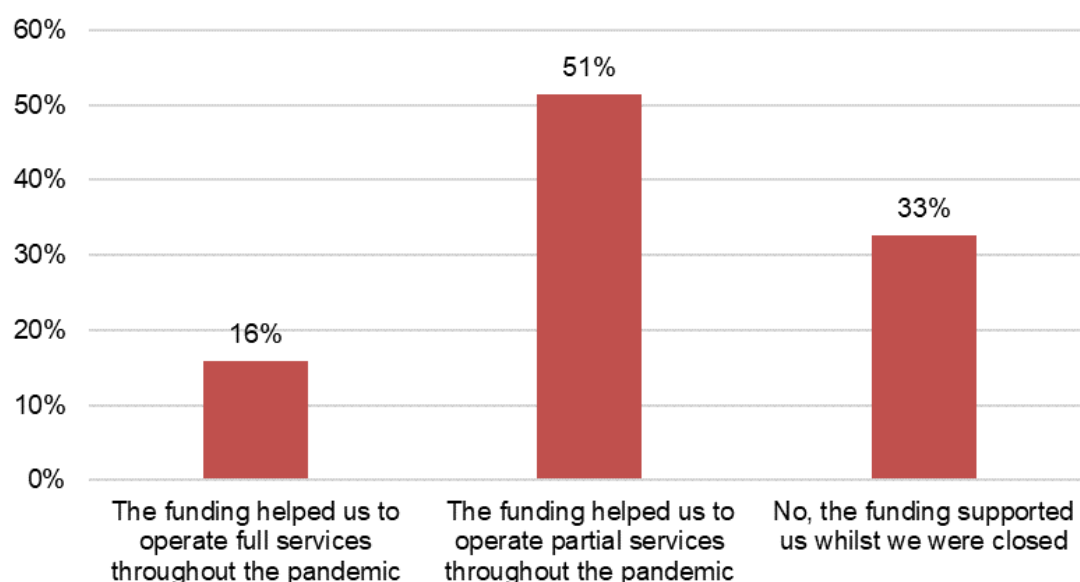
6.12 This point was also highlighted by stakeholders with around half suggesting that the Fund had, alongside a lull in activity, provided a space and means for reflection, innovation, and development. Doing so, in some instances, has led to an expansion of capacity. This, in future, may prove valuable in offsetting the impact of the pandemic.

‘Very effective... The funds for digital equipment will help them to develop a new offer/revenue stream that can offset the revenue lost and likely lower future revenue from room hire. It has accelerated their development digitally. They have been able to deliver digitally across the year, supporting and engaging their network of 60-70 volunteers.’ (Stakeholder Interview, 2021)

‘Without the scheme our business, would certainly not have lasted and all our staff would have been made redundant.’ (CRF1 grant recipient, 2021)

- 6.13 It is also evident from applicants’ responses to the online survey that the Fund has also been pivotal in helping around two in three organisations (67 per cent) to continue to operate services throughout the pandemic (Figure 6.6).

Figure 6.6 Whether the funding enabled organisations to continue operating through the pandemic



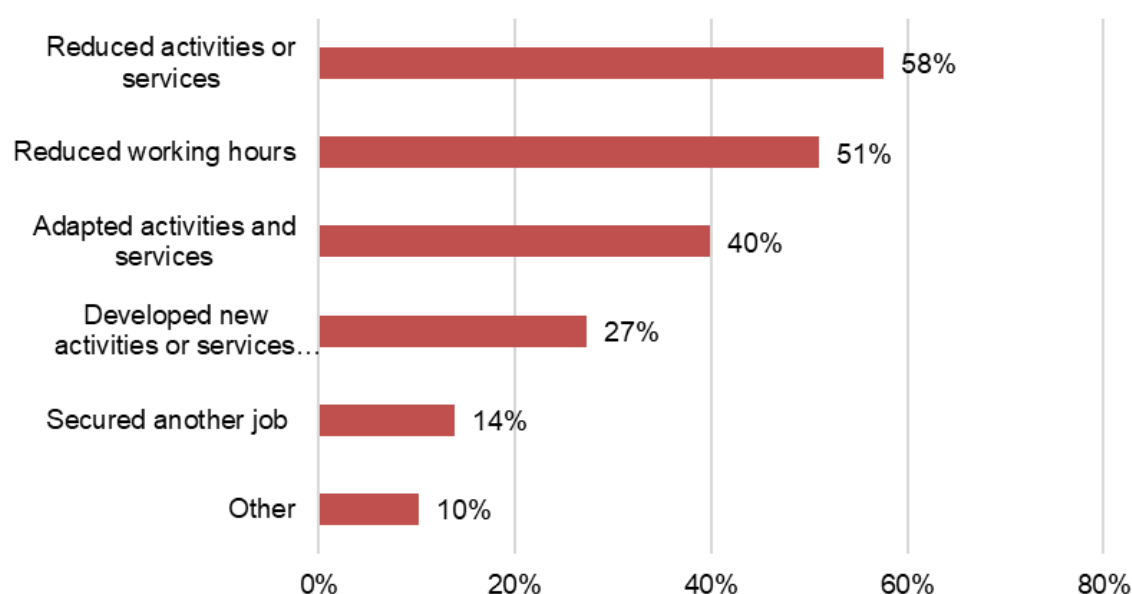
Source: Wavehill survey of CRF grant recipients 2021. N=159

- 6.14 One important activity that the ability to continue operating through the pandemic has facilitated is the ability of organisations to network within and beyond their respective sector, gaining feedback around factors that can support their ongoing resilience and help them to navigate their way through the public health restrictions. It has also enabled organisations to continue to generate revenue streams, albeit on a limited basis, which in turn has contributed towards their survivability.

Freelancers

- 6.15 The most common response by freelancers to the pandemic was to reduce their delivery of activities and services or working hours, with a resultant impact on income levels (Figure 6.7). Four in 10 freelancers reported that they adapted their activities and services in response to the pandemic, mainly in shifting these online (reported by 70 per cent of freelancers). Just over a quarter (27 per cent) of freelancers stated that they developed new activities or services.

Figure 6.7 Actions taken by Freelancers



Source: Wavehill survey of freelancers 2021. N=431

- 6.16 Where freelancers reported to have developed new activities and services this related to the delivery of online events, teaching or workshop sessions (41 per cent of respondents; n=101). A similar proportion stated that they were able to diversify their work (40 per cent of respondents; n=101).

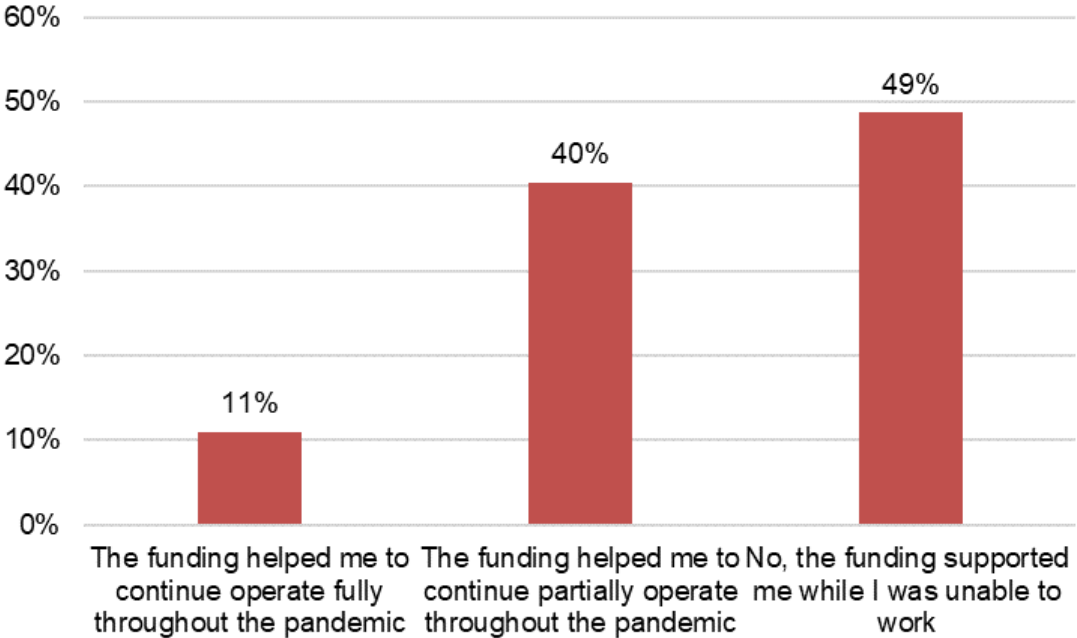
‘Rather than just art prints I also offered jigsaws of my work given people are at home more, so it was an extension of my work I’d have never had tried before.’
(Visual Arts)

‘I had no writing commissions, so I took on more editing and proofreading work.’
(Publishing)

- 6.17 Half of freelancers reported that the fund did not enable them to continue to operate through the pandemic but rather supported them whilst they were unable to work (Figure 6.8). However, for two in five the fund enabled them to partially operate

through the pandemic, supporting communities in a range of ways (see later report section) and for one in 10 the funds enabled them to fully operate through the pandemic.

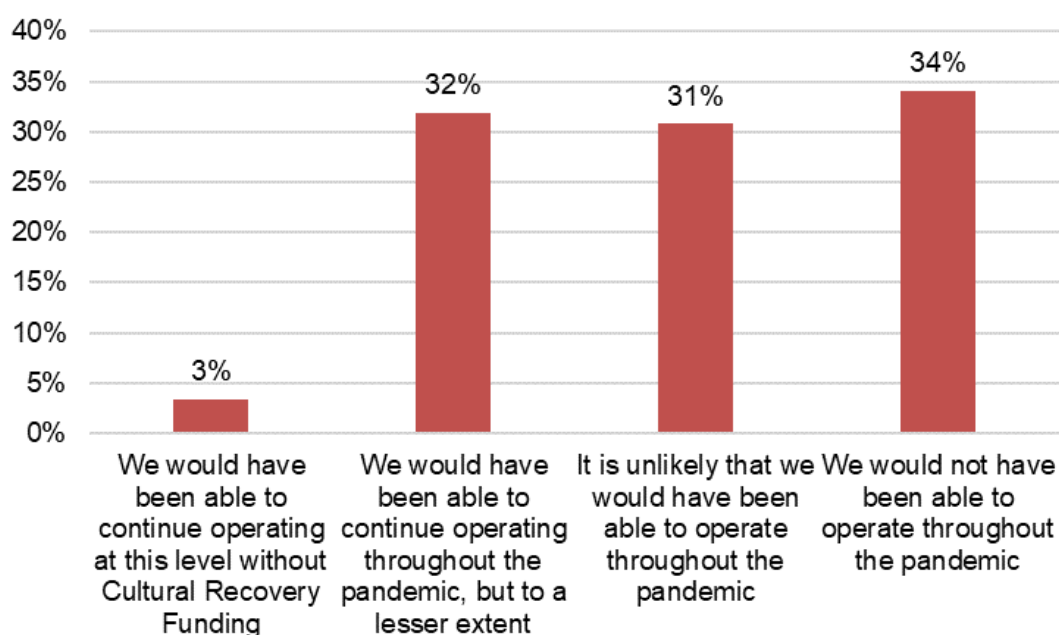
Figure 6.8 Freelancer Fund supporting operation through the pandemic



Source: Wavehill survey of freelancers 2021. N=411

6.18 A third of freelancers indicated that they would not have been able to operate through the pandemic and just under a third indicated that it would have been unlikely that they could operate in the absence of their funding award (Figure 6.9 over page).

Figure 6.9 Operational impact in the absence of the Freelancer Fund



Source: Wavehill interviews with freelancers 2021. N=91

- 6.19 Regardless of the funding awarded, freelancers from several sub-sectors were still unable to operate through the pandemic, most notably within Dance, Performing Arts, and the Theatre sector.

Innovation and investment

Cultural organisations

- 6.20 Several stakeholders referenced the importance of organisations being able to diversify their income streams and services to enable them to adapt, survive and thrive in a post-pandemic economy.

‘Without the CRF, there may well have been serious implications for the capital redevelopment and our future plans with the communities in the South Wales Valleys, we are therefore hugely appreciative of the support we have received from this fund and Arts Council of Wales staff.’ (CRF1 grant recipient, 2021)

- 6.21 Multiple lockdowns have meant working from home has become the norm. As a result, it has been even more important for cultural organisations in Wales to get creative and reimagine their activity and engagement as entities unaided (but also unconstrained) by their buildings. Many organisations have used the funding to establish or enhance their online offer, developing new services and capabilities from which they aspire to grow new, sustainable income streams.

6.22 Whilst for many this has not, as yet, replaced the income streams from traditional in person engagement, it has helped to offset some of the financial loss incurred by the pandemic and open up future possibilities.

‘We moved our content online including performances of our plays and workshops. This opened us to whole new global audience which we wouldn't have been able to access before. Unfortunately, whilst we had good numbers accessing the online content it did not replace the income we would normally get for performances and workshops delivered face-to-face. (CRF Round 1 Grant Recipient)

‘We invested in software, equipment and training for our staff so that they could work online. We also developed our online business and expanded how many of our books that were available in a digital format and also expanded our capabilities to sell directly to consumers online.’ (CRF Round 1 Grant Recipient)

6.23 For many theatres, galleries, art centres and venues, CRF funding via the Arts Council of Wales has provided a lifeline. As outlined in research from the Audience Agency,³⁹ for some, the break from routine has offered an opportunity for vital audience research and in some cases a re-evaluation of where they sit within their communities. As a result, many venues are facing the prospect of reopening their doors with a new sense of purpose.

6.24 One of the consequences of the pandemic is that audiences have had to adapt, taking part in new experiences online. New forms of artistic and cultural activity are developing through virtual formats including digital film commissioning, online artist-led art markets and non-venue based digital content creating.⁴⁰ CRF funding has enabled many organisations to take stock, assess their digital capability and put in place investment (equipment and training) to respond creatively to new models of participation and engagement.

‘We set up a podcasting department, we went from live events and tours to doing podcasts with comedians. We employed an additional member of staff to help with the recording and engineering of it.’ (CRF Round 1 & 2 Grant Recipient)

³⁹ View [Audience Agency research](#).

⁴⁰ Centre for Cultural Value (October 2020)- ‘Policy review: Cultural policy responses to COVID-19 in the UK’. October 2020.

6.25 Just over half of organisations have used the funding to revise their operating model or to develop new activities and services, commonly in response to the restrictions imposed by the pandemic but also in recognition of changes in community and consumer trends within society.

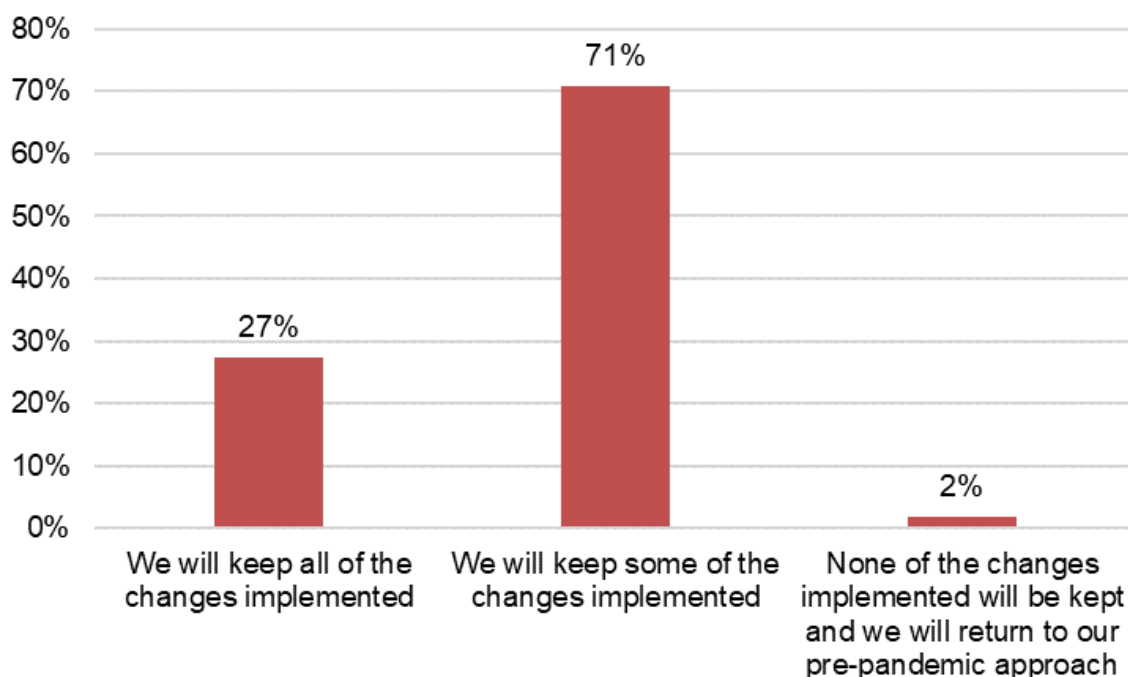
‘We realised we were too dependent on events for income and switched some of our content online in terms of some online concerts and music performances.’ (CRF Round 1 & 2 Grant Recipient)

‘We had an opportunity to bring in some consultancy to help advise and support us to diversify our fundraising and helping us to write a mission statement. We were able to do some research and planning for a year long programme focusing on helping galleries to become inclusive ready.’ (CRF Round 1 Grant Recipient)

6.26 Nearly all of the organisations in receipt of funding intend to keep some or all of the changes they have implemented in response to the pandemic (Figure 6.10 over page).

‘Through the CRF we were able to put in place a new suite of digital donation methods and various contact lists, donation points, sales points. After three or four years of researching Customer Relationship Management systems (CRM), we finally found one that fitted us perfectly..., the CRF enabled us to find a CRM. The additional management capacity we'd budgeted for allowed for that extra research and time. Another thing was we were able to bring in a freelance consultant to work with us to develop core messaging around donation campaigns and membership schemes. (CRF Round 1 & 2 Grant Recipient)

Figure 6.10 Retaining organisational changes adopted during the pandemic



Source: Wavehill survey of CRF grant recipients. N=106

- 6.27 Following the initial shock accompanying the early stages of the pandemic, the timings of the launch of CRF in July 2020 and subsequent delivery of a further round of support has coincided with grant recipients taking time to both manage immediate financial pressures whilst also exploring options to innovate their offer to support objectives around organisational resilience.
- 6.28 CRF funding has enabled many organisations to direct investment in different areas of their business, including capital costs associated with the purchase of new equipment or maintenance of a fixed asset, as well as training and development costs for staff and volunteers. In combination, this has enabled the Fund to both support immediate survivability as well as longer time viability for many cultural organisations.

Freelancers

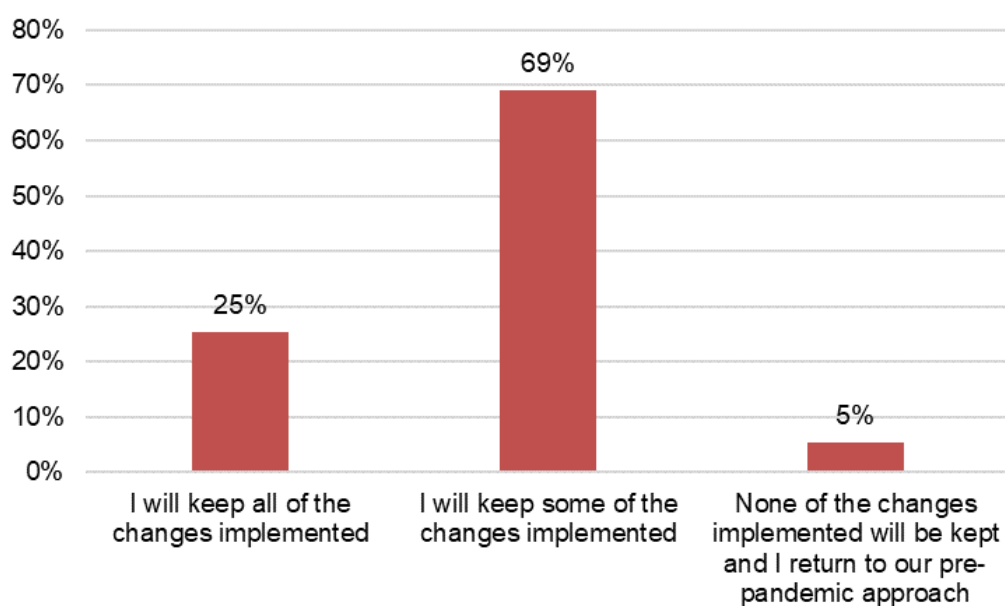
- 6.29 Many freelancers reported that the funding has provided them breathing space to reflect on their creative practice and identify future opportunities. It had also led to freelancers thinking on the impact of their work and its value to society. For some, the fund allowed them to purchase new equipment or update their facilities. For others, it provided an opportunity to network with other freelancers, enter into new ventures, or undertake professional development and training.

‘It did take off the initial stress and anxiety of not having any income and due to the changes in the industry and with the schools still not being open to visitors yet, I had time to rethink my practice and now going back to illustrator and due to this I have a new commission starting.’ (Carmarthenshire. Design, Events, Photography, Publishing, Visual Arts and Crafts)

‘Due to meeting loads of creative people in the community we all got together and had zoom meetings where we supported each other and shared any work or advice... From there I am just about to sign a lease with a new partner to have a creative hub, music studio, cafe where we can hold workshops and have a learning zone for music, film making lots of different projects which is open to everyone...So this wouldn't have happened if it wasn't for COVID.’ (Blaenau Gwent. Design, Entertainment, Events, Film and TV, Music, Photography, Publishing, Radio, Video)

- 6.30 With one in five freelancers indicating that they used their funding award to revise and refine their business model, activities, and services, it is likely that this will support efforts for the sector to become more resilient and able to respond to any future disruptions caused by the pandemic. A quarter of freelancers indicated that they would keep all the changes implemented in response to COVID-19 with just under seven in 10 keeping some of the changes (Figure 6.11).

Figure 6.11 Sustaining new models of working in the freelancer sector



Source: Wavehill survey of freelancers 2021. N=165

'My career has totally changed from what I was doing before/during lockdown. Through contacts I have worked for in the past I am now doing arts projects - short term contracts, mainly in schools through Arts Council work and my career is blossoming and very exciting - an example of work is organising dance for people with dementia. Through the Arts Council and other organisations in Wales I hope to be able to continue different projects as they become available.'

(Powys. Dance, Performing Arts, Theatre)

- 6.31 This demonstrates the broader shift in practice that has been facilitated by the Freelancer Fund which can continue to the objective of safeguarding freelancer roles across Wales.

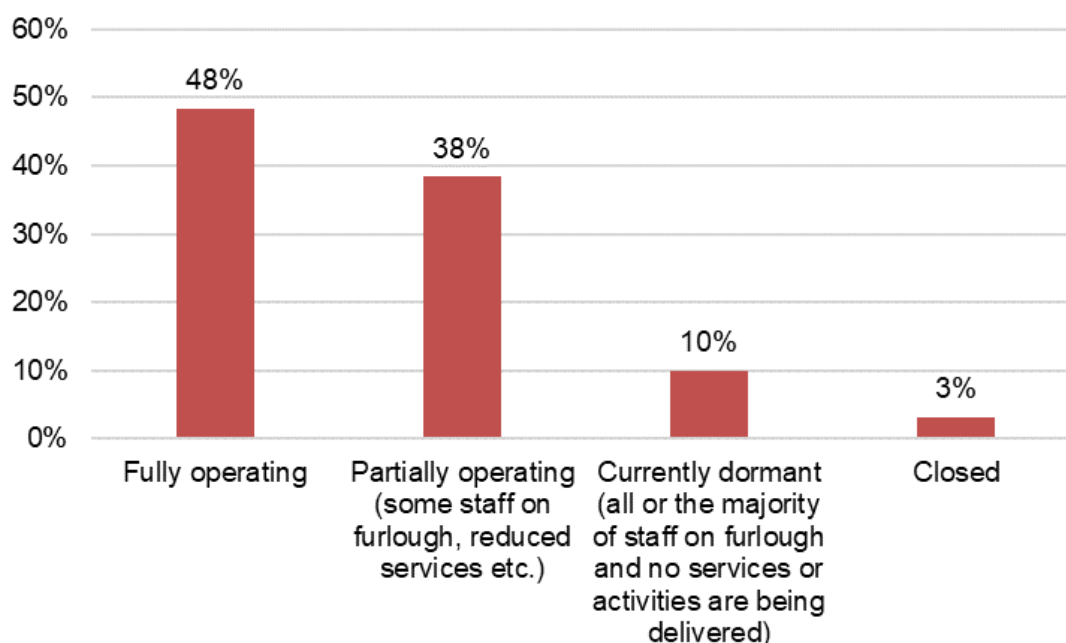
7. Impact of the CRF on grant recipients

7.0 This section of the report provides an assessment of the performance of the CRF against its two main objectives of supporting the survival of creative and cultural organisations across Wales. The analysis also presents a counterfactual position as to what the likely impact would have been in the absence of funding support across both rounds as well as the contribution of the Fund to social, cultural and wellbeing objectives.

Business survivability

7.1 Although the pandemic and public health restrictions commenced in March 2020 its effects are continuing into 2022. When asked about their current status, just under half of applicants were fully operating with around one third (38 per cent) operating on a partial basis and one in 10 being dormant.⁴¹

Figure 7.1 Operational status of Fund applicants (organisations)



Source: Wavehill survey of CRF grant applicants. N=159

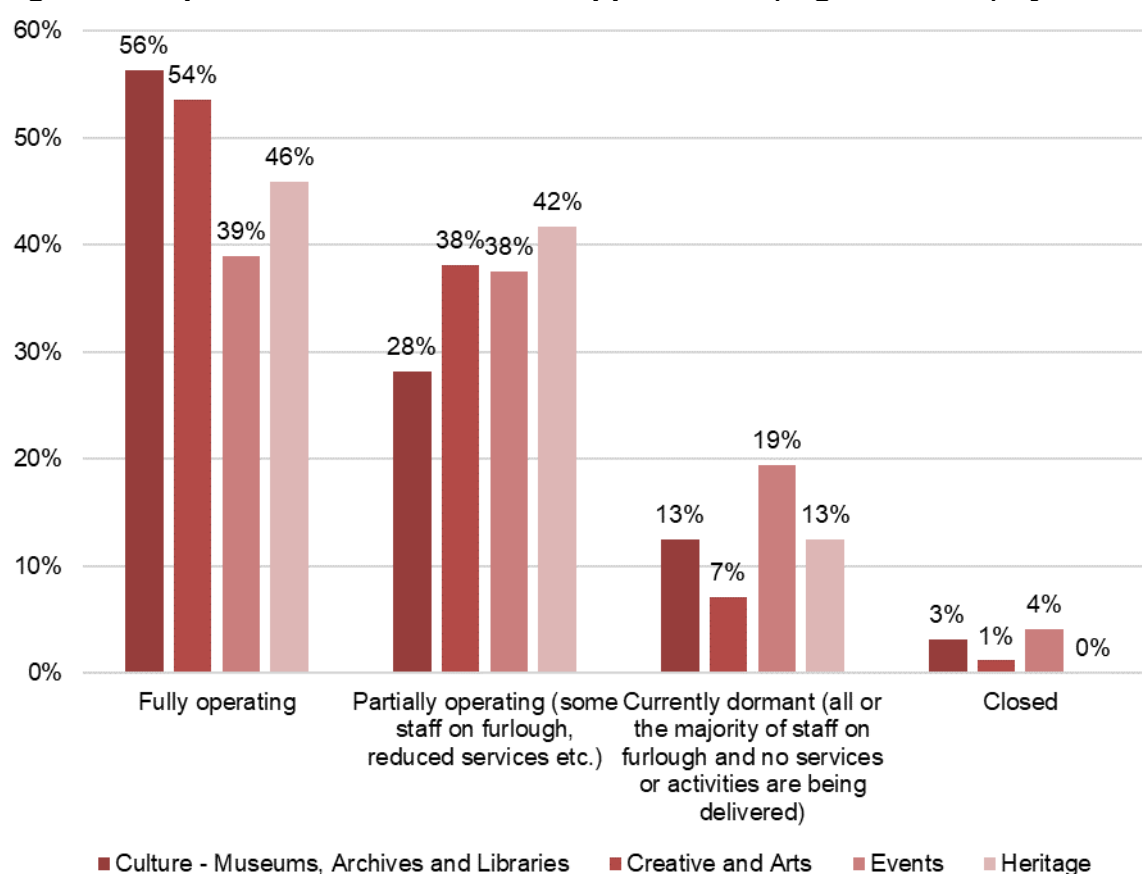
7.2 This profile differs across the four main sectors with considerably fewer organisations within the events sector reporting to be fully operating compared with the Culture and Creative and Arts sectors (Figure 7.2 over page).

⁴¹ The survey was launched on the 29th of July 2021 and closed on the 1st of September 2021.

7.3 Nearly one in four (23 per cent) applicants in the events sector reported to be dormant or closed at the point they responded to the evaluation survey compared to 16 per cent in the Culture sector, 13 per cent in the Heritage sector and 8 per cent in the Creative and Arts sector.

7.4 This reflects the timeline for the easing of public health restrictions with affected sectors differently. For example, indoor museums and galleries were able to reopen from the 17th of May 2021 but restrictions on festivals and large-scale events continued for some months, including the introduction of the COVID pass scheme on the 5th of October 2021.⁴²

Figure 7.2 Operational status of Fund applications (organisations) by sector



Source: Wavehill survey of CRF grant applicants. N=159

7.5 This demonstrates that for many organisations in the Creative and Cultural sector their ability to return to pre-pandemic operating levels is unknown. As such the full impact of the Fund in safeguarding organisations and protecting jobs may not be

⁴² View [Timeline of the Covid-19 pandemic in Wales](#)

fully apparent for some time following the lifting of restrictions and a return to pre-pandemic operating conditions.

- 7.6 Stakeholders suggested that in the absence of CRF, the sector would have been more deeply impacted by the pandemic. The Fund had served to complement other COVID-19 relief funds and addressed gaps in the wider support provision where cultural organisations were not eligible for funding through other routes.

‘Many organisations would have struggled to survive. CRF has bought time but there are still many organisations that were fragile prior to the pandemic. The future is still unknown in terms of visitor numbers and income streams, but the immediate support needs have been addressed by CRF1.’ (Stakeholder Interview, 2021)

- 7.7 Most stakeholders did not feel that the Fund had missed any particular groups or sectors. Indeed, the open criteria was frequently acknowledged as a particular strength. However, though only raised by very few interviewees, the understanding and subsequent provision for the night-time economy was thought limited. The definition of music venues, for example, was thought to have resulted in some, though not full-time music venues, folding or ceasing to offer live music.

- 7.8 To ascertain the likely impact on the cultural sector in the absence of the Fund, grant applicants were asked what they would have expected to happen if they had not received the funds (Figure 7.3 over page). Just over half (52 per cent) of respondents indicated that it would have resulted in the closure of their organisation, with a wider impact on the sector’s ability to support communities as part of the recovery phase from the pandemic.

- 7.9 Just under half (46 per cent) of organisations suggested that they would have had to draw on their organisations’ reserves and around four in 10 (38 per cent) felt that it would have led to staff redundancies.

Figure 7.3 Expected impact of Fund recipients in the absence of their grant award



Source: Wavehill survey of CRF applicants N=141

7.10 The level of reserves held by an organisation provides a measure of its ability to withstand unexpected changes to income streams or unanticipated events such as building repairs. One of the themes highlighted by stakeholders related to the importance of cultural organisations retaining some reserves to support their reopening and recovery from the pandemic.

7.11 The absence of sufficient financial reserves would place many organisations within a precarious operating position, vulnerable to failure or closure because of future economic influences (pandemic or otherwise).

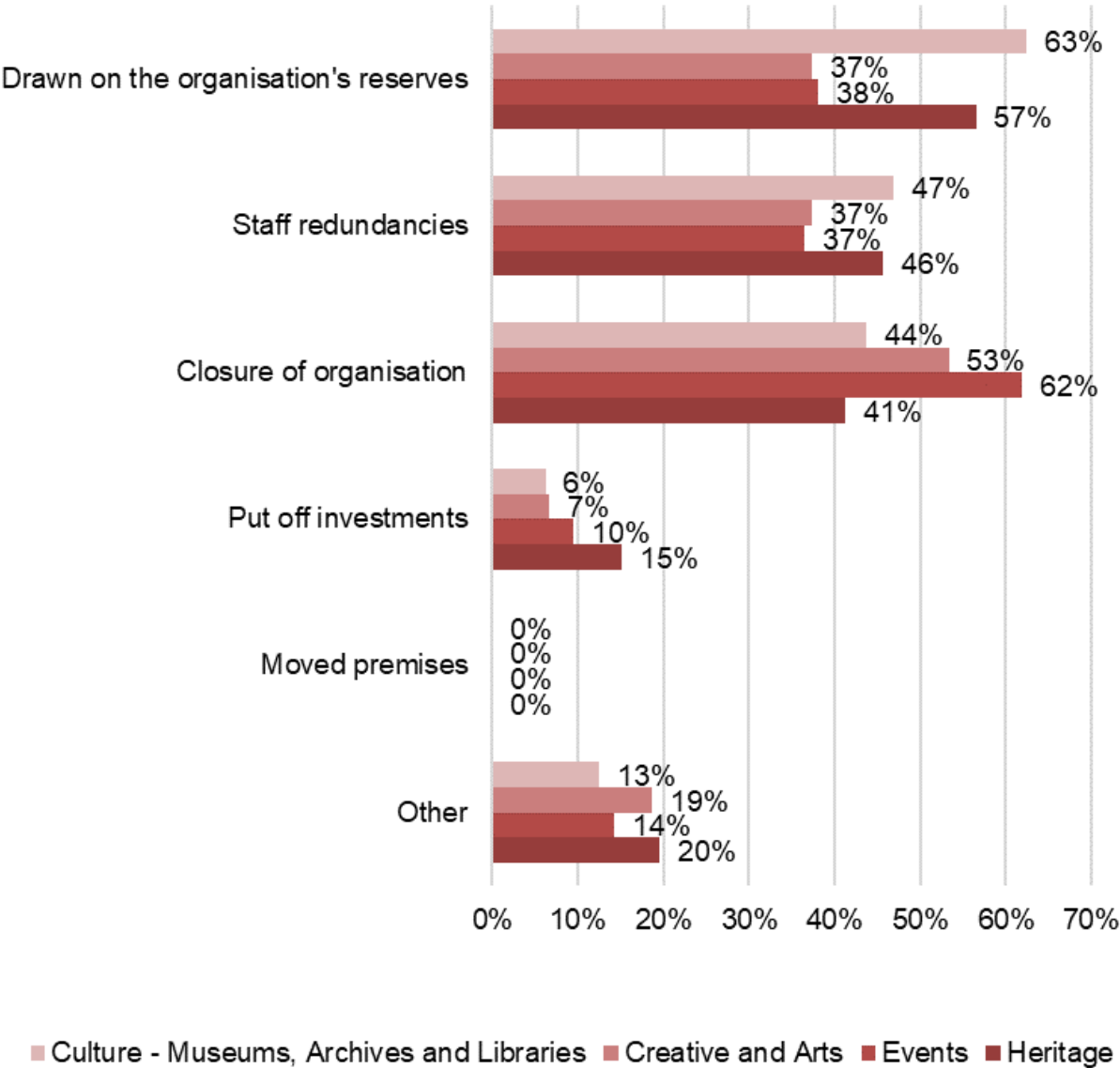
‘We just want to reiterate how crucial the CRF support has been for our charity. Welsh Government has kept us informed and supported from the outset of the pandemic and the support from officials at the Arts Council for Wales and the Museums, Archives and Libraries Division [of Welsh Government-now the Culture Division] has been crucial and much appreciated.’ (CRF1 grant recipient, 2021)

7.12 Analysis of the organisation responses to the survey of CRF applicants by sector reveals variation in the expected impacts in the absence of CRF grant awards. Organisations from the Culture and Heritage sectors were more likely to state that

they would have expected redundancies and to have drawn on the organisation’s reserves than the Creative and Arts and Events sectors (Figure 7.4 over page).

7.13 Approaching two thirds of organisations in the Events sector stated that they would have expected to close in the absence of their CRF grant award, with just over half of organisations in the Creative and Arts sectors stating similar.

Figure 7.4 Expected impact in the absence of their grant award (by sector)



Source: Wavehill survey of CRF grant recipients. N=141

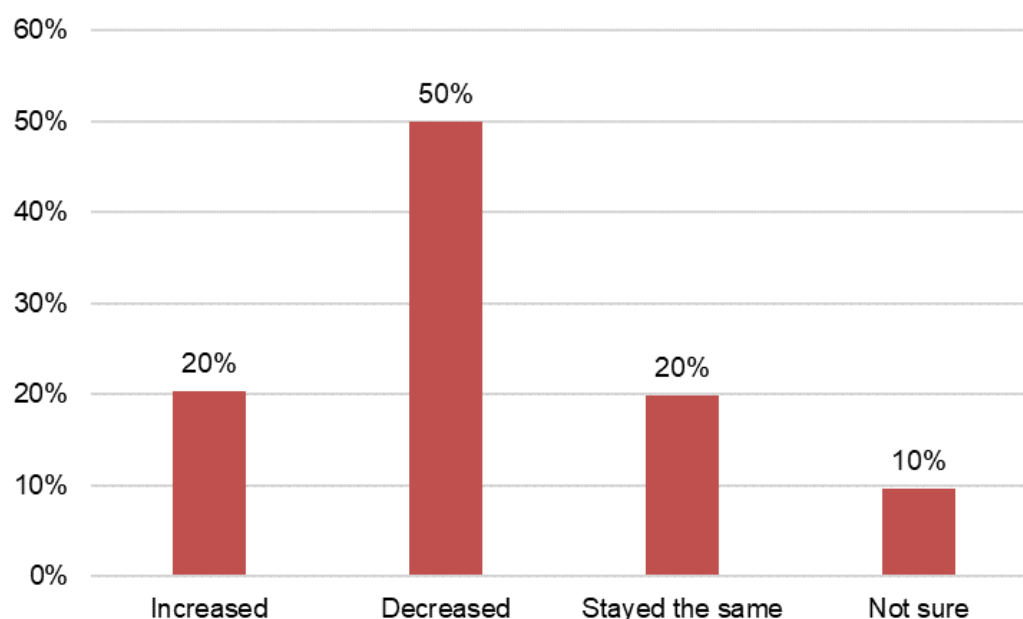
- 7.14 Around six in 10 (57 per cent) survey respondents stated that the Fund has been fundamental to their organisation's survival to a great extent with around a third (37 per cent) feeling it had been to some extent. Given the timing of when the survey was disseminated, around four months following the completion of the CRF1 funding award, this response has benefited from organisations being able to reflect on where they may otherwise have been in the absence of the support through the Fund.
- 7.15 Analysis of responses by sector highlights that Creative and Arts organisations were more likely (65 per cent) to indicate that their grant was fundamental to their organisation's survival. Organisations within the Culture - Museums, Archives and Libraries sector were least likely to attribute the Fund to their survival, albeit many of these are managed by local authorities and have to some extent been protected through the pandemic as they are maintained through mainstream budgets.
- 7.16 In-depth interviews with grant recipients demonstrated repeatedly the important and often central role that CRF played in helping organisations to survive through the pandemic. The Fund has also provided space to enable organisations to invest in training, review their operating systems which in turn can better position them to adapt to a post-pandemic delivery landscape.

'It put us on an even keel and allowed us to keep going, keeping our staff and keep sustainable for however long it was going to be, and it allowed us and to give us time to look at different ways to work.' (CRF Round 1 Grant Recipient, Creative sector)

'Honestly the fund helped us to survive until now, it gave us the time to re-evaluate and diversify and help us to make more local connections. We trained our staff and did some marketing and market research, all for these are the things we wouldn't usually have time for as we are firefighting. We have implemented different processes to ensure the working environment works for our staff and community and it helped us cover overheads during the period we had to close and when we were getting back on our feet when we re-opened - we were starting again from nothing.' (CRF Round 2 Grant Recipient, Culture sector)

7.17 Based on feedback provided in depth interviews, half (50 per cent) of organisations in receipt of funds reported that their turnover has decreased as a result of the pandemic, with one in five (20 per cent) stating that it has increased (Figure 7.5). This highlights the longer-term impact of the pandemic and the differing pace of recovery influenced by organisation's sector, ability to fully reopen and ongoing public health restrictions.

Figure 7.5 Impact of the pandemic on turnover



Source: Wavehill interview of CRF 1 and 2 grant recipients. N=175

7.18 Three quarters (74 per cent) of grant recipients indicated through in-depth interviews that their CRF grant had helped to mitigate the impact of the pandemic, demonstrating the contribution of the fund to ensuring the survivability of the cultural sector across Wales.

7.19 When asked to summarise their overall thoughts on the Cultural Recovery Fund, 57 per cent of grant recipients stated that it saved their organisation, by far the most frequent response.⁴³

⁴³ Source: Wavehill interviews with CRF1 and 2 grant recipients. N=211.

Safeguarding jobs

Cultural organisations

- 7.20 Across both rounds of funding applicants were associated with 7,832 FTE jobs. Those in receipt of funding accounted for 4,777 FTEs, estimated at 0.27 per cent of total employment in Wales.⁴⁴ The proportion of all FTE jobs supported through the Fund vary across cultural sectors, ranging from 23 per cent in the arts sector to three per cent in the Culture and Creative: Supply Chain sector and the Culture sector (Table 7.1).

Table 7.1 Number of FTE jobs supported by CRF round and sector

CRF Round 1		
Sector	Number of jobs supported	% of total jobs supported
Events	866	23%
Heritage	964	25%
Creative	612	16%
Culture	322	8%
Culture and Creative: Supply Chain	78	2%
Arts	953	25%
Total	3,795	100%
CRF Round 2		
Events	216	6%
Heritage	246	6%
Creative	170	4%
Culture: Museums, Archives and Libraries	46	1%
Culture and Creative: Supply Chain	104	3%
Arts	587	15%
Total	1,369	100%
Combined Rounds		
Events	1,071	22%
Heritage	1,049	22%
Creative	838	18%
Culture: Museums, Archives and Libraries	145	3%
Culture and Creative: Supply Chain	444	9%
Culture	139	3%
Arts	1092	23%
Total	4,777	100%

Source: Welsh Government BAS data & Arts Council of Wales Grant Management Data

- 7.21 During in-depth interviews, cultural organisations in receipt of CRF Funds were asked how many jobs they were able to safeguard because of the support they

⁴⁴ BRES 2020 survey.

received. In total, organisations stated that there were able to safeguard 622 full time jobs (based on responses from 176 organisations) and 903 part time jobs (based on responses from 161 organisations).⁴⁵

- 7.22 Reflecting the composition of the sector with higher proportions of micro-businesses, most commonly organisations were able to safeguard between two-five full time or part time jobs.

‘Think it has been vital and will continue to be vital and hope there will be another round. It has had such impact on loss of revenue and revenue was cut off, no doubt lot would have gone bust, and freelancers would have looked for work elsewhere and would need to be built back up. We aren’t yet into steady recovery, so it will be a long way before we see anything like revenues before.’
(Stakeholder Interview, 2021)

- 7.23 Across the surveyed organisations conducted in the summer of 2021, there was an average fall in employment of 3.85 FTE per organisation since application to the CRF. Applying this to the population would suggest that of the 4,777 FTE associated with successful applicants, there are now ~2,900 still employed in these organisations.
- 7.24 Given that 57 per cent of respondents reported that the support received from the CRF was fundamental to their organisation’s survival, across all employment in the successful applicant population, this would equate to the safeguarding of 2,700 FTE jobs.
- 7.25 Thirty-eight per cent of CRF survey respondents suggest that they would have had to make staff redundant if the funding support had not been available. Of these, 41 per cent (or 16 per cent of all respondents) report that the CRF was to some extent important in their organisation’s survival. If one-third of the FTE jobs in these organisations are assumed to have been lost in addition to the 57 per cent of organisations which would have failed, employment would have been reduced by an estimated 2,950 FTE across the cultural sector in Wales.
- 7.26 Alternatively, a range of job loss assumptions can be made for the 38 per cent who reported that they would have had to make redundancies had they not received support. A 30 per cent reduction in employment among these organisations would

⁴⁵ Source: Wavehill interviews with CRF1 and 2 grant recipients.

equal 560 FTE jobs lost, a 50 per cent reduction would equal 934 FTE jobs and a 70 per cent reduction would equal 1,308 FTE jobs.

- 7.27 Feedback from CRF grant applicants presents evidence of the reduction in employment levels because of the pandemic (Table 7.2).⁴⁶ Around 15 per cent (31) of organisations interviewed indicated that they have been able to create new jobs as a result of the support from the CRF fund, equating to 60 new jobs.

Table 7.2 Average employment levels among surveyed organisations

	Pre COVID-19	Currently	Difference
Average Full Time Staff	7.5	6.4	-1.2
Average Part Time Staff	8.3	2.6	-5.7
Average FTE Staff	10.9	7.0	-3.9
Average Part Time Hours	70.5	37.1	-33.4
Average Volunteers	26.2	16.8	-9.4

Source: Wavehill survey of CRF applicants. N=159

- 7.28 Looking at the 275 repeat applications from BAS data is interesting in terms of job change. This indicates that for the majority (60 per cent) of repeat applicants, their change in staff between their applications stayed the same. A broadly equal proportion saw an increase in FTE staffing levels as saw a reduction (Table 7.3).

Table 7.3 Change in FTEs between rounds

Change in staff between applications	Number who applied	% of all repeat applications	Total FTE lost / gained	Successful CR1 only	Successful CRf2 only	Successful in both	Unsuccessful both times
Increase	59	21%	107	5	2	44	8
Decrease	52	19%	-250	8	2	34	8
Stayed the same	164	60%		23	9	102	30

Source: Welsh Government BAS data

Supporting contractual freelance roles

- 7.29 The contribution of CRF to supporting the survival of many cultural organisations has impacted not only on paid staff but also the considerable number of freelancers contracted to support their operation and delivery. Analysis of application data reveals that the total number of contractual freelancer roles hosted by cultural organisations applying for support was 41,916 (Table 7.4).

⁴⁶ Full Time staff refers to an individual employee who works more than 30 hours per week for an organisation. Full Time Equivalent (FTE) is the number of staff that would be employed if they were all full time so allows combination of part time and full time based on hours of work undertaken.

- 7.30 For organisations in receipt of grant funding across either or both rounds, this equates to 21,396 contractual freelancer roles.⁴⁷ When accounting for organisations in receipt of funding across both rounds the total number of unique contractual freelancer roles supported is 21,008.⁴⁸

Table 7.4 Supporting freelancer roles

Round	Number of contractual freelancer roles in applications	Number of contractual freelancer roles in awarded applications	Unique freelancer roles safeguarded
CRF 1	38,498	18,780	18,512
CRF 2	3,418	2,615	2,496

Source: Welsh Government BAS data

- 7.31 Combined with the targeted support to freelancers provided by the Freelancer Fund, this demonstrates the ability of the CRF programme to protect a considerable workforce that is central to the operation of numerous cultural organisations and without which many would be unable to reopen and survive.

Protecting volunteer roles

- 7.32 The application process for CRF Round 2 asked organisations to provide details of the number of volunteers that supported their delivery. A total of 304 organisations provided details who combined supported 23,916 volunteers, covering a range of roles (e.g. one off volunteering opportunities at large scale participation events and longer-term volunteers).
- 7.33 Whilst this data was not captured for CRF Round 1, using the average number of volunteers supported per organisation (79) by the total number of unique organisations in receipt of funding across both rounds, it is estimated that around 77,000 volunteer roles have been protected through the Fund.⁴⁹
- 7.34 Stakeholders emphasised the central role that volunteers play in the cultural sector, enabling organisations to deliver a range of activities and services to participants, users, and audiences across Wales. Many of these volunteers were unable to continue in their prior volunteer roles because of the pandemic.

⁴⁷ This figure does not include information from organisations in receipt of funding from ACW as this data was not captured in the application process. The actual number across the programme is likely to be higher.

⁴⁸ It should be noted that this figure is likely to include duplicates given that multiple grant recipients may have used the services of a single freelancer.

⁴⁹ This figure does not include information from arts organisations in receipt of funding from ACW as this data was not captured in the application process. The actual number across the programme is likely to be higher.

- 7.35 Survey results indicate that on average organisations had around 28 volunteers prior to the pandemic and this had fallen to 22 by the time of the survey. However, organisations were hopeful in their ability to rebuild their volunteer base.
- 7.36 More broadly, the process of safeguarding cultural organisations has also helped to protect these volunteer opportunities, which in turn provide a range of positive outcomes both for the volunteers themselves and the communities they support.
- 7.37 Volunteering is outlined as one of the indicators within well-being goal 5 'A Wales of cohesive communities' within the Well-being of Future Generations (Wales) Act 2015.⁵⁰ This demonstrates the direct contribution that the CRF has provided in supporting efforts to increase volunteering across Wales.
- 7.38 Funding has enabled organisations to maintain contact with their volunteer base to help to mitigate the loss of volunteer capacity which, for many organisations, would underpin their ability to reopen.
- 7.39 One of the key areas of uncertainty for organisations that are reliant on volunteers to support delivery is the extent to which their volunteers are confident and willing to return to their roles as the nation emerges from the pandemic. This is particularly uncertain for organisations that have older volunteer profiles who may have ongoing requirements to shield to due personal health reasons and/or care responsibilities.

'We had to make a policy decision to cut back on all of our volunteers; we felt that we could not expose them to risks of the pandemic by being onsite and coming into contact with the general public.' (CRF Round 1 & 2 Grant Recipient, Heritage sector)

'We are starting to restart our volunteer programmes. We had closed them down during lockdown as our volunteers tend to be in the at-risk group if they caught COVID-19. The fund allowed us to keep staff working which allowed us to start having small groups of volunteers back to do gardening activities.' (CRF Round 1 & 2 Grant Recipient, Heritage sector)

- 7.40 This potentially highlights a need to ascertain the ability of cultural organisations to retain and/or expand their volunteer base as public health restrictions are lifted.

⁵⁰ Welsh Government (2021)- 'Well-being of Wales: 2021. A report about the progress Wales is making towards improving well-being of current and future generations.'

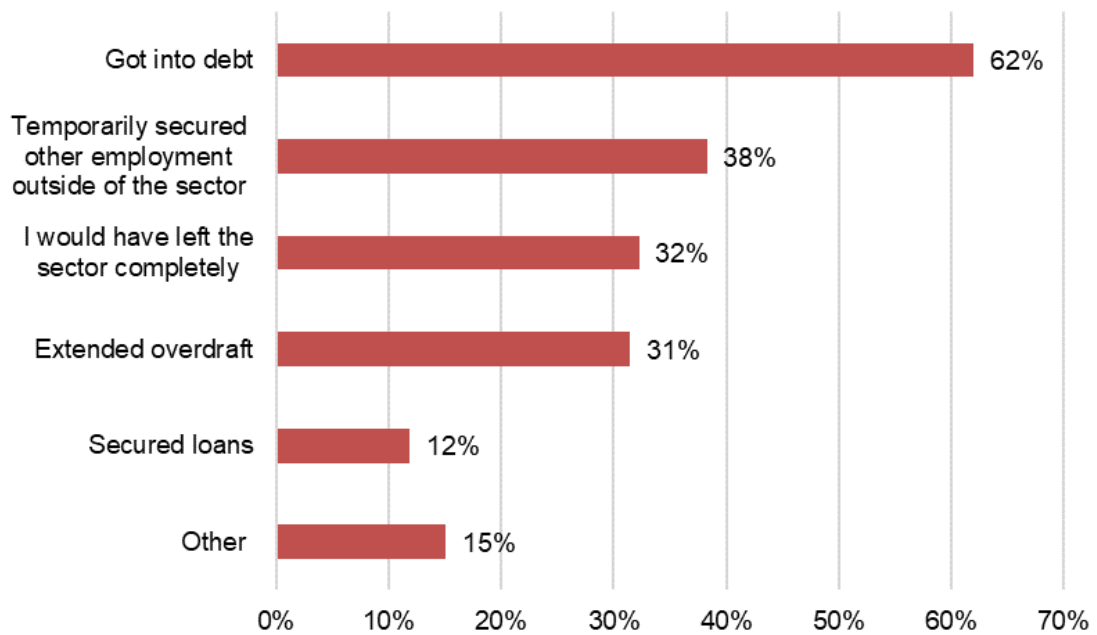
- 7.41 Consideration should be given to developing a campaign to promote volunteering roles within the cultural sector to assist the future operation and management of many cultural services and activities across Wales. This may include coordinated work with the Volunteering Wales platform.

Freelancers

- 7.42 The review conducted by the Centre for Cultural Value into cultural policy responses in the UK found emerging evidence that the crisis has exacerbated inequalities within both the cultural sector and wider society.⁵¹ The review draws attention to precarity for freelance artists and cultural workers, with the pandemic exposing complexities of how individuals generate income through portfolio working and short-term contracts.
- 7.43 Based on the monitoring data collated by local authorities, six in 10 freelancers also received support from the SEISS, however their feedback in in-depth interviews has highlighted the important contribution that the Freelancer Fund has made to protect freelancer roles. The most commonly envisaged impact in the absence of the Freelancer Fund was freelancers getting into debt (Figure 7.6 over page) reported by around six in 10 survey respondents. Around a third indicated that they would have had to extend their overdraft or for one in 10 secured loans.

⁵¹ Centre for Cultural Value (October 2020)- 'Policy review: Cultural policy responses to COVID-19 in the UK'. October 2020.

Figure 7.6 Envisaged impacts in the absence of the Freelancer Fund



Wavehill survey of freelancers 2021. N=397

- 7.44 In-depth interviews conducted with freelancers highlighted concerns and anxieties around their financial situation and fundamentally the impact that this would have on their creativity and productivity as well as their mental wellbeing.
- 7.45 Freelancers also referred to the detrimental impact that this would have on their family, highlighting the wider impacts related to household income, in particular for those with dependents.
- 7.46 Whilst many freelancers report to have taken on debt because of the pandemic, the Freelancer Fund has helped to reduce the level of debt and thus perceived viability of their future freelance practice beyond the pandemic.
- ‘It would have been a disaster and I would have had to borrow money off the family. I don’t think I would have been so creative, and my diversification may not have happened.’ (Wrexham. Design, Visual Arts and Crafts)
- ‘I would never have given up, but I would have been even more in debt that I am already. It might well have just tipped me over the edge.’ (Swansea. Film and TV, Theatre)
- 7.47 Around a third (32 per cent) of freelancers stating that they would have left the sector completely in the absence of funding with a similar proportion indicating that

they would have temporarily secured other employment outside of the sector (Figure 7.6 above)

- 7.48 In practice, only one in seven secured another job, providing an indication that the funding has helped to stem a flight away from the sector.

‘I would have seriously had to consider looking for a different type of work, I do rely on the money, would be a shame as I've been doing it for such a long time, and I do enjoy the work.’ (Swansea. Entertainment)

‘I would have taken the full-time job I was offered at Tesco and left the industry. Simple as that.’ (Rhondda Cynon Taf. Film and TV, Performing Arts, Radio, Theatre, Video)

- 7.49 Nearly all (99 per cent) of freelancers stated that the fund contributed to safeguarding their organisation, with six in 10 stated that this to a great extent but high levels of attribution in the Performing Arts, Dance, Visual Arts and Entertainment sectors.

- 7.50 Very few freelancers indicated that they would have been able to continue relatively unaffected in the absence of their grant funding award.

‘Effectively it saved my business and saved me from going into debt.’ (Rhondda Cynon Taf. Entertainment, Events, Music)

‘I was able to stay in my job because of the fund and I am so grateful. I was able to pay the mortgage and keep the house and put food on the table for my family until work started to come back. I have work for January, so things are starting.’ (Gwynedd. Design, Film and TV)

- 7.51 As 58 per cent of those who received support from the Freelancer Fund reported in their survey response that it was fundamental to the survival of their practice. This is equivalent to 2,194 FTE roles in the sector.⁵²

- 7.52 Some 32 per cent of freelancers would not have been able to operate throughout the pandemic without the support provided. Thirty-eight per cent suggest they would have sought temporary work outside of the sector and 32 per cent would have left the sector completely.

⁵² Based on 58 per cent of 3,783 unique fund recipients.

- 7.53 Whilst the CRF has helped to protect many freelancer roles across Wales, there remains a degree of uncertainty as to how many freelancers missed out on support given the first come nature of the funds' delivery.
- 7.54 The pandemic has highlighted the precarious and uncertain nature of freelancer work, whilst at the same time underlying the integral and essential role that freelancers play in the functioning of the cultural sector.
- 7.55 Moving forward, the Welsh Government and relevant sector bodies should consider options to raise the visibility of and support for creative freelancers as well as more fundamentally exploring the extent to which cultural organisations can be encouraged to shift their operating models to offer greater job security for the freelance sector.

Wider social and cultural impacts of the funds

- 7.56 The full value of the culture and arts sectors is seen through its wider impacts. The activity of these sectors makes an important, cross-cutting contributions to the goals of the Well-Being of Future Generations Act (2015).
- 7.57 Research has highlighted that cultural activities play a role in predicting if someone will report high well-being, as those who attend or participate in cultural activities are 23 per cent more likely to report high life satisfaction.⁵³ Cultural institutions and organisations also help to build social capital,⁵⁴ support volunteers,⁵⁵ act as education hubs and provide formal learning sessions,⁵⁶ and also support the criminal justice system.⁵⁷
- 7.58 Participatory arts⁵⁸ work in Wales is a vital part of the arts sector, the practice of which traditionally depends on face-to-face delivery. Whilst the shift of practice online through the pandemic has been a huge learning curve for the sector, many organisations and artists have found a whole range of approaches including online arts classes across artforms, delivering high quality doorstep creative packs, weekly

⁵³ Browne Gott, H. (2020)- 'Exploring the relationship between culture and well-being'. Cardiff: Welsh Government, 15/2020

⁵⁴ Wavehill (2021)-'The Contribution of Events to Scotland's Wellbeing'. A report for Visit Scotland.

⁵⁵ Taylor, P. et al (2015)- 'A review of the Social Impacts of Culture and Sport'.

⁵⁶ Welsh Government (2016)- 'Spotlite on Museums 2016'.

⁵⁷ Arts Council England (2018)- 'Arts and culture in health and wellbeing and in the criminal justice system: A summary of evidence'.

⁵⁸ Participatory arts work embraces all of the following: Community Arts; Youth Arts; Arts and Health; Arts and Older People and Socially Engaged Arts.

phone calls, and postcards to those who are socially isolating or to people with no access to the internet.

- 7.59 The participatory arts sector is by its nature inclusive and supportive, and many hours of time have been spent on support to get people online and keep them connected. Once established, these services have proved a lifeline to young people, older adults and to those who are shielding with long term health conditions.⁵⁹
- 7.60 Several stakeholders pointed to the fact that the Fund has made a direct contribution to enabling the creative and cultural sectors to support individuals and communities through the pandemic. This included the delivery of online activities, dissemination of creative resources and family packs and maintaining links with volunteers. Whilst these wider benefits are not the primary focus of this evaluation, feedback from stakeholders has highlighted their importance in supporting mental wellbeing and addressing isolation and loneliness affecting many people through the pandemic.
- ‘We have spoken to people in the community who told us some families didn’t have any books and that started a help your neighbour scheme... we linked up to a local food bank and donated books into their boxes’ (CRF Round 1 Grant Recipient, Creative sector)
- ‘The CRF played a big role in combating social isolation by allowing us to maintain engagement with vulnerable people.’ (CRF Round 1 Grant Recipient, Culture & Creative: Supply Chain Sector)
- 7.61 Many organisations reported that they had wanted to do more to engage and support communities through the pandemic but their capacity to do so was reduced due to a decline in their volunteer numbers and both staff and volunteers feeling uncomfortable with undertaking customer or public facing roles during the pandemic.
- 7.62 For some organisations, pivoting their delivery activities to support local communities through the pandemic has enabled them to develop new links and deepen their connections with local groups. Several organisations reported that these connections would be further cultivated as they resumed their core delivery,

⁵⁹ ArtWorks Cymru (2020)- ‘Covid-19 Impact on Participatory Arts in Wales’. Written evidence.

allowing them to strengthen their contribution to wider social and wellbeing objectives.

‘Our services to the community changed. We did a lot of zoom calls, telephone calls, to be able to keep in contact to help with mental health and wellbeing. We managed to get iPads to give out to the community in order to keep in touch. We started online activities too. What we have been doing is not an exaggeration, but we have been saving lives and a big part is mental health and wellbeing. We are delivering food, dealing with a lot of loss and grief in the community with those who have lost people who were not able to spend time with them at the end’. (CRF Round 2 Grant Recipient, Culture Sector)

- 7.63 One of the issues raised during stakeholder consultations was the important role that the Fund has played in protecting and safeguarding cultural assets, including key buildings and collections.
- 7.64 A report in August 2020 by the Culture, Welsh Language and Communications Committee⁶⁰ highlighted concerns around the pandemic shrinking the network of museums, libraries, and heritage sites across Wales, particularly those in rural areas which provide a vital boost to the local economy.
- 7.65 The loss of these assets would considerably diminish the cultural infrastructure across Wales and have a direct knock-on impact on the number of jobs roles (staff and freelancer roles) and volunteer roles supported by the sector. It would also reduce the level and range of cultural events and activities across Wales which have an integral role to play in society’s recovery from the pandemic.

‘Museums and galleries have buildings and collections to maintain. These costs are the same regardless of whether a building is open or closed. A loss of income through visitors, retail, café trading creates a cumulative deficit that may mean that they aren’t viable organisations. In which case, collections may be sold off privately and lost for the nation and future generations.’ (Stakeholder Interview, 2021)

- 7.66 As such, support through CRF has not only enabled many organisations to operate community-based support services throughout the pandemic but has also protected

⁶⁰ Welsh Parliament (2020)- ‘Impact of the COVID-19 outbreak on heritage, museums and archives.’ Culture, Welsh Language and Communications Committee. August 2020.

numerous community and cultural venues across Wales. In doing so, the Fund has ensured that the cultural sector can play a central role in enabling communities across Wales to recover from the pandemic and continue to contribute toward the goals of the Well-Being of Future Generations Act (2015), most notably for goal 6 ‘A Wales of vibrant culture and thriving Welsh language’.

Maintaining visitor, spectator and audience numbers

- 7.67 Analysis of data provided by organisations that host visitors in receipt funds through both rounds of CRF reveals large number of visitors, spectators and audiences engaged by these grant recipients. As self-reported in their BAS applications, combined this equates to just under 22 million visitors, spectators, or audience members. Should the 57 per cent of organisations for whom the CRF was fundamental in safeguarding have not survived there would have been an equivalent loss of 12 million visitors, spectators, or audience members.
- 7.68 While it is not possible to estimate what the total loss to Wales may have been, as individuals substitute other activities, it is likely to have reduced spending in Wales.
- 7.69 Looking specifically at visitors, in 2019 (most suitable data prior to the pandemic), domestic day visits in Wales numbered 87.3m generating expenditure of £3.5 billion or £39.40 per visit.⁶¹ Overnight domestic visits brought in £2 billion from 10.7 million visits or £187 per visit, and there were over 1 million international visits with an expenditure of £515 million or £503 per visit.
- 7.70 BAS analysis suggests that 84 per cent of visitors, spectators or audiences were domestic therefore using the domestic day visit spend rate of £39.40 applied to the equivalent loss of visitors, spectators or audience members for the organisations that would have closed, the expenditure protected could be £471 million. Even if half of these were to be substituted to other activities, without the CRF there could have been a reduction in expenditure of £235 million when the limitations of the pandemic subsided.
- 7.71 Given the protection afforded to many visitor organisations through CRF and the substantial contribution that the visitor economy provides to the national economy, future efforts should continue to be directed to rebuilding both domestic and

⁶¹ Wales Tourism Performance, Welsh Government, 2020.

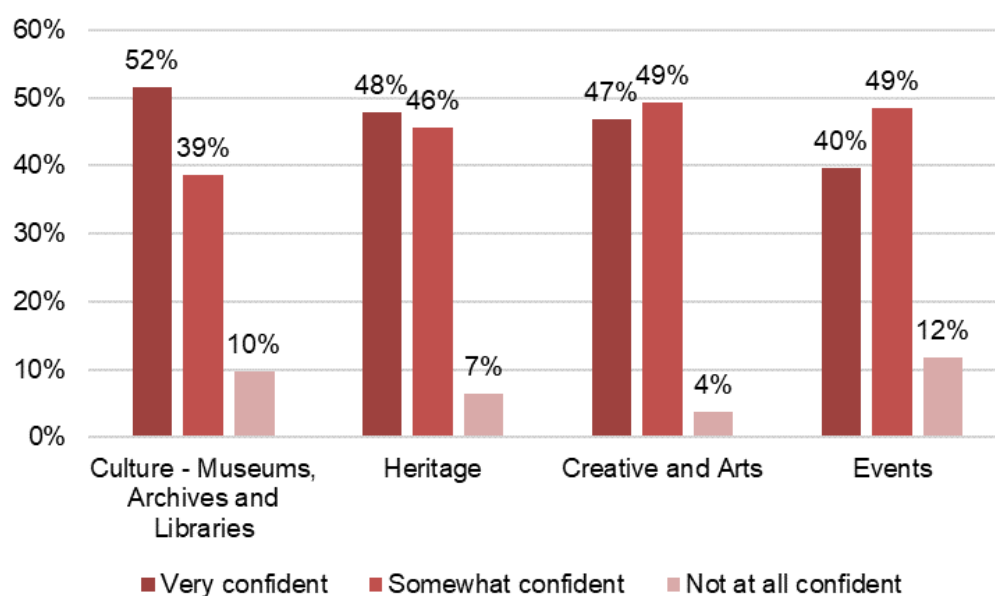
international visitor, spectator, and audience numbers as part of a coordinated tourism campaign led through Visit Wales.

Confidence and outlook

Cultural organisations

- 7.72 Just under half (47 per cent) of organisations responding to the survey of grant applicants conducted in 2021⁶² reported to be very confident that their organisation would survive the next 12 months and the same proportion stated they were somewhat confident.⁶³ This is a positive finding given the considerable uncertainty and sector vulnerability evident throughout the pandemic.
- 7.73 Organisations within the Events and Culture sectors were the least confident in their ability to survive the next 12 months (Figure 7.7), which highlights a differing pace of recovery influenced by restrictions limiting public gatherings and public health guidelines.

Figure 7.7 Confidence in ability to survive next 12 months (by sector)



Source: Wavehill survey of CRF grant recipients. N=148

- 7.74 This suggests further targeted support may be required to ensure that the gains achieved through CRF to date are not lost and organisations that have survived this

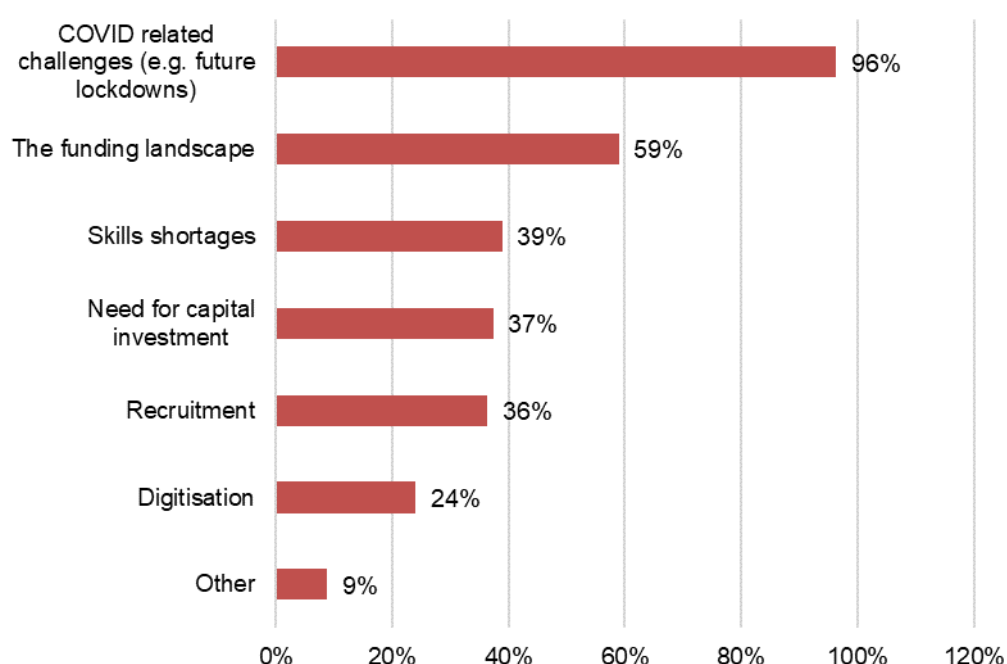
⁶² The survey was launched on the 29th of July 2021 and closed on the 1st of September 2021.

⁶³ Please note that the survey was launched on the 29th of July 2021 and closed on the 1st of September 2021. Levels of confidence at the preparation of this report not necessarily the same as those reported at the time the survey was live.

far are further protected up to a point where operating and/or trading levels return to pre-pandemic levels.

7.75 Interviews with cultural organisations highlights that the challenges related to any recurrence of public health restrictions are front and centre in the minds of grant recipients and influences their views on future outlook and confidence. However, it also highlights an opportunity for Welsh Government and sector bodies to support other areas including recruitment, skills development and capital investment (Figure 7.8).

Figure 7.8 Factors impacting on outlook and confidence for the next one to 3 years



Source: Wavehill interviews with CRF1 and 2 grant recipients. N=195

‘At the moment, not having a completely clear ‘that’s the end of COVID’, there are so many variations that people talk about and are potentially still around, that those are things I’m a little bit worried of, once I know we’re safe, I’ll probably be more confident to go ahead with other plans’. (CRF Round 2, Events Sector)

‘Brexit, international travel and how easy that will be and the general impact of COVID and business confidence generally’. (CRF Round 2, Heritage Sector)

7.76 Having a level of certainty around what ongoing support is available (including but not restricted to the third round of CRF announced in January 2022) will be a key driver for organisational confidence as Wales emerges from the pandemic. Keeping

lines of communication open between Welsh Government and sector bodies will help to build greater confidence, which in turn may unlock investment and encourage the cultural sector to grow back stronger.

Freelancer Fund

- 7.77 Most freelancers (91 per cent) responding to the online survey report to be confident that their practice would survive the next 12 months, with two in five reporting to be very confident. Freelancers from the Animation, Video and Film and TV sub-sectors were the most confident about their survival over the next 12 months, with those from Publishing, Radio, Music and Dance the least confident. This again highlights the differing pace of recovery across the cultural sector due to ongoing influences exerted by both the pandemic, consumer trends and financial outlook.
- 7.78 Analysis of confidence levels by profile characteristics suggests that younger freelancers (16-49 years) were more likely to be confident of their survival than older age groups (50+). Freelancers with any physical, sensory, learning, or mental health conditions, or illnesses that have lasted, or are expected to last, 12 months or more also reported to be less confident about their survival, with one in six reporting to be not confident at all, more than double the rate of freelancers who did not state any health or long-term conditions.
- 7.79 This highlights an area for Welsh Government and key sector bodies to explore in further detail given growing concerns that the pandemic has aggravated and accelerated existing inequalities and longer-term terms across the arts and cultural sector⁶⁴ which may disproportionately lead to individuals and communities already under-represented in the cultural workforce to leave cultural jobs.
- 7.80 Feedback from freelancers demonstrates the continuing pressure facing the sector. Whilst there is a sense that the worst effects of the pandemic are over, continued support is needed by many freelancers up until they are able to fully operate their practice.

‘Lots of needs, training needs, financial needs to keep delivering and support to network.’ (Dance, Entertainment, Events, Performing Arts, Theatre, Circus)

⁶⁴ Centre for Cultural Value (2022)- ‘Culture in Crisis: Impacts of COVID-19 on the UK cultural sector and where we go from here’.

7.81 A broader concern raised in the freelancer consultations was the contraction of the traditional community infrastructure within which many freelancers operate. This had the potential to reduce the overall size of the freelancer market with the closure of many venues and community spaces decreasing the demand for creative practitioners.

‘I think that's one of the things that's rather concerned me is how many galleries, community centres, theatres etc. won't reopen...exhibitions, concerts, theatre all those things if they disappear because of lack of funding, I think that's an unmeasurable loss.’ (Visual Arts and Crafts)

‘It might look like it's gone back to normality, especially if you just look at the large organisations, but for small businesses it's still a real struggle and it's all very uncertain.’ (Photography)

7.82 Welsh Government should concurrently consider the impact of the pandemic on the community venues and spaces across Wales and the implications for nature of work within the cultural freelancer community.

Future support needs

Cultural organisations

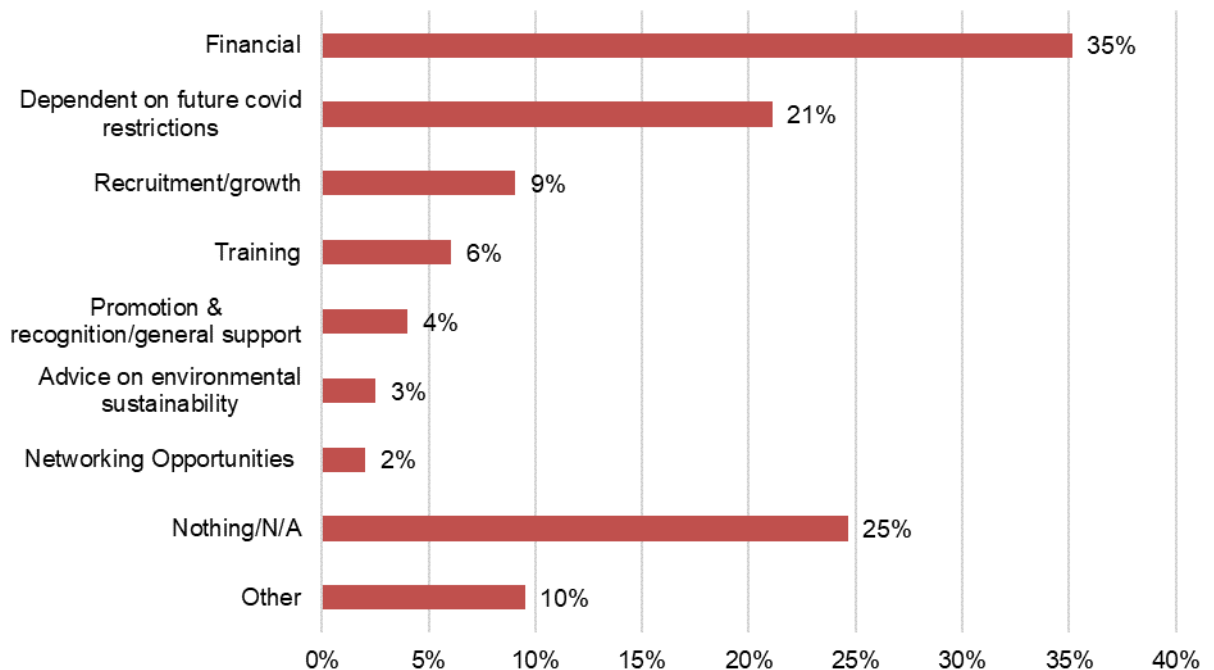
7.83 In-depth interviews with cultural organisations highlighted a range of envisaged future support needs to enable them to recover from the pandemic. The most common response was for further financial support, often in recognition of the lag between the lifting of public health restrictions and their ability to return to pre pandemic operating levels and associated income streams/trading (Figure 7.9 over page).

7.84 Pressure on operating costs linked to rising energy prices, higher supplier costs and general inflation was also referenced in feedback, at a point where many organisations felt less able to absorb these due to a reduction in income streams and levels of financial reserves.

7.85 Around one in five organisations indicated that their future support needs would be strongly influenced by any further public health restrictions associated with potential new variants of concern. In this regard, organisations expressed a desire for continued dialogue between sector bodies and the Welsh Government and, if

possible, reassurance that support will be forthcoming should any public health restrictions remain or return.

Figure 7.9 Future support needs of cultural organisations



Source: Wavehill interviews with CRF1 and 2 grant recipients. N=199

- 7.86 Recent research by the Centre for Cultural Value⁶⁵ draws attention to the fact that some sectors are recovering at a slower pace to others. The research cites the performing and visual arts and museums and galleries as having a slower return to ‘normal’.
- 7.87 Drawing on the most recent data from the Business Impact of COVID-19 survey (BICS)¹, covering the period May 2020 to August 2021, the research by the Centre for Cultural Value found that when furlough was coming to an end, performing arts had almost 30 per cent and museums and galleries had over 10 per cent of the workforce on furlough, even as pandemic restrictions were eased and ended, whereas other sectors had only two per cent of the workforce furloughed.
- 7.88 These aren’t the only sectors affected. Whilst the impact of the pandemic on film and television and publishing is less dramatic than for performing and visual arts

⁶⁵ Brook, O. O’Brien, D. & M. Taylor (2022)- ‘COVID, furlough and creative businesses.’ Centre for Cultural Value.

and museums, rates of furlough on average remained higher than the rest of the economy.

'I just hope the funding continues as the pandemics and COVID is far from over. I would like to see Round 3 as I didn't know there was a second round which I would definitely applied for had I have known about it. I get emails every now and again from the Government but these don't seem to have any content so I would like more specific information on Funding being sent out'. (CRF Round 1 Grant Recipient, Creative Sector)

'We need some ongoing support from Arts Council to get us back to position, that's sustainable. I think that is a mixture of additional short term funding support, not necessarily long term, but the short term will allow us the window of opportunity to rethink the organisation.' (CRF Round 1 and 2 Grant Recipient, Culture Sector)

- 7.89 Sector bodies such as the Museums Association have highlighted concerns around the rising number of redundancies in their sector.⁶⁶ This demonstrates that the impacts of the pandemic are still being felt some two years since restrictions to control the spread of the virus were introduced in March 2020. The question facing many organisations in the sector, as the furlough scheme has ended and as the cultural sector cautiously faces new uncertainties, is whether the jobs protected under the scheme will still be safe.⁶⁷
- 7.90 Conversely, around one in ten cultural organisations expressed a desire for support to aid their recruitment and growth as they recovered from the pandemic. One of the challenges raised by cultural organisations was their ability to recruit, with some struggling to fill vacancies and to attract people with the right skills.
- 7.91 Cultural organisations and sub-sectors that are more reliant on the use of freelancers, may be limited in their ability to recovery their revenue streams to pre-pandemic levels due to an inability recruit to freelance roles.

'I would like support and advice about taking on and recruiting new staff in a very competitive jobs market.' (CRF Round 1 Grant Recipient, Events Sector)

⁶⁶ [View Museums Association Redundancy Tracker.](#)

⁶⁷ Brook, O. O'Brien, D. & M. Taylor (2022)- 'Covid, furlough and creative businesses'. Centre for Cultural Value.

- 7.92 Another area raised by cultural organisations was a desire for a national campaign promoting the sector and encouraging people to return as visitors, audience members, participants and volunteers. Ensuring that the public felt safe to return, including vulnerable groups, was important in bringing confidence and income back into the sector.
- 7.93 Consumer and audience confidence to return to events, venues and cultural activities is also uncertain. Cultural organisations that are more reliant on overseas visitors may not see a recovery in their core visitor base for several years. Indoor venues and outdoor events are likely to be influenced by a range of factors including any future social distancing requirements associated with localised or national spikes in COVID-19 rates or a mandatory requirement for audiences and participants to provide evidence that they have been vaccinated, for example a COVID pass.
- 7.94 For many venue based cultural organisations the decision on how and when to reopen and commence programming or live events is strongly influenced by considerations around capacity and seat occupancy levels.
- ‘We need people through the doors, and I think most of the museums and galleries are in the same position; we need help to ensure people are confident to come back to visitor attractions’. (CRF Round 1 and 2 Grant Recipient, Culture: Museums, Archives and Libraries)
- 7.95 Feedback also identified a desire for more opportunities for the cultural sector to network, enabling them to explore potential collaborative working, share ideas, discuss best practice and generally to support efforts to build collective resilience across the sector.
- ‘Networking opportunities are few and far between so I would like to see more opportunities for this - I have found networking opportunities and networks in Wales generally are not very good - it would be good to develop some sector networks where we can share information and knowledge.’ (CRF Round 1 Grant Recipient, Creative Sector)
- 7.96 In recognition of the ongoing challenges facing many organisations, in January 2022 a £15.4 million fund was announced to support Wales’ arts and cultural sectors, as part of the third round of the Cultural Recovery Fund. The fund aims to

specifically support organisations impacted by the Alert Level 2 measures Ministers put in place in late December to help control the rapid spread of the omicron variant.⁶⁸ The previously announced winter stability fund⁶⁹ has been merged with this third round of CRF to ensure alignment with the funding support on offer. The funding also provides support for eligible businesses and organisations which have not received support via CRF to date and who meet the fund criteria.

- 7.97 The delivery of CRF3 will certainly help to protect many organisations that have received grant support in the first two rounds that are specifically affected by Alert Level 2 and in doing so contribute to their continued survival and recovery as Wales and the wider UK emerges from the pandemic during the spring of 2022.
- 7.98 More broadly, the pandemic has highlighted the need for both the UK and Welsh Governments to work with sector bodies to address the gaps and inequities evident in a range of support schemes administered in response to the pandemic. This needs to move beyond a governmental response to unprecedented events such as COVID-19, to more fundamentally recognising structural weaknesses within the sector and the central role that freelancers play in the creative and cultural sector in Wales and the importance of improving work security and support.
- 7.99 Stakeholders and cultural organisations highlighted uncertainty around future public sector funding and an anticipated reduction in local authority cultural budgets which in turn would place pressure on many museums, archives, and libraries. As such, whilst many of these have been supported through access to the Fund, their future sustainability was regarded as far from secure. Stakeholders highlighted a need for new models of delivery that could help to protect a range of cultural assets and services from future budget cuts.

⁶⁸ View [Welsh Government funding announcement](#).

⁶⁹ View [Cultural Winter Stability Fund](#) details.

8. Key lessons

8.0 This section of the report outlines the key lessons from the evaluation of the Cultural Recovery Fund.

8.1 Whilst a range of lessons were suggested by stakeholder interviewees, most notably and consistently however, lessons learned related to the relationship that had been developed between the sector and government or public bodies. Several stakeholders reflected that delivery of the fund has enabled Welsh Government to develop and deepen their understanding of the cultural sector. This has the potential to facilitate stronger dialogue and partnership working as part of continued efforts to support the sector's recovery from the pandemic.

'The delivery of the fund has helped to improve dialogue between Welsh Government and the cultural sector, and within the sector. This has potential to support innovation and new models of working moving forwards as part of the recovery phase from the pandemic.' (Stakeholder Interview, 2021)

8.2 A few interviewees also felt that the pandemic and the Fund had developed an appreciation not only of the connections within/between the sector and other sectors, but also between the sector and communities.

8.3 It is clear that the effects of the COVID-19 pandemic on the economy have been different across sectors. Stakeholders within some sectors spoke of the longer-term or ongoing impact upon planning and preparation that is integral to their work. Big events, for example, are reliant on long term planning and development periods. Uncertainty around future social distancing measures and public confidence to attend events continues to create major challenges.

8.4 Sectors reliant on physical spaces, such as libraries or museums, suggested that uncertainty over the confidence that the public to visit and attend indoor events will continue to impact their revenue into the future – possibly necessitating continued support or the spreading of the support over several years and potential advocacy or campaign activity at a national level. Other industries meanwhile foresee a shift in consumer trends and service use. As society moves into a recovery phase, several challenges are likely to linger.

'Longer term outcomes are related to consumer trends. Cinemas are investing in improving seating, sound, and the broader customer experience. There has also been an issue on the film slate with less films released for distribution in the first lockdown reopening which affects cinema revenue streams. This is getting better but still isn't back to pre-pandemic levels. It has become at the moment more reliant at the big blockbuster releases and less diversity with medium and smaller size released being held back for fear of losing income to the distributor (lower bookings).' (Stakeholder Interview, 2021)

- 8.5 As such, Welsh Government and sector bodies may need to consider the use of a more targeted policy and funding response to address these challenges for specific sectors as part of both a recovery and rebuild phase.

'Whilst CRF has been important in getting business this far, business that deliver heritage & cultural events for International Tourism Groups will continue to suffer for a long time to come and require bespoke support. Business cannot return before Spring 2022, with many predicting impacts for years to come.

Unfortunately, it is not 'job done.' (CRF1 grant recipient, 2021)

- 8.6 Feedback from stakeholders has highlighted a range of issues and challenges that are likely to influence the longer-term survivability of cultural organisations across Wales. This includes the loss of skills and experience as staff or freelancers move out of the sector to jobs that are perceived to be more secure or better paid.

- 8.7 Conversely, stakeholders highlighted challenges that a range of cultural organisations are currently facing in reopening due to an inability to fill posts or commission subcontractors (including within supply chains that support cultural services, events, and activities). This also extends to a need to support cultural organisations with rebuilding their volunteer base.

- 8.8 The partnership momentum and knowledge sharing evident in the design and delivery of the first two rounds of CRF can help to inform future policy response to support and sustain the sector. The pandemic has drawn attention to more deep-seated, structural issues within the cultural sector in Wales which need to be addressed to reduce its vulnerability to any future public health restrictions whilst also strengthening its already considerable contribution to the seven well-being goals outlined in the Well-being of Future Generations (Wales) Act 2015.

- 8.9 This includes supporting organisations within the cultural sector to become more resilient and develop new models of delivery including establishing new revenues streams to protect them from a challenging public sector funding environment in the future. The Cultural Contract and Freelancer Pledge have the potential to facilitating peer learning and further innovation across the sector to support resilience whilst also enabling cultural organisations and freelancers to strengthen their contribution to wider policy areas.

9. Conclusions

- 9.0 This report details the findings of the process and impact evaluation of the Cultural Recovery Fund (CRF) 2020-2021. What has been evident throughout the delivery of the evaluation is that the challenges resulting from the pandemic have evolved. As such the nature of support and the ability of organisations and freelancers to return to some semblance of normal operating conditions has been affected.
- 9.1 Consequently, whilst the evaluation has examined the implementation and immediate impacts of the grant support provided through CRF against key objectives around organisational survival and the safeguarding of jobs, challenges remain, and longer-term impacts are still unclear. For many grant recipients, CRF has provided a bridge to enable them to navigate the pandemic, yet the landscape into which many organisations and freelancers emerge remains very different to the one before the onset of COVID-19 in early 2020.
- 9.2 However, feedback from grant recipients has highlighted that CRF has helped and is helping with mitigating the negative impacts of the pandemic. Funding has protected financial reserves and income, enabled and facilitated innovation, developed and strengthened networks and collaboration and supported organisations and freelancers alike to retain confidence in their future prospects as Wales emerged from COVID-19.

Impact of the pandemic

- 9.3 One of many insidious characteristics of the COVID-19 pandemic has been the disproportionate impact on specific groups and sectors within the economy. Diverse activities from live performance and theatre productions to exhibitions and galleries, have seen their revenues fall dramatically as venues have closed their doors and gatherings have been prohibited to maintain social distancing.
- 9.4 The Welsh Government's announcement of the CRF in July 2020, and subsequent notification of a further round of funding in November 2021, has provided a total fund of £63.7 million to support cultural organisations, supply chains and freelancers across Wales. The unprecedented nature of the pandemic has meant that the usual processes and timeframes for developing and administering grant funding support have been unworkable, thus necessitated the design and delivery of new grant support mechanisms.

Fund design and delivery mechanisms

- 9.5 The level of work required to get CRF Round 1 up and running only a few months following the onset of the pandemic should not be underestimated and the speed of response across the three strands of the programme has been broadly recognised and welcomed across the sector.
- 9.6 The design and delivery of the Fund has been successful in achieving an appropriate balance between ensuring that funding has been provided at pace given the financial crisis facing many organisations whilst at the same time protecting the public purse. Achieving this, whilst also ensuring that the application form and process remains as light touch as possible, has necessitated a pragmatic approach by the Culture, Sport and Tourism Directorate and Arts Council of Wales.
- 9.7 Stakeholders broadly held the same view as applicants with the Fund generally thought to have been well designed, providing clarity and ease of access. The speed with which the funding had been delivered was felt to have been a key strength. Moreover, the engagement between the sector, public bodies and the Government has provided a further, unforeseen but positive outcome. This level of engagement and collaboration now has the potential to focus on longer-term and structural support needs within the cultural sector in Wales as the nation moves into a recovery and rebuilding phase.
- 9.8 Whilst stakeholders and applicants support the aspirations behind both the Cultural Contract and Freelancer Pledge, further guidance and support is needed to ensure that the aspirations and objectives behind their development are fully realised. Yet there are positive signs that already some cultural organisations in receipt of CRF funds have made changes to the business model to support inclusive growth, wellbeing, and environmental objectives. Freelancers also supported the concept of the Pledge with many commending the Welsh Government for driving this forward. This has the potential to generate a legacy both for the cultural sector and wider society across Wales.

Profile of grant applicants and recipients

- 9.9 Across CRF Round 1 and 2 the Fund has received a total of 2,013 applications of which 1,211 organisations have secured grant funding support. A total of £71.6 million has been awarded across CRF Rounds 1 and 2 from £100.5 million applied

for by cultural organisations. This exceeds the original fund budget of £63.7million. Reflecting the higher proportions of micro-businesses within the creative and cultural sectors in Wales, 90 per cent of approved applications across both rounds have been awarded to micro-businesses.

- 9.10 The administrative data from both rounds of the Freelancer Fund that was delivered by local authorities shows that some 3,783 unique freelancers have received support across the two rounds of the Freelancer Fund, with 995 receiving grant funding in each round. The total value of grants awarded has amounted to just over £10 million. For the majority of those in receipt of support, their freelancer practice was full time and as such they have had no ability to offset their loss of income from any salary or income obtained from non-cultural sector work. In other words, most freelancers were unable to rely on other sources of supporting themselves through the pandemic.

Grant recipients' response to the pandemic

- 9.11 Organisations have used their grant funding to pay bills, cover overheads and staff salaries. However just over half of recipient organisations also used the funding they received to revise their business model or services or invest in equipment. Feedback from freelancers has presented a similar picture with most using the funds to pay bills and overheads as well as providing a source of income.
- 9.12 Just over half of cultural organisations have developed new activities or services in response to the pandemic. This provides emerging evidence that the Fund has supported and enabled cultural organisations to innovate thus potentially developing new areas of business and revenue streams and improving resilience to manage future disruption and operational restriction associated with the pandemic. Four in 10 freelancers also reported that they adapted their activities and services in response to the pandemic with just over a quarter developing new activities or services.
- 9.13 The evaluation has found that CRF funding has enabled many organisations to direct investment in different areas of their business, including capital costs associated with the purchase of new equipment or maintenance of a fixed asset, as well as training and development costs for staff and volunteers. In combination, this has enabled the Fund to both support immediate survivability as well as longer time

viability for many cultural organisations. Many freelancers reported that the funding has provided them breathing space to reflect on their creative practice and identify future opportunities.

Impact of the CRF on grant recipients

- 9.14 For many organisations in the cultural sector their ability to return to pre-pandemic operating levels is yet unknown. As such the full impact of the Fund in safeguarding organisations and protecting jobs may not be fully apparent for some time following the lifting of restrictions and a return to pre-pandemic operating conditions.
- 9.15 Just over half of grant recipients indicated that they would have closed their organisation in the absence of CRF, with a wider impact on the sector's ability to support communities as part of the recovery phase from the pandemic. Just under half would have had to draw on their organisations' reserves, potentially placing them in a more precarious operating position, and around four in 10 would have made staff redundant.
- 9.16 Those in receipt of funding accounted for 4,777 FTEs, estimated at 0.27 per cent of total employment in Wales. Given that 57 per cent of respondents reported that the support received from the CRF was fundamental to their organisation's survival, this would equate to the safeguarding of 2,700 FTE jobs. The total number of contractual freelancer roles hosted by cultural organisations in receipt of funding support is 21,396. Combined this demonstrates the scale of impact that the fund has achieved in protecting jobs and livelihoods across the cultural sector in Wales.
- 9.17 The process of safeguarding cultural organisations has also helped to protect an estimated 77,000 volunteer roles, which in turn provide a range of positive outcomes both for the volunteers themselves and the communities they support.
- 9.18 Consultation with freelancers has found that around a third would have left the sector completely in the absence of funding support with a similar proportion indicating that they would have temporarily secured other employment outside of the sector. In practice, only one in seven secured another job, providing an indication that the funding has helped to stem a flight away from the sector.
- 9.19 Analysis of visitor organisations in receipt of funds through both rounds of the CRF reveals large number of visitors, spectators and audiences hosted by these grant recipients. Combined this equates to just under 22 million visitors, spectators, and

audience members. In the absence of the CRF it is feasible that many visitor organisations would not have survived with an equivalent loss of 12 million visitors, spectators, or audience members. This would have resulted in a reduction in expenditure of £235 million when the limitations of the pandemic subsided.

- 9.20 Finally, support through the CRF has enabled many organisations to operate community-based support services throughout the pandemic and has also protected numerous community and cultural venues across Wales. In doing so, the Fund has ensured that the cultural sector can play a central role in enabling communities across Wales to recover from the pandemic and continue to contribute toward the goals of the Well-Being of Future Generations Act (2015).
- 9.21 In recognition of the ongoing challenges facing many organisations, in January 2022 a £15.4 million fund was announced to support Wales' arts and cultural sectors, as part of the third round of the Cultural Recovery Fund. The delivery of this third round of support will certainly help to protect many organisations that have received grant support in the first two rounds and in doing so contribute to their continued survival and recovery as Wales and the wider UK emerges from the pandemic during the spring of 2022.

10. Policy considerations

- 10.0 A small number of policy considerations are presented below in response to the key findings from the evaluation of the Wales Cultural Recovery Fund 2020-2021.

Consideration 1

- 10.1 The partnership momentum and knowledge sharing evident in the design and delivery of the first two rounds of the CRF can help to inform future policy response to support and sustain the sector. The pandemic has drawn attention to more deep-seated, structural issues within the cultural sector in Wales which need to be addressed to reduce its vulnerability to any future public health restrictions whilst also strengthening its already considerable contribution to the seven well-being goals outlined in the Well-being of Future Generations (Wales) Act 2015. The Welsh Government and key sector bodies should ensure that the recovery from COVID-19 is considered and included in the development of the national Culture Strategy. This should focus on helping the sector to move from a survive to thrive stage.

Consideration 2

- 10.2 Given the absence of any reliable profile data on the freelancer workforce across the cultural sector in Wales it is not possible to determine whether any specific groups are underrepresented in the profile of grant recipients. Welsh Government and relevant sector bodies could consider undertaking work to map and profile the size and composition of the freelancer community across Wales as part of ongoing work to support and engage a workforce that is integral to the operation of many cultural organisations.

Consideration 3

- 10.3 Whilst stakeholders and applicants supported the aspirations behind both the Cultural Contract and Freelancer Pledge, feedback has highlighted a need for further guidance and support. Welsh Government and sector bodies could produce further resources and establish a community of practice to enable the potential of both the Contract and Pledge to be realised across Wales.

Consideration 4

- 10.4 The Welsh Government could consider investing in a dedicated campaign to promote volunteering roles within the cultural sector to assist the future operation and management of many cultural services and activities across Wales. This could include coordinated work with the Volunteering Wales platform.

Consideration 5

- 10.5 The Welsh Government and relevant sector bodies could consider options to raise the visibility of and support for creative freelancers as well as more fundamentally exploring the extent to which cultural organisations can be encouraged to shift their operating models to offer greater job security for the freelance sector.

Consideration 6

- 10.6 Given the protection afforded to many visitor organisations through the CRF and the substantial contribution that the visitor economy provides to the national economy, continuation of the coordinated tourism campaign led through Visit Wales will help to rebuild both domestic and international visitor numbers.

Consideration 7

- 10.7 The Welsh Government could assess the impact of the pandemic on the future viability and sustainability of community venues across Wales given their integral role as spaces for cultural organisations and freelancers to engage and support audiences, participants, and communities.

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Annex A: Research method

Monitoring Information

For the Wales Cultural Recovery Fund, monitoring information provided to the evaluators included Business Accounts System (BAS) Fund application records, ACW Fund application records provided through their Grants Management System and information on applications from individual sector leads in Welsh Government. Analysis of this data was undertaken to identify the number of records collected, the application process and what information was captured. Given the comprehensiveness of the data, the majority of the analysis was undertaken from a compilation of BAS records and ACW records where broadly consistent fields were used in both.

These records were used to compile a dataset of unique applicants based on the Business URN field in BAS records and organisation names in ACW records. Analysis of this data set was carried out to understand trends in the 2,103 organisations that applied and to determine the impact the fund has had on the sector for the 1,211 businesses.

For the Freelancer Fund Round 2, 21 individual spreadsheets were provided to the evaluation team from the local authorities that distributed the funds. Previous analysis of Freelancer Fund 1 data was provided by Welsh Government to the evaluation team. These were collated and cleaned in order provide analysis on the 3,425 freelancers supported.

CRF Applicant Survey

Respondents self-selected their sectors and in the survey were able to select multiple sectors to reflect their operations. Analysis was conducted using these multi select categories, but organisations were subsequently coded to a single sector to assess sample representativeness against Monitoring Information.

CRF Applicant Survey – Respondent sectors

	N	Survey	MI
Culture - Museums, Archives and Libraries	15	10%	33%
Heritage	33	21%	16%
Events	34	22%	24%
Creative and Arts	75	48%	26%
Culture and Creative : Supply Chain	2	1%	0.48%
Total	157		

Responses to the data were analysed and broken down by sector to understand any differing impacts.

Freelancer Fund Recipient Survey

Respondents were able to select multiple subsectors to capture their areas of work and their selections are presented below.

Freelancer Fund Recipient Survey – Respondent sectors

Sector	N	%
Music	157	36%
Performing Arts	107	25%
Entertainment	104	24%
Theatre	100	23%
Film and TV	97	22%
Events	90	21%
Visual Arts and Crafts	75	17%
Photography	49	11%
Video	49	11%
Design	44	10%
Dance	30	7%
Museum, Libraries, Galleries and Heritage	24	6%
Publishing	25	6%
Radio	23	5%
Animation	7	2%
Other	37	9%
	434	

CRF Applicant In-depth interviews

Qualitative data was analysed and coded to draw out key themes from the interviews.

Contact records provided to the evaluation contained information on respondents' chosen sector at application and this information was attached to their survey responses.

CRF Applicant In-depth interviews – Respondent sectors

Sector	N	%
Events	48	23%
Creative	49	23%
Culture	53	25%
Heritage	36	17%
Culture and Creative : Supply Chain	24	11%
Total	210	

Freelancer Fund In-depth interviews

Qualitative data was analysed and coded to draw out key themes from the interviews.

Contacts for this survey were selected from responses to the Freelancer Fund Recipient Survey which included their self-selected sectors of work.

Freelancer Fund In-depth interviews – Respondent sectors

Sector	N	%
Music	38	39%
Film and TV	23	24%
Events	17	18%
Theatre	17	18%
Visual Arts and Crafts	16	16%
Performing Arts	16	16%
Design	12	12%
Photography	11	11%
Publishing	9	9%
Radio	8	8%
Dance	7	7%
Museum, Libraries, Galleries and Heritage	5	5%
Entertainment	2	2%
Animation	2	2%
Circus, Music and Storytelling	1	1%
Curator / Festival director	1	1%
Total	97	

Annex B: Stakeholder Discussion Guide



Evaluation of the Cultural Recovery Fund 2020 – 21: interviews with stakeholders

[Mae fersiwn Gymraeg o'r ddogfen hon ar gael | This document is available in Welsh]

The Welsh Government has commissioned Wavehill to undertake an independent evaluation of the Cultural Recovery Fund 2020 - 21. The revenue fund is intended to provide essential support to organisations in the sector, including music venues, heritage sites, museums, archives, libraries, events and their technical support suppliers, and independent cinemas who have all seen a dramatic loss of revenue due to the pandemic. The aim is to help protect sustainable organisations and as many jobs in the culture sector as possible in order to ensure the sector survives the COVID-19 crisis and remains vibrant, viable and sustainable in 2021 and beyond.

The evaluation will analyse the impact of the funding on those supported organisations and individuals and assess the extent to which the core aim of the Programme, to improve business survivability and protect jobs, has been met. In addition, the evaluation will examine whether wider, unanticipated impacts are identified.

As part of this evaluation Wavehill will be gathering information through interviews with stakeholders.

The Welsh Government is the data controller for the research. However, Wavehill will delete any personal data provided through the interviews, and anonymise the raw data, before it is shared with the Welsh Government.

The information collected during the project will be included in a report published on the Welsh Government website.

Your Participation in this research is completely voluntary. However, your views and experiences are important in order to help inform Welsh Government policies.

The contact for this research at Wavehill is Andy Parkinson

E-mail address: andy.parkinson@wavehill.com

Telephone number: 01545 571711

For further details please read the Privacy Notice by clicking [here](#).

Questions for discussion

Introduction

1. As an introduction, please outline your role and the nature of your involvement with the Cultural Recovery Fund or the cultural sector in Wales more widely?

Rationale, Objectives and Programme Design

2. What challenges has the COVID-19 pandemic generated for the cultural sector?
3. In your view, what is the rationale for the Fund? What is it trying to achieve?
4. In terms of the wider policy context, how does the Fund align with wider COVID-19 grant funding support? Is there any duplication?
5. What is your understanding of the Cultural Contract and/or the Freelancer Pledge? How widely is this understood across the cultural sector?
6. What, in your view, what are the strengths and weaknesses of the Fund *as designed*?
 - a. *The definition of culture/eligibility criteria*
 - b. *The level of funding available*
 - c. *Grant funding conditions*
7. Are you aware of any cultural organisations or sectors that have failed to be supported through the Fund (i.e. by way of not being eligible or their funding needs not addressed)?

Delivery and impact

8. How well do you feel the Fund has been promoted?
9. What are your views on the level of guidance provided to applicants?
10. What are your overall perceptions on the effectiveness of the Fund in supporting and sustaining the sector due to the ongoing challenges resulting from the COVID-19 pandemic?
11. Which aspects of the delivery of the Fund have worked well?
12. Could anything have been improved?
13. What would have been the impact on the pandemic on your sector in Wales in the absence of the Fund? What are the issues that your sector has faced/is facing?

Barriers, Enablers, Risks and Opportunities

14. Are there any factors within your sector which might have affected the delivery of the Fund and/or affect its outcomes?
15. Are there any external factors which might have affected its delivery and outcomes?
16. What do you see as the ongoing or future support needs for the cultural sector?

Evaluation

17. What do you see as the key lessons from the delivery of the Fund to date?
18. Do you have any suggestions or recommendations for the design of future support funds?
19. Is there anything that has not been covered in the interview that you think is important for us to consider at this initial stage of the evaluation?

Annex C: List of stakeholder organisations consulted

Archives and Records Council Wales
Arts Council of Wales
Bectu
Book Council for Wales
Cadw
Carmarthenshire County Council
Creative Wales
Cultural Freelancers Wales
Culture, Sport, and Tourism Directorate in Welsh Government
Denbighshire County Council
Events Wales Industry Advisory Group
Federation of Museums and Art Galleries of Wales
Ffilm Cymru
Film Hub Wales
Glamorgan Archives
Rhondda Cynon Taf County Borough Council
Society of Chief Librarians Wales
UK Cinema Association
Visit Wales

Annex D: CRF Applicant Survey

Cultural Recovery Fund (Round 1) Survey

Wavehill are undertaking an evaluation of the Cultural Recovery Fund on behalf of the Welsh Government. The information gathered will be used to help Welsh Government and their partners to assess the impact of the Fund and provide evidence to help improve future delivery.

As an organisation who applied for support from the Cultural Recovery Fund - Round 1, we would appreciate you providing responses on your experiences of the application process, whether you applied for other funding support and how you used the funding.

This survey is separate to your completion report and is primarily about your experiences before and during applying for the Cultural Recovery Fund. There will also be a separate qualitative survey from Wavehill which will focus on your experiences post-completion.

The survey will take around 10-15 minutes to complete, depending on your answers.

For more information on the survey and how the data will be used, please see our privacy notice at: <https://www.wavehill.com/culturalrecoveryfundgrantapplicants>

Are you happy to continue with the survey? Please note you can stop completing the questionnaire at any time if you decide you do not want to continue.

- ☐ Yes
 - ☐ No
-

Q1 Please can you provide us with the following information:

Please leave any fields blank that are not applicable

Organisation name

Local Authority area

Postcode

VAT number

Company Registration Number

Charity Number

Q2 Which of the following sectors does your organisation operate in?

Tick all that apply

- ☐ Culture – Museums, Archives and Libraries
- ☐ Creative and Arts
- ☐ Events
- ☐ Heritage

Q2a Which of the following sub sectors does your organisation operate in?

Tick all that apply

- ☐ Comedy venues
- ☐ Independent Cinemas
- ☐ Music Venues
- ☐ Publishing organisations
- ☐ Music recording and rehearsal studios
- ☐ Supplier to Events
- ☐ Community Library
- ☐ Independent Accredited Archive or working towards accredited status
- ☐ Independent Accredited Museum or working towards accredited status
- ☐ Independent Library
- ☐ Events - Business
- ☐ Events - Cultural
- ☐ Events - Sporting
- ☐ Archaeological organisations
- ☐ Heritage attractions
- ☐ Historic sites or buildings usually open to the public for 28 days or more
- ☐ Organisations delivering participatory heritage activities
- ☐ Organisations specialising in the conservation of historic assets
- ☐ Theatres, arts centres and concert halls
- ☐ Galleries
- ☐ Organisations producing and touring arts activity
- ☐ Organisations providing participatory arts activity

Q3 How many rounds of funding did you apply for from the Cultural Recovery Fund?

- Applied for _____
- Successfully received _____

If you have successfully received funding from the Cultural Recovery Fund

Q3a How much funding did you receive from the Cultural Recovery Fund?

If you do not know the split please put the total amount into the box for Round 1

- Round1 _____
- Other rounds _____

Q4 What is the current status of your organisation?

- Fully operating
- Partially operating (some staff on furlough, reduced services etc.)
- Currently dormant (all or the majority of staff on furlough and no services or activities are being delivered)
- Closed

If your organisation is closed

Q4a When did the organisation close?

- Month _____
- Year _____

Ask to all

Q5 What actions were taken by your organisation in response to the pandemic?

Tick all that apply

- ☐ Furloughed staff
- ☐ Made redundancies
- ☐ Reduced working hours
- ☐ Left existing premises
- ☐ Reduced activities or services
- ☐ Adapted activities and services
- ☐ Developed new activities or services (anything novel that was introduced)
- ☐ Other

If What actions were taken by your organisation in response to the pandemic? Tick all that apply = Other

Q5a Please tell us what other actions were taken by your organisation in response to the pandemic.

If What actions were taken by your organisation in response to the pandemic? Tick all that apply = Adapted activities and services

Q5b Please explain how you adapted your services.

If What actions were taken by your organisation in response to the pandemic? Tick all that apply = Developed new activities or services (anything novel that was introduced)

Q5c Please tell us about those activities / service you developed

We are now going to ask some questions on your application for the Cultural Recovery Fund.

Ask all

Q6 How did you become aware of the Cultural Recovery Fund?

- ☐ Word of mouth
- ☐ Advertising online
- ☐ Advertising in print
- ☐ Informed via a membership group or affiliation
- ☐ Direct contact
- ☐ From my Local Authority
- ☐ Don't recall
- ☐ Other

If How did you become aware of the Cultural Recovery Fund? = Other

Q6a Please tell us how else you became aware of the Cultural Recovery Fund

Q7 Please score the following processes from the application on a scale from 1 to 5 where 5 is strongly agree and 1 strongly disagree.

	1 - strongly disagree	2	3	4	5 - strongly agree	N/A
The Cultural Recovery Fund was well promoted, and we were made aware of it promptly.						
The eligibility checker was clear and helpful						
The application form was clear and easy to complete.						
The eligibility criteria was clear and easy to understand.						
The evidence requirements were straightforward and simple to provide.						
The decision making for funding was quick.						
<i>If your application was unsuccessful</i> The reason the application was not successful was clear and understandable.						
<i>If you were successful in your application</i> The funding was promptly transferred.						

Q8 What improvements, if any, would you make to the application process?

If your application was unsuccessful

Q9 When you applied for the funding, what were you intending to use the Cultural Recovery Funding for?

Please tick all that apply

- ☐ Retain staff
- ☐ Retain premises
- ☐ Train staff
- ☐ Invest in new equipment
- ☐ Develop new services, products or offer
- ☐ Improve premises
- ☐ Something else

If What were you intending to use the Cultural Recovery Funding for? = Something else

Q10 Please tell us what else you were intending to use the funding for.

Q33 Have you applied to any of the following COVID-19 Relief funds?

Tick all that apply

- ☐ Business Rates Grant (25k)
- ☐ Business Rates Grant (10k)
- ☐ Coronavirus Job Retention Scheme
- ☐ Business Interruption Loan Scheme
- ☐ Statutory Sick Pay Support
- ☐ Development Bank for Wales
- ☐ Support for the Self-Employed
- ☐ Economic Resilience Funds
- ☐ WCVA grants
- ☐ National Heritage Lottery Fund grants
- ☐ Moondance Foundation grant
- ☐ Emergency Digital Development Fund
- ☐ Emergency TV Development Fund
- ☐ Grassroots Music Relief Fund
- ☐ Other
- ☐ None of the above

If Have you applied to any of the following COVID-19 Relief funds? Tick all that apply = Other

Q34 Please tell us which other fund(s) you applied to.

If you applied to any of the COVID-19 Relief funds

Q36 As an estimate, how much funding did you receive from these funds?

Please do not include funding received from the Cultural Recovery Fund

Q37 Have you also applied for any of the following?

Tick all that apply

- ☐ Bank overdraft facility
- ☐ Commercial mortgage
- ☐ Credit cards
- ☐ Equity Finance e.g. where a share of the business is sold to investors or other people
- ☐ Factoring/invoice discounting
- ☐ Leasing or hire purchase
- ☐ Loan from a bank, building society or other financial institution
- ☐ Loan from family/friend
- ☐ Loan from business partner/directors/owner
- ☐ Loan from a peer-to-peer platform
- ☐ Other finance
- ☐ None of these

If Have you also applied for any of the following? = Other finance

Q39 Please tell us which other finance you applied for.

If your funding application was successful

Q40 What did you use the Cultural Recovery Funding for?

Please tick all that apply

- ☐ Paying bills/overheads
- ☐ Staff salaries
- ☐ Revising organisation business model, activities or services
- ☐ Training staff
- ☐ Investing in equipment
- ☐ Investing in premises
- ☐ Something else

*If What did you use the Cultural Recovery Funding for? Please tick all that apply =
Something else*

Q41 Please tell us what else you used the funding for.

Display This Question:

*If If How many rounds of funding did you apply for from the Cultural Recovery Fund?
Text Response Is Greater Than 0*

Q64 Is there anything else you would have liked to use the Cultural Recovery Funding for?

Display This Question:

*If How many rounds of funding did you apply for from the Cultural Recovery Fund?
Text Response Is Greater Than 0*

And If

What is the current status of your organisation? = Fully operating

Or What is the current status of your organisation? = Partially operating (some staff on furlough, reduced services etc.)

Or What is the current status of your organisation? = Currently dormant (all or the majority of staff on furlough and no services or activities are being delivered)

Did the Cultural Recovery Funding received enable you to continue to operate throughout the pandemic?

- The funding helped us to operate full services throughout the pandemic
- The funding helped us to operate partial services throughout the pandemic
- No, the funding supported us whilst we were closed

Display This Question:

If Did the Cultural Recovery Funding received enable you to continue to operate throughout the pande... = The funding helped us to operate full services throughout the pandemic

Or Did the Cultural Recovery Funding received enable you to continue to operate throughout the pande... = The funding helped us to operate partial services throughout the pandemic

Q37 If you had not received the funds, would you have been able to operate during the pandemic?

- We would not have been able to operate throughout the pandemic
- It is unlikely that we would have been able to operate throughout the pandemic
- We would have been able to continue operating throughout the pandemic, but to a lesser extent
- We would have been able to continue operating at this level without Cultural Recovery Funding

Display This Question:

*If If How many rounds of funding did you apply for from the Cultural Recovery Fund?
Text Response Is Greater Than 0*

Q39 If you had not received the funds, what impacts might you have expected?

Tick all that apply

- ☐ Drawn on the organisation's reserves
- ☐ Moved premises
- ☐ Put off investments
- ☐ Staff redundancies
- ☐ Closure of organisation
- ☐ Other

Display This Question:

If If you had not received the funds, what impacts might you have expected? Tick all that apply = Other

Q65 What other impacts might you have expected?

Display This Question:

*If If How many rounds of funding did you apply for from the Cultural Recovery Fund?
Text Response Is Greater Than 0*

And If

*What is the current status of your organisation? = Fully operating
Or What is the current status of your organisation? = Partially operating (some staff on furlough, reduced services etc.)
Or What is the current status of your organisation? = Currently dormant (all or the majority of staff on furlough and no services or activities are being delivered)*

Q43 To what extent do you feel the Cultural Recovery Fund safeguarded your organisation?

Tick all that apply

- ☐ To a great extent, it was fundamental to my organisation's survival
- ☐ To some extent, it was one of several support mechanisms that helped the organisation survive
- ☐ To a lesser extent, it contributed a small amount to my organisation's survival
- ☐ To no extent
- ☐ Don't know

Q44 How many paid **full time** (30 hours per week or more) employees did your organisation have **pre-COVID-19 pandemic (March 2020)**?

Display This Question:

If What is the current status of your organisation? != Closed

Q45 How many paid **full time** (30 hours per week or more) employees does your organisation have **currently**?

Q47 How many paid **part-time** (<30 hours per week) employees did your organisation have **pre-COVID-19 pandemic (March 2020)** and what hours did they approximately work?

	Number of part time employees	Hours worked per week

Display This Question:

If What is the current status of your organisation? != Closed

And And How many paid full time (30 hours per week or more) employees does your organisation have currently? Text Response Is Displayed

Q46 How many paid **part-time** (<30 hours per week) employees does your organisation have **currently** and what hours do they approximately work?

Q48 How many **volunteers** did your organisation have **pre-COVID-19 pandemic (March 2020)**?

Display This Question:

If What is the current status of your organisation? != Closed

Q49 How many **volunteers** does your organisation have **currently**?

Q50 Do you use any paid freelancers or contractors to support your activities?

- ☐ Yes
 - ☐ No
-

Display This Question:

If Do you use any paid freelancers or contractors to support your activities? = Yes

Q51 How many **freelancers / contractors** did your organisation use **pre-COVID-19 pandemic (March 2020)**? In a typical year approximately how many days were freelancers contracted for?

	Number of freelancers / contractors	Days contracted for

Display This Question:

If Do you use any paid freelancers or contractors to support your activities? = Yes

Q52 How many **freelancers/contractors** does your organisation use **currently**?

Approximately how many days do you think your freelancers will be contracted for over the course of the year?

	Number of freelancers / contractors	Days contracted for

Display This Question:

If What is the current status of your organisation? != Closed

Q53 How confident are you that your organisation will survive the next 12 months?

- ☐ Very confident
- ☐ Somewhat confident
- ☐ Not at all confident

Display This Question:

If What actions were taken by your organisation in response to the pandemic? Tick all that apply = Adapted activities and services

Or What did you use the Cultural Recovery Funding for? Please tick all that apply = Revising organisation business model, activities or services
And If

What is the current status of your organisation? != Closed

Q54 Do you anticipate the changes your organisation made to remain in place over the next 12 months or will your services and approach return to pre-pandemic activity?

- ☐ We will keep some of the changes implemented
- ☐ We will keep all of the changes implemented
- ☐ None of the changes implemented will be kept and we will return to our pre-pandemic approach

Q66 Please could you tell us the months that your financial year runs?

	From	To
	▼ January (1 ... December (12)	▼ January (1 ... December (12)

Q57 What was your **turnover** in your last financial year **prior** to the COVID-19 pandemic (March 2020)?

If you would prefer to answer as a banded figure, please use the bands below

Display This Question:

If What was your turnover in your last financial year prior to the COVID-19 pandemic (March 2020)? If you would prefer to answer as a banded figure, please use the bands below Text Response Is Empty

Q59 Bandings

- ☐ Up to £10,000
- ☐ £10,001 to £25,000
- ☐ £25,001 to £50,000
- ☐ £50,001 to £75,000
- ☐ £75,001 to £100,000
- ☐ £100,001 to £150,000
- ☐ £150,001 to £200,000
- ☐ £200,001 to £250,000
- ☐ £250,001 to £350,000
- ☐ £350,001 to £500,000
- ☐ £501,000 to £1m
- ☐ £1.01m to £2.5m
- ☐ £2.51m to £5m
- ☐ £5.01m to £10m
- ☐ More than £10m
- ☐ Rather not say
- ☐ Don't know

Display This Question:

If What is the current status of your organisation? != Closed

Q64 What was your **turnover** in your latest financial year **since** the beginning of the COVID-19 pandemic (March 2020 to present)?

If you would prefer to answer as a banded figure, please use the bands below

Display This Question:

If What was your turnover in your latest financial year since the beginning of the COVID-19 pandemic (March 2020 to present)? If you would prefer to answer as a banded figure, please use the ... Text Response Is Empty

And If What was your turnover in your latest financial year since the beginning of the COVID-19 pandemic (March 2020 to present)? If you would prefer to answer as a banded figure, please use the ... Text Response Is Displayed

Q65 Bandings

- ☐ Up to £10,000
- ☐ £10,001 to £25,000
- ☐ £25,001 to £50,000
- ☐ £50,001 to £75,000
- ☐ £75,001 to £100,000
- ☐ £100,001 to £150,000
- ☐ £150,001 to £200,000
- ☐ £200,001 to £250,000
- ☐ £250,001 to £350,000
- ☐ £350,001 to £500,000
- ☐ £501,000 to £1m
- ☐ £1.01m to £2.5m
- ☐ £2.51m to £5m
- ☐ £5.01m to £10m
- ☐ More than £10m
- ☐ Rather not say
- ☐ Don't know

Display This Question:

If What is the current status of your organisation? != Closed

Q66 What do you expect your turnover to be in your **next** financial year?

If you would prefer to answer as a banded figure, please use the bands below

Display This Question:

If If What do you expect your turnover to be in your next financial year? If you would prefer to answer... Text Response Is Empty

And If

If What do you expect your turnover to be in your next financial year? If you would prefer to answer... Text Response Is Displayed

Q67 Bandings

- ☐ Up to £10,000
- ☐ £10,001 to £25,000
- ☐ £25,001 to £50,000
- ☐ £50,001 to £75,000
- ☐ £75,001 to £100,000
- ☐ £100,001 to £150,000
- ☐ £150,001 to £200,000
- ☐ £200,001 to £250,000
- ☐ £250,001 to £350,000
- ☐ £350,001 to £500,000
- ☐ £501,000 to £1m
- ☐ £1.01m to £2.5m
- ☐ £2.51m to £5m
- ☐ £5.01m to £10m
- ☐ More than £10m
- ☐ Rather not say
- ☐ Don't know

Q68 What was your total **annual salary cost** in the financial year **prior to the COVID-19 pandemic**?

If you would prefer to answer as a banded figure, please use the bands below

Display This Question:

If What was your total annual salary cost in the financial year prior to the COVID-19 pandemic? If you would prefer to answer as a banded figure, please use the bands below
Text Response Is Empty

Q69 Bandings

- ☐ Up to £10,000
 - ☐ £10,001 to £25,000
 - ☐ £25,001 to £50,000
 - ☐ £50,001 to £75,000
 - ☐ £75,001 to £100,000
 - ☐ £100,001 to £150,000
 - ☐ £150,001 to £200,000
 - ☐ £200,001 to £250,000
 - ☐ £250,001 to £350,000
 - ☐ £350,001 to £500,000
 - ☐ £501,000 to £1m
 - ☐ £1.01m to £2.5m
 - ☐ £2.51m to £5m
 - ☐ £5.01m to £10m
 - ☐ More than £10m
 - ☐ Rather not say
 - ☐ Don't know
-

Display This Question:

If What is the current status of your organisation? != Closed

Q70 What is your **current** total **annual salary cost** (including any amount made up in furlough payments)?

If you would prefer to answer as a banded figure, please use the bands below

Display This Question:

If If What is your current total annual salary cost (including any amount made up in furlough payments)?If you would prefer to answer as a banded figure, please use the bands below Text Response Is Empty

And And What is your current total annual salary cost (including any amount made up in furlough payments)?If you would prefer to answer as a banded figure, please use the bands below Text Response Is Displayed

Q71 Bandings

- ☐ Up to £10,000
- ☐ £10,001 to £25,000
- ☐ £25,001 to £50,000
- ☐ £50,001 to £75,000
- ☐ £75,001 to £100,000
- ☐ £100,001 to £150,000
- ☐ £150,001 to £200,000
- ☐ £200,001 to £250,000
- ☐ £250,001 to £350,000
- ☐ £350,001 to £500,000
- ☐ £501,000 to £1m
- ☐ £1.01m to £2.5m
- ☐ £2.51m to £5m
- ☐ £5.01m to £10m
- ☐ More than £10m
- ☐ Rather not say
- ☐ Don't know

Q67 Is there anything you would like to tell us about your experience with the CRF that has not been covered by the questions above?

Annex E: Freelancer Fund Recipient Survey

Cultural Freelancer Fund Survey (Rounds 1 and 2)

Wavehill are undertaking an evaluation of the Freelancer Fund on behalf of the Welsh Government. The information gathered will be used to help Welsh Government and their partners to assess the impact of the Fund and provide evidence to help improve the future delivery.

As a freelance professional who has received support from the Freelancer Fund, we would appreciate you providing responses on your perceptions of the application process, whether you applied for other funding support and how you used the funding.

The survey will take around 10 minutes to complete, depending on your answers. Participation in the survey is voluntary. You can decide to not take part before or during the survey and can choose to not answer certain questions if you prefer.

For more information on the survey and how the data will be used, please see our privacy notice at: <https://www.wavehill.com/culturalrecoveryfundgrantapplicants>

Q1 Are you happy to continue with the survey? *Please note you can stop completing the questionnaire at any time if you decide you do not want to continue.*

- ☐ Yes
- ☐ No

Display This Question:

If Are you happy to continue with the survey? Please note you can stop completing the questionnaire... =
No

Thank you for your time. To exit this survey, you can close this tab in your browser.

Q2 Please can you tell us which rounds of funding you have applied for:

Tick all that apply

- ☐ Round 1 - October 2020 to March 2021
- ☐ Direct top up payment - February 2021 to March 2021
- ☐ Round 2 - April 2021 to September 2021
- ☐ Not sure

Display This Question:

If Select more than one option at Q2

Q3 How many times have you successfully received funding from the Freelancer Fund?

To enable the research team to analyse the profile of cultural freelancers supported through the Fund we would like to capture some basic demographic information. This will remain confidential.

Q4 Which of the following best describes your gender identity?

- ☐ Male
- ☐ Female
- ☐ Non-binary / third gender
- ☐ Prefer not to say

Q5 Which of the following age categories do you fit into?

- ☐ 16-24
- ☐ 25-49
- ☐ 50-64
- ☐ 65+
- ☐ Prefer not to say

Q6 Which one of the following best describes your ethnic group or background?

- ☐ White
- ☐ Mixed/Multiple ethnic group
- ☐ Asian/Asian British
- ☐ Black/African/Caribbean/Black British
- ☐ Other ethnic group
- ☐ Prefer not to identify

Display This Question:

If Which one of the following best describes your ethnic group or background? = Other ethnic group

Q7 If other, please specify

Q8 Do you have any physical, sensory, learning, or mental health conditions, or illnesses that have lasted, or are expected to last, 12 months or more?

- ☐ Yes
- ☐ No
- ☐ Prefer not to say

Q11 Can you understand, speak, read or write Welsh?

Tick all that apply

- ☐ Understand Welsh
 - ☐ Speak Welsh
 - ☐ Write in Welsh
 - ☐ None of the above
-

Q12 Which local authority do you live in?

- ☐ Blaenau Gwent
 - ☐ Bridgend
 - ☐ Caerphilly
 - ☐ Cardiff
 - ☐ Carmarthenshire
 - ☐ Ceredigion
 - ☐ Conwy
 - ☐ Denbighshire
 - ☐ Flintshire
 - ☐ Gwynedd
 - ☐ Isle of Anglesey
 - ☐ Merthyr Tydfil
 - ☐ Monmouthshire
 - ☐ Newport
 - ☐ Neath Port Talbot
 - ☐ Pembrokeshire
 - ☐ Powys
 - ☐ Rhondda Cynon Taf
 - ☐ Swansea
 - ☐ Torfaen
 - ☐ Vale of Glamorgan
 - ☐ Wrexham
 - ☐ Prefer not to say
-

Q13 Please can you provide us with the following:

Please leave blank any that are not applicable

- VAT number _____
 - Company Registration Number _____
-

Q16 In which of the following sub sectors do you operate in?

Tick all that apply

- ☐ Animation
 - ☐ Dance
 - ☐ Design
 - ☐ Entertainment
 - ☐ Events
 - ☐ Film and TV
 - ☐ Museum, Libraries, Galleries and Heritage
 - ☐ Music
 - ☐ Performing Arts
 - ☐ Photography
 - ☐ Publishing
 - ☐ Radio
 - ☐ Theatre
 - ☐ Video
 - ☐ Visual Arts and Crafts
 - ☐ Other
-

Display This Question:

If In which of the following sub sectors do you operate in? Tick all that apply = Other

Q17 Please tell us which other sub-sectors you operate in.

Q18 Is your freelancer practice...?

- ☐ Full time
 - ☐ Part time
-

Q19 What is the current status of your practice?

- ☐ Fully operating
 - ☐ Partially operating
 - ☐ Currently dormant
 - ☐ Closed
-

Q20 What actions did you take in response to the pandemic?

Tick all that apply

- ☐ Reduced working hours
 - ☐ Reduced activities or services
 - ☐ Adapted activities and services
 - ☐ Developed new activities or services (anything novel that was introduced)
 - ☐ Secured another job
 - ☐ Other
-

Display This Question:

If What actions did you take in response to the pandemic? Tick all that apply = Other

Q21 Please describe what other actions you took in response to the pandemic.

Display This Question:

If What actions did you take in response to the pandemic? Tick all that apply = Adapted activities and services

Q22 Please explain how you adapted your services.

Display This Question:

If What actions did you take in response to the pandemic? Tick all that apply = Developed new activities or services (anything novel that was introduced)

Q23 Please tell us about those activities / services you developed

We are now going to ask some questions on your application for the Freelancer Fund.

Q25 How did you become aware of the Freelancer Fund?

- ☐ Word of mouth
- ☐ Advertising online
- ☐ Advertising in print
- ☐ Informed via a membership group or affiliation
- ☐ Direct contact
- ☐ From my Local Authority
- ☐ Don't recall
- ☐ Other

Display This Question:

If How did you become aware of the Freelancer Fund? = Other

Q26 Please tell us how else you became aware of the Freelancer Fund.

Q27 Please score the following processes from the application on a scale from 1 to 5 where 5 is strongly agree and 1 strongly disagree.

	1 - strongly disagree	2	3	4	5 - strongly agree
The Freelancer Fund was well promoted, and I was made aware of it promptly.					
The application form was clear and easy to complete.					
The eligibility criteria was clear and easy to understand.					
The evidence requirements were straightforward and simple to provide.					
The decision making for funding was quick.					
The funding was promptly transferred.					

Q28 What improvements, if any, would you make to the application process?

Q29 Did you receive support from the Self Employed Income Support (SEISS)?

- ☐ Yes
- ☐ No
- ☐ Not sure

Q30 What did you use the Freelancer Fund for?

Please tick all that apply

- ☐ Paying bills/overheads
- ☐ Salary / income
- ☐ Revising organisation business model, activities or services
- ☐ Training
- ☐ Investing in equipment
- ☐ Investing in premises
- ☐ Something else

Display This Question:

If What did you use the Freelancer Fund for? Please tick all that apply = Something else

Q31 Please tell us what else you used the funding for.

Q32 Did the Freelancer Funding received enable you to continue to operate throughout the pandemic?

- ☐ The funding helped me to continue operate fully throughout the pandemic
- ☐ The funding helped me to continue partially operate throughout the pandemic
- ☐ No, the funding supported me while I was unable to work

Display This Question:

If Did the Freelancer Funding received enable you to continue to operate throughout the pandemic? = The funding helped me to continue operate fully throughout the pandemic

Or Did the Freelancer Funding received enable you to continue to operate throughout the pandemic? = The funding helped me to continue partially operate throughout the pandemic

Q33 If you had not received the funds, would you have been able to operate during the pandemic?

- ☐ I definitely would not have been able to operate throughout the pandemic
- ☐ It is unlikely that I would have been able to operate throughout the pandemic
- ☐ I would have been able to continue operating throughout the pandemic, but to a lesser extent
- ☐ I would have been able to continue operating at this level without Freelancer Funding

Q34 If you had not received the funds, what other impacts might you have expected?

Tick all that apply

- ☐ Secured loans
- ☐ Got into debt
- ☐ Extended overdraft
- ☐ Temporarily secured other employment outside of the sector
- ☐ I would have left the sector completely
- ☐ Other

Display This Question:

If you had not received the funds, what other impacts might you have expected? Tick all that apply = Other

Q35 What other impacts would you have expected?

Display This Question:

*If What is the current status of your practice? = Fully operating
Or What is the current status of your practice? = Partially operating
Or What is the current status of your practice? = Currently dormant*

Q36 To what extent do you feel the Freelancer Fund safeguarded your organisation?

- ☐ To a great extent, it was fundamental to my practice
 - ☐ To some extent
 - ☐ To a lesser extent, it contributed a small amount to my survival
 - ☐ To no extent
 - ☐ Don't know
-

Q37 How confident are you that your practice will survive the next 12 months?

- ☐ Very confident
 - ☐ Somewhat confident
 - ☐ Not at all confident
-

Display This Question:

If What actions did you take in response to the pandemic? Tick all that apply = Adapted activities and services

Q38 Do you anticipate the changes you have made will remain in place over the next 12 months or for your services and approach to return to pre-pandemic activity?

- ☐ I will keep some of the changes implemented
 - ☐ I will keep all of the changes implemented
 - ☐ None of the changes implemented will be kept and I return to our pre-pandemic approach
-

Display This Question:

If How many times have you successfully received funding from the Freelancer Fund? Text Response Is Greater Than 0

Q39 Have you opted into the Freelancer Pledge?

- ☐ Yes
- ☐ No

Q40 What was your total income from your work as a freelance professional in the period **April 2019 to March 2020**?

If you would prefer to answer as a banded figure, please use the bands below

Display This Question:

If What was your total income from your work as a freelance professional in the period April 2019 to March 2020? If you would prefer to answer as a banded figure, please use the bands below Text Response Is Empty

Q41 Bandings

- ☐ Up to £5,000
- ☐ £5,001 to £10,000
- ☐ £10,001 to £25,000
- ☐ £25,001 to £50,000
- ☐ £50,001 to £75,000
- ☐ £75,001 to £100,000
- ☐ £100,001 to £150,000
- ☐ £150,001 to £200,000
- ☐ £200,001 to £250,000
- ☐ More than £250,000
- ☐ Rather not say
- ☐ Don't know

Q42 What was your total income from your work as a freelance professional in the period **April 2020 to March 2021**?

If you would prefer to answer as a banded figure, please use the bands below

Display This Question:

If What was your total income from your work as a freelance professional in the period April 2020 to March 2021? If you would prefer to answer as a banded figure, please use the bands below Text Response Is Empty

Q43 Bandings

- ☐ Up to £5,000
- ☐ £5,001 to £10,000
- ☐ £10,001 to £25,000
- ☐ £25,001 to £50,000
- ☐ £50,001 to £75,000
- ☐ £75,001 to £100,000
- ☐ £100,001 to £150,000
- ☐ £150,001 to £200,000
- ☐ £200,001 to £250,000
- ☐ More than £250,000
- ☐ Rather not say
- ☐ Don't know

Would you be willing to take part in a further in depth interview with one of our researchers to explore your experiences of the Freelancer fund in more detail?

If you provide your contact details, they will only be used to contact you for one further in-depth interview as part of this evaluation. Your contact details will be held by Wavehill for the duration of the project and deleted within three months of the project which will be February 2022. Wavehill will not share the contact details you provide with the Welsh Government or any other organisations.

- ☐ Yes
- ☐ No

Q6 Please can you provide the following information:

- Your name _____
- Telephone number _____
- Email address _____

Annex F: CRF Applicant Discussion Guide

Evaluation of the Cultural Recovery Fund 2020 – 21: interviews with applicants

[Mae fersiwn Gymraeg o'r ddogfen hon ar gael | This document is available in Welsh]

The Welsh Government has commissioned Wavehill to undertake an independent evaluation of the Cultural Recovery Fund 2020 - 21. The fund is intended to provide essential support to organisations in the sector, including music venues, heritage sites, museums, archives, libraries, events and their technical support suppliers, and independent cinemas who have all seen a dramatic loss of revenue due to the pandemic. The aim is to help protect sustainable organisations and as many jobs in the culture sector as possible in order to ensure the sector survives the COVID-19 crisis and remains vibrant, viable and sustainable in 2021 and beyond.

The evaluation will analyse the impact of the funding on those supported organisations and individuals and assess the extent to which the core aim of the Programme, to improve business and organisation survivability and protect jobs, has been met. In addition, the evaluation will examine whether wider, unanticipated impacts are identified.

As part of this evaluation Wavehill will be gathering information through interviews with those who have applied for and received support from the programme. This evaluation is in addition to the post completion monitoring requirements of your grant.

The Welsh Government is the data controller for the research. However, Wavehill will delete any personal data provided through the interviews, and anonymise the raw data, before it is shared with the Welsh Government.

The information collected during the project will be included in a report published on the Welsh Government website.

Your Participation in this research is completely voluntary. However, your views and experiences are important in order to help inform Welsh Government policies.

The contact for this research at Wavehill is Andy Parkinson

E-mail address: andy.parkinson@wavehill.com

Telephone number: 01545 571711

For further details please read the Privacy Notice by clicking [here](#).

Questions for discussion

Introduction

1. Please introduce yourself and your company/organisation.
2. Please can you confirm which CRF round(s) you received funding from.
3. Overall, what are your thoughts on the Cultural Recovery Fund (CRF)? *If you were asked by a friend to explain briefly what the CRF did for your company/organisation, what would you say?*

Engagement with the CRF

4. How did the pandemic impact your company/organisation?
 - a. What impact did the pandemic have upon income/turnover?
 - b. Employment?
 - c. Operations?
 - d. Development and innovation?
 - e. Future plans prior to the commencement of the pandemic?
5. Why did you engage with the CRF?

Rationale, Objectives and Programme Design

6. What, in your view was the fund trying to achieve?
7. How does the fund compare or fit in relation to other grants or funds that were available?

Are you able to comment on the Cultural contract? If Yes

8. Do you have any thoughts on the rationale for the Cultural Contract?
9. Are you clear on what is expected from organisations that have committed to develop Cultural Contract Pledges?
10. To what extent have you taken steps to align your organisation against the objectives of the Cultural Contract? *Please explain your answer*

Impact

11. How effective was the fund in relation to safeguarding jobs at your organisation? *Please explain/detail your answer*
 - a. How many jobs were you able to safeguard as a result of the support?
 - i. Full time jobs
 - ii. Part time jobs
 - b. Has the grant funding helped create any jobs?
 - c. Has the fund had any impact on volunteers and/or your volunteering programmes?
 - d. Discussion

12. How effective was the fund in relation to safeguarding your organisation/company? *Please explain/detail your answer*

- a. What impact has the fund had in relation to your income/turnover?
- b. Has the fund enabled any investment, development, innovation or reform of your services or processes?
- c. Has the fund mitigated the impact of the pandemic?
- d. Discussion

Note: Question below is solely for heritage and cultural organisations in receipt of grant funding.

13. How effective was the fund in relation to safeguarding historic assets/collections cared for by your organisation/company? *Please explain/detail your answer*

- a. What impact has the fund had in relation to maintaining your historic assets?
- b. Are there issues with your assets due to the pandemic that the fund has not been able to assist with?

14. Did the fund have any further or additional impact upon your company/organisation?

15. Has the fund enabled a broader impact, on the sector or the community?

- a. How about specific communities/groups and their engagement with your company/organisation, such as Black Asian and Minority Ethnic / Welsh Language / NEETs / Vulnerable people/ Older age groups

16. Were there any external factors, outside you or the funder's control, that have enabled or limited the contribution of the fund to your immediate survival?

17. What factors impact your outlook and confidence for the next 1-3 years?

18. What would have been the impact on the pandemic on your company/organisation if the fund wasn't available?

Future and Reflection

19. Looking back, would you change or add anything about the fund?

20. Looking to the future, do you have any support needs?

- a. For your organisation?
- b. For the sector?

21. What would you say are the key lessons or points of learning from your experience of fund?

- a. For your organisation?
- b. For the sector?

22. Is there anything else, or something that we have not discussed, that you feel we should?

Annex G: Freelancer Fund Recipient Discussion Guide

Evaluation of the Cultural Recovery Fund 2020 – 21: interviews with Freelancer Fund Round 1 and 2 recipients

[Mae fersiwn Gymraeg o'r ddogfen hon ar gael | This document is available in Welsh]

The Welsh Government has commissioned Wavehill to undertake an independent evaluation of the Cultural Recovery Fund 2020 - 21. The Freelancer Fund aimed to provide financial help for freelancers working in the cultural sectors whose work was affected by the COVID-19 pandemic.

As a freelance professional that has received financial support through the fund this interview will help to ascertain the extent to which the fund achieved its objectives to safeguard the freelance sector in Wales to ensure that it survives the COVID-19 crisis and remains vibrant, viable and sustainable in 2021 and beyond.

The evaluation will analyse the impact of the funding on those supported and examine whether wider, unanticipated impacts are identified.

As part of this evaluation Wavehill will be gathering information through interviews with those who have received support from the programme.

The Welsh Government is the data controller for the research. However, Wavehill will delete any personal data provided through the interviews, and anonymise the raw data, before it is shared with the Welsh Government.

The information collected during the project will be included in a report published on the Welsh Government website.

Your Participation in this research is completely voluntary. However, your views and experiences are important in order to help inform Welsh Government policies.

The contact for this research at Wavehill is Andy Parkinson

E-mail address: andy.parkinson@wavehill.com

Telephone number: 01545 571711

For further details please read the Privacy Notice by clicking [here](#).

Questions for discussion

Introduction

- 23. Please introduce yourself and your freelancer role, including details of within which creative and cultural sub sectors you operate.
- 24. Is your freelance practice full time or part time?
- 25. Approximately what proportion of your freelance work is delivered in Wales?
- 26. Overall, what are your thoughts on the Freelancer Fund? *If you were asked by a friend to explain briefly what the Freelancer Fund did for you what would you say?*

Engagement with the CRF

- 27. How did the pandemic impact your freelance work?
 - a. What impact did the pandemic have upon your existing freelance contracts?
 - b. Freelance opportunities?
 - c. Future plans?
- 28. Why did you engage with the Freelancer Fund?

Rationale, Objectives and Programme Design

- 29. What, in your view was the fund trying to achieve?
- 30. How does the fund compare or fit in relation to other grants or relief funds that may be available?

Are you able to comment on the Freelancer Pledge? If Yes

- 31. Do you have any thoughts on the rationale for the Freelancer Pledge?
- 32. Will you engage with/sign up to the Freelancer Pledge? *Please explain your answer*
- 33. What impact do you expect the Freelancer Pledge to have a) on your organisation b) wider society?

Impact

- 34. How effective was the fund in relation to supporting you through the pandemic?
- 35. Are you aware of any freelancer colleagues that were not able to access support through the fund?
- 36. Has the fund enabled you to reflect on your freelance practice and identify future opportunities?
- 37. Did the fund have any further or additional impact upon you?
- 38. Were there any external factors, outside you or the funder's control, that have enabled or limited the contribution of the fund to your immediate survival?
- 39. What factors impact your outlook and confidence for the next 1-3 years?
- 40. What would have been the impact on the pandemic on your freelance practice if the fund wasn't available?

Future and Reflection

- 41. Looking back, would you change or add anything about the fund?
- 42. Looking to the future, do you have any support needs?
 - a. For your freelance practice?
 - b. For the wider cultural sector?
- 43. What would you say are the key lessons or points of learning from your experience of fund?
- 44. Is there anything else, or something that we have not discussed, that you feel we should?

Annex H: Eligibility criteria for CRF Round 1 and 2

Component of support	Eligibility criteria	Criteria changes for Round 2
Wales Cultural Recovery Fund ⁷⁰ (Welsh Government lead)	<p>Applications were accepted from the following organisations:</p> <p>Creative</p> <ul style="list-style-type: none"> • Grassroots Music venues • Music Recording and rehearsal studios • Independent Cinemas • Comedy venues • TV & Film post production • TV & Film VFX • Publishers (books and magazines) who have their head office in Wales. <p>Culture</p> <ul style="list-style-type: none"> • Independent museums • Independent archives • Community libraries • Independent libraries <p>Events</p> <ul style="list-style-type: none"> • Businesses (including sole traders) who are able to show a track record (within the last three years) of organising: • Cultural events • Sporting events • Business events 	<p>Applications were also accepted from the following organisations:</p> <p>Supply Chain businesses- Arts, Creative & Events</p> <p>Businesses (including sole traders) that are able to show a track record (within the last three years) of providing Creative Technical and Support Services to the following sectors:</p> <ul style="list-style-type: none"> • Cultural, Sporting or Business events (as defined by this Fund) • Independent Cinemas • Grassroots Music Venues • Arts Sector (music, dance, theatre, literature, visual and applied arts, combined arts, Digital Art)

⁷⁰ View [Welsh Government Wales Cultural Recovery Fund Supporting Information](#)

	<p>Heritage</p> <ul style="list-style-type: none"> • Organisations that care for heritage attractions in Wales; • Not for profit organisations / private owners who care for historic buildings and sites that open their doors to visitors more than 28 days a year, such as historic places of worship; • Heritage businesses that generate the majority or a substantial portion of their turnover from heritage work • Organisations delivering participatory heritage events and activities; • Other organisations that provide significant services to the heritage sector. <p>Organisations:</p> <ul style="list-style-type: none"> • Must be based in Wales or have heritage assets located in Wales. • Must be able to produce at least one year's full independently certified or audited financial statement but does not need to be VAT registered if total turnover is below the registration threshold. • Must be able to demonstrate the organisation was operating sustainability in February 2020. • Must be able to demonstrate a significant loss of turnover/income since 1st March 2020 as a result of the pandemic <p>Organisations seeking funding over £150k:</p> <ul style="list-style-type: none"> • Must be a recognised organisation within the culture sector • Applicants must be operating and employing in Wales and able to produce at least one year's full independently certified or audited financial statement but does not need to be VAT registered if total turnover is below the registration threshold. 	
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<p>Wales Cultural Recovery Fund⁷¹ (Arts Council of Wales lead)</p>	<p>A grant of up to £1.5million, to be used by 30 September 2021. The level of funding that organisations could apply for depended on their final level of turnover as specified in their 2018/19 annual accounts.</p> <ul style="list-style-type: none"> • If total turnover was £750,000 or under, organisations could apply for up to £100,000 • If turnover was between £750,001 and £2,000,000, organisations could apply for up to £250,000 • If your turnover was above £2,000,000, organisations could apply for up to a maximum of £1,500,000 <p>Organisations could apply if they were:</p> <ul style="list-style-type: none"> • based in Wales, and formally constituted as one of the following: <ul style="list-style-type: none"> ○ a Company Limited by Guarantee ○ a registered charity (including charitable trusts) ○ a Charitable Incorporated Organisation (CIO) ○ a Community Interest Company (CIC) ○ a Company Limited by Shares (see public benefit criteria below) ○ an Unincorporated Association ○ a Partnership, including a Limited Liability Partnership ○ University or other Public Body running cultural activity • contributing to the cultural life of Wales by providing creative activities that people can enjoy and take part in working mainly (50%+) in one of our supported disciplines (music, dance, theatre, literature, visual and applied arts, combined arts, Digital Art) • able to show a track record (within the last three years) of providing publicly accessible arts activity that has a public benefit delivering the majority of their work (60%+) in Wales 	
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⁷¹ View [Arts Council of Wales Guidelines for Covid-19 Revenue Support for Arts Organisations](#)

	<p>This Fund does not support:</p> <ul style="list-style-type: none"> • Individuals, freelance practitioners and sole traders • Festivals and Events • Grassroots music venues and Bands, comedy venues, publishing, film and tv, creative Industries • Technical support services • Independent cinemas • Local Authority directly managed arts provision 	
Freelancer Fund ⁷² (Local authorities lead)	<p>A grant of £2,500 was available per individual, to support with immediate cash flow to help through the disrupted period.</p> <p>Support was available to assist freelancer professionals whose work has direct creative/cultural outcomes, who work in the four key sub sectors:</p> <ul style="list-style-type: none"> • The Arts; • Creative Industries; • Arts and Heritage Events; • Culture and Heritage. <p>Individuals were eligible if they were employed part-time and also had a freelance professional creative practice. Individuals that had received previous support from either the CJRS and SEISS were still eligible for the fund.</p> <p>Individuals were not eligible if:</p> <ul style="list-style-type: none"> • They worked as a freelancer in the sport sector; • Had recently received funding from the Start-Up Grant launched in June 2020 to help new businesses survive the economic consequences of coronavirus (COVID-19). 	Applications were also accepted from freelancers from the wedding and events industries.

⁷² View [Welsh Government Wales Cultural Recovery Fund Supporting Information](#)

	<p>This funding was specifically for creative/cultural subsectors and roles that have been forced to cease work and/or face difficulty restarting because of the impact of COVID restrictions. Those in roles that had been able to continue at previous or near previous levels of activity (e.g. architects, graphic designers, games designers etc.) with or without support were advised not to apply.</p>	
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