

ROAD TO RECOVERY?

Cultural Freelancers
Wales Report 2022

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Executive Summary

16 months after the publication of our 2020 study, [Rebalancing and Reimagining](#), this report analyses the changes to freelancers' lives, looks at the current situation and future outlook for freelancers, and asks what - if any - progress has been made to rebalance the cultural sector as we progress on the road to recovery from the Covid-19 pandemic.

As a new year begins, the situation is still very bleak for many freelancers in Wales, with half of freelancers losing over 80% of their work during 2021. Just as venues were opening, audiences tentatively returning, and freelancers being employed again, the Omicron variant appeared and new restrictions were brought in. Unfortunately this means that the recovery freelancers had hoped for has not been realised and the road ahead is still uncertain.

A comparison of both studies shows that the longer the Covid-19 pandemic continues, the worse impact it is having on freelancers' well-being (84% of freelancers reported their well-being was negatively impacted by the pandemic in 2021, compared to 79% in 2020). Our data shows that freelancers with protected characteristics and/or who had caring responsibilities in 2021 face additional barriers to support and are at greater risk of leaving the industry. With many support schemes which ran during 2021 now closed and new restrictions in place, freelancers face a tumultuous and difficult year ahead.

On the continuing impact of Covid-19 on freelancers, our survey showed that:

- 92% of freelancers indicated that their work has been negatively impacted by Covid-19, with half losing 80% of their work in 2021.
- On average, freelancers lost 76% of income in 2020. The loss of income in 2021 shows only a small improvement, with a loss of 59% of income.
- 45% lost income due to cancellations and 37% due to a reduction or curtailment of offers of work and available opportunities.
- 57% stopped investing in new equipment, material, products, education, training, etc.
- Although there is an improvement in perception of future prospects between 2020 and 2021, almost a quarter of freelancers are still uncertain about whether they will stay in or leave the industry.

On Covid-19 financial support schemes, our survey showed that:

- 91% of freelancers applied for one or more support schemes.
- 86% of applications for support were successful, but deficiencies in support were particularly noticeable for freelancers with protected characteristics and/or who had caring responsibilities.

- Despite issues with delivery, the Welsh Government's Freelance Fund had the highest satisfaction rating (60%), with 89% of applicants receiving funding from this scheme.
- 54% of freelancers felt inadequately informed about the range of Covid-19 support schemes available.
- Less-experienced freelancers had a more difficult time finding their way through support options.

There are also small but hopeful signs of improvement, with 72% of freelancers now reporting that they are likely or will definitely stay in the sector, compared to 62% of freelancers in 2020. Despite the challenges and the precarious livelihoods, it is heartening that freelancers still seek to work in their chosen field and commit to supporting the sector in Wales. It is crucial that the salaried sector and key stakeholders, in turn, protects the skills and experience of the freelance workforce and does everything in its power to amplify freelancers' voices and respond to their needs.

Our recommendations to cultural organisations, Arts Council of Wales, and Welsh Government fall into 6 main categories:

- improving infrastructure and geographic equity;
- improving diversity and inclusivity;
- strengthening Welsh-language work;
- changing organisational governance;
- investment in cultural freelancers and rebalancing systems;
- improving funding and accountability processes.

We report that there is increasing concern in the freelance sector that doors which were opened during 2020 are now closing again, with a focus on 'returning to normality' rather than inspiring systems change and tackling the sectoral imbalance which freelancers have called for clearly and responsibly.

The Covid-19 pandemic disproportionately affected freelancers, who make up half the cultural sector workforce in Wales.¹ This report suggests those effects will disproportionately weigh down on the freelance sector over the next few years — strengthening the case for intensive strategic investment in freelancers by cultural organisations and stakeholders over that period.

¹ creativecardiff.org.uk/sites/default/files/Creative%20Cardiff%20study%20on%20COVID-19%20Support%20Scheme%202.4.20.pdf

About the study

Cultural Freelancers Wales (CFW) **Llawryddion Celfyddydol Cymru (LICC)**

CFW is a diverse collective of cultural freelancers in Wales, strengthening the freelance voice and offering inclusive support to fellow freelancers. CFW is fully bilingual and operates across Wales. Running since April 2020 (formerly as Wales Freelance Taskforce), CFW was supported by an Arts Council of Wales Connect and Flourish grant (2021). Our partners are Arts and Business Cymru, Disability Arts Cymru, People Make It Work, and Race Council Cymru. Find out more about CFW via cfw.wales.

CFW's work over the last year includes:

- Meeting over 250 freelancers in focus groups: listening and responding to freelancer needs and concerns which directly inform our work.
- Creating spaces for freelancers to talk with one another and formulate new ideas in a series of 'Our Freelance Future' workshops online.
- Launching a Wales-wide initiative to map the locations and skillsets of over 350 freelance arts workers, in collaboration with Clwstwr's [Creative Economy Atlas](#).
- Offering 10 Professional Development placements in collaboration with Arts and Business Cymru.
- Commissioning a new 2021 study, *Road to Recovery?*, collecting data on the current situation for freelancers (to be published this month).
- Facilitating a series of free Upskilling Workshops for freelancers by freelancers.
- Providing free Well-being Sessions for freelancers with Mind Newport.
- Advising the Welsh Government on the freelance sector in Wales, currently involved in consultations around Omicron and further freelance support.
- Advising Creative Wales and the Arts Council of Wales on funding strategies and their impact on freelancers.
- Developing strategic partnerships with sector-wide organisations within Wales and across the UK.

CFW contracted the Creative Economy team at Cardiff University to run the survey and analyse the data. The Creative Economy team supports and develops research into the creative industries by encouraging collaboration both within and beyond the Cardiff University. Find out more via cardiff.ac.uk/creative-economy.

For further information about this report contact:

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Introduction

Background

As noted in our 2020 report, [Rebalancing and Reimagining](#), very little data has been collected on freelancers in the performance sector in Wales, despite their representing half the cultural sector workforce in Wales.² *Rebalancing and Reimagining* was based on a survey carried out during July and August 2020, and its recommendations sought to rebalance the arts sector in Wales to empower and include freelancers, especially those who have been historically marginalised. The report sparked widespread discussion, including at the Arts Council of Wales (ACW) and Welsh Government, and organisations such as National Theatre Wales, which has committed to implementing some of the report's recommendations.³

16 months after the publication of *Rebalancing and Reimagining*, Cultural Freelancers Wales commissioned Cardiff University's [Creative Economy Unit \(CEU\)](#) to action a follow-up survey to discover how freelancers are 'recovering' as performance venues reopen and society adapts to the effects of the pandemic. This report provides an insight into the present moment for cultural freelancers in Wales, how they see their future, and the long-term impact of the pandemic on their finances and well-being.

Recent research has highlighted the disproportionate impact of Covid-19 on cultural freelancers. Supporting our 2020 report, the Labour Force Survey shows that the arts, entertainment and recreation sectors have been hardest hit by the pandemic,⁴ and Office for National Statistics data shows that about 55,000 arts jobs (nearly a third of the sector's workforce) have been lost since the first lockdown in the UK.⁵ Support schemes for the self-employed and the creative sector (such as ACW's Resilience and Stabilisation funds, the Welsh Government's Freelance Fund, the UK Government's SEISS scheme) were introduced at the height of the pandemic in 2020, and since many of these have now ended, it is appropriate to consider the current state of the cultural freelance workforce in Wales.

² creativecardiff.org.uk/sites/default/files/Creative%20Cardiff%20study%20on%20COVID-19%20Support%20Scheme%202.4.20.pdf

³ National Theatre Wales, Strategic Equalities Plan 2021-22, nationaltheatrewales.org/about-us/company-policies/strategic-equalities-plan/

⁴ artsprofessional.co.uk/news/growing-freelance-creative-workforces-may-pose-risk-regions

⁵ artsprofessional.co.uk/news/55000-arts-jobs-lost-lockdown

Methodology

An online survey was distributed to freelancers within Wales,⁶ and ran from September to October 2021. CEU developed a survey which reflected many of the questions asked in the 2020 survey, thus allowing the data from both surveys to be directly compared in order to monitor changes. A total of 186 responses were received from a range of cultural freelancers across Wales. The report was also informed by responses from 250 freelancers who took part in focus groups throughout 2021.

⁶ Equity Wales and Writers' Guild of Great Britain (WGGB) Wales refused to distribute our survey to their members.

Information about the respondents

Age

There was a good response to the survey across ages, but in general respondents were older than in the 2020 survey (Figure 1).

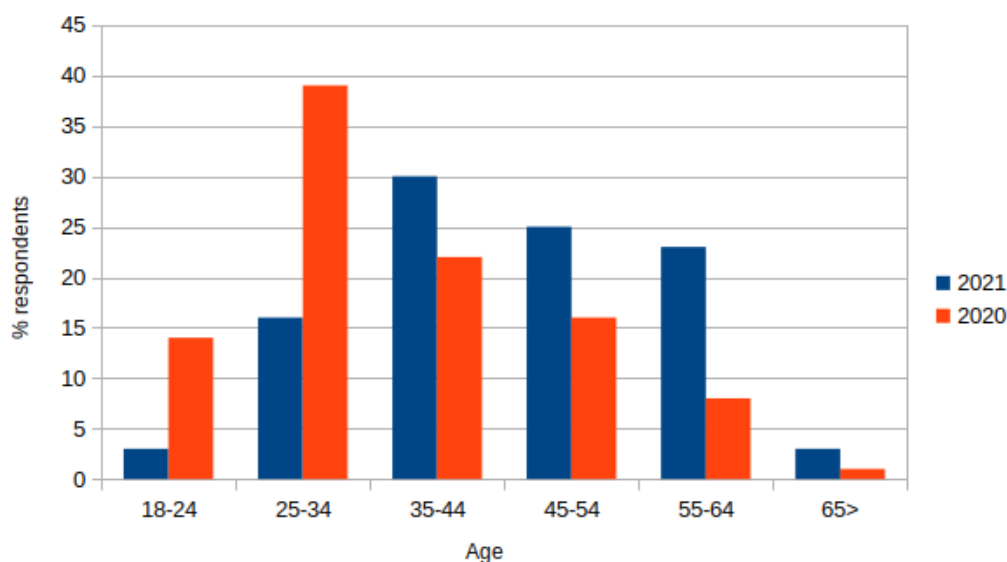


Figure 1: Age of respondents 2020 and 2021

Location

Survey respondents are located throughout Wales (Figure 2): grouping the Local Authorities by region shows that 48% (2020: 74%) are located in South Wales, with 26% (2020: 15%) in North Wales and 26% (2020: 11%) in Mid and West Wales.⁷ Cardiff accounted for 12% of the respondents (2020: 42%), but there were actually more respondents from Powys (15%) - see Figure 2.

About 41% of cultural freelancers in Wales are located in rural areas,⁸ a pattern that cuts across different occupations (Figure 3). Design was the only occupational group where rural freelancers outnumbered urban freelancers.

⁷ *South Wales*: Merthyr Tydfil, Neath Port Talbot, Swansea, Bridgend, Rhondda Cynon Taf, Vale of Glamorgan, Cardiff, Caerphilly, Blaenau Gwent, Torfaen, Newport, Monmouthshire. *North Wales*: Conwy, Denbighshire, Flintshire, Gwynedd, Isle of Anglesey, Wrexham. *Mid and West Wales*: Powys, Ceredigion, Carmarthenshire, Pembrokeshire.

⁸ 'Urban areas' are defined as clusters of contiguous grid cells of 1 km² with a density of at least 300 inhabitants per km² and a minimum population of 5,000. 'Rural areas' are defined as areas outside urban clusters. See ec.europa.eu/euro-stat/web/rural-development/methodology.

A particular challenge that cultural freelancers in rural areas still face is a lack of basic infrastructure, which impacts their competitiveness and access to available work. The effects have been amplified by the shift to digital following Covid-19:

“Rydym yn byw mewn ardal wledig dros ben, ac mae'r cyfleoedd gwaith i bobl yn fy maes i yn brin. Dwi'n gwneud yn iawn ac yn gorfod bod yn ddyfalbarhaus, yn benderfynol a 'resilient' dros ben - mae'n ymdrech enfawr.”

“Some work [since Covid-19] began to filter back in digital formats, but I am limited by a lack of broadband here in rural Wales (satellite is my only option and it is hugely expensive, with data limits).”

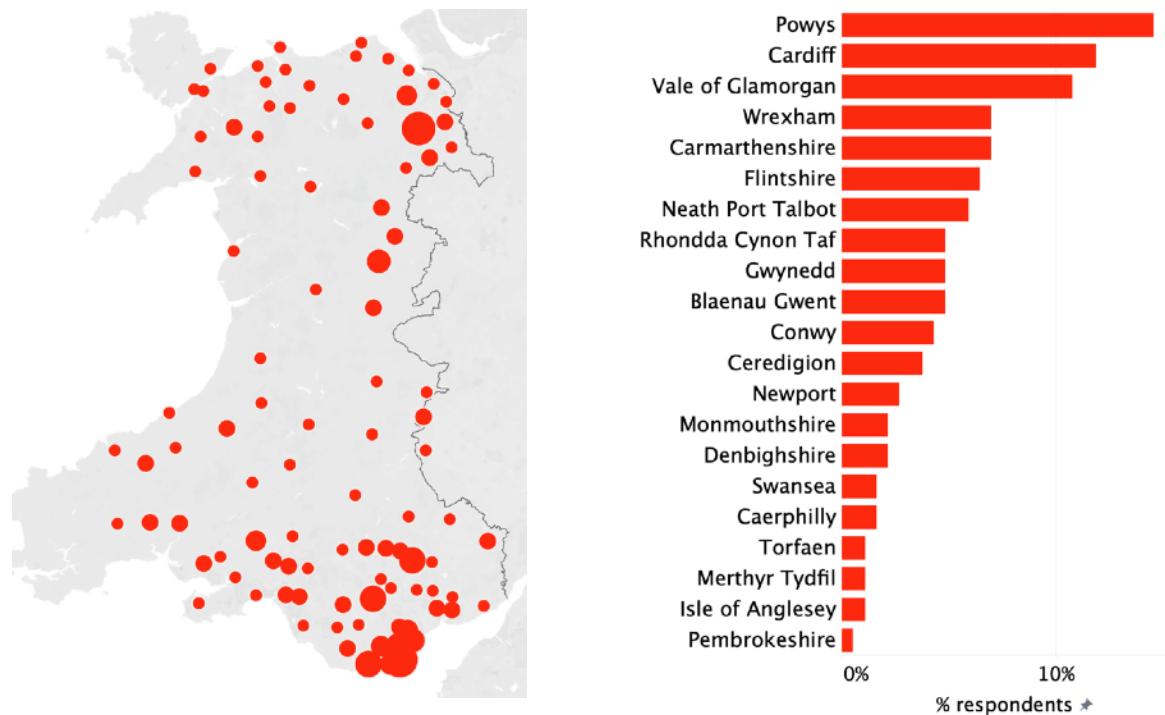


Figure 2: Distribution and local authority of the respondents

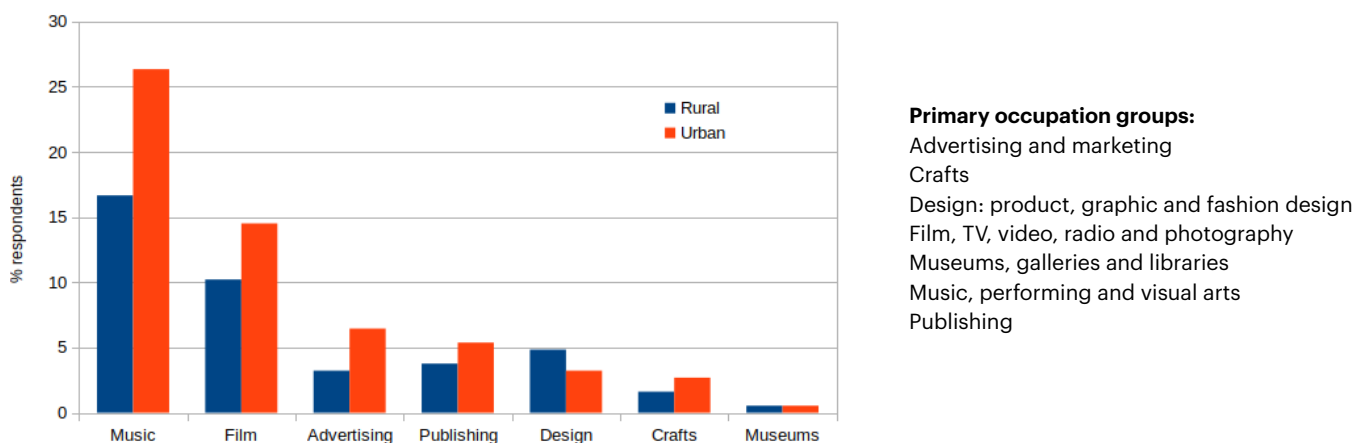


Figure 3: Urban/rural distribution of occupations

Gender

52% of respondents described themselves as women (2020: 52%), and 45% as men (2020: 48%), with 2% non-binary/other, and 2% preferring not to say.

The same stark difference as in the 2020 report between male and female income pre-Covid is apparent here: more than twice as many women as men are in the £5-10,000 income band, and their representation decreases in all higher income bands (Figure 4). The most common band for male income is £25-30,000.

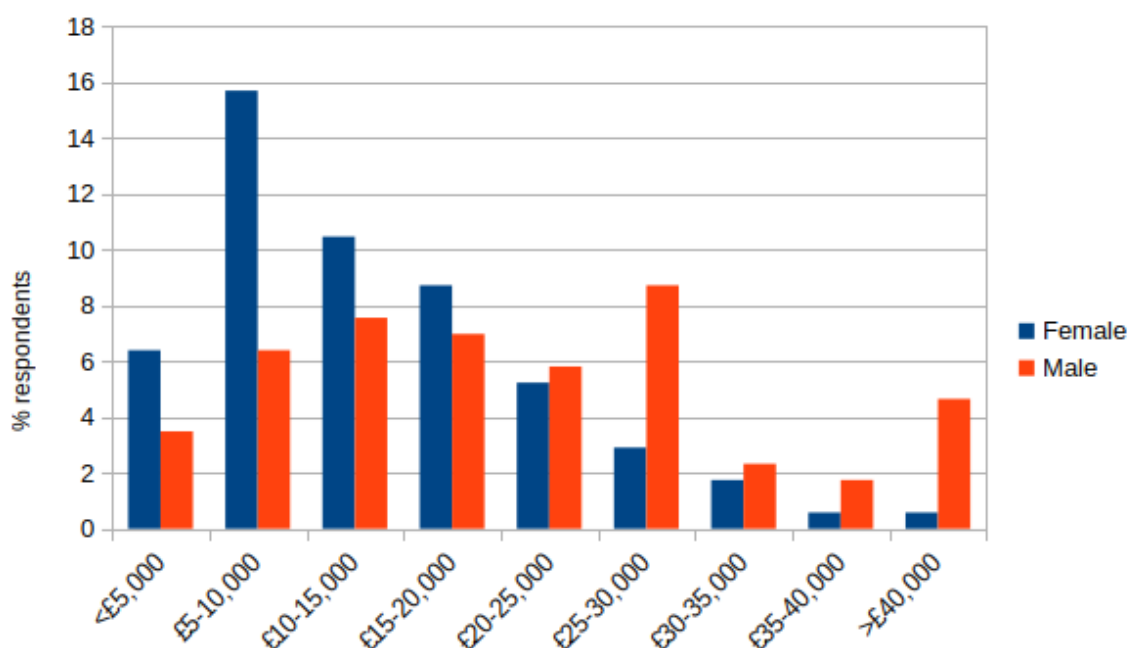


Figure 4: Relative male/female income

Sexuality

76% of respondents described themselves as heterosexual/straight, 7% as bisexual, 6% as gay, and 3% as other (pansexual, fluid). 8% of respondents preferred not to say. This compares with the Annual Population survey in Wales from 2020 suggesting that gay and bisexual people comprise about 3% of Wales' population.⁹ One person identified as trans.

While survey respondents indicated that the arts and culture sector seems to be generally inclusive, the survey suggested there are still prejudices and barriers certain groups face which were amplified through the pandemic.

⁹ stats.wales.gov.wales/Catalogue/Equality-and-Diversity/Sexual-Orientation/sexualidentity-by-year-identitystatus

“The live event industry is open and inclusive from the outside but really it's very white and male-dominated from the top down.”

“As a female Lighting Designer I would say there is still some 'old school' prejudice in this role.”

Welsh language

5% of the responses were returned in Welsh (2020: 18%). 39% of respondents did not speak Welsh (2020: 29%). Though the categories are not completely comparable between surveys, 36% had a basic knowledge of Welsh (2020: 21%), and 26% had conversational knowledge of Welsh (2020: 48%).

Disability

17% of respondents are disabled, or have an impairment or long-term physical or mental health condition, compared to 23% of people of working age in the whole of Wales.¹⁰ The question was not comparable with the 2020 question.

Ethnicity

7% of respondents are Black, Asian, and/or of multiple/mixed ethnicities (2020: 5%), in comparison to 5% in all of Wales.¹¹

Caring responsibilities

34% of respondents have caring responsibilities (such as being a primary or secondary carer for children, an older person, or people who are disabled), and noted that combining those caring responsibilities with a freelance job was often especially difficult. This point has also been made in other anecdotal reports.¹² The experience of intermittent school closures during the pandemic made this group especially vulnerable.

“As a woman working in TV it's almost impossible to have a child as filming hours are average 14hr days and travel. Really hard to balance life.”

¹⁰ <https://statswales.gov.wales/Catalogue/Equality-and-Diversity>

¹¹ <https://statswales.gov.wales/Catalogue/Equality-and-Diversity>

¹² theguardian.com/tv-and-radio/2021/nov/30/he-fell-on-my-body-bit-me-work-tv-woman-britain-childcare

Career length

70% of respondents had worked in the sector for more than 5 years (2020: 63%), and 20% had worked in it for less than 2 years (2020: 14%) - see Figure 5.

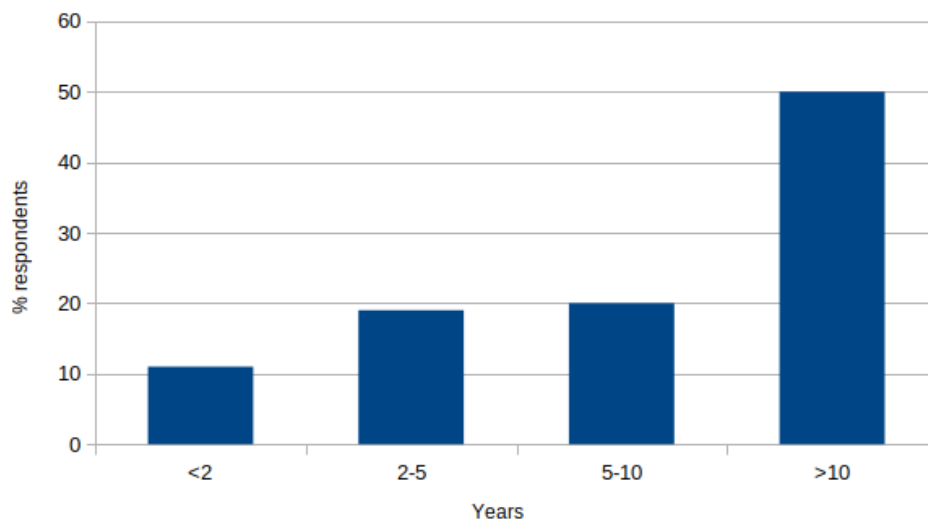


Figure 5: Career length of respondents

Occupations

The largest group of respondents in Wales work in music, performing and visual arts (43%). This includes freelancers working as artists (17%), musicians (14%), actors, entertainers, and presenters (12%). The next biggest group works in film, TV, video, radio and photography (25%). This includes arts officers, producers and/or directors (12%) and photographers, audio-visual and broadcasting equipment operators (11%).

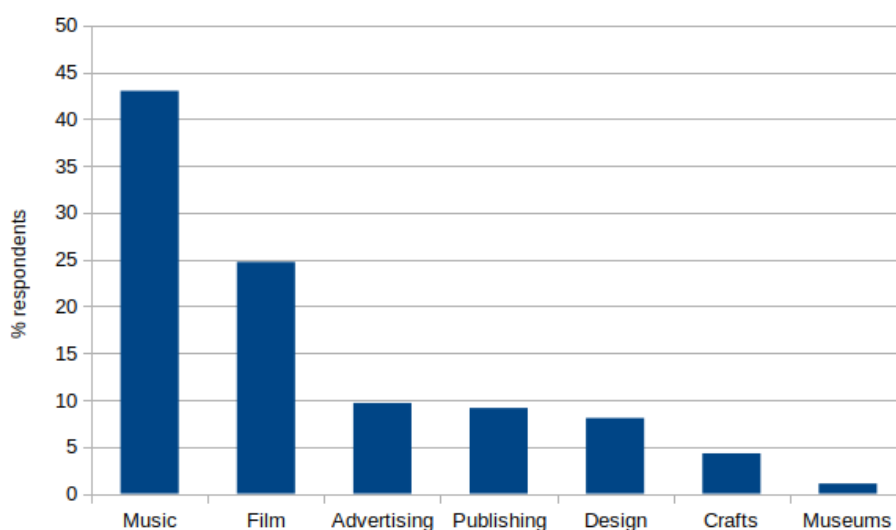


Figure 6: Primary occupation group of the respondents

Other groups captured in the survey are authors, writers and translators (8%), graphic designers (5%), dancers and/or choreographers (5%) and other freelancers working in occupations such as public relations or as teachers in arts and crafts.

These proportions are broadly in line with the size of the Welsh creative sectors, with music and the performing arts and film, TV, radio, video and photography being the two largest Welsh creative industry employers.¹³

Employment status

80% of respondents were self-employed (2020: 67%), with a minority (2%) being employees (PAYE) (2020: 5%). A substantial number (18%) fall into both categories (2020: 25%).

Income

On average, respondents' annual income was just over £17,000 (virtually identical to the 2020 figure), which is 53% of the average Wales salary of £32,000,¹⁴ and 62% of average UK income in the cultural sector.¹⁵ Income was less than £20,000 a year for 63% of respondents (2020: 61%).

This confirms the precarious working conditions experienced by freelancers in Wales. The low rates of pay cannot be entirely explained by age or experience: 50% of respondents have been working for more than 10 years in the cultural sector (Figure 5). It is more likely that working conditions for freelancers do not allow for the same career progression as might be expected amongst traditional employees.

These difficulties have been amplified by the pandemic, but appear to be deep-seated:

"[I have been d]enied holiday pay, sick pay etc on the basis of self-employment. Myth of self-employment is that earnings are sufficient to offset these costs. It's institutionalised low pay. Also, industry rates are not commensurate with the work done or more importantly, comparable with the salaries of people within organisations."

¹³ Komorowski, M., & Lewis, J. (2020). Clwstwr Creative Industries Report No.1: The Size and Composition of the Creative Industries in Wales. Clwstwr / Creative Cardiff, 1, 1-33. clwstwr.org.uk/sites/default/files/2020-05/Creative%20Industries%20Report%20No%201_Final_compressed.pdf

¹⁴ plumplot.co.uk/Wales-salary-and-unemployment.html

¹⁵ gov.uk/government/statistics/dcms-sectors-economic-estimates-2020-earnings/dcms-economic-estimates-2020-provisional-earnings

"The difference in benefits when compared to my life pre-self-employment are stark. Fees/salaries do not sufficiently take this into consideration. I feel at a disadvantage when comparing to 'regular' work/jobs."

Impact of Covid-19

Loss of work

92% of respondents indicated that their work had been negatively impacted by Covid-19 (2020: 94%). This has led to some freelancers ending up in precarious living conditions.

Almost half (49%) lost at least 80% of their work. On average, respondents lost 71% of the work normally available to them.

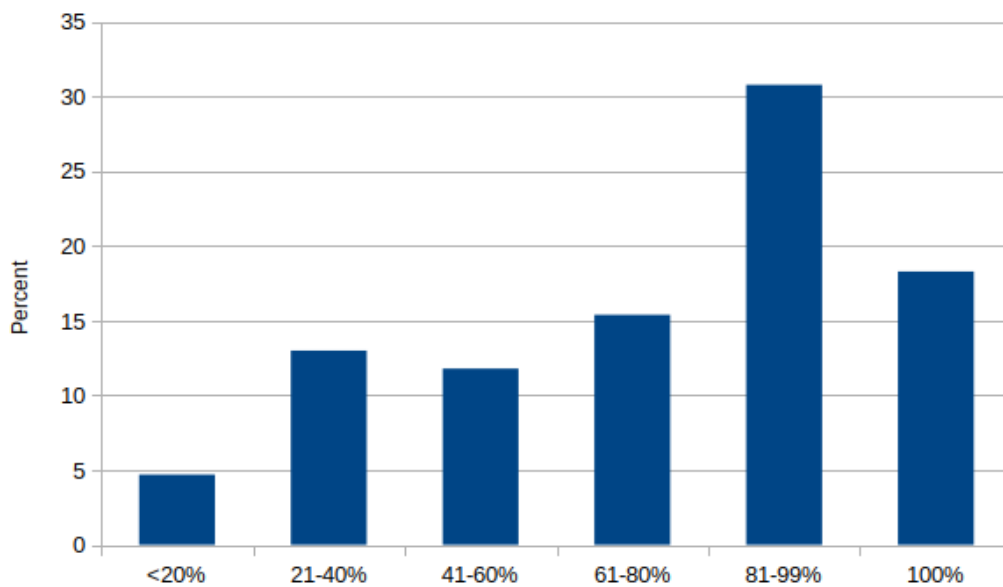


Figure 7: Percentage of work lost

While this paints a generally stark picture, not all respondents experienced a negative impact. However, in 6 cases, through the intensification of online activities, the pandemic has provided more work than before. This highlights the need for a good infrastructure for a functioning and crisis-resistant cultural freelance workforce.

"I did get a lot more editing work outsourced to me which I wouldn't have usually been afforded or been able to take on if it wasn't for the pandemic."

Loss of income

On average, respondents who lost income lost an estimated £14,000 during 2020, the first year of Covid-19. This is 82% of the average annual income of just over £17,000 (see above).

The loss of income in 2021, to the date of the survey, showed some improvement, with an average loss of just over £12,000. Respondents estimated that their average loss over the full year of 2021 would be slightly smaller again, at just over £10,000 (Figure 8), bringing the total average loss of income over the two years of the pandemic to some £24,000.

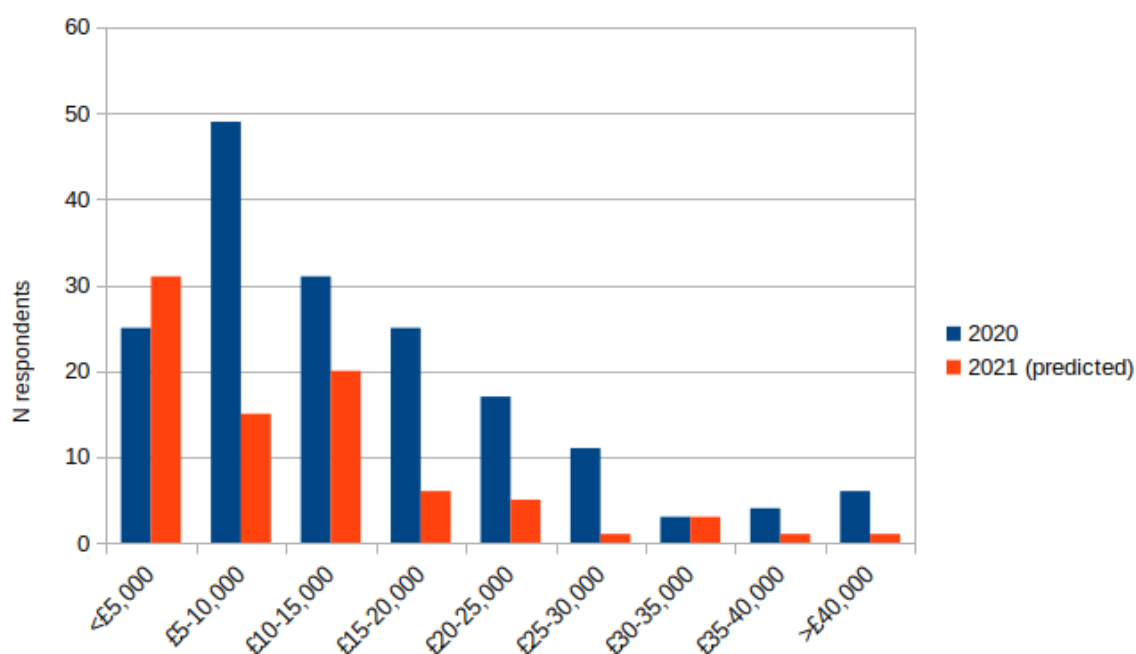


Figure 8: Income lost over 2020 and 2021 by band.

The financial impact of Covid-19 goes beyond the freelancer themselves, because often the families and family dependencies have been impacted by financial losses. In this context, women and freelancers with caring responsibilities are especially vulnerable.

“Cafodd bron fy holl waith oedd yn weddill o Fawrth 2020 ymlaen ei ohirio tan 2021, ac ambell brosiect unigol eu canslo’n gyfangwbl.”

“I was completely financially dependent on my husband.”

“O ran fy ngwaith, fe wnes i lawer llai o arwain gweithdai a mwy o waith cynhyrchu. Fe wnes i hefyd dderbyn gwaith nad oedd yn gyffrous iawn i mi yn greadigol

oherwydd fy mod angen yr incwm. Canslwyd un darn mawr o waith i mi, ac roedd gorfod chwilio am fanion bach yma ac acw i wneud fyny am hynny yn hynod flinedig.”

“Loss of work meant loss of income which resulted in moving back with parents and not being able to pay phone bill etc.”

“I had to support my grown children again, I had to support my mother [...]”

Reasons for loss of work

Nearly half (45%) of respondents indicated that cancellation of projects and events was the main reason for loss of work, followed by a reduction or curtailment of offers of work and available opportunities (37%) - see Figure 9.

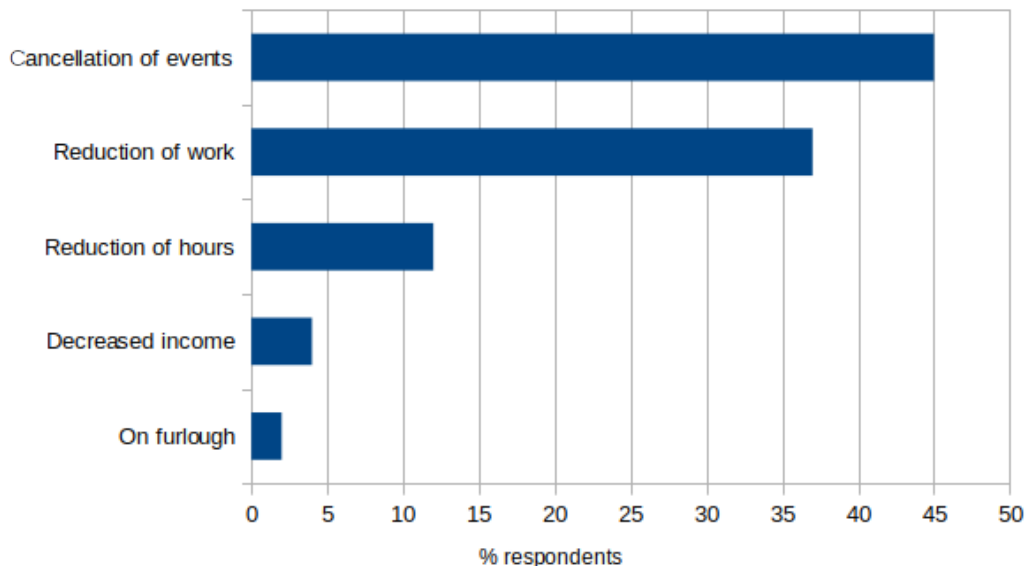


Figure 9: Reasons for loss of work

Respondents generally highlighted that the pandemic led to difficult decisions with high levels of uncertainty about the future:

“Due to job insecurity I have taken a PAYE job as an employee and shut down my business mostly.”

“Because many people have lost their jobs and/or their businesses have closed, it is very difficult to find a client, especially as most people now have financial problems.”

“There is very little support for freelancers in North Wales. Barriers include financial barriers to accessing support, funding opportunities, work opportunities, transport links, accessible arts culture venues and spaces, no infrastructural support for emerging/intermediate arts to train, and gain experience or exposure in the area, limited access to venues and audiences, limited access to other artists and good practice. No representation from national venues in the North, and requirement to travel to South Wales is financially impossible as a working-class single mum, as well as limited time around childcare for transport.”

Impact on freelancers

Loss of income and work meant that over half of the respondents (57%) stopped investing in new equipment, material, products, education, training, etc. (Figure 10). Additionally, 18% had to reallocate time to activities outside of the cultural sector in Wales. Other impacts included fewer freelancers and subcontractors being hired on projects.

Overall, respondents highlighted the long-term impact on their own business and activities:

“Roeddwn yn ddibynnol ar gynigion i wneud gwaith dros Zoom a chefias nawdd ymchwil bychan gan y CCC. Rwyf wedi penderfynu ymddeol o waith mewn ysgolion oherwydd y cyfyngiadau mae Covid yn ei greu.”

“I could no longer build my reputation in the marketplace and lost my momentum for networking for new project-based partnerships and work. I am effectively back at square one with my business, but with many more restrictions on my business activities and offer.”

“[My pre-Covid investments] took more than half of my income [i]n the year before covid, so the grants that I did receive didn’t account for this long-term investment. I’m now in a lot of debt, having taken out 2 credit cards with [£]6,500 limits just to survive the year.”

Well-being

The well-being of 84% of respondents was negatively impacted due to Covid-19 (2020: 79%), with over a third reporting an “extremely negative” impact on their well-being (Figure 11). Long-term effects included mental and physical health problems and overworking.

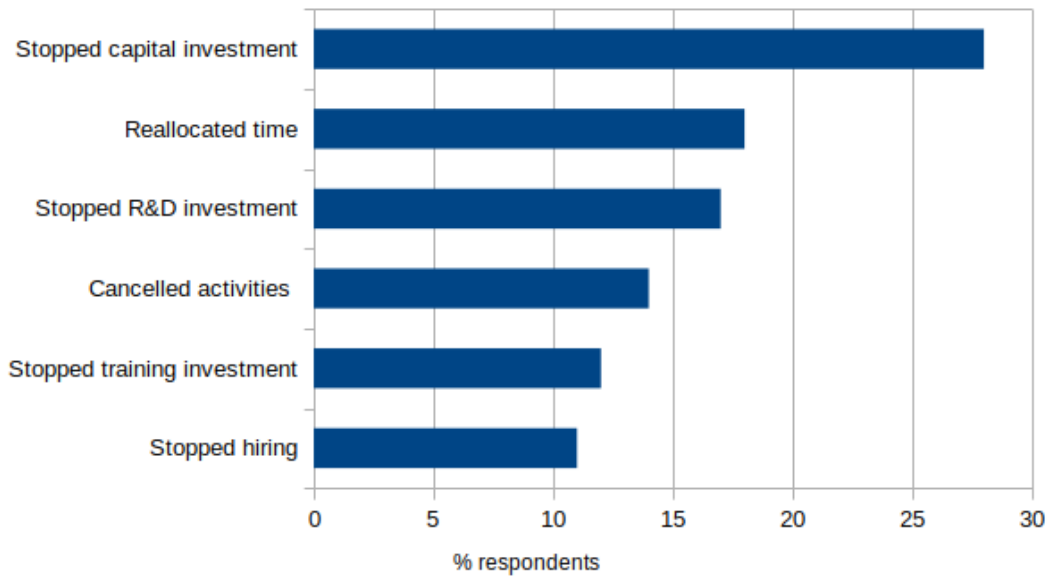


Figure 10: Impact of loss of income and work

This suggests that the well-being of cultural freelancers has not “bounced back” in the past year, but has further deteriorated:

“Gan nad oeddwn yn gallu cyd-weithio ag artistiaid eraill a mynychu arddangosfeydd yn y byw ac ati, ffeindiais i mod fy hunan hyder wedi gostwng.”

“I became seriously ill and my mental health was damaged beyond repair.”

“I have had to do more hours, resulting in increased seizures.”

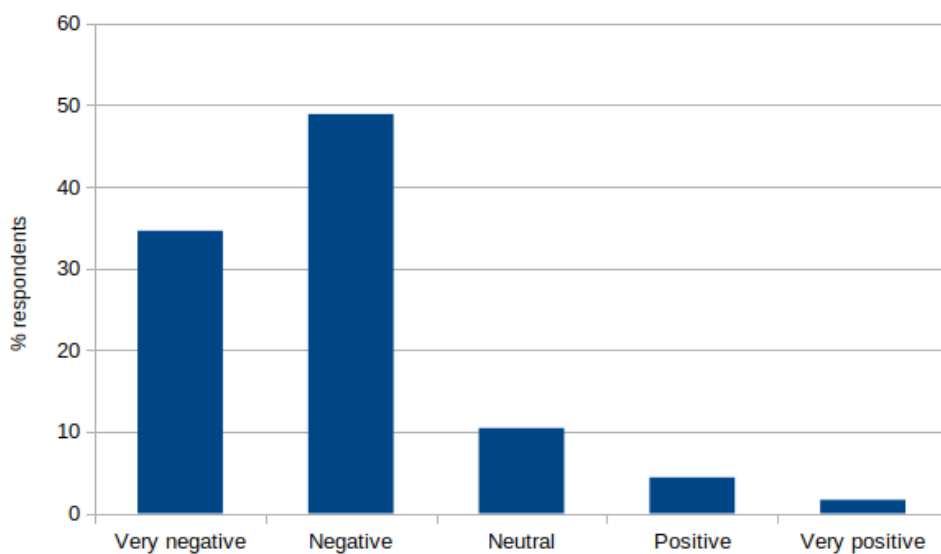


Figure 11: Impact on well-being

Impact of support schemes

Support scheme applications

Before Covid-19, only 8% of respondents had ever applied for a support scheme of some kind, but during Covid-19 91% of respondents did so. On average, respondents applied for 2 support schemes (Table 1). Of 364 applications for support, 86% were successful. The most supportive were Welsh Government’s Freelance Fund (Cultural Recovery Fund), SEISS, and Universal credit (Figure 12).

Scheme	Supported	Unsupported	Not eligible	Unaware
CRFF	118	14	19	18
SEISS	100	5	41	13
UC	38	5	71	15
ACWRF	18	8	43	63
ACWSF	14	7	31	72
VAT	9	2	57	51
SB	6	3	70	46
TTP	6	0	35	75
JRS	4	5	67	48
SSPR	0	2	62	53
Total	313	51	496	454

Table 1: Applications to support schemes¹⁶

(CRFF: Welsh Government Cultural Recovery Freelancer Fund; SEISS: Self-Employment Income Support Scheme; UC: Universal Credit; ACWRF: Arts Council of Wales Resilience Fund (Urgent Response);

ACWSF: Arts Council of Wales Stabilisation Fund; VAT: Deferring VAT and Income Tax payments; SB: Small Business Grant Funding; TTP: HMRC Time To Pay scheme; JRS: Job Retention Scheme; SSPR: Statutory Sick Pay Relief package)

The Welsh Government’s Cultural Recovery Fund for Freelancers accounted for 36% of applications, 9% of which were unsuccessful. The UK Government’s SEISS scheme, accounted for 29% of applications, 5% of which were unsuccessful (2020: 47%), as were 12% of Universal Credit applications (2020: 28%), which accounted for 12% of total applications.

¹⁶ Nine freelancers surveyed also received support from other funds and organisations, which included the PRS foundation for music (<https://prsfoundation.com/funding-support/>), the Theatre Artist Fund (<https://theatreartists.fund/>), the Bounce Back Loan, Business Wales, and the National Lottery Fund.

As in 2020, Arts Council of Wales schemes had low uptake, forming only 13% of all applications. 66% of applications to the Stabilisation Fund were successful (2020: 75%), and 69% of those to the Resilience Fund (2020: 74%).

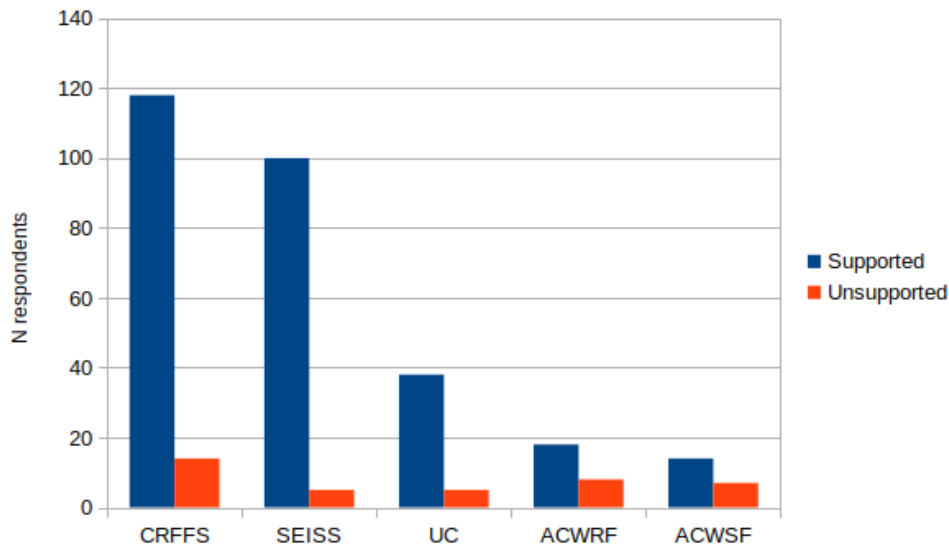


Figure 12: Support schemes with most applications

Eligibility

On average each cultural freelancer was ineligible for 2.6 support schemes. Taking respondents who were ineligible for a scheme as a percentage of all those who answered the question about that scheme, the Welsh Government’s Cultural Recovery Fund was clearly the most “welcoming” – only 11% were ineligible. More respondents were ineligible for the Arts Council of Wales’ schemes (25% for the Resilience Fund and 32% for the Stabilisation Fund), and the more specialised UK government schemes – of which 50% of respondents were ineligible (Figure 13).

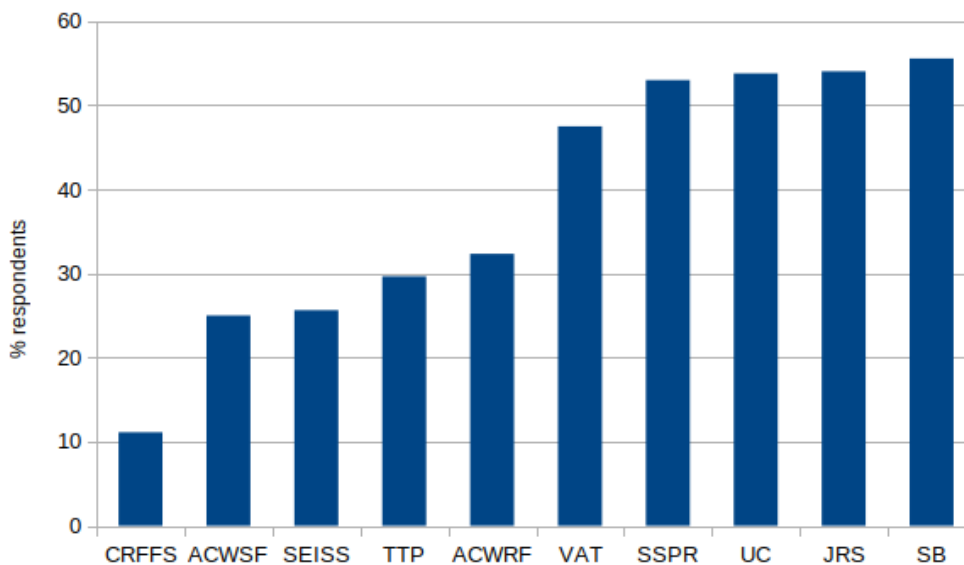


Figure 13: Ineligibility for support schemes

Ineligibility has a deleterious impact on some freelancer businesses:

“Roeddwn i mewn sefyllfa lle nad oeddwn wedi bod yn llawrydd am ddigon o amser i fod yn gymwys am SEISS, ac fe wrthododd cwmni lle roedd fy ngwaith wedi canslo gydnabod hynny, gan honni mai 'mewn trafodaeth' oeddem ni, yn hytrach na mewn cytundeb llafar (roeddwn yn disgwyl am gytundeb electroneg ar y pryd). O ran fy ngwaith PAYE, fe gawsom gefnogaeth CRF a grant busnes bach, a oedd yn llawer o gymorth i fusnes micro.”

“I was really disappointed not to receive the first SEISS as I hadn't been a freelancer for a long enough period of time. A new business like mine needed the money more than established ones. I had no financial support for months.”

“Until the pandemic, there was little support as I fell outside of the normal funding available. This has improved due to the freelance funding and I am now able to use this funding to rebuild the business.”

Lack of awareness of support schemes

Taking respondents who did not know about a scheme as a percentage of all those who answered the question about that scheme, it is clear that the three most popular support schemes (CRF, SEISS, UC) were also the ones that most respondents knew about (lack of awareness was 11% or less) — see Figure 14.

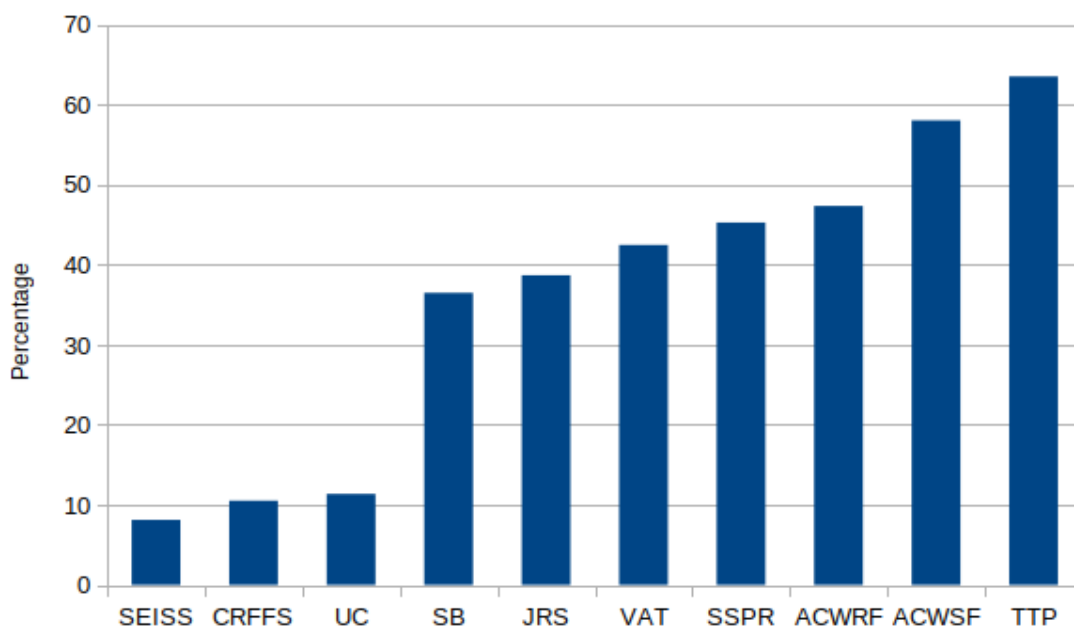


Figure 14: Lack of awareness of support schemes

Respondents were much less aware of other UK government support schemes, from the 30% who were unaware of the Small Business scheme to the 60% of the Time To Pay scheme. This raises questions about how effectively these schemes were publicised.

The two Arts Council of Wales schemes had unawareness levels of 47% (Resilience Fund) and 58% (Stabilisation Fund), which suggests that ACW may need to review its methods for publicising its schemes.

“Dydw i ddim yn siwr os oedd cymorth/grantiau ddigonol ar gael ar gyfer llawryddion yn y celfyddydau yng Nghymru oherwydd nid oeddent wedi cael eu hysbysebu'n ddigon da yn fy marn i.”

Support scheme information

Reflecting the high lack of awareness for some support schemes, only 46% of respondents felt that they had been adequately informed about the range of Covid-19 support schemes available.

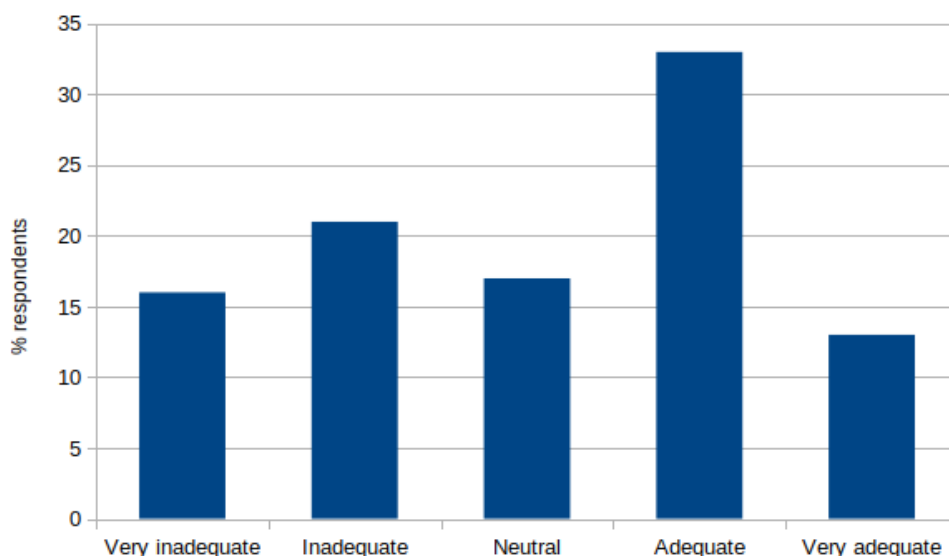


Figure 15: Adequate information about support schemes

Respondents noted that less experienced freelancers have a harder time finding their way through support options. Since only 8% of survey respondents had applied for support pre-Covid (see above), there may have been relatively little experience in making applications, which compounds the difficulties related to lack of awareness about possible support options.

“Nid oeddwn yn gallu rhwydweithio a chyd-weithio gydag artistiaid eraill cymaint ac yr hoffwn.”

“I'm unaware of support for women within live events and music festivals. I would cherish an opportunity to seek support for furthering my career and expanding on skills and experience.”

“Freelancing can be very isolating [so] access to knowing people who are more experienced is essential to feel supported.”

It was noted that support networks became even more essential during the pandemic. Since relying on networks or community support provided by unions, for example, was important, being a new freelancer with weaker networks probably impacted the capacity to find support.

“Nid oes unrhyw gefnogaeth i bobl fel fi. Dwi wedi gweithio ar brosiect pilot I fentora pobl sy'n gweithio yn yr run un maes a fi, ac yn teimlo'n gryf y byddai sefydlu rhwydweithiau lleol parhaol gyda cefnogaedd cydlynedd yn gwneud gwahaniaeth mawr i gadw pobl llawrydd mewn cysylltiad, I cyd-drefnu digwyddiadau defnyddiol, llesol a hyfforddiant yn gwneud gwahaniaeth mawr.”

“Networks are there (undoubtedly) but they can be a bit niche and also not particularly visible if you're not in the requisite circles.”

This indicates the importance of communication channels and networks – such as Creative Cardiff (which held a series of online interviews with key funders in 2020 to help explain and disseminate schemes) – to reach a dispersed and sometimes isolated freelance community.

Financial support received

While it was encouraging that many respondents received much-needed support, this only covered around half of their lost income. Those respondents who received support received on average £8,300 from support schemes, which is 58% of the average income loss of £14,300 in 2020 (Figure 16).

Shortcomings in support

Some freelancers with protected characteristics and/or who had caring responsibilities noted deficiencies in support. It was also noted that the delivery of some of the

schemes were poorly managed, including schemes 'running out' of funds in some areas.

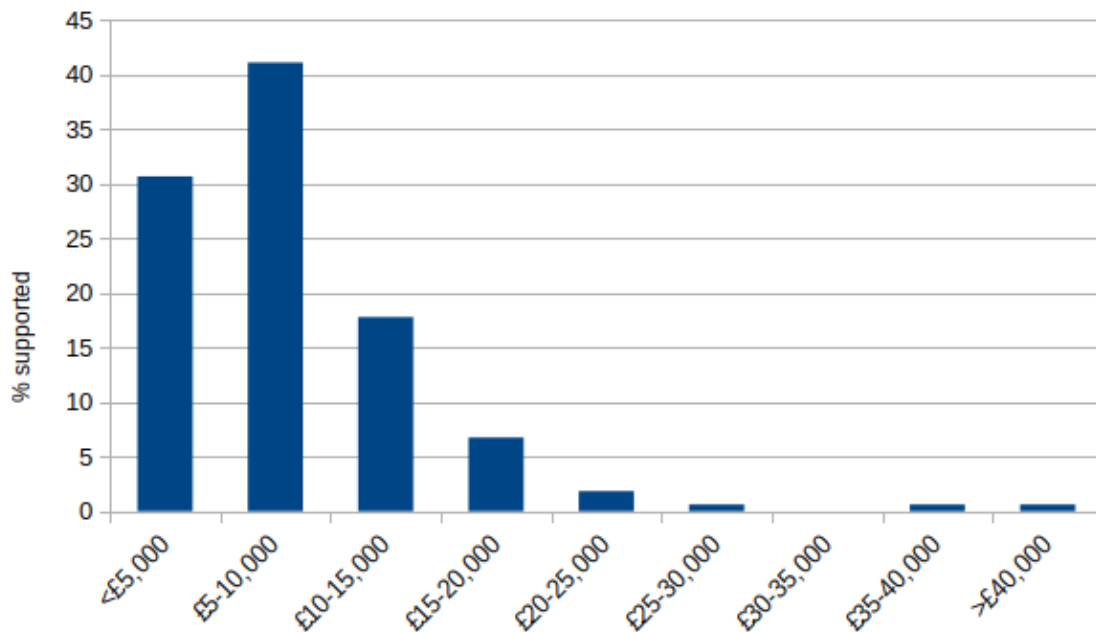


Figure 16: Support received by financial band

(a) Gender

Among the specific challenges faced by women are gender bias and lack of recognition.

"Being a female is always difficult in the performance industry."

"A lot of places still try to get me to work for nothing, for the 'exposure'. I sometimes feel that I would be taken 'more seriously' if I were male!"

"I honestly find it really hard to be heard as a...woman from a very rural part of Wales."

(b) Disability

D/deaf and disabled freelancers mentioned barriers such as complex language in documents, and the general feeling that authorities do not actually understand disability. Respondents also said that there was a lack of understanding of the real needs of the overall cultural freelancing sector.

"The way text is presented is confusing - bilingual emails can become a wall of words if not managed properly; it would also be useful to have more description and

explanation of what a place I might be attending will be like - such as photographs of the building inside and out, what the parking is like."

"My own needs arising from unpredictable disability and chronic illness and the unpredictable requirements to support my disabled children... I am surrounded by a cage of barriers [...]"

"I would have applied to Creative Wales but the opportunities were not disabled friendly [...]"

"[Grants were looking for] evidence [...] such as proof of cancelled work, which did not apply. [Given] my disorder, I went into a personal lockdown early for the sake of my own health, and did not book any in person work, so had no proof of cancelled work. In this way I was punished for being a disabled creative. [...] The only support money I received was a small amount of universal credit (less than £1000 over the pandemic), none of the grants reached me. I relied on others in my life for a place to live and to ensure I was not hungry."

This indicates that certain groups had less access to and were not able to apply for the available support schemes. One potential solution for improving this situation is that organisations and the Welsh and UK governments could improve accessibility for specific sub-groups by providing support to help with completing funding applications.

(c) Caring responsibilities

Respondents with primary or secondary caring responsibilities stressed how home-working conditions and child-care responsibilities created additional issues amplifying the negative impact of Covid-19.

"It's hard working in the dining room when you have two kids and a husband and the telly is in the other half of the room."

Satisfaction with support schemes

Respondents expressed different satisfaction levels with the sources of support from the Welsh Government, the Arts Council of Wales, and the UK government (Table 2).

Grouping the non-neutral feelings into negative and positive categories, and expressing the numbers for each source as a percentage (Figure 17), shows that the Welsh Government had the highest satisfaction ratings (60% of respondents were positive about its support), and the lowest dissatisfaction ratings (25% were negative). This is a distinctly positive shift since 2020, when the ratings for Welsh Government were 20% positive and 40% negative.

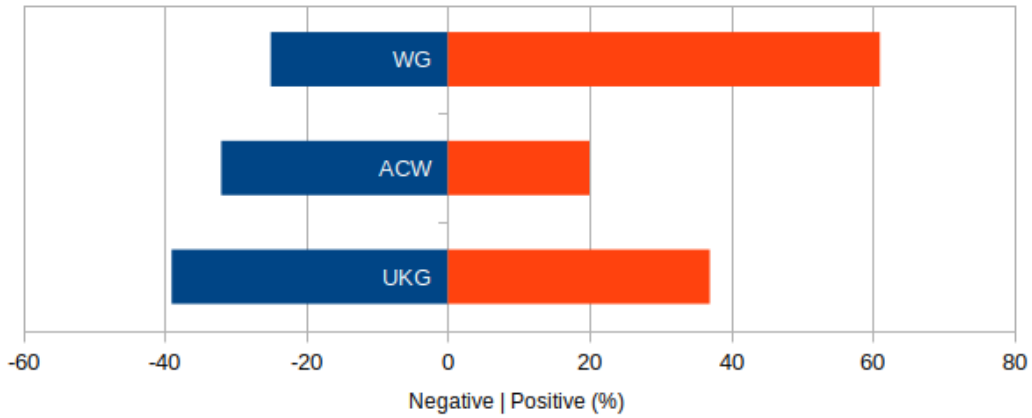


Figure 17: Negative and positive satisfaction levels

	WG	ACW	UKG
Extremely dissatisfied	21	22	34
Somewhat dissatisfied	25	24	28
Neither satisfied or dissatisfied	25	68	38
Somewhat satisfied	64	14	39
Extremely satisfied	47	14	19

Table 2: Satisfaction levels (% respondents)

Arts Council of Wales had much lower satisfaction ratings (32% negative), and higher dissatisfaction ratings (20% positive). This is a substantial negative shift since 2020, when the ratings were 15% negative and 31% positive.

Notably, the UK government had the highest dissatisfaction rating of the three, though this was balanced by a satisfaction rating of about the same size.

“Roedd y cymorth a gefais o fudd mawr, er iddo gymryd tipyn o amser i'r system gael ei chreu i rhoi cymorth.”

Outlook

In spite of the uncertainty caused by Covid-19, 72% of respondents said they will definitely or will likely continue to work in the sector (2020: 62%) – see Figure 18. However, a sizeable number (23%) are uncertain about whether to stay in the sector (2020: 33%).

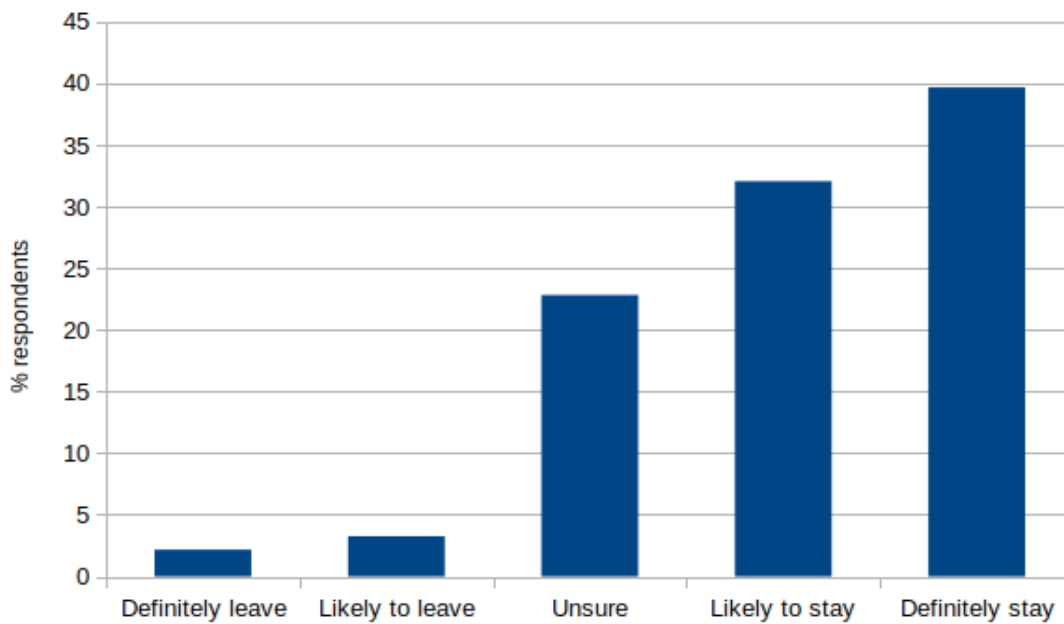


Figure 18: Career outlook for respondents

This suggests that, in the post-pandemic world, Wales may face skills shortages in some areas of the cultural sector – a situation that would have been far more critical without the support schemes that enabled creative freelancers to survive during the pandemic.

“I had to reallocate time to activities in other non-cultural sectors.”

“I have lost work as an artist but gained work as a researcher into the impact of Covid-19 on the arts sector.”

“I’m taking odd hours at a rate I was on 5 years ago which distract and take time from projects which are arts-related and helping me grow.”

“[...] the lack of future work available (in terms of what I can deliver in person as a facilitator) is scary. Now that SEISS [self-employment income support scheme] is likely to end I don’t think I’ll be able to continue with just my creative work.”

“My confidence and the confidence our clients and fellow freelancers has been really knocked, budgets have been reduced, which in turn has meant my day rate as a freelancer has been reduced. All this pressure has had a negative impact on myself and my family. My only hope is that next year things will start to return to normal.”

Conclusions and recommendations

Despite some differences in respondent profiles between this 2021 CFW survey and the 2020 *Rebalancing and Reimagining* survey,¹⁷ the picture that emerges of the impact of the Covid-19 crisis on the Wales freelance sector is remarkably similar. This section of the report summarises the main features and figures from the 2021 survey, and makes recommendations based on its findings.

The recommendations fall into 6 main categories:

- improving infrastructure and geographic equity;
- improving diversity and inclusivity;
- strengthening Welsh-language work;
- changing organisational governance;
- investment in cultural freelancers and rebalancing systems;
- improving funding and accountability processes.

We make no apology for repeating some of the 2020 recommendations in this 2021 report, since they are vital to rebalancing the sector to enable its effective future development by urging systemic changes to the working environment for freelancers. It also highlights that the change which freelancers have called for has not materialised. It is understandable that many organisations were in ‘firefighting’ mode during Covid-19, but the urgency and value of these recommendations has not diminished, and they need to be addressed over the next few years if the sector is to flourish.

Organisations and their boards, self-producing freelancers, and other stakeholders must resist the temptation to simply ‘get back to normal’ and instead focus on what role they will play in reshaping the sector for a flourishing and more inclusive future.

Assuming CFW can continue our work this year, we plan a Winter 2022 survey to monitor changes on these systemic issues, and seek feedback from freelancers on their working environment.

¹⁷ On average, respondents to this survey were older, less likely to be based in South Wales, less likely to speak Welsh, and more likely to be self-employed.

Freelancers in Wales

There are around 8,500 freelancers in Wales, constituting around half of all individuals working in the cultural sector.¹⁸ Almost half are based in South Wales, but a quarter each are located in North and Mid Wales. About 60% are based in towns and cities, but the remainder are based in rural areas.

43% of freelancers work in the performing and visual arts (actors, musicians, etc), and 25% work in film and TV (producers, directors, etc). Others work as authors (8%), graphic designers (5%) and choreographers (5%). 80% are self-employed, and virtually all of the remainder are self-employed for at least some of their work.

Annual freelance income on average is just over £17,000, 62% of average UK income in the cultural sector, and 53% of the average salary in Wales. Income was less than £20,000 a year for 63% of freelancers. This points up the precarious nature of employment for freelancers in Wales, and the need to strengthen the sector in order to avoid a deficit in cultural capital.

Covid-19 meant that many freelance activities had to shift online, and many freelancers adapted to this new way of working. However, freelancers lacking the skills to do this, or living in areas lacking the infrastructure to do this, were left behind.

Recommendation: The Welsh Government should prioritise the rollout of high-bandwidth internet connectivity in all parts of Wales, but particularly rural areas, in order to give freelancers better access to work opportunities wherever they live. This reinforces the recommendations made by the National Infrastructure Commission for Wales Report 2020.¹⁹

Recommendation: The Welsh Government and Arts Council of Wales should promote measures to improve and diversify the digital skillsets of freelancers.

Recommendation: Arts Council of Wales should ensure that funding is equitably distributed to all parts of Wales, particularly where funding for venues is involved. Funding levels for North and Mid Wales are especially important in view of the knock-on effect they will have on the Welsh language.

¹⁸ The estimation is based on the latest DCMS sector data, which found around 17,000 people working within the cultural sector in 2020 in Wales. Taking into consideration current sector estimates, around half of the workforce in the creative and cultural industries are freelancers. See www.gov.uk/government/statistics/dcms-sectors-economic-estimates-employment-percentage-measure.

¹⁹ gov.wales/sites/default/files/publications/2020-12/digital-communications-infrastructure-in-wales-report-and-recommendations.pdf

Gender

Women form 52% of the freelancer workforce, but they are disproportionately represented at lower income bands, and on average earn only 67% of what men earn.

Recommendation: Arts Council of Wales should require organisations to report annually on the gender pay gap for both salaried and freelance staff, and the steps they are taking to minimise this gap.

Caring responsibilities

34% of freelancers have caring responsibilities, and this applies to both women (38%) and men (28%). On average, freelancers with caring responsibilities had a larger income (116%) than those who did not have such responsibilities, but this may be due to additional caring-related payments.

Recommendation: Organisations should sign up to the Parents in Performing Arts (PiPA) charter.²⁰

Recommendation: Organisations should support freelancers with caring responsibilities by giving reasonable flexibility (e.g. working hours) upon returning – as well as offering the possibility to bring children to work, supporting this where reasonable and safe.

Ethnicity

Freelancers who are Black, Asian, and/or of mixed/multiple ethnicities form 7% of the freelancer workforce, but on average earn only 69% of what white freelancers earn.²¹

Recommendation: Arts Council of Wales should require organisations to report annually on the race pay gap for both salaried and freelance staff, and the steps they are taking to minimise this gap.

Disability

D/deaf and disabled freelancers form 17% of the freelancer workforce, and on average earn 60% of what freelancers who do not identify as disabled earn.

Recommendation: The Welsh Government and the Arts Council of Wales should ensure it is always possible to apply for funding using BSL, audio, video, or other

²⁰ pipacampaign.org/pipa-best-practice-charter

²¹ Note that since respondent numbers from the Global Majority were small, the conclusions may be less statistically robust.

accessible methods, and provide funding or support to complete such applications. This should be publicised widely.

Recommendation: Arts Council of Wales should require organisations to report annually on the disability pay gap for both salaried and freelance staff, and the steps they are taking to minimise this gap.

Diversity and Inclusion

Recommendation: Organisations should adopt and publish Strategic Equalities Plans which plot specific time-lines for each action.

Recommendation: Organisations should prioritise forming long-term and/or task and finish Equity Panels comprised of paid D/deaf and disabled freelancers and freelancers of the Global Majority, in order to advise on strategies and Equality and Diversity planning.

Recommendation: Organisations should ensure that all staff have regular diversity and inclusion training, and ensure that this training is only delivered by facilitators with lived experience.

Recommendation: Organisations should ensure that women, D/deaf and disabled freelancers, and freelancers of the Global Majority are equitably represented on associate and development schemes.

Recommendation: Arts Council of Wales should hold all funding recipients accountable for action towards greater inclusivity and diversity within their workforces by making such action part of the criteria for the award of funding.

Welsh language

62% of freelancers had at least a basic knowledge of Welsh. Wales is a bilingual nation with two official languages - English and Welsh. According to the 2011 Census, 19% of the population speak Welsh. The Welsh Government's *Cymraeg 2050* initiative aims to double the number of Welsh speakers to 1 million by 2050.²² Publicly-funded organisations must take their share of responsibility for achieving this.

Recommendation: APWs should develop or produce at least one Welsh-language production/project per year (this includes 'non-language based' companies, e.g. dance companies hosting classes/events in Welsh), using subtitle/translation systems to increase accessibility where necessary.

²² gov.wales/sites/default/files/publications/2018-12/cymraeg-2050-welsh-language-strategy.pdf

Recommendation: Arts Council of Wales should require organisations to report annually on the number of Welsh-speakers among both salaried and freelance staff, and the steps they are taking to encourage the use of Welsh and offer access to Welsh learning in their venues, productions, etc.

Recommendation: Organisations should seek to include more Welsh-speakers as arts associates.

Diversity at management level

Arts Council of Wales has already drawn attention in its Strategic Equality Plan to the lack of diversity in the management boards of APW organisations.²³

Recommendation: Arts Council of Wales should require organisations to report on how they plan to diversify their management boards by end-August 2022, and what steps they will take beyond that date to enable a plurality of voices to strengthen their organisation at the highest levels.

Organisations also need to pay greater attention to the freelancer workforce, without which many of their activities could not be delivered. This implies having freelancers represented at board level, where decisions are made. This may entail changing some current working methods in order to allow full participation by freelancers.

Recommendation: Organisations should aim to have at least 2 theatre and performance freelance workers on their board by end-August 2022.

Recommendation: Organisations should provide training for board members to understand what freelance workers contribute, and also training for freelancers to enable them to contribute to the processes and outcomes of board meetings.

Recommendation: Organisations should ensure annual diversity and inclusion training is undertaken by the board, facilitated by those with lived experience.

Recommendation: Organisations should review honorariums for board members in order to allow lower-resourced freelancers to fully engage with board-level work.

Impact of Covid-19

Covid-19 had a negative impact on the income of 92% of freelancers. Almost half (49%) lost at least 80% of their work. On average, freelancers lost £14,000 in 2020 (82% of the average £17,000 income), though the predicted average loss for 2021 was less, at £10,000 (59% of average income). This is likely to be a consequence of the support schemes made available by the Welsh Government and others (see below).

²³ arts.wales/resources/strategic-equality-plan-2017-21

45% of freelancers suffered cancellation of projects and events, and a further 37% had offers of work reduced or curtailed. As a result, 57% ceased investing in new equipment, training, etc., with knock-on effects for suppliers of those items. This could affect future competitiveness and growth in the cultural sector and other related sectors. 18% had to reallocate time to activities outside the cultural sector, and 11% hired fewer freelancers on their own projects.

Covid-19 also had a negative impact on the well-being of 84% of freelancers, with longer-term effects including mental and physical health problems. This is a small increase in negative impact since 2020, suggesting that there has been no improvement in well-being since the start of the pandemic.

Impact of support schemes

Before Covid-19, only 8% of respondents had ever applied for a support scheme of some kind, but 91% of respondents did so during Covid-19. On average, respondents applied for 2 support schemes, and 86% of applications were successful. The schemes appear to have had a significant impact on income – on average, as noted above, lost income was £4,000 less in 2021 than in 2020.

The most successful and well-regarded support scheme appears to be the Welsh Government's Cultural Recovery Fund for Freelancers, which accounted for 36% of applications, 89% of which were successful.

The next most successful was the UK Government's SEISS scheme, which accounted for 29% of applications, 95% of which were successful.

The Arts Council of Wales support schemes accounted for 13% of applications, 60% of which were successful.

Universal Credit accounted for 12% of applications, 88% of which were successful.

On average, freelancers received over £8,000 from support schemes.

Although these support schemes were a vital lifeline for many freelancers, they were of necessity put together quickly in order to provide a rapid response, which inevitably created shortfalls in provision.

Many freelancers were ineligible for one or more of the support schemes. The Welsh Government's CRFF had the lowest ineligibility rate (11%), followed by SEISS (26%) and Arts Council of Wales (28%). Other more specialised support schemes had higher rates of ineligibility, up to over 50%, so they were less accessible to freelancers. Younger freelance businesses were not eligible for some support schemes, and less-experienced freelancers with weaker support and information networks may have found it more difficult to find their way to support options.

Recommendation: The Arts Council of Wales should continue to invest in and support the establishment and development of networks which can connect with and represent freelancers.

Only 46% of freelancers felt adequately informed about the support schemes available. The Welsh Government's CRFF, SEISS and Universal Credit were the most widely-known – lack of awareness of them among freelancers was 11% or less. Other support schemes had lack of awareness rates of up to over 60%, among them those from the Arts Council of Wales (with a lack of awareness rate of 53%).

The dispersed nature of the freelance community means that “ordinary” communication channels may not have been effective.

Recommendation: Providers of support schemes should put particular emphasis on publicising the scheme, perhaps by asking existing freelance networks to distribute information.

Satisfaction

This covered not just financial support, but other aspects including accessibility, the application process, and availability of information.

The speedy and proactive response of the Welsh Government to the crisis facing freelancers during Covid-19 seems to have been appreciated, since its support received a high satisfaction rating (61%) which was 3 times the 2020 rating. The UK Government had the next highest positive rating (37%), but this was balanced by a 39% negative rating. Arts Council of Wales had the lowest positive rating (20%), a decline from its position in 2020, when it was viewed positively by 31%.

Net positive/negative ratings for the support offered were:

- Welsh Government: +36%
- UK Government: -2%
- Arts Council of Wales: -12%

Outlook

There is an improvement between 2020 and 2021 in the perception of future prospects for freelancers in the sector. 72% of freelancers feel they will continue to work in the sector (up from 62% in 2020), though 23% are uncertain about whether they will do that (down from 33% in 2020).

As the Covid-19 crisis diminishes, though, it is important not to go back to the pre-pandemic status quo where the value and input of freelancers to the overall value of

the cultural sector was often played down or overlooked. Working conditions need to reflect a new awareness of how important freelancers are to the sector.

Recommendation: Organisations should expand affiliation programmes, especially targeting under-represented groups or art forms/roles, in order to help develop home-grown freelancer talent.

Recommendation: Organisations should where possible offer free places to freelancers on courses or training which the organisation plans to offer internally.

Recommendation: Organisations should leverage their online footprint to build awareness of freelancers by regularly signposting local freelancer work on their websites and on social media, even if those freelancers are not formally affiliated with the organisation.

Rebalancing the cultural sector work environment

Freelancers stated they feel 'underpaid and undervalued', and that current systems do not '[make] it very easy for people to plan or stay in the industry', with one respondent calling for a 'total rethink' of the way the sector is organised. Our research shows that a rebalancing of the cultural sector and day-to-day work environments for freelancers is urgently needed.

Recommendation: Organisations should prioritise engaging and supporting Wales-based freelancers, and protect their 'freelance spend' as a proportion of turnover.

Recommendation: Organisations should formalise arrangements for contract cancellation to ensure that they are not disadvantageous to freelancers. For instance, contracts due to start within the next three months might be honoured on a sliding scale. Income protection insurance and sick pay guarantees should be included in freelance contracts.

Recommendation: Organisations should interview and audition across Wales, in order to expand their pool of workers and cater for those who may not be able to afford to travel to, for example, Cardiff to interview. Options such as Zoom have become more widespread and acceptable during Covid-19, so there is little reason not to use them.

Recommendation: Organisations should make a specific effort to contract new freelancers (i.e. those whom the organisation has not worked with before) and early-career freelancers to improve career development, which will strengthen the freelance sector while at the same time enlarging the range of home-grown workers available to organisations. A target might be that new and early-career freelancers should form 20% of the team on at least 50% of an organisation's projects in any given year.

Recommendation: Organisations should seek to enhance the working environment for freelancers by (for example):

- Introducing new hires to the core team and giving them a welcome pack with key information (in accessible formats when that is appropriate), including WiFi codes.
- Arranging dedicated workspace for the duration of the contract, with storage space (eg. a locker) and WiFi access.
- Offering to freelancers the same level of discount at the venue’s facilities (cafe, shop, etc) as offered to employed/permanent staff.

Recommendation: Organisations should improve two-way communication with freelancers by (for instance):

- Responding promptly to contact from freelancers or from work applicants who have been unsuccessful, including feedback points where possible.
- Offering (paid) debrief sessions for freelancers who have worked there to learn from their experience with the organisation and hear what improvements can be made.
- Always ensuring fees and expenses are on the call-out / in the early stages of discussions where there is no call-out. Do not wait for the freelancer to ask.

Investment in the cultural freelance sector

Recommendation: The Welsh Government (in consultation with Arts Council of Wales) should pilot a Universal Basic Income (UBI) scheme, using theatre and performance freelancers in Wales as a testbed, as recommended by the Future Generations Commissioner.²⁴ The 2022 Budget for the Republic of Ireland has committed to a UBI pilot of €25m for artists, with payments beginning from March 2022.²⁵

Recommendation: Arts Council of Wales should move towards “light touch” application forms, consonant with the need to ensure that public money is appropriately spent with accountability.

²⁴ futuregenerations.wales/news/future-generations-commissioner-calls-for-a-universal-basic-income-pilot-for-creatives

²⁵ thejournal.ie/readme/universal-basic-income-catherine-martin-5385399-Mar2021

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