
Global Survey of World Cities: the Role of Culture in Recovery

October 2020
Introduction and Overview

This is the fifth Bulletin summarising discussions across global cities about the impact of COVID-19.

It has been prepared in advance of the WCCF Global Conversation on 29 October 2020, which will bring together Mayors and leaders from WCCF member cities.

It is based on a specially commissioned survey of the forty member cities of the World Cities Culture Forum - capturing support for culture and its role in recovery.

It is designed for WCCF member cities to help inform COVID-19 recovery planning.

At the start of the pandemic there were emergency responses: helping cultural producers – organisations, artists and freelancers – to survive the sudden, severe impact.

Now, the longer term consequences are becoming clearer. Shifts in how we live our lives will severely affect demand for arts and culture even into the medium term. Cities and cultural organisations are working out how they can support the recovery from COVID-19.
How Culture can support cities’ recovery from COVID-19

World Cities need to secure the future of culture so that it can drive recovery

World Cities are positioning culture to drive recovery
- A more sustainable way of life
- A fairer, more resilient economy
- New digital opportunities

Cities require new levels of co-operation & partnership
- Closer links developed between cities, culture and other partners
- But city resources now under huge strain

First cities must secure the future of culture: it still faces an existential threat
- Huge falls in revenue
- Audience collapse
- Cultural workers especially vulnerable
- Venues’ economics precarious

The impact of culture in the recovery will be strongest where it aligns with citizens’ needs
Cities & culture stand or fall together

World Cities and their cultural sectors are bound together as never before to secure the future of culture and position it to drive recovery.

• Initially, emergency responses were needed to protect the cultural sector from the devasting shock of the pandemic. Those measures are still relevant: we are not over the crisis.

• Our survey shows that cities expect the pandemic’s effect to extend into the medium term and beyond.

• Cities are now thinking not just about protecting the cultural sector, but how the city and its cultural sector rebuild together.

• Support from cities will be most forthcoming when culture’s recovery aligns with citizens’ needs.
A more sustainable way of life

The pandemic is changing our relationship with our cities. We are focusing more on our own cities, neighbourhoods and homes. Culture can bring richness and vitality to this new way of living.

- We have an opportunity for a greener, more localist culture, with the drop in long-distance travel expected into the medium term. In Milan 2 million Euros were allocated to the ‘Cultural Plan’ primarily focused on grassroots and local culture.

- Organisations can redefine their community engagement. While closed, London’s Young Vic theatre kept on three community engagement staff, building new links with local social health and community partners, and producing an outdoor installation “The Unforgotten” celebrating local black trailblazers.

- Many aspire to the 15 minute city. We can bring culture to people’s neighbourhoods. In Helsinki, the Art Gifts app allows cultural practitioners to share intimate live performances, and bring culture to public space in the neighbourhoods were people live.
A fairer, more resilient economy

The cultural sector is a $2 trillion industry employing 30 million people. But the pandemic has shown its institutions and workers are especially vulnerable. Plans to rebuild robust economies with secure jobs need to include the cultural sector.

• Freelancers, micro-businesses and individual artists may not survive the downturn. Social security support, or more stable employment contracts can help. France’s Intermittant du Spectacle scheme provides social security cover recognising the breaks in performers’ employment.

• Commercial income in culture has been devastated. Public funds have helped but these are limited. Cities were already thinking about new funding models – for example Zurich’s Laboratory for New Forms of Cultural Funding – this work is now urgent.

• The crisis has generated more resilient partnerships with wider social missions like health and education. In Moscow, the art community has seen more self organisation and solidarity, with online sales platforms, a mutual support group, and an artist nominated group show at the Garage Museum.
New digital opportunities

COVID-19 has shifted the balance online in home-working, retail and cultural consumption. Cities need culture’s innovation and content creation to make a success of new digital opportunities in our economic, social and civic lives. But not all citizens have digital access, which must be addressed.

• Organisations moved online with amazing speed, finding new audiences and income streams. The Met Opera in New York launched a Nightly Met Opera Stream. Viewership increased by 1,500% during lockdown with a 2,000% increase in new users.

• Cities created digital platforms for creatives, helping transition to digital. In 2021 Warsaw is launching a service with free and paid content, with professional recording quality and copyright guidelines.

• Digital delivery is helping maintain international links while travel is limited. Buenos Aires’ Cultura en Casa online programme features guest content from other cities: Mexico, Barcelona, Montevideo and Bogotá.
Increase in co-operation and partnership

Cities, their cultural sectors and wider partners need to work together better. The pandemic has seen new relationships emerge, but cities’ resources are now under huge strain.

Cities have improved links with the cultural sector and other parts of government

• 70% of cities say links with the culture sector are better. 58% have improved relations with the rest of government.

But there is no settled view on the sector’s needs, and anxiety about culture’s funding and policy priority

• 48% say the city has a clear understanding of culture’s post-pandemic needs.

• Despite aspirations for extra funding, 30% think budgets will fall. Only 21% think culture will be a priority.

Source: World Cities Culture Forum (2020). Global Survey of World Cities: the Role of Culture in the Recovery
Increase in co-operation and partnership

World Cities Culture Forum Global Survey of World Cities: the Role of Culture in the Recovery

Cities have improved links with the cultural sector and other parts of government

- Improved links with the cultural sector: 70%
- Improved relations between the city’s culture department and other departments of government: 58%

But no settled view on the sector’s needs, and anxiety about funding and priority within cities

- The city has a clear understanding of culture’s post-pandemic needs: 48%
- There will be cuts to the city’s culture budget post-pandemic: 30%
- Culture will be a more important priority for the city post-pandemic: 21%

Source: World Cities Culture Forum (2020). Global Survey of World Cities: the Role of Culture in the Recovery
Note: Data above represented net agreement rate across 29 respondents.
Culture still faces an existential threat

Culture isn’t like most parts of the economy. Its unique qualities have been especially vulnerable to the effects of the pandemic, and this is set to continue.

There is a huge drop in revenue across the sector

- Cities have provided substantial additional funding, but cannot offset the huge losses in commercial and philanthropic income.
- 77% of cities have major concerns over the bankruptcy and permanent closures. 30% of cities worry increased public funding in the future will not be possible.

Audiences will remain low into the medium term

- World Cities have world audiences. Bigger institutions, in particular, rely on cultural tourists.
- This is a major concern for 84% of world cities, with 75% rating a negative or very negative impact on cultural tourism in medium term.
Cultural workers are especially vulnerable

- Many individual artists, freelancers and small-businesses don’t have the resources to see out the downturn. Many may leave the profession.
- World cities see a severe impact of the pandemic so far on artists, freelancers and small businesses: 91% of world cities rated a negative or very negative impact on them.

Venues’ economics are precarious

- Even where venues are reopening, it is with higher costs and lower revenues.
- 77% of world cities have major concerns about losing venues. 91% rated a negative or very negative impact on grassroots venues.
Emergency responses needed to support and protect cultural sector

The impact to-date on world cities’ cultural ecosystem:

Freelance artists and creative professionals

Small, grassroots venues

Large venues

Festivals and cultural events

Private sector organisations

Publicly supported organisation

Source: World Cities Culture Forum (2020). Global Survey of World Cities: the Role of Culture in the Recovery
Note: data above shows the weighted average of the rating from very negative to very positive.
Culture faces an existential threat. Cities’ major concerns:

- Loss of cultural tourists: 84%
- Bankruptcy / permanent closure of venues and organisations: 77%
- Freelance artists and creative professionals leaving the sector / the city because of lack of work: 69%
- Temporary closure of venues: 59%
- Redundancies among cultural sector employees: 57%

Source: World Cities Culture Forum (2020). Global Survey of World Cities: the Role of Culture in the Recovery
Views on the medium term impact of COVID-19

Audiences will remain low, except for digital

Cultural tourism

Demand for in-person cultural activities

Demand for digital cultural activities

Cultural ecosystem remains vulnerable

The diversity of the creative workforce

Physical venue infrastructure

New artistic works, commissions, shows and exhibitions

Source: World Cities Culture Forum (2020). Global Survey of World Cities: the Role of Culture in the Recovery Note: data above shows the weighted average of the rating from very negative to very positive.
Questions for city leaders…

• People are thinking local: how do organisations build new links with their communities?

• Long-distance travel has collapsed: how do we remain globally connected if we are operating more locally?

• Digital will only become more important: what is the role of city government in digital culture?

• Freelancers and artists are suffering: how do we build more secure employment models for the cultural sector?

• Every kind of funding stream has taken a hit: what does a reliable future funding model for culture look like?

• Difficult times have brought artists and policy makers together: how do we best build on these partnerships?

• The pandemic is a health crisis first and foremost: is there a new role for culture in health and wellbeing?
About World Cities Culture Forum

The World Cities Culture Forum is the leading network of senior policy-makers from 40 world cities providing global leadership on culture.

We are a collaborative network of influential city leaders championing culture across urban policy.

We enable city members to share experiences, develop knowledge and grow leadership.

This bulletin is part of the WCCF programme for 2020-21:

Response, Recovery, Reinvention

1. **Response** – Phase one responds to the current crisis cities are facing through weekly briefings, webinars, virtual events and analysis bulletins

2. **Recovery** – Phase two adapts and extends our existing programme to answer the central questions about recovery for culture in cities

3. **Reinvention** – Phase three looks to the future of culture in cities. What have we learnt? What are the new opportunities? What does city leadership look like?