

The impact of the COVID-19 pandemic on the creative industries: a literature review and future research agenda

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The Impact of the COVID-19 Pandemic on the Creative Industries: A Literature Review and Future Research Agenda

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Abstract

The ongoing COVID-19 pandemic has affected countless businesses, leading to serious disruptions for many industries. Drawing on the resilience literature, this study offers an understanding of the impact of the COVID-19 pandemic on the creative industries and their response to the challenges they have encountered. This study reviews 59 papers following the systematic literature review approach and reveals several positive implications of the COVID-19 pandemic within the creative industries (e.g., IT and software) as well as the negative (the music industry, festivals, cultural events). Identifying six themes related to the impact of the COVID-19 pandemic on the creative industries, we develop a response matrix based on the discussion of firms' digital capabilities and their ability to adapt to the COVID-19 crisis. We outline future research directions using a Theory-Context-Characteristics-Methodology (TCCM) framework.

Keywords: Creative industries, COVID-19, TCCM, resilience.

1. Introduction

Since November 2019 the world has been battling the pandemic caused by the Severe Acute Respiratory Syndrome Coronavirus 2 (SARS-CoV-2), also known as 'Coronavirus Disease 2019' (COVID-19) (Barrero, Bloom, and Davis, 2020). This ongoing pandemic has brought significant losses for countless businesses, leading to serious disruptions for many industries (Leite, Hodgkinson, and Gruber, 2020; Ivanov, 2020; Prentice, Quach, and Thaichon, 2020; Mehrolia, Alagarsamy, and Solaikutty, 2021). Along with the travelling, hospitality and retail trade sectors, the creative industries have been severely affected by the COVID-19 pandemic (Banks and O'Connor, 2020; Harper, 2020; Pacella, Luckman, and O'Connor, 2020;

Ratten, 2020a; Serafini and Novosel, 2020). Gaining a better understanding of the social and economic impacts of the COVID-19 pandemic, as well as formulating potential responses to this crisis, is part of the current research agenda (Banks and O'Connor, 2020; Ratten, 2020a, 2020b; Verma and Gustafsson, 2020).

The business and management literature related to the economic and social effects of the COVID-19 pandemic is growing rapidly (Nayal, Pandey, and Paul, 2021; Donthu and Gustafsson, 2020; Verma and Gustafsson, 2020; George, Lakhani, and Puranam, 2020; Fairlie and Fossen, 2021). However, little is known about how the creative industries are handling the COVID-19 pandemic and its impact (Ratten, 2020a; Banks and O'Connor, 2020; He and Harris, 2020; Meyrick and Barnett, 2020; Joffe, 2020). The dynamics of the impact vary significantly across creative subsectors and countries (OECD, 2020; Dümcke, 2021; Florida and Seman, 2020), with the Information Technologies sector experiencing positive effects (Kim, Parboteeah, and Cullen, 2020) while libraries, museums, the arts and entertainment industries have experienced negative effects (Agostino, Arnaboldi, and Lampis, 2020; Machovec, 2020).

The creative industries overall have faced many short and long-term challenges as a result of the pandemic, such as redundancies, bankruptcy, event cancellations, and so on (OECD 2020). Different countries introduced many different governmental and private support measures (e.g., job retention schemes, one-off grants and funding) to leverage the long-term economic and social impacts of the COVID-19 pandemic (Dümcke, 2021; Joffe, 2020; Betzler et al., 2020). An analysis of the way different countries have responded to the COVID-19 pandemic could assist in developing further measures to offset the loss of income in the creative industries.

Recent studies have examined the economic effects of the COVID-19 pandemic on small businesses and the self-employed (Fairlie and Fossen, 2021; Barrero et al., 2020; Donthu and Gustafsson, 2020). These studies have focused on either the transformation of traditional business models or on the mechanisms underlying changes in employment patterns and customer engagement (Sheth, 2020; Donthu and Gustafsson, 2020). However, despite the socio-economic significance of the creative industries in terms of their economic and social footprints and their employment contribution (OECD, 2020), research into the impact of the COVID-19 pandemic on this sector is rather scarce (Majdúchová, 2021).

Situated within the literature on the creative industries and organisational resilience (Vogus and Sutcliffe, 2007; Williams and Vorley, 2017; Linnenluecke, 2017; Sawalha, 2020) this paper offers an understanding of the impact of the COVID-19 pandemic on the creative industries and their response to this crisis (Eikhof, 2020). Our study is guided by the following

research question: What is the topical focus and trend direction of publications exploring the socioeconomic effects of the COVID-19 pandemic on the creative industries?

In order to answer this question, we have undertaken a systematic literature review. We conducted an overview of existing research on COVID-19's impact on the creative industries, drawing on recent studies discussing the pandemic's social and economic effects and how it has affected businesses (Barrero et al., 2020; Verma and Gustafsson, 2020). We chose this approach for the following reasons. Firstly, we aimed to collect, critically analyse, and synthesize the existing and newly-emerged literature on the creative industries during the COVID-19 pandemic. Secondly, a systemic literature review enables us to investigate research gaps and identify areas which require further research. In doing so, we have applied the Theory Context Characteristics Methodology (TCCM) framework (Paul and Rosado-Serrano, 2019, Rosado-Serrano, Paul, and Dikova, 2018). This will help us identify COVID-19's social and economic effects as well as potential directions for future research into the creative industries – the COVID-19 pandemic research domain. Thirdly, the systematic literature review allows us to identify the state of knowledge regarding the creative industries during the COVID-19 pandemic (Snyder, 2019). Our review focuses on organizations of all sizes (small, medium and large organisations, individual entrepreneurs and freelancers) in the creative industries. Out of the 578,560 papers published between November 2019 – April 2021, we retained 59 peer-reviewed papers pertaining to the impact of the COVID-19 pandemic on the creative industries.

This paper contributes to the business research and management literature by providing a systematic review of how the creative industries have responded to the COVID-19 pandemic by developing a response matrix for firms in creative industries based on six themes that were derived from the review. It also extends the COVID-19 pandemic research to the creative industries (Ammirato, Linzalone, and Felicetti, 2020; Eikhof, 2020) by adopting the TCCM framework to suggest future research directions (Paul and Rosado-Serrano, 2019). Finally, this study provides insights for policymakers working to support the creative industries during the pandemic, as well as for scholars wishing to address the gaps in research (Mays, Pope, and Popay, 2005).

This study is structured as follows. In Section 2, we briefly introduce the literature on pre-COVID-19 cultural entrepreneurs and creative industries. Section 3 discusses the organisational resilience theory, while Section 4 outlines the methodology of the study. In Section 5 we synthesise the results of the impact of the COVID-19 pandemic on the creative industries, then go on to define six key themes related to this research. We discuss our findings and future research directions using the TCCM framework in Section 6. Section 7 concludes.

2. Cultural entrepreneurs and the creative industries pre-COVID-19

2.1. The role of creative industries in global economy

The creative industries have been widely acknowledged as an important conduit for economic growth and development (Henry, 2007; UNCTAD, 2008; Landoni et al., 2020; Cooke and De Propris, 2011). The creative industries concept has been developing since the 1990s as governments have introduced policies to systematically develop and promote culture, the technology-intensive sectors, entertainment, and so on (Caves, 2000; Lampel and Germain, 2016). The creative industries are of particular interest to business and management scholars because of their inclusiveness and post-industrial characteristics, such as their flexible organisation, extensive use of technologies, and the employment of creative and technical talents (Lampel and Germain, 2016; Lampel, Lant, and Shamsie, 2000). In addition, the creative industries cover a full range of organisational characteristics and activities, from large multinationals to micro-businesses and cultural entrepreneurs (Li, 2020).

Over the past decade, the creative industries have also become an important sector of the global economy (Li, 2020; Rodríguez-Gulías, Fernández-López, and Rodeiro-Pazos, 2020). This sector has a profound impact on the social and cultural aspects of people's lives (Santoro, Bresciani, and Papa, 2020; Pratt and Jeffcutt, 2009). The creative industries were estimated to make up over 7% of the world's GDP (UNCTAD, 2004). According to The United Nations Educational, Scientific and Cultural Organization (UNESCO) (2017) the creative industries generated annually an estimated US\$2,250 billion of revenues globally and were projected to represent over 10% of global GDP in the years to come. "With export growth rates of over 7% over 13 years, global trade in creative goods was an expanding and resilient sector. During the period 2002-2015, the value of the global market for creative goods doubled from \$208 billion in 2002 to \$509 billion in 2015" (UNCTAD, 2018, p.9). According to the World Bank (2020), the UK and US significantly increased the values and shares of exports of goods related to the creative industries, with a year-on-year average growth rate of 1.02% for the US and 29.28% for the UK between 2002 and 2015. While the United Nations Conference on Trade and Development (UNCTAD) (2018) highlighted that the global market value of the creative industries was estimated at \$1.3 trillion, the Organisation for Economic Co-operation and Development (OECD) pointed to annual growth rates of between 5 and 20% in OECD countries. In the European Union (EU), the creative industries contributed 3.3% of the EU's GDP and represented 3% of the EU's total employment (European Commission, 2012).

2.2. Defining the creative industries and their taxonomy

The literature contains a number of classifications and definitions for the creative industries (Galloway and Dunlop, 2007; Cruz and Teixeira, 2015; UNCTAD, 2018; Li, 2020; British Council, 2010; Nesta, 2008). This paper adopted the UK's Department for Digital, Culture, Media and Sport (DCMS) definition of the creative industries as “those industries which have their origin in individual creativity, skill, and talent and which have a potential for wealth and job creation through the generation and exploitation of intellectual property” (DCMS 2019, p. 7).

Taking into account the diverse nature of the creative industries, which cover a wide range of activities such as creativity and intellectual activity (WIPO, 2017; Cruz and Teixeira, 2021), we apply the industrial perspective of classifying the creative industries based on DCMS (2013, p. 13). This includes advertising and marketing; architecture; design and designer fashion; film, TV, video, radio and photography; IT, software and computer service; music, performing and visual arts; publishing.

Cultural entrepreneurship is important for the success of the creative industries. It is broadly defined as “the process by which actors draw upon cultural resources (e.g., discourse, language, categories, logics, and other symbolic elements) to advance entrepreneurship or to facilitate organizational or institutional innovation” (Lounsbury and Glynn, 2019, p. 3; Park and Zhang, 2020). Cultural entrepreneurship enables the creative industries' stakeholders to generate revenue from cultural activities (Konrad, 2013; Hausmann, 2010; Enhuber, 2014). Cultural entrepreneurs can also be referred to as freelancers, the self-employed, and owner managers (Ellmeier, 2003; Konrad, 2013; Johnson, 2007; Smit, 2011; Wilson and Stokes, 2005). The role of key stakeholders in the development and evolution of the creative industries cannot be overstated. They form the sector's strategies and policies, support the community, and control the quality of goods and services (Quero and Ventura, 2009; Voss and Voss, 2000; OECD, 2018). Strong stakeholder networks can help the creative industries' workers to enhance cooperation within the industry's sub-sectors (Bazalgette, 2017).

3. Developments in the research on resilience theory

Resilience theory provides a framework which allows scholars to examine how individuals, organisations and even countries recover from the impact of unexpected events such as crises, economic shocks and other forms of adversity (Kitsos and Bishop, 2018). Resilience can be considered from different perspectives, such as organisational responses to external threats, organisational reliability, employee strengths, the adaptability of business models, or design principles that reduce supply-chain vulnerabilities and disruptions (Linnenluecke, 2017; Vogus and Sutcliffe, 2007). From an organisational perspective,

‘resilience’ can be defined as the “inherent characteristics of those organizations that are able to respond quicker, recover faster, or develop more unusual ways of doing business under duress than others” (Linnenluecke, 2017, p. 4).

3.1. The conceptual origins of the resilience theory

The genesis of resilience as a concept can be traced back to Meyer (1982), who investigated how organisations respond to external shocks. He suggested that organisations can implement new strategies and practices in responding to external threats, namely retention. It is also necessary to learn from the impact of environmental jolts by adopting first-order changes and one-off learning trainings, namely resiliency. Another important work in the development of resilience theory is Staw, Sandelands, and Dutton (1981), who suggested that resilience is applied to avoid risks and adapt to external threats.

During the 1990s and early 2000s, scholars shifted towards investigating how organizations can prepare for future unknown challenges (Sitkin, 1992) and how organizational systems can learn from crises by introducing and scaling experimentation. Sitkin (1992) suggested that organisations should not be afraid of failure, and should develop “intelligent failure” as a part of their learning process. The further research continued to explore how organizations cope with crises and adversity (Weick, Sutcliffe, and Obstfeld, 1999; Weick and Sutcliffe, 2001). Weick et al. (1999) remarked that high-reliability organizations often have a component of inertia in their activities. The authors moved from conceptualizing resilience as an outcome variable to resilience as a measure of reliability.

3.2. The implications of resilience theory post 9/11

Resilience theory was challenged by the events of 9/11 (Linnenluecke, 2017), shifting attention to coping mechanisms and response strategies to external shocks and crises. With growing global climate change, environmental uncertainty has also influenced research on resilience. The concept of resilience was first used as a regulatory framework by the Governors of the Federal Reserve System during this period (Hiles, 2008) as a response to the global financial crisis. In addition, Juettner and Maklan (2011) provided evidence regarding supply chain resilience during the 2007-2009 global financial crisis. They also developed resilience capabilities such as reaction speed, access to information, collaborations and flexibility.

In the 2000s, the research on resilience emphasized the role of individuals with the capability and ability to manage psychological pressures, creating workplace resilience (Coutu, 2002; Luthans, 2002). The research shifted to the importance of individual resilience, which was defined as ‘the capability of individuals to cope successfully in the face of significant change, adversity, or risk’ (Luthans, 2002, p. 702).

Further developments of resilience literature investigated the role of adaptation and the adjustment and reconfiguration of business models in organizations affected by hostile environments (Sutcliffe et al., 2003). Sutcliffe et al. (2003) demonstrated that organisations are more likely to be resilient if enabling conditions related to information processing, slack availability and capability development are reinforced.

Since the 2000s, research on organisational resilience has clustered on the impact of exogenous shocks on organizations and individuals, such as natural disasters, terrorism, supply chain development and so on. It has focused mainly on the influence of pre-existing conditions and the role of organisational capabilities in responding to such shocks (Chang and Falit-Baiamonte, 2002; Powley, 2009; Burnard and Bhamra, 2011; Pettit, Fiksel, and Croxton, 2010; Doern, Williams, and Vorley, 2019; Williams et al., 2017; Linnenluecke, 2017).

3.3. Recent developments of resilience literature

The recent research on organisational resilience focuses on the response to shocks by industries represented by small organisations (e.g., creative industries, retail trade, agriculture) (Herbane, 2019; Barrero et al., 2020). Building on work associating organizational resilience with crisis recovery, Herbane (2019) examined how small- and medium-sized enterprises (SMEs) could grow and pursue their activities to enhance resilience against operational interruptions. Barrero et al. (2020) examined how enterprises within constantly-changing dynamic environments implement strategic choices to respond to such environments and grow. The authors found that in order to grow, enterprises need to develop a robust structure of inter-connection between elements and organisational control systems during major macroeconomic shocks (e.g., global financial crises, the COVID-19 pandemic).

Earlier studies also highlighted the role of adaptation and adjustment as a strategic response to crises (Barrios, 2016; Olsson et al., 2015). Flexibility and agility are crucial to organisations during crises (Herbane, 2019). Resilience has become an essential part of addressing the crisis caused by COVID-19. Sawalha (2020) conclude that lessons learned from past crises must be reviewed in order to gain an awareness of how to adapt systems to new events and take advantage of them.

The literature that describes customer experiences during the COVID-19 pandemic emphasizes the change in customer attitudes and preferences triggered by lifestyle change and uncertainty (Sheth, 2020; Donthu and Gustafsson, 2020; Mehroliia et al., 2020; Prentice et al., 2020). One immediate effect of the COVID-19 pandemic has been irrational consumer behaviour, where customers simultaneously experienced panic-buying behaviour and a pent-up

demand for postponed purchases and services such as art, music and theatrical performances, etc (Billore and Anisimova 2021).

In addition, customers had to adapt to the “new normal” by modifying their customer behaviour. Such behaviour (e.g., face coverings, social distancing) is likely to be adopted for those attending museums, concerts, theatres and other social events (Sheth, 2020; Donthu and Gustafsson, 2020). Sheth (2020) demonstrated that changes in customer behaviour during the COVID-19 pandemic were associated with hoarding (stockpiling products), improvisation due to financial constraints and restrictions, learning digital skills, and other. A new trend for customers has been the delivery of online services (e.g., online concerts, performances, exhibitions) by the creative industries (Davies, 2020).

3.4. The creative industries in the context of resilience theory

Resilience theory was applied more widely during the COVID-19 pandemic (Hynes, Trump, Love, and Linkov, 2020), particularly in the creative industries. As an important component of the knowledge economy, the creative industries can be characterised as entrepreneurial, innovative, sustainable, and flexible. Such industries are particularly resilient to external crises (OECD, 2014; Herbane, 2019) and their flexibility is a key to this (Felton et al., 2010). The creative industries are considered as a sector which contributes considerably to sustainability and inclusive growth because of the diversity of its activities (e.g., IT, painting, crafts) (UNESCO, 2021; UNCTAD, 2010; OECD, 2006). Having considered the unique characteristics of this sector, Archer (2009) developed a resilience model for creative workers, which for the first time introduced two main characteristics describing creative workers and the context they work in: a) sustainability and b) challenging the current system in order to satisfy customer demand without major disruption. The resilience model introduced by Archer (2009) was in this respect distinct from frameworks applied to other industries.

The COVID-19 pandemic has pushed many businesses, including those within the creative industries, to operate rapidly and develop new, more resilient ways of functioning (Eggers, 2020; Ivanov, 2020). In order for businesses and organisations to survive in times of crisis, the main component of every system should be resilience (Hynes et al., 2020). The recent events of the COVID-19 pandemic have demonstrated that the creative industries adopted new business models to operate during this crisis. For example, some museums started to offer online exhibitions, while musicians delivered concerts via online streams or recorded their performances (Agostino et al., 2020; Gu et al. 2020), changing the customers’ experience, demand and consumption. The literature has also demonstrated that the majority of small

businesses, freelancers, and self-employed in the creative industries struggled to adapt to new changes and be resilient (UNESCO, 2021; Florida and Seman, 2020).

The COVID-19 pandemic has changed the way social capital is created and maintained, because it significantly restricted the traditional forms of networking between the creative workers and the communities (Dahles and Susilowati, 2015; Torres, Marshall, and Sydnor, 2019) and created the demand for new business models for creative industries. To overcome this issue, additional investments needed to be made in social capital; new forms of engagement with external collaborative partners and community were adopted by creative industries in order to enhance their resilience during and in the aftermath of the COVID-19 pandemic.

The analysed literature on resilience theory enabled us to identify potential data limitations, as a significant number of cultural entrepreneurs are freelancers working as a gig-economy, project by project. These data limitations create a gap between the contribution of creative workers who are formally employed, and the part-time self-employed, freelance and gig-workers in the economy. This data limitation may lead to underestimating the potential threat to national economies and the extent of possible spillover from the creative industries to other industries. Yet little research has been conducted examining the economic effects of the COVID-19 pandemic on entrepreneurs and small businesses (Belitski et al. 2021), particularly on those in creative industries. Ammirato et al. (2020) encourage the exploration of a variety of approaches to organizational resilience in the creative industries. Researchers need to consider the difference between the socioeconomic effects on the creative industries of COVID-19 specifically and of recession generally, and distinguish the differing socioeconomic effects of COVID-19 on creative industries and creative industries, including freelancers and gig-economy (Burtch, Carnahan and Greenwood, 2018).

4. Methodology

4.1. Generic considerations

Systematic reviews can be approached in many different ways (Paul and Criado, 2020), including theory-based reviews (e.g., Gilal, Zhang, Paul, and Gilal, 2019; Hassan, Shiu, and Parry, 2016), theme-based reviews (e.g., Mishra, Singh and Koles, 2020; Hao et al., 2019; Kahiya, 2018; Canabal and White III, 2008; Paul, Parthasarathy, and Gupta, 2017; Rana and Paul, 2017; Rosado-Serrano et al., 2018), framework-based reviews (e.g., Paul and Benito, 2018; Lim, Yap and Makkar, 2021), theory-context-characteristics-methodology (TCCM)-based reviews (e.g., Canabal and White III, 2008; Paul and Rosado-Serrano, 2019; Paul and Singh, 2017), theory development reviews (e.g., Paul, 2019; Paul and Mas, 2020; Pansari and

Kumar, 2017), hybrid reviews (e.g., Dabić et al., 2020), bibliometric analysis (e.g., Ruggeri, Orsi, and Corsi, 2019), and meta-analysis (e.g., Rana and Paul, 2020; Barari, Ross, Thaichon, and Surachartkumtonkun, 2021). In this study, we were guided by the TCCM-based review protocol (Paul and Rosado-Serrano, 2019, Rosado-Serrano et al., 2018) in order to develop an agenda for future research, thus narrowing down the literature review approach (Chen, Mandler, and Meyer-Waarden, 2021).

Our objective is to identify the literature on the impact of the COVID-19 pandemic on the creative industries and to suggest directions for future research. We consider a systematic literature review to be an effective tool in achieving this objective (Tranfield, Denyer, and Smart, 2003; Cassel, Denyer, and Tranfield, 2006; Denyer, Tranfield, and Van Akenet, 2008; Snyder 2019) as it is widely used in business research (Witell et al., 2016; Verma and Gustafsson, 2020). A systematic review is the most reliable and efficient method of identifying and evaluating a sizeable volume of literature (Grant and Booth, 2009; Macpherson and Jones, 2010).

4.2. Literature collection, synthesis and analysis

We used the *Web of Science* database for this study and *Scopus* as a robustness check (Verma and Gustafsson, 2020). Taking our lead from Rousseau, Manning and Denyer (2008), Denyer et al. (2008), we followed a five-stage process to collect, analyse, and synthesise the literature. In the first stage we established the rationale, scope and aim of the review. The search terms were developed in the light of the concepts / theories underpinning resilience literature, which were then used to comprehend the impact of the COVID-19 pandemic on the creative industries. In order to ensure a coherent search (Snyder, 2019), we used all possible synonyms of the keywords used in previous academic studies (Nesta, 2020; Ammirato et al., 2020; Verma and Gustafsson, 2020). We focused on a combination of the keywords “creative industry”, “COVID-19”, and “impact”. The words “state support” and “government support” were also included in order to capture more papers that could be associated with governmental policy responses to the COVID-19 pandemic.

In the second stage we developed our search strings and a set of inclusion criteria to ensure the robustness of the literature review sample. We identified core and additional inclusion criteria for our study. In the third stage, we applied the core inclusion criteria, which are: the timeframe of the publications, document type, language, research area, and the methodology used in the publication. The period from November 2019 to April 2021 covered by the review was chosen because it covers the period from the beginning of the pandemic to

the time of writing. We included all articles, data sets, early-access publications and data studies in English, yielding 123,825 articles published in the specified period. We then used the second- and third-level inclusion criteria with the aim of retaining publications from relevant fields: business economics, computer science, telecommunications, film, radio, television and others. We searched for studies that used all types of methodologies, namely qualitative, quantitative, and mixed approaches.

We excluded the BIOSIS Citation Index, BIOSIS Previews, Medline, Zoological Record, and FSTA, yielding 2,671 articles. The third-level exclusion criteria were applied to include only papers from the fields of business, economics, other social sciences topics, etc. yielding 1,318 articles (Figure 1).

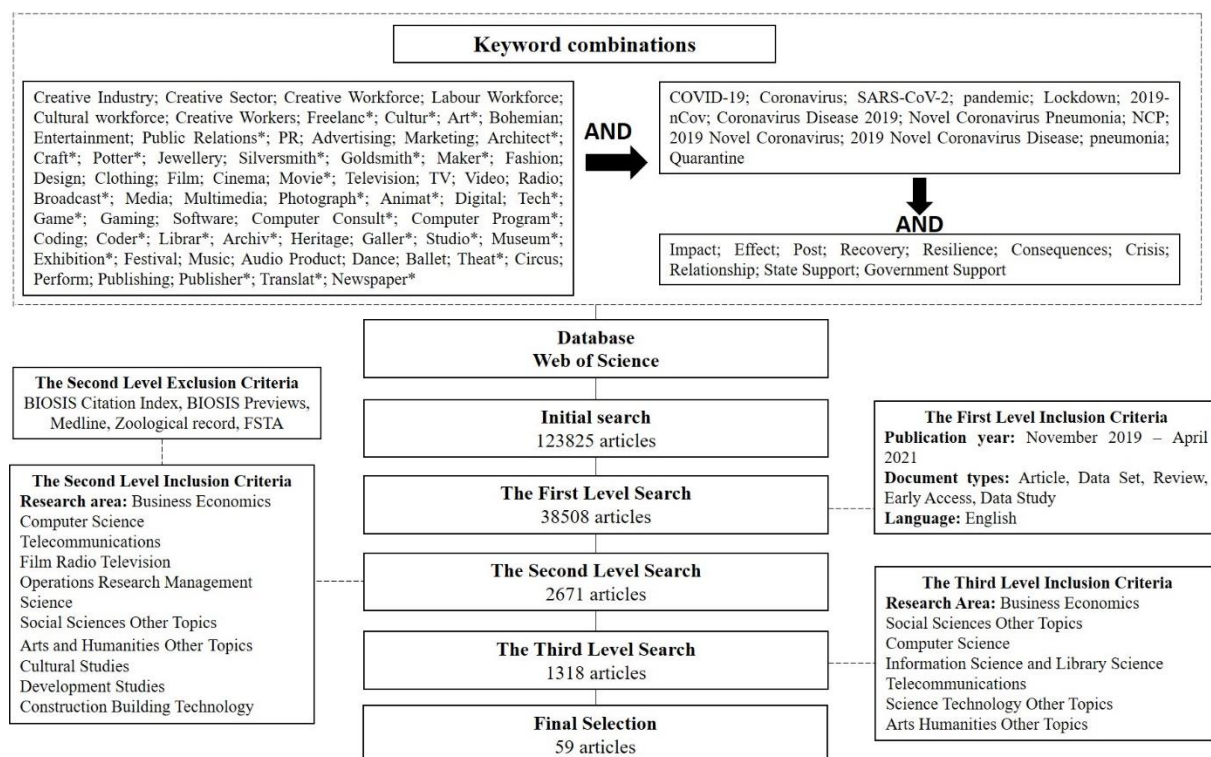


Figure 1. *Web of Science* Research Design
Source: Authors

In the fourth stage, we applied additional inclusion criteria, such as the paper's keywords and the reputation of the journals. With regards to the keywords, we were guided by the keywords used in our search when choosing potential papers for the final sample (Paul and Rosado-Serrano, 2019). The lead reviewer initially conducted a review of all potentially relevant articles before cutting them down. The other two reviewers examined a small sample of discarded articles to ensure that inclusion/exclusion criteria were applied correctly and consistently. At this stage, no inconsistencies were detected. The final decision on inclusion /

exclusion was made by the two reviewers, who each independently applied the criteria to the sample (Denyer et al., 2008).

In order to ensure that the papers in our final sample were of an appropriate quality, we selected articles published in journals featuring on the approved list of the Association of Business Schools (ABS) in the United Kingdom, which is widely considered to be a benchmark database of journals of international standard (Paul and Benito, 2018). However if a journal was not in the ABS list, the impact-factor criteria (at least 1.0 score) was used (Paul and Rosado-Serrano, 2019).

In addition to the *Web of Science* search results, we repeated the procedure as a robustness check using the *Scopus* database. We applied the same criteria to *Scopus* while using the different options available in the *Scopus* search engine. At the third stage, we applied inclusion criteria such as computer science, social sciences, arts and humanities, business, management and accounting, economics, econometrics, and finance. Three levels of search were available in *Scopus*, and we initially identified 578,560 papers. By the end of the search, we retained 82 papers. This search provided us with four fewer papers than the *Web of Science* search (Figure 2).

The final stage was concerned with literature extraction. Both Tranfield et al. (2003) and Rousseau et al. (2008) suggest that reliable and valid reviews use standardized pre-determined categories for abstracting data from papers. We analysed the abstracts and excluded papers that did not focus on activity within the creative industries during the COVID-19 pandemic and the impact of the disease. In order to identify existing areas of scholarly interest as well as gaps and potential future research areas, the papers on literature reviews and editorial publications were also included.

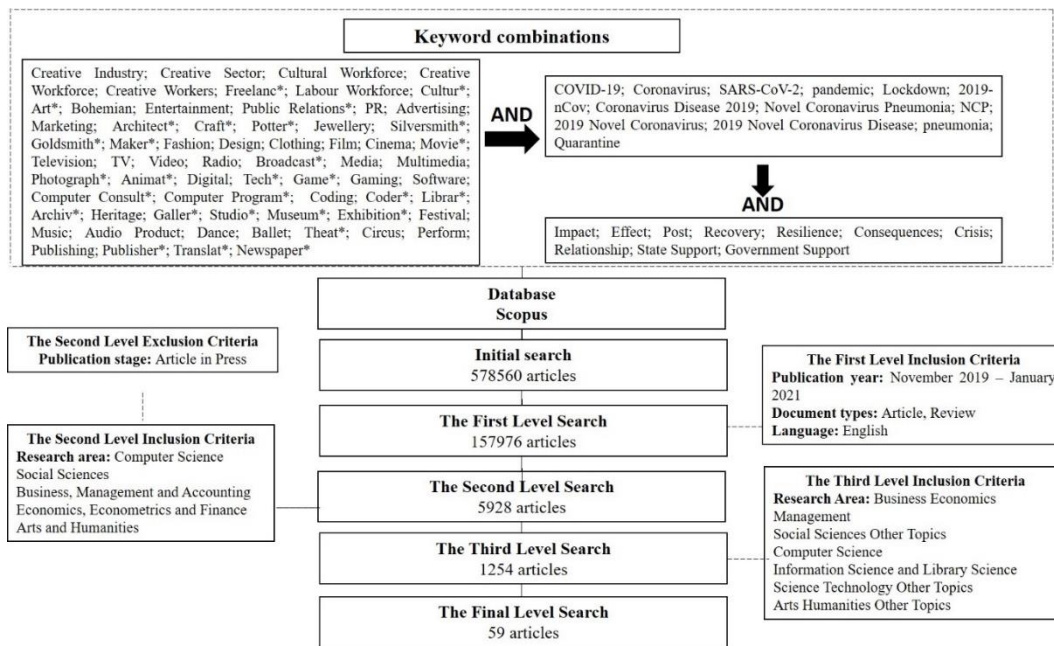


Figure 2. Scopus Research Design

Source: Authors

The screening process enabled us to select a unique sample of 59 papers published within November 2019 – April 2021 from 28 different journals and 22 different countries. The list of journals is presented in Table A1 in the Appendix. In terms of countries used in the papers included in our literature review, most researchers examined Australia, the UK and China, or conducted multinational studies (Table 1). Many papers were concerned with the general trends or impact of the COVID-19 pandemic on the creative economy or certain creative sub-sectors (e.g., IT and software industry, libraries, museums, social media).

Table 1. Countries investigated in the literature review

Country (number of publications)	Exemplary studies
United States (2), Argentina (1), Jamaica (1)	Harris, 2021; Machovec, 2020; Serafini and Novosel, 2020 ; Barrero et al. 2020
United Kingdom (6), Italy (2), Germany (1), Other Europe (6)	Agostino et al. 2020; Banks and O'Connor, 2020; Dümcke, 2021; Pokorná et al., 2020
China (5), India (1), South Korea (1), Kuwait (1)	Bae, Sung, and Kwon, 2021; Gu, Domer, and O'Connor, 2020; Kumar and Sharma, 2021
Australia (4)	Botherway, 2020; Cowell, 2020; Pacella et al., 2020
South Africa (2), Zimbabwe (1), Nigeria (1)	Apuke and Omar, 2021; Ocholla, 2021; Tsekea and Chigwada, 2020
Country not reported (19)	Marabelli, Vaast, and Li, 2021; Peruginelli, Conti, and Fioravanti, 2021; Sivan, 2020
Multiple-country (5)	Carugati et al., 2020; Landi, Costantini, Fasan, and Bonazzi, 2021; Kummitha, 2020

Source: Authors

4.3. The limitations identified during the literature review process

Our literature review enabled us to examine the relevant research and identify its limitations. Four specific limitations were in evidence in the recent systematic literature reviews examining the impact of the COVID-19 pandemic. The first limitation is that research has been conducted broadly and across different research fields (e.g., Ammirato et al., 2020; Queiroz, Ivanov, Dolgui, and Wamba, 2020; Xiong et al., 2020), with little or no evidence of a specific research design for the creative industries.

The second limitation is the presence of selection bias. For instance, Ammirato et al. (2020) examined only studies in recognised international journals or selected conference proceedings, while other authors used selected research from the Scopus database and Google Scholar. This creates a bias towards a specific community of scholars, privileging studies which are made available on these two platforms.

The third limitation is that the new keywords which have appeared during the COVID-19 pandemic may not be fully representative, as more work is needed for a full understanding of the situation. For example, Queiroz et al. (2020) presented a limited research protocol together with the query they used when searching for keywords on the databases, a procedure that significantly limits research scale and scope related directly to COVID-19 and impacts our ability to gauge the effects of the pandemic on the creative industries. Finally, prior systematic literature reviews focus on a restricted geographical area when applying qualitative and narrative reviews in order to understand the impact of COVID-19 (Xiong et al., 2020).

5. The creative industries during the COVID-19 pandemic

A science mapping approach was applied to the systematic literature review (Singh, Verma, and Chaurasia, 2020; Donthu et al. 2021) which combines both the *Scopus* and *Web of Science* research designs (Figure 3). This technique is used for the literature analysis and helps identify the relationship (interactions, connections) between research constituents (Donthu et al., 2021; Donthu et al., 2020; Ramos-Rodríguez and Ruíz-Navarro, 2004; Baker et al., 2021). One of the widely used techniques for science mapping is a co-word analysis, which aims to examine the relationships between different themes by analysing the content of the selected publications in a research field.

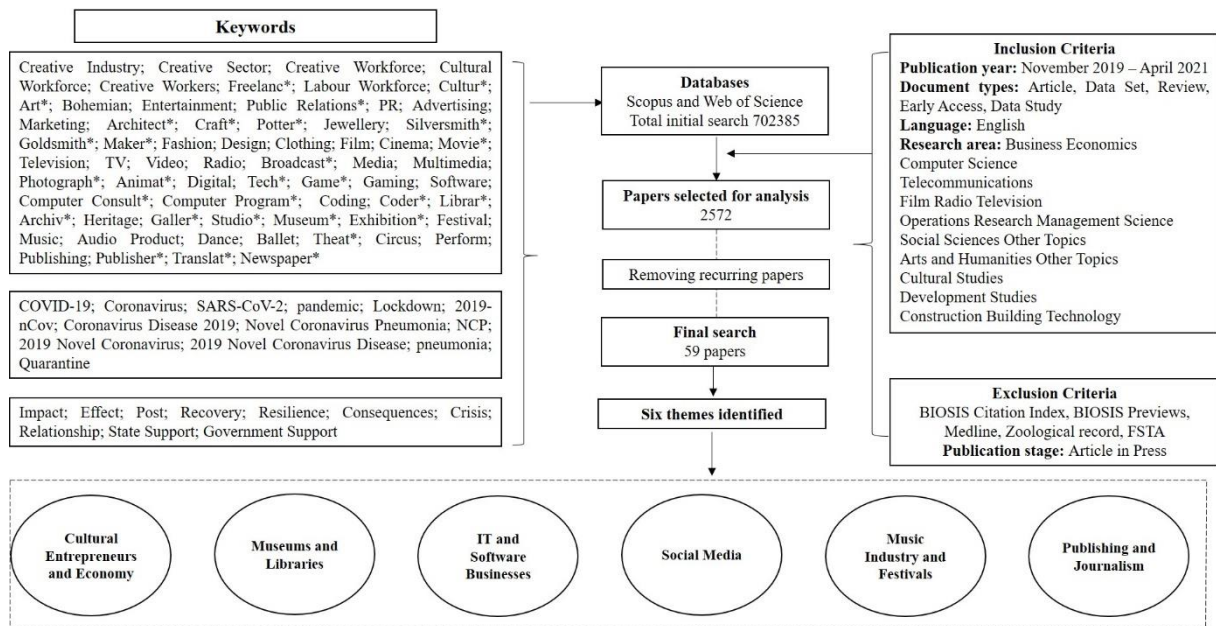


Figure 3. Science map of the systematic literature review
Source: Authors

The co-word analysis identifies words that most frequently appear together and have a thematic relationship. This technique was used in this study to extend our understanding of the themes (topics or categories) thus derived, elaborate on the content of each theme, and develop future research directions (Donthu et al., 2021). Based on the keywords and abstracts from 59 papers, we used a software tool VOSviewer to create a visualization network to identify the themes related to the impact of COVID-19 on the creative industries. Co-word analysis was used to apply text-mining techniques to the papers' titles, abstracts, and keywords. Co-word connections allowed us to identify and combine multiple keywords in the same paper, as well as determine the relationship between different keywords (Verma and Gustafsson, 2020; Van Eck and Waltman, 2010; Donthu et al., 2021) (Figure 4).

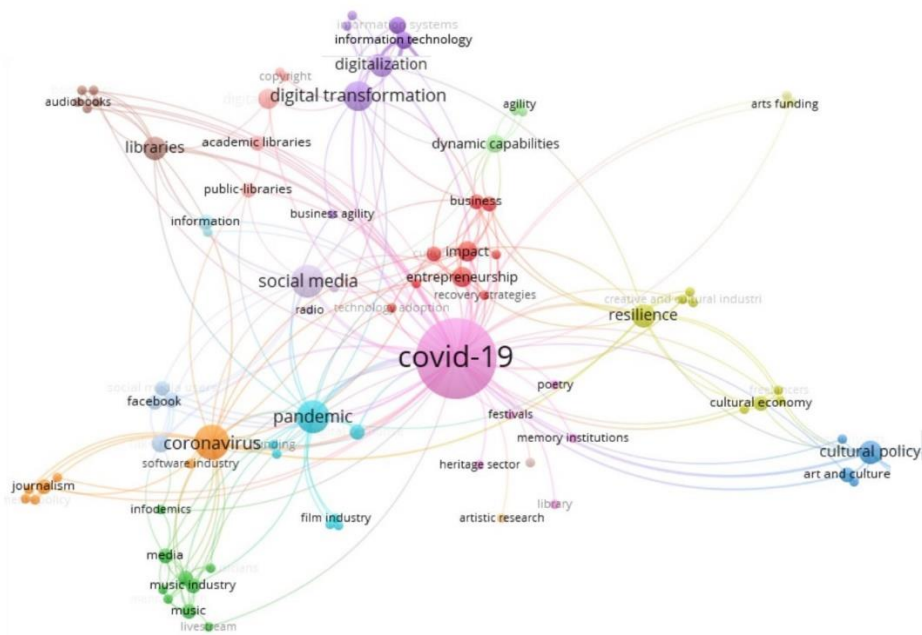


Figure 4. The keyword network visualisation of the COVID-19 pandemic – creative industries relations

Source: Authors

The results of the network were divided into themes based on the classification of the creative industries. This allows us to improve the rationale of the discussion and develop more specific future-research directions for each sector. Six distinctive themes are comparable to the creative sub-sectors, namely cultural entrepreneurs and economy; museums and libraries; IT and software businesses; social media; the music industry and festivals; and publishing and journalism. These themes provide a clear understanding of the boundaries of the creative sub-sectors and their potential response to the impact of the COVID-19 pandemic. In addition, Table 2 presents a summary of the final sample with the distribution of the papers across the six themes. with country of research and methodology used, key findings and research gaps.

5.1. The impact of the COVID-19 pandemic on the creative economy and cultural entrepreneurs

The COVID-19 pandemic has become a significant challenge for different stakeholders across the creative industries, and especially for cultural entrepreneurs (Barrero et al., 2020; Betzler et al., 2020; Ratten, 2020a, 2020b, 2020c). Recent publications on this theme have focused on the disruptive effects of the COVID-19 pandemic on the creative industries (He and Harris, 2020; Meyrick and Barnett, 2020; Joffe, 2020; Banks and O’Connor, 2021). The cancellation of cultural events, exhibitions, concerts, performances and festivals, along with the

restrictions on social distancing and limited economic activity in many countries, have negatively affected cultural workers, freelancers, the self-employed and other stakeholders in the creative sector (Joffe, 2020; Ratten, 2020; Pacella et al., 2020).

Table 2. The distribution of reviewed papers among themes with the key findings and research gaps

Theme	No of Papers	Methodology	Country of Research	Key Findings	Research Gaps
Cultural entrepreneurs and economy	12	Qualitative	The UK, Germany, Australia, Argentina, South Africa, African continent, Latin America, China, New Zealand, the Netherlands	Employment in the creative sector collapsed due to venue closures and social distancing rules. The current crisis has revealed a serious lack of response capacity across the creative industries in both developing and developed countries.	Why is the creative sector particularly vulnerable to the consequences of the COVID-19 pandemic? What is the creative industries' stakeholder involvement? Is the government able to mitigate the negative impact of the COVID-19 pandemic? What will new business models look like within the creative industries? What differences exist between national governments' support packages and measures implemented to support the creative industries?
Museums, and libraries	15	Qualitative and Quantitative	Italy, Africa, Jamaica, Australia, Greece, China, North America, Sweden, the Czech Republic, the Netherlands, the US, the UK, Zimbabwe	The COVID-19 pandemic has facilitated the adoption of digital technology by museums. Lack of funding represents a drag on the adoption of digital tools. The way libraries have responded to COVID-19 varies depending on the extent of government support .	Who are the stakeholders and what is the extent of their involvement? How have scholars compared the differences in government policies and responses to COVID-19 by museums, libraries, and exhibitions?
Information Technology and software sectors	17	Qualitative and Quantitative	China, France, Denmark, Kuwait, Germany, Italy, Singapore, South Korea, the US, Spain, Belgium	Adoption of IT tools to develop resilience The COVID-19 pandemic has considerably facilitated the use of IT technologies. IT has significantly changed the nature of work, training, hiring, delivering content and education during the pandemic.	More research is needed on customers rather than employees and organisations How could digital technologies be adopted and diffused by the creative industries during the pandemic? How will new technologies affect patterns of work in the creative industries? Understanding the long-term business, social and health effects of IT and how it will change the industry in the post- COVID-19 world What strategies could be used to improve the digital maturity and readiness of the creative industries to the COVID-19 crisis?
Social media	5	Qualitative and Quantitative	Italy, the UK, New Zealand, South Korea, India, Nigeria, Cyprus	"Infodemics" (fake news) dissemination as a result of resource scarcity. Social media as a platform for influencers to actively promote products during the pandemic.	In what contexts is fake news more likely to occur/develop, and what strategies can be used to resist this? What are effective ways to identify fake news and support the dissemination of transparent information?

				The growth in the number of affected people increases the motivation to use social media and be exposed to fake news. Misinformation on social media has increased panic regarding COVID-19.	How can social media be used as a tool to promote new products and services and engage with customers during the pandemic?
Music industry and festivals	5	Qualitative	China, Australia, the UK, the US	Mental health problems have negatively affected the creativity and productivity of music industry workers. Festivals could become more inclusive events. Online streaming is the new normal for the music industry.	What is the role of digital tools and platforms in the future of festivals and the music industry? What is the long-term impact of the pandemic on the music industry? How can music events become safer and inclusive during and after the pandemic?
Publishing and journalism	5	Qualitative	Italy and Australia	Journalists have changed their media operations and newsgathering strategies. Policy authorities have hidden information from journalists.	-What cooperation strategies should be used by publishers to ensure they report reliable information during the pandemic? -What government or public strategies should be applied to local newspapers? - How much censorship is justified during a pandemic?

Source: Authors

The effects of the COVID-19 pandemic were felt first by creative workers, and especially freelancers (Dümcke, 2021). In addition, Bailey et al. (2020) considered the long-term changes in the creative industries caused by the COVID-19 pandemic, which could be more visible at the firm and individual levels. The creative industries' workers could not continue to perform their regular business activities due to social distancing rules and the closure of all creative and cultural venues, and had to switch to virtual live performances instead (Banks and O'Connor, 2020; Ratten, 2020a, 2020b).

The existing literature identified a significant number of individual entrepreneurs and firms which had gone bankrupt or just surviving with the governmental support, e.g., introduced in the UK, Germany and Africa (Comunian and England, 2020; Dümcke, 2021; Joffe, 2020). A number of studies have been very critical of the public policies (e.g., limited government support, narrow focus of the support packages, one-off support) intended to mitigate the impact of the COVID-19 pandemic in different countries (Betzler, 2020; Joffe, 2020). For example, Comunian and England (2020) stressed the importance of factoring in the geographical dimension of the impact of the COVID-19 pandemic, as this information could assist in the development of specific policies.

In terms of the recovery measures introduced by governments and other organisations, the industry is very fragmented, and includes freelancers along with casual, temporary and part-time workers who are often ineligible for governmental support packages (Audretsch, Lehmann, and Seitz, 2019; Florida and Seman, 2020). For example, a number of European policy-makers in both the public and private sectors have developed measures to manage the negative economic effects of the COVID-19 pandemic, such as tax measures, employment-related measures, and stimulus measures (Betzler et al., 2020). Germany and the UK can also be used as examples of an immediate policy response to the COVID-19 pandemic. For example, the German government announced it would provide financial support of 130 billion euros for cultural organisations, struggling businesses, and others (e.g., NGOs, cultural organisations) (Desson et al., 2020; Dümcke, 2021). The UK's approach was offer job retention schemes (80% of salary), self-employment income support schemes for those negatively affected by the COVID-19 pandemic (HM Government, 2020).

Many authors stated that policymakers should reconsider their approach when designing policies and change their strategies with regard to the creative industries (Banks, and O'Connor, 2020; Joffe, 2020; Pacella et al., 2020; Dümcke, 2021). It has also been argued that in order to maintain the productivity of the sector, greater inclusiveness of stakeholders in the creative industries should be promoted (Eikhof, 2020).

5.2. The impact of the COVID-19 pandemic on cultural organizations – museums and libraries

The COVID-19 pandemic is very different from other forms of crisis (e.g., financial, political) because it has had a significant overall impact on all business models, organisations, creative workers and amateurs (OECD, 2020). For example, in many countries social distancing requirements and national lockdowns have caused serious difficulties to libraries that provided face-to-face services (Agostino et al., 2020). Museums have also faced significant constraints during lockdown. In other words, cultural organisations have had to reorganise their interactions with their customers in a more dynamic way in order to survive during and after the COVID-19 crisis.

Researchers investigating the impact of the COVID-19 pandemic on cultural organisations have considered the resilience strategies used to overcome the crisis (Agostino et al., 2020; Koulouris, Vraimaki, and Koloniari, 2020; Mehta and Wang, 2020; Samaroudi, Echavarria, and Perry, 2020). Some cultural organizations (e.g., museums, galleries) were able to adopt digital technologies and develop their digital infrastructure (Li et al., 2016), which enabled them to survive and mitigate the impact of the pandemic.

In terms of the current COVID-19 pandemic crisis, museums and libraries have demonstrated their resilience by developing different approaches and responses to overcome the challenges they have experienced. For instance, Mehta and Wang (2020) considered the digital response by libraries. The most recent examples include the creation of library consortia, which allow all consortia members to access and share digital technologies (e.g., cloud technology, big data, websites, marketing) in order to reduce costs and provide broader access to digital infrastructure. This type of digital library model attempts to replace traditional library services during lockdown (Machovec, 2020). The readiness of libraries for this crisis has also been examined (Botherway, 2020; Carbery et al., 2020; Guo et al., 2020; Harris, 2021; Koulouris et al., 2020; Machovec, 2020; Ocholla, 2021; Peruginelli et al., 2021; Pokorná et al., 2020). Libraries have demonstrated strong resilience during the COVID-19 pandemic along with the potential to grow by attracting more readers. In this respect, the development of a digital safety net is crucial for creative and cultural organizations in different world regions (Pokorná et al., 2020; Connected Commerce Council, 2020, 2021; Raimo, Ricciardelli, and Vitolla, 2021).

In order to attract more visitors, museums have begun to adopt more digital technologies. These enable museums to reduce costs and improve the visitor experience during

lockdown. More specifically, the digital transformation has led museums to reconsider their social role with respects to the new positioning on the market and how they can attract a new target audience digitally (Raimo et al., 2021). Museums have revealed the importance of using digital technologies as their survival instrument. For example, during the lockdown Italian state museums facilitated online activities and changed their communication strategies to make better use of social media (Agostino et al., 2020).

These activities considerably improved the relations between museums and customers, and were effective in creating the new concept of the participatory museum and promoting post-visit learning. This means that digital technologies allowed museums to explore new ways of involving visitors by increasing their social media activity and providing online access options to attend the museum, as well as online tours (Raimo et al., 2021). Heritage organisations, memory institutions and museums in the US and UK also considered using similar approaches to digitalisation as a resilient response to the COVID-19 pandemic (Samaroudi et al., 2020).

5.3. The impact of the COVID-19 pandemic on the Information Technology and Software sectors

Despite COVID-19's negative effects on businesses, industries, and human beings, the pandemic has had a strong positive impact on the products and services provided by the IT industry (Bartik et al., 2020; George et al., 2020; Panigutti, Perotti, and Pedreschi, 2020). Companies selling digital technologies experienced a surge in demand for their products and services during the COVID-19 pandemic.

Many businesses have introduced digitalisation processes as a mitigation tool to deal with the consequences of the COVID-19 pandemic (Fletcher and Griffiths, 2020; Hantrais et al., 2020; Kamal, 2020; Lee and Trimi, 2020; Klein and Todesco, 2021). At the same time, the continuing use of digital tools could negatively affect the public's mental health, with potential to cause internet addiction, psychological problems, and so on (Marabelli et al., 2021).

Indeed, work, education, medicine and social lives have moved online, and an increase in digital tools and services is considered the only safe way to keep businesses operating and growing (Naidoo, 2020; Yost, 2020; Saide and Sheng, 2020). By implementing and adopting IT in their business models, organisations wanted to demonstrate to employees and customers their capacity to survive, adapt and operate during the crisis (Carugati et al., 2020).

A resilient response was created by using digital services (Panigutti et al., 2020), termed the digital safety net. This is often low-cost or free to small businesses services, and includes communications, digital marketing and advertising, websites and social media, back-office tools, and e-commerce and online payment tools. The small and large businesses which use

more digital tools, technologies, and online marketplaces have operated better during the COVID-19 pandemic (Connected Commerce Council, 2020).

The IT and software industries have expanded significantly due to increased demand for IT and software products, including MS Teams, Zoom, and other online communication digital platforms (Dwivedi et al., 2020; Marabelli et al., 2021). In addition, the IT industry has facilitated the complementarity effect within other creative industries, and served as a digital spillover for firm resilience and better performance (e.g., online delivery, online teaching and learning, online mentoring sessions and meetings) (Soni, 2020). Overall, the COVID-19 pandemic has increased the use of technology for both work and leisure through digital transformation (Dey, Al-Karaghoul, and Muhammad, 2020; Marabelli et al., 2021).

5.4. The impact of the COVID-19 pandemic on Social Media

Websites and social media played an important role in the digital safety net while lockdown restrictions were in place and physical contact between people was limited (Connected Commerce Council, 2020; Landi et al., 2021; Marabelli et al., 2021). Businesses increased their use of remote services via social media tools and platforms (e.g., Facebook, Instagram, LinkedIn, Tik-Tok) (Bae et al., 2021; Marabelli et al., 2021; Cifuentes-Faura, 2020; Kaya, 2020; Ferrara, Cresci, and Luceri, 2020).

Recent studies have investigated the “infodemics” which appeared during the early stages of the COVID-19 pandemic (Apuke and Omar, 2021; Bae et al., 2021; Cifuentes-Faura, 2020; Ferrara et al., 2020; Greenspan and Loftus, 2021; Kumar and Sharma, 2021; Zeng and Chan, 2021). “Infodemics” refers here to the dissemination of fake news, especially via social media. During the COVID-19 pandemic social media has been widely used by many people, and fake information has started to disseminate very rapidly (Apuke and Omar, 2021; Hou et al., 2020).

In some cases, “infodemics” could lead individuals to make decisions based on false assumptions, the consequences of which could become counterproductive for their interests and those of society as a whole (Kumar and Sharma, 2021). Apuke and Omar (2021) stressed that an increase in COVID-19 cases worldwide would facilitate the spread of fake news and stories. It has been argued that individuals search for new information on how to protect themselves from the virus, which will eventually lead them to access fake information. Filtering information and avoiding fraudulent activities thus becomes a priority when forming a resilient response to the COVID-19 pandemic, alongside the development of new communication strategies between businesses and customers (Verma and Gustafsson, 2020).

Another new trend which arose during the COVID-19 pandemic was the emergence of a new group of influencers on social media who promoted various brands and trademarks (Casaló, Flavián, and Ibáñez-Sánchez, 2020). These influencers, also known as “digital first personalities”, promote a variety of products to their followers on social media (e.g., Instagram, Facebook, Twitter) (Hutchinson, 2020). An example of using the social media platforms is introduced by the company Stella, which communicated with their customers through “the adoption of digital tools and operations across the business” (Connected Commerce Council, 2020, p. 88).

5.5. The impact of the COVID-19 pandemic on the music industry and festivals

The music industry is of paramount importance for the creative economy (Anderton, 2011; Robinson, 2015). The cancelation of concerts, festivals, tours, and solo performances due to COVID-19 has had a profound negative effect on the music industry (Gu et al., 2020). In addition, musical events have been at risk of suffering from low attendance because of the increasing costs and restrictions on travelling, accommodation and social distancing.

Like other industries, small businesses in the music and entertainment sectors have been forced to develop creative ways to deliver their services in a socially-distanced world. Challenging their traditional model of in-person delivery of services, the COVID-19 pandemic has pushed these firms towards a greater use of digital tools, especially video conferencing (Connected Commerce Council, 2020, p. 116).

Prior to the COVID-19 pandemic, musicians usually interacted with their audiences face-to-face (Vandenberg, Berghman, and Schaap, 2020). The literature examined the impact of social media (e.g., Facebook, Instagram) on the music industry, for example the increase in the number of people attending online music events (Bartholomew and Mason, 2020; Burroughs, 2014; Gibbs et al., 2015; Gu et al., 2020). In terms of the COVID-19 pandemic, one initial response of musicians and bands was to move their performances online, as well as record them in advance and share them as screencasts. This has enabled these musicians to keep in touch with their fans and audience, as well as to evolve their activity beyond the crisis (Gu et al., 2020). Online streaming has been considered as a technologically easy way (Keane and Chen, 2017) to carry on their activity with respects to the national lockdowns and social distancing rules.

There is significant uncertainty about the long-term impact of the pandemic on the music industry, particularly in respect of the format of such events, as further restrictions may be placed on the number of attendees. It is unclear whether music festivals might become more ‘exclusive’ due to space limitations and a corresponding increase in ticket prices (Davies,

2020). This could restrict access to some music events and make face-to-face performances less affordable to the general public. More affordable events using digital tools, such as augmented and virtual realities or immersive technologies, could thus have more potential in the future (Dashper and Finkel, 2020; Bossey, 2020; Davies, 2020).

5.6. The impact of the COVID-19 pandemic on publishing and journalism

Journalism has always been an essential public service. The impact of the COVID-19 pandemic on journalism has been mixed (Cifuentes-Faura, 2020; Davies, 2020; Hess and Waller, 2020). On the one hand, publishing houses have limited access to information at a time when press freedoms are under attack and journalists are working in dangerous conditions that could affect their physical health and well-being (Bernadas and Ilagan, 2020).

On the other hand, there has been an increasing demand for up-to-date information and news related to the COVID-19 pandemic (Park et al., 2020), and for the latest updates on restrictions to business activities, education and so on. While local newspapers have been negatively affected (with many closing down or moving online), larger outlets and news channels have been more resilient with more people visiting their websites on a regular basis. In addition, users have become more digitally active, frequently commenting on and reacting to news stories. In order to reach customers quickly, newspapers and publishers have been promoting information about the COVID-19 pandemic on their websites and on social media and using digital newsletters (Hess and Waller, 2020). Digital technologies were instrumental in allowing journalists to continue working during the lockdowns (Gu et al., 2020).

Certainly, digitalisation is not the only answer to most of the challenges across different sub sectors. Many digital technologies such as Kindle and audio books, Facebook and Whatsapp were the lifeline during the COVID-19, while the COVID-19 pandemic further articulated the importance of using digital tools and embedding them in a business model of organizations, integrating them along to generate synergies.

6. Discussion and Avenues for future research

The analysis of the literature discussed in the paper clearly demonstrated that the COVID-19 pandemic has affected the creative industries worldwide (Dümcke, 2021; Betzler, 2020; Comunian and England, 2020). Two dimensions emerged during our systematic literature review: firstly, the immediate impact of the COVID-19 pandemic on the creative industries, and secondly, their responses to the crisis. With regard to the immediate impact of the COVID-19 we identified a number of challenges, such as cash flow issues, revenue loss, and increase in demand for IT and software services (Klein and Todesco, 2021; Ratten, 2020a; Raimo et al.,

2021; Carugati et al., 2020; Yeganeh, 2021). In order to overcome these challenges, it is essential for policy-makers to design long-term employment support schemes for the creative industries (Williams and Oz-Yalaman, 2021) as well as to improve their digital capabilities and resource capacity.

Our systemic literature review demonstrated that the digital capabilities of firms and their ability to adapt were crucial components of resilience strategies for the COVID-19 pandemic. Recent studies have claimed that the use of information and communication technologies (ICT) has enabled the survival and economic growth of some sub-sectors within the creative industries (Koulouris et al., 2020; Samaroudi et al., 2020). Several studies evidenced that organisations which enhanced their digital capabilities would create new boundaries and opportunities for growth (Batra, 2020; Gabryelczyk, 2020).

Businesses have had to adapt their business models in response to the new challenges posed by the crisis, especially in areas such as real-time decision-making, digital nets, business continuity and testing business resilience (Donthu and Gustafsson, 2020). There are a number of opportunities which might be derived from the resilience strategies of some creative industries, e.g., using digital tools to engage with customers. Museums, musicians, artists and other cultural organisations have adopted digital tools to interact with their customers and audiences, and to deliver their services online (e.g., online exhibitions, recorded tours, concerts, lectures, etc.) (Agostino et al., 2020; Mehta and Wang, 2020; Gu et al., 2020; Botherway, 2020; Carbery et al., 2020; Guo et al., 2020).

However, the visual arts, publishing, and social media sectors faced considerable challenges and have demonstrated a lack of ability to cope with the current crisis (Cifuentes-Faura, 2020; Davies, 2020). By contrast, IT and software companies have benefited from the COVID-19 pandemic and experienced a surge in demand for their products and services (Kamal, 2020; Gabryelczyk, 2020; Sheng et al., 2020).

Our systematic literature review has identified a number of research gaps which could be addressed to further understand the impact of the COVID-19 pandemic (see Table A2 in Appendix) on the creative industries. Taking a lead from prior reviews (Paul and Rosado-Serrano, 2019; Chen, Mandler, and Meyer-Waarden, 2021; Rosado-Serrano et al., 2018) we follow the TCCM framework to develop the future research agenda. Accordingly, the following sections investigate future research directions in terms of theory development, context, characteristics, and methodology (Paul and Rosado-Serrano, 2019).

6.1. Theory development (T)

Since the early 1980s researchers (Staw et al. 1981; Meyer, 1982) investigated how organisations respond to external shocks using resilience theory. More recent studies on resilience used crisis management (Ratten, 2020a, 2020b, 2020c), disaster management (Ocholla, 2021) and knowledge management (Saide and Sheng, 2020) theories to explain how firms deal with crises and environmental shocks such as the COVID-19 pandemic. In this review, we noticed the limited use of organisational resilience theory with regard to the creative industries during the COVID-19 pandemic. In addition, small businesses and self-employed individuals in the creative industries have remained under-researched fields in the resilience literature (Doern et al., 2019). While recent literature has focused on organisational resilience (Williams et al., 2017; Barrios, 2016; Herbane, 2019), few studies (5% of the reviewed sample) have examined the individual characteristics of cultural entrepreneurs (Newsinger and Serafini, 2021; Apuke and Omar, 2021; Brunt, 2021) and how they are overcoming the COVID-19 pandemic, including their engagement with external stakeholders and how the relationship with stakeholders have changed over time (Friedman and Miles, 2002). In particular, highly conflicting relations between organizations and external stakeholders have been ignored, with few attempts to integrate the separate strands of stakeholder theory to organizational resilience theory. Friedman and Miles (2002) developed a model that combines stakeholder theory with a realist theory of social change and distinguishes between different types of stakeholders. Their model may expand the discussion on what other factors, apart from organisations own and internal attempts, can provide organization resilience.

Altogether, the insights from the organisational resilience theory and stakeholder's theory could be applied as a basis for future empirical studies to investigate the internal and external factors that drive resilience during of the COVID-19 pandemic across the creative industries. We need new theoretical approaches that can explain the resilience strategies used in the creative industries, such as the mechanisms the self-employed or SMEs in the creative industries used in order to survive the COVID-19 pandemic (Newsinger and Serafini, 2021).

In addition, Cooke and DePropris (2011) mentioned that creative industries located in agglomeration economies have higher demand for their products and services. However, the rapid implementation of digital tools in business models during the COVID-19 pandemic (Fletcher and Griffiths, 2020; Hantrais et al., 2020) has demonstrated that the location of creative enterprises no longer matters. This has implications for future research in business management, economic geography, and industrial economics, as new business models in the COVID-19 era need to be developed towards digitization (Yost, 2020; Saide and Sheng, 2020). In addition, future research would benefit from empirically testing and comparing cross-

national differences in resilience settings (Cellini and Cuccia, 2019) of the creative industries during the COVID-19 pandemic.

6.2. Context (C)

In this review, we identified that a significant portion of research into COVID-19's impact on the creative industries is related to the creative economy, or to specific industries such as social media, publishing, journalism, IT, software, music, museums and libraries (e.g., Apuke and Omar, 2021; Betzler et al., 2020; Desson et al., 2020; Dümcke, 2021). Table A2 in the Appendix introduces the suggestions for future research into the creative subsectors under review and the overall creative economy. However, within the limits of our inclusion criteria, we did not find any studies examining the socioeconomic impact of COVID-19 on the fashion, architecture, crafts, advertising and marketing, film, TV, radio, video, and photography industries.

In terms of country of research, our literature review revealed that most studies in this field were conducted in the UK, Central Europe, China and Australia (e.g., Chau, Luo, and Duan, 2021; Cowell, 2020; Botherway, 2020). Future research should examine the impact of the COVID-19 pandemic on the creative industries beyond North America and European countries going to Asia, Africa, and Latin America. For example, the experience of Korea, Singapore and Japan could offer a model providing appropriate settings to test the role of local context (e.g., IT infrastructure in Republic of Korea) in overcoming the challenges presented by the COVID-19 pandemic (Kim et al. 2020). In addition, future research could also focus on emerging and transitional economies to generalize prior results and test the organisational resilience theory. Finally, it would be useful to investigate the role of the local context (economic conditions, cultural differences, IT infrastructure, other settings) as a moderating factor to overcome the crisis (Chen et al., 2021).

We argue that the COVID-19 pandemic created a series of inherent constraints for the creative industries. Many sub-sectors in the creative industries require governmental support due to the nature of their activities (e.g., freelancers, the self-employed and those on zero-hours contracts) (Chandler and Cuneo, 2021; Burger and Easton, 2020). For these categories, their income streams disappeared in the space of a few days following the introduction of restrictions. Governmental support is thus required in order to protect these categories of workers. Subsequent research should pay more attention to the heterogeneity of creative industry workers needs further investigation, in particular in order to understand how the most vulnerable categories of creative workers have been affected.

Research requires the development of the long-term policy responses needed to support the creative industries (Ratten, 2020a). Building on the strengths of the creative industries, there is a call for greater investment in the digital technologies needed to support the 'remote' delivery of products and services required to make the creative economy work (Harper, 2020). Future research should also consider the digital maturity of the countries and organisations combatting the negative impact of the pandemic (Dwivedi et al., 2020). In addition, it would be useful to investigate the attitudes and motivation of customers using new IT solutions to access the creative industries' activities online and offline. Synergy and complementarity effects across the creative industries may thus become an important avenue for future research (Williams et al., 2017).

6.3. *Characteristics (C)*

Our literature review has addressed this phenomenon of constructs from various perspectives, units of analysis, explanatory variables and case studies, and so on. Many studies considered digital technologies to be an important conduit for resilience and survival during the COVID-19 pandemic (Kim et al., 2020; Raimo et al., 2021; Klein and Todesco, 2021; Peruginelli et al., 2021). Indeed, digital technologies have been considered a determinant to foster business model innovation, as well as a new way of creating and capturing value (Al-Debei and Avison, 2010; Gordijn and Akkermans, 2001), in particular in the creative industries (Li, 2020).

The COVID-19 pandemic has a number of lessons for decision-makers, including the importance of adapting to highly-volatile business environments, digital technology adoption strategies, and the digital maturity of organisations (Dwivedi et al., 2020; Fletcher and Griffiths, 2020; Kim et al., 2020). It is therefore important to further understand the relationship between digital technologies and organisational capabilities in creative industries during and after the COVID-19 pandemic.

For organisational resilience during the pandemic, digital capabilities have become one of the most important elements of organisational capabilities. We consider digital capabilities (DCs) to be a crucial element of the dynamic capabilities framework (Teece, 2012), which is important for business performance (Eisenhardt and Martin, 2000; Arend, 2014; Teece and Leih, 2016; Rashid and Ratten, 2021). Digital capabilities could be operationalized in order to respond and adapt to rapid changes in the environment (Eisenhardt and Martin, 2000), e.g., as in the case of the changes brought about by the COVID-19 pandemic.

Furthermore, the ability of businesses to respond to changes in their external environment (Marshall, Niehm, Sydnor, and Schrank, 2015; Dahles and Susilowati, 2015) - in

other words, their adaptive capacity - could further assist firms and individuals in the creative industries to cope with the impact of the COVID-19 pandemic. We refer here to the “capacity for an enterprise to survive, adapt, and grow in the face of turbulent change” (Fiksel, 2006, p. 16). Drawing on the resilience literature (Archer, 2009; Williams and Vorley, 2017; Heeks and Ospina, 2019; Eikhof, 2020) we developed a response matrix to the COVID-19 pandemic for the creative industries.

This matrix explains how digital capabilities and the ability to adapt to changes using organizational resource capacity can influence the creative industries’ response to the COVID-19 pandemic. This is different from prior research on digital capabilities (Li et al., 2016; Herbane, 2010; Khalil and Belitski, 2020) which did not show how these capabilities can be used to respond to exogenous shocks. We identified four potential strategic responses, namely constancy (low digital capabilities and low ability to adapt), adaptation to survive (high digital capabilities and low ability to adapt), adaptation to growth (high digital capabilities and high ability to adapt), and strategic stability (low digital capabilities and high ability to adapt) (Figure 5).

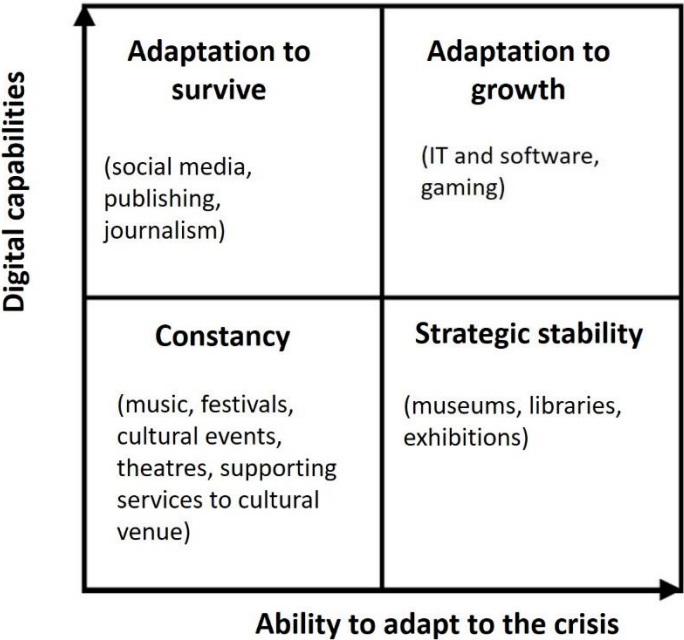


Figure 5. Response matrix of the creative industries to the COVID-19 pandemic
Source: Authors

The creative subsectors with low digital capabilities and low ability to adapt to the COVID-19 pandemic are part of the “Constancy” response matrix quadrant (e.g., music industry, festivals, cultural events, theatres, supporting services to cultural venues). These types of creative industries are particularly ill-equipped to face the pandemic. Workers in these

sectors were forced to suspend their business activities temporarily or indefinitely, and/or had to seek temporary employment to replace the loss of income. Many creative workers have lost their jobs and left the market due to low levels of digital readiness, an inability to adapt and lack of resource capacity, and because of the nature of the industry employment model (e.g., labour market regulation, part-time employment and self-employment) (Patrick and Elsdén, 2020).

The creative subsectors (e.g., social media, publishing and journalism) with low development of digital capabilities but a high ability to adapt to the new conditions appear in the “Adaptation to survive” response matrix quadrant. They are operating and seeking to implement digital solutions in order to create small revenue streams that can sustain their businesses during the COVID-19 pandemic (Connected Commerce Council, 2020).

The creative subsectors that combine high digital capabilities, capacity to adapt and advanced digital tools (e.g., digital competences, skills, expertise and platform-based business) continue to operate, meeting the parameters of the “Adaptation to growth” response matrix quadrant. Subsectors such as IT and software have demonstrated that they are well-equipped to develop digital technologies which the other creative subsectors could use to overcome the COVID-19 pandemic. Finally, creative subsectors which were able to continue to (fully or partially) operate (e.g., museums, libraries, exhibitions) are placed in the “Strategic stability” response matrix quadrant. Some of them closed down their operations and used a combination of government support and cost reductions to endure the restrictions of the COVID-19 pandemic until they were allowed to reopen. Future studies may extend the research towards the response matrix on how the COVID-19 pandemic affected businesses and the self-employed in the creative industries. It is also important to understand how the measures imposed by governments (e.g., job retention schemes) affected firms in the creative industries.

6.4. Methodology (M)

The reviewed literature on the impact of the COVID-19 pandemic on the creative industries included both qualitative (e.g., Agostino et al., 2020; Davies, 2020; Temiz and Salelkar, 2020) and quantitative methods (regression analysis, Monte Carlo simulation). However, there are too few quantitative papers to examine this area for research (Bae et al., 2021; Apuke and Omar, 2021; Koulouris et al., 2020; Urbaczewski and Lee, 2020). Future studies could consider developing more sophisticated quantitative-based and mixed-method approaches when examining the social and economic impact of the pandemic on the creative industries. We developed several recommendations regarding research methods, data collection

techniques and sample selection methods in order to improve the methodological rigor of the COVID-19 pandemic – creative industries research.

6.4.1. Methods to analyse the data and data collection

There are many opportunities to undertake research based on survey and multiple case study methods using primary data. Previous studies used mostly case-study analysis with small groups (Gu et al., 2020; Temiz and Salelkar, 2020; Raimo et al., 2021), content analysis (Young, 2020; Ocholla, 2021), or review of the literature or government programmes (Gabryelczyk, 2020; Dümcke, 2021; Verma and Gustafsson, 2020). The samples used in the reviewed literature were small, which restricted the generalisation of the results. In terms of the quantitative pathway, scholars could use the *Eurostat* database, in particular *The Cultural and Creative Cities Monitor*, *IBISWorld*, *D&B Hoovers*, and *Crunchbase* databases to access the firms or country data to investigate the similarities, differences, etc. The research would benefit from longitudinal studies to examine the dynamics of responses to the COVID-19 pandemic. Therefore, the scholars could develop new frameworks and test the theoretical lenses using the collected data (Paul and Rosado-Serrano, 2018).

6.4.2. Sample selection

There are several challenges related to sample selection. First, the vast majority of research investigated the companies in the creative industries, cultural organisations, or specific countries. Therefore, more research is needed towards the self-employed entrepreneurs, freelancers, multinational companies. With regards to the country selection reported in Table 1, it will be beneficial to examine the impact of the COVID-19 pandemic towards the creative industries in developed, developing, emerging and transitional economies as the research towards countries was rather sporadic. In addition, the research would benefit from the comparative studies with multi-countries selection. This would enable scholars to generalise the results of the research and provide policy implications.

7. Conclusions

In this paper, we presented a systematic literature review in order to understand the ways the creative industries have been affected by the COVID-19 pandemic so far. This work provides a comprehensive and detailed overview. We argue that different creative subsectors encountered both positive and negative effects as a result of the COVID-19 pandemic. Specifically, we identified areas within the creative subsectors which have responded differently to the COVID-19 pandemic. This enabled us to create the response matrix.

We demonstrated that the creative industries have not shown a sufficient resilience to the COVID-19 pandemic overall. The impact was particularly severe for self-employed and

part-time creative workers, with the exception in the publishing, social media, IT and software subsectors. The subsectors, such as museums and libraries have been unable to fully exploit the digital technologies and infrastructure made available for online delivery of their products. Through our literature review, it became evident that the creative industries have been one of the most overlooked in economic recovery efforts in many countries (Joffe, 2020; Pacella et al., 2020; Comunian and England, 2020; Ratten, 2020a).

In many cases, the creative industries were supported by government measures in the form of business grants and job retention schemes. However, in the longer run, if the consequences of the COVID-19 pandemic persist, it is plausible that only the most resilient creative subsectors will survive. In order to prosper and grow, the creative industries would require an increase in their financial and human capital capacity. They will also need to employ digital safety nets and develop their digital skills further.

We argue that the resilience of the creative industries is important for their ability to survive, sustain their level of operations or workforce, and adapt in order to grow. Through our analysis we have identified essential conditions for survival and adaptation to the COVID-19 pandemic, namely the adaptation and use of digital capabilities by the creative subsectors.

As one of the policy implications, we suggest the creation of a more centralised source of aid for the creative industries through professional associations and stakeholders (Bazalgette, 2017). Such a centralised structure might have a range of advantages, namely lower overhead costs, access to a broader network of artists and opportunities, a centralised database of host organisations, a network of partners, and a mechanism to provide better overall support to the sector based on feedback (OECD, 2018).

In addition, the bodies who make decisions on grants and funds need to provide clarity regarding uncertainty over COVID-19's impact on grants and awards (Chandler and Cuneo, 2021). Since artists were unable to take advantage of face-to-face networking opportunities, the role of the sector in supporting organisations and facilitating virtual connections will be vital. Other concerns (e.g., restrictions in accessing contacts and networks, community engagement) in the creative subsectors vary, so professional associations need to pay particular attention to supporting the needs of different subsectors (Burger and Easton, 2020). Financial support is required for all these activities, e.g., longer-term commitments from major funders for the sector, funding to recover lost revenue, the creation of new approaches to income generation (partnerships with commercial sponsors, development of new commercial models, new forms of philanthropy, etc.).

We acknowledged that Table A2, which covers future research on the impact of the COVID-19 pandemic on the creative industries, is limited to the scope of this study's research question. This is understandable given the bibliometric review method. This literature review does not provide insights into the legitimacy of the organisational resilience theory, research method or measures used to undertake this study. In this research, we considered only peer-reviewed papers in recognised international journals which were published in English. The results of our study could be extended by taking into consideration books, abstracts and reports (Ammirato et al., 2020). In addition, the themes developed as a result of this review may focus on the different units of analysis within each theme. While this does not allow the generalizability of findings across the themes, our interest in generating the six themes was to examine the impact of the COVID-19 pandemic and the responses of different representative stakeholders within each theme. Taking into account that a solid systematic literature review covers at least a 10-year time period (Paul and Criado, 2020), and up to 50 years (Paul and Feliciano-Cestero, 2020), our literature review is limited to the events of the COVID-19 pandemic from November 2019 to April 2021. This research observed publications immediately after the first and second waves of the COVID-19 pandemic. There is still uncertainty about how long the pandemic will last, and there is a time-lag in publications exploring the consequences of the crisis.

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Appendix

Table A1. Journals included in the literature review and the impact factor

Journal title	Papers finally selected	Journal impact factor
Cultural Trends	13	2.06
European Journal of Information Systems	4	2.60
Digital Library Perspectives	4	1.01
Information Systems Management	4	3.94
Library Management	4	1.12
World Leisure Journal	3	1.04
Journal of Business Research	3	4.87
Journal of Enterprising Communities	2	2.59
Journal of Museum Management and Curatorship	2	1.30
International Journal of Information Management	2	8.21
Journal of Library Administration	1	1.50
Journal of Management Studies	1	5.83
Government Information Quarterly	1	5.09
Telematics and Informatics	1	4.13
International Journal of Entrepreneurial Behavior & Research	1	3.52
Accounting, Auditing & Accountability Journal	1	3.49
British Journal of Management	1	3.02
Digital Library	1	2.98
Journal of Entrepreneurship in Emerging Economies	1	2.97
Journal of Mental Health	1	2.70
Library Hi Tech	1	2.20
Technology Analysis & Strategic Management	1	2.00
Technology in Society	1	2.00
Leisure Sciences	1	1.95
Journal of Quality Assurance in Hospitality & Tourism	1	1.94
Online Information Review	1	1.80
Knowledge and Process Management	1	1.66
Reference Services Review	1	1.12
Total number of journals: 28	59	

Table A2. Future research on the impact of the COVID-19 pandemic on the creative industries

Theme	Future research
Cultural entrepreneurs and economy	<ol style="list-style-type: none"> 1. The contribution of cultural entrepreneurs in economic and social recovery in post-COVID-19. 2. Understanding the variety of entrepreneurship activities and the different markets that they serve. 3. The use of mixed methods in understanding the impact of COVID-19 on entrepreneurship in the creative industries, e.g., using propensity score matching, case study data, interviews and longitudinal survey data. 4. The contribution of cultural entrepreneurs to mitigating the COVID-19 crisis in communities and the pandemic's impact on the sustainability of the sector. 5. How the creative industries can mitigate the impact of the COVID-19 including the decisive role of digital capabilities and digital tools if adopted can enhance the resilience of firms in the creative industries. 6. Adopting digital tools and learning skills to adapt to new market conditions, retain customers, reduce shortage of revenues and growth.

Museums and Libraries	<ol style="list-style-type: none"> 1. Current challenges and opportunities for the theme 2. The use of online platforms and digital technologies (e.g., augmented reality, artificial intelligence systems, etc) to enable museums, libraries to sustain their income and increase the number of online visitors. 3. Strategy for reopening and managing the security of libraries and museums. 4. The pandemic's social and economic impact on the industry. 5. How audiences have engaged with the digital services provided by the creative industries. While there are no agreed methods and metrics to measure digital engagement in this field, a mixed-method approach to analysis could be applied.
IT and Software Businesses	<ol style="list-style-type: none"> 1. Integration of a variety of technological solutions needed to adapt to changes along with the digital infrastructure needed for growth. 2. The role of IT and software as knowledge spillover in other industries. 3. Analysis of the models used in IT and software businesses for dealing with the repercussions of the pandemic. 4. Need to conceptualize the digital responses and strategies employed by digital businesses and entrepreneurs in response to the COVID-19 pandemic. 5. The role of digital competences and capabilities in facilitating adaptation to survive and grow. 6. Human-centric and all-inclusive approach to information systems and IT adoption by small businesses in the creative industries. 7. The impact of the digital divide and digital safety nets across the creative industries and regions with different levels of digital literacy and well-being. 8. What does the adoption of IT mean for the creation of new business models in the creative sector?
Social Media	<ol style="list-style-type: none"> 1. Mechanisms and channels to filter and monitor information in social media in particular to tackle infodemics and fake news about the COVID-19 pandemic. 2. Integration of skills required by social media and other digital technologies. 3. Differences in social media coverage and activities during the COVID-19 pandemic and pre-COVID-19 periods within the collectivist and common goals. 4. The role of social media in uniting communities. 5. Longitudinal analysis of digital technologies and the interplay with social media as up-to-date analyses are mainly cross-sectional.
Music industry and Festivals	<ol style="list-style-type: none"> 1. The role of livestreaming and digital presence for music firms and festivals transitioning to new business models. 2. Comparative perspective analysing the differences among events, cultural genres (e.g. theatre, art performances) in different regions and countries that were differently affected by the COVID-19 crisis. 3. How COVID-19 restrictions may affect the physical and the online demand for events, and the demand elasticity curves.
Publishing and Journalism	<ol style="list-style-type: none"> 1. How the COVID-19 pandemic affected publishing activity by firm size and market (international and domestic newspapers). 2. The importance of adjusting to supply and demand changes due to digitalization and robotization in the industry and the role of censorship in cross-country reporting of COVID-19 cases and the impact of the COVID-19 pandemic on the economy and society.

Source: Authors