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Covid-19 and Creative Industries in the UK – the Destruction of Creativity

Ruth Towse

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Covid-19 and Creative Industries in the UK – the Destruction of Creativity

Ruth Towse

Abstract

Covid-19 has wreaked destruction in many parts of the creative industries, especially in the performing arts. In the UK, the government has put in place various policy measures to protect artists and the arts and culture. This article charts the progress of the measures, using a basic classification to identify the policy objectives. It concludes with a case study of one orchestra's experience.

The creative industries embrace a wide range of cultural and artistic activities including the performing arts, plastic arts, literature, heritage, software, games, advertising and so on. Some operate on an industrial scale while others are one-person enterprises; some are non-profit producers, others are for-profit enterprises and there may be a mixture of both. Regardless of the underlying motivation, each has to deal with similar economic features of producing and distributing creative work with the main difference between them being the extent of reliance on self-generated revenue: non-profits are more likely to receive subsidy from governmental sources than for-profits. All have been affected by Covid-19: some have seen increased sales while others have been crippled by restrictions imposed to control the outbreak. In this context, there is no meaningful distinction between being subsidised or not: both are equally affected. The live performing arts in particular have been decimated by the need for 'social'-distancing', that is, maintaining two meters between individuals who are not living in the same household. The UK government has recognised and responded to the pandemic, tasking the Arts Councils (of England, Scotland and Northern Ireland) with offering financial support to those most in need over all creative industries. In so doing, Covid-19 has altered previous policy and administrative criteria.

Within the creative industries there is a range of activities requiring differing economic organisation due to the underlying technology of production and differing cost structures. For example, a museum produces several outputs that do not rely on the presence of visitors (such as

maintaining the collection). Performing arts vary a lot in their production needs: there may be only a few performers on stage but a host of backstage personnel and massive equipment requirements. Cinemas have other cost combinations. Cost structures as well as limitations on demand are important here for understanding the immediate short term impact of Covid-19 but also for thinking about longer term future problems.

This article views the policy response to Covid-19 in the UK up to the end of 2020. It may be typical of other countries' response in some aspects but not in others. Rather than offer a blander broader review, I have chosen to give a targeted account of those policies adopted and the criteria stated or implied in their administration.

Economic impact of Covid-19 in the UK

The UK had its first national lockdown due to the pandemic from March 23rd 2020 which began to ease after during May that year and then a second national lockdown began on 5th November 2020, ending 2nd December.ⁱ In the interim there was a differential tier system with restrictions applying regionally or locally according to the severity of the transmission of the virus as measured by the number of persons tested positive, hospitalizations and deaths of those who had tested positive. Scotland, Wales, Northern Ireland (which have their own discretion in health matters) and the north of England had higher rates of infection and so experienced stronger restrictions. Regardless of the status of the category, however, all included social distancing and accordingly restricted numbers of both participants and audiences for indoor and outdoor cultural events, even when they were permitted.

In official documents, fortnightly 'waves' starting from March 9th were used for analysing the impact of Covid-19 on businesses.ⁱⁱ By April, 2020, UK GDP in real terms had fallen by 25%; by September 2020 it had risen with the easing of restrictions to 8% lower than it had been at the onset. Surveys of businesses show that hardest hit were SMEs. The Office for National Statistics (ONS) estimated from its Business Impact of Coronavirus (COVID-19) Survey data that the arts, entertainment and recreation industry had 34% of its workforce on partial or full furlough leave, compared with 9% across all industries.ⁱⁱⁱ

With the initial lockdown the UK government introduced the UK-wide Coronavirus Job Retention Scheme (the 'furlough' scheme) for the employed and the Self-Employment Income Support Scheme (SEISS). Employees placed on leave by their employer received 80% of their pay, up to a maximum of £2,500 a month, while the employer paid contributions for pension and National Insurance. The furlough scheme was to have ended by November but was

extended with the second lockdown to March 2021. SEISS was also extended in stages. It has been estimated that 18% of those for whom self-employment makes up most of their income were ineligible, many of whom worked in the creative industries.^{iv}

Unemployment between July and September was 4.8 per cent. Given the lag in the collection of data and the presence of policies to reduce lay-offs in that period, those figures were projected to rise to over 7.5 per cent in early 2021. Over the whole of 2020, that had increased to almost 10 per cent. Unemployment hit those in the age group 16-24 years the hardest, in part due to that fact that they worked in hospitality industries, which were the most badly affected by the pandemic.^v

A report commissioned by the Arts Council of England (ACE) stated that creative industries contributed £111.7bn to the UK economy in 2018, a 43.2% increase in real terms since 2010. Between 2017 and 2018, the sector GVA grew by 7.4% in real terms, which was more than five times the growth rate of the UK economy as a whole (1.4% increase). The report projected a fall in turnover of 50% and a drop in employment of 19% in the first half of 2020. Freelancers and the self-employed were expected to be hardest hit. This was expected to translate into a GVA shortfall of £29bn in 2020 compared to 2019 (-26%), over half of which is in London and the South East.^{vi}

Administration of grants to the arts and culture in the UK

The Arts Council of England (ACE) receives a grant from the DCMS (the UK government Department of Digital, Culture, Media and Sport) for distribution to organisations and individuals working in the arts, performing arts, museums and libraries and also distributes the share of the proceeds of the National Lottery allocated to the cultural sector. The Arts Councils of Northern Ireland and of Wales and Creative Scotland are independent and responsible for their own grants. Within England, ACE places emphasis on regional equality of access and reports its distributions by region (presumably its own former regions).

In 'normal' times, ACE distributes grants according to a two-tier system: to National Portfolio Organisations (NPOs), such as the Royal Opera and Ballet, National Theatre and the Royal Shakespeare Company; and Project Grants to a range of other applicants, great and small. NPOs receive grants for a three-year cycle; project grants are given for the planned duration of the project. Project grants support 'projects that directly create and deliver creative and cultural activity and content for audiences, visitors and digital users, and also development, research and

development and sector support'.^{vii} Various criteria for awarding grants are used – appeal to new audiences, production of new works, maintaining quality, enabling forward planning, international work and so on.

ACE states its objectives as 'to champion, develop and invest in artistic and cultural experiences that enrich people's lives'. From the economic point of view, these may be viewed as a combination of efficiency and equity principles. The question: is have these changed or been interpreted differently due to Covid-19?

UK Government schemes for the cultural sector during Covid-19

Employed artists and related workers (such as those employed in theatres - actors, singers and dancers, backstage staff et al.) were eligible for the furlough scheme via their employer. Those who were self-employed could claim support from SEIIS. The Kickstart Scheme was added in September funding employers to create job placements for 16 to 24 year olds on Universal Credit (the UK's unemployment compensation scheme), the group that was hardest hit by the pandemic.

As many artists do both employed and self-employed work in various sectors, however, they fell between two stools. Eventually the Arts Council England set up its own £2m fund for self-employed artists and made grants to actors' and musicians' trade unions for them to administer: £1 million each to the Theatre Artists Fund and the Help Musicians' Financial Hardship Funding programme. (Some examples of other private benevolent funds are given later on). In response to Covid-19 and by using its own reserves, ACE extended its grants to the NPOs for a further year to ensure financial survival, which meant they were no longer in the 'at risk' category; they could, however, apply for a project grant for a specific purpose. They were therefore able to retain those working for them with the extended grant.

Creative activity of all kinds was supported by the UK government's £1.57bn Culture Recovery Fund. It was to be distributed by ACE on behalf of the DCMS (the UK government Department of Digital, Culture, Media and Sport), starting early on with an **Emergency Grassroots Music Venues Fund** of £2.25 million for venues at risk of imminent closure (for which funding had been 'ring-fenced' by DCMS from the Fund). 'Culture' was defined as sitting within the usual remit of ACE (though Library services were not eligible) but distribution of the Fund was not limited to non-profit organizations (as would normally be the case for ACE), indicating a

significant change in policy. Lump sums were allocated via ACE to the arts councils of Northern Ireland and Wales and to Creative Scotland for distribution in their regions.

One might ask if £1.57 billion is a high degree of support as the government claims. It is more or less equivalent to its previous grant to ACE but had to be spread over a much wider spectrum of activities than those under the usual ACE remit. Put another way: the combined GVA of the Creative Industries and the Cultural Sector was £144bn in 2018 so the new grant represented 1% of that.

Research commissioned by ACE from the Centre for Economic and Business Research indicated that the Culture Recovery Fund should help the cultural sector, predicting that Creative Industry Gross Value Added (GVA) would return to its pre-lockdown level of £13.5bn by 2022, a full year earlier than was anticipated without government intervention. It showed that the sector is set to be worth £15.2 billion to the economy by 2025.^{viii} The research was carried out early on in the first lockdown: in retrospect, those predictions were optimistic given the second lockdown (the more so in view of subsequent restrictions).

The National Lottery Project Grants had a budget of £75 million available to individual artists and practitioners, community and cultural organisations, museums and libraries for arts, museums and libraries projects that ‘engage people in England with creativity and culture’ until March 2021. Other measures included a favourable loan scheme (‘repayable finance’), the Developing Your Creative Practice fund supporting individual cultural and creative practitioners to assist with the next stage of their career through ‘research, time to create new work, travel, training, developing ideas, networking or mentoring.’^{ix}

As part of the Cultural Renewal Taskforce for recreation and leisure an Entertainment and Events Working Group was created, supported by working groups for museums and galleries, heritage, tourism and libraries as well as ones for sport. It was to include representatives from both subsidised arts and commercial organisations and performance venues. A Commissioner for Cultural Recovery and Renewal was appointed ‘whose task was to initiate an ambitious philanthropic focus on arts and culture, and help ensure Arts Council England, National Lottery Heritage Fund and Historic England and other important bodies work together with DCMS to develop and deliver support to the sector’.^x

Impact of Covid-19 on cultural consumption in the UK

One might ask what impact the Covid-19 has had on consumer behaviour and the efficacy of the various policies. Ongoing research into online consumption offered some early results. Between 9th and 19th April, 2020 a representative sample of the UK population aged 16 and over showed that during the study period they were: reading books on average for two hours; listening to music between two and a half to three hours; watching film for two and a half to three hours; playing video games for three hours, and watching TV for three to four hours. Some comparison with pre-lockdown behaviour was possible using the results of the Intellectual Property Office (IPO) Annual Online Copyright Infringement Survey that tracks the extent of online copyright infringement, digital behaviours and attitudes among people aged 12+ in the UK.^{xi} Lockdown restrictions began to ease by July, enabling researchers to gauge any ‘structural’ change or longer term effects it had engendered. While streaming films and TV fell back, music remained close to its previous peak and the proportion of the population downloading/accessing video games fell back to what it was during the lockdown weeks of the study.^{xii} The results also show that individuals (professionals and others) as well as arts organisations were putting more content online.

These surveys are, of course, limited to online consumption and, as they are conducted online, are biased in favour of those with access to a computer. This bias led to under-reporting of cultural consumption by lower socio-economic groups. The closure of public libraries during lockdown in the UK increased the gap between those with and without that access.

The impact on revenues depends on how trade takes place and on business models. Revenues would only increase for sales and downloads or for increases in the number of subscriptions being taken out: existing subscriptions often allow unlimited access to the catalogue. Sales of games and books increased notably in the 16-24 age group.

The greater use of online material might suggest increased revenues from copyright; copyright lasts from the date of ‘fixation’ in copiable form to 70 years beyond the death of the author or performer. It applies to any artistic, literary or musical work, regardless of who the creator is (whether professional or not). Though it might seem that royalties would increase due to greater use during Covid-19, that is unlikely to be the case, for example for music, because live performances were no longer possible. PRS for Music anticipates a fall of 15-25 per cent in musical royalties in 2020 compared to 2019.^{xiii}

Policy objectives and Covid-19

Can we infer any general aims of the policy measures adopted for the creative industries in the UK, for example, can they be classified in terms of equity or efficiency objectives? There are several ways of summarising the enquiry: universal versus specific policies; those for venues versus individual artists; short term survival versus long term development, and so on.

Starting with the objectives of the economy-wide policies, the UK government's stated aim was 'to protect lives and livelihoods'. By pumping money into the economy, widespread unemployment and severe economic hardship could be avoided while businesses could be kept afloat to trade where possible and anyway to survive to trade another day. The 'furlough' scheme and the SEISS (as well as other schemes and tax holidays not discussed here) applied to any type of business, including non-profit cultural organisations. The underlying objectives of these policy measures are a combination of efficiency and equity: efficiency in terms of both macroeconomic aims of a Keynesian type to boost income and consumption and at the industry level, maintaining its structure for subsequent revival; and equity in terms of avoiding widespread poverty and deprivation brought on by external forces.

Those policies, however, were not adequate for all sectors of the economy and special measures were brought in. For the cultural sector, the DCMS (which also has responsibility for sport, which experienced similar problems to those of the arts) allocated responsibility to ACE to distribute emergency funding for which it developed its own criteria. As the brief covered a wide range of creative industries, ACE, which normally dealt only with non-profit organisations, now also had responsibility for distributing funds to for-profit enterprises. In fact, over preceding decades ACE had already adopted business-like language in its dealings with the arts, for instance, referring to 'investment' rather than 'subsidy'. The banner headline of the ACE website states: 'We invest in art and culture for a lasting return. We're looking for organisations, artists, events, initiatives and others to apply for our funding and help us achieve our strategy, Let's Create.'^{xiv}

The stated objective of the Culture Recovery Fund was to enable cultural organisations 'affected by the Covid-19 crisis to stay afloat, providing them with support over a 6-month period to ensure that by 31 March 2021 they can reopen, either fully or partially, or operating on a sustainable, cost-efficient basis until they are able to reopen at a later date'. The grants itemised above were 'to help them plan for reopening and restarting performances and programmes.....also help to support organisations as they plan for the future and create

opportunities for freelancers.’^{xv} These appear to be largely short term efficiency policy objectives and were aimed at organisations and venues.

ACE announced its criteria for National Lottery Project Grants as: Quality, Public engagement, Finance and Management. It also stated that due to Covid-19, they were keen to support applications from individual creative practitioners (including time to think and plan), research and development activity, organisational development activity, live activity that can be safely delivered within the immediate period (rather than activity with a start date far in the future) and activity that closely aligns with equality objectives.^{xvi} This suggests a combination of short and long term efficiency aims that should be compatible with equity.

What criteria were adopted by the committees charged with distributing the various funds set up by DCMS and ACE? The Arts Council National Lottery Project Fund announced a round of funding with a budget of £59.8 that ‘aims to provide grants of £1,000–£100,000, with specific focus on individuals whose work has been affected by the COVID-19 pandemic and are currently unable to apply for closed ACE programmes like *Developing your Creative Practice*.’ The fund supports creative practitioners thinking of taking their practice to the next stage through research, time to create new work, travel, training, developing ideas, networking or mentoring.^{xvii} These would appear to be efficiency criteria, clearly aimed at self-employed artists and those in related occupations.

ACE has, however, stated that equality objectives would inform all its decision making in response to Covid-19 in order to support the communities most impacted by the pandemic, as well as responding to any social injustice. These are equity objectives that temporarily replace their earlier ones or anyway notably reverse the emphasis:

- i) Improving access to the sector for disabled, neuro-divergent and D/deaf workers, audiences and participants
- ii) Ensure funded organisations and projects improve and can demonstrate meaningful engagement with Black, Asian and Minority Ethnic workers, audiences and participants
- iii) Challenging racism and embedding anti-racism values across all of the Arts Council's policy and funding decisions
- iv) Address specific disadvantages facing Children and Young People and Older People as a result of COVID-19

- v) Improving access to creative and cultural activities to those from lower socio-economic backgrounds.^{xxviii}

Policy for the arts and culture in the UK has always combined efficiency and equity objectives: ‘raise quality and spread access’ was the watchword from the inception of the Arts Council in 1945. Latterly, though, in keeping with both the aims of DCMS and of the broadening to include popular culture in the creative industries, the tone has changed to that seen above.

Distributions of funds by the end of 2020

By November 2020, £427 million had been allocated by the ACE from the Culture Recovery Fund, 43 grants in the £1-3 million category and 1,970 in the ‘Under £1 million’ category.^{xix} As described by ACE, the grants went ‘to cultural organisations and venues of all sizes, including cinemas, heritage sites, museums, circuses, festivals and comedy clubs across the country.’^{xx}

A specific initiative ‘Operation Sleeping Beauty’ was announced in October 2020 to support the production of the annual pantomime (the popular UK Christmas show) in various venues around the country, whereby the National Lottery would compensate theatres for seats that could not be sold due to social distancing. Up to 250,000 tickets were expected to be available, with more than 20,000 free tickets going to National Lottery players.^{xxi} It was not to be, however: a further lockdown at the eleventh hour on 19th December prevented the (already rehearsed) productions from taking place.

Private initiatives to support the arts and artists

Professional associations and trade unions in the UK have long-established charities and funds which offer financial support for their members in need. For the music industry, the Musicians’ Union has a hardship fund while the Performing Rights Society has the *PRS Emergency Relief Fund*, which has helped over 4,000 songwriters and composers with more than £2.1 million.

For theatre, there is a network of charities to relieve hardship, such as the *Royal Opera House Benevolent Fund* for its employees, and the *Grand Order of Water Rats* charity for entertainers, to name just a few.^{xxii} *Acting for Others* working with other charities was set up for relief of theatre

workers due to Covid-19; it had raised £3.3 million through donations and fund-raising by October, 2020.^{xxiii}

Crowdfunding has become established in the UK with Kickstarter the platform most used for creative projects; however, I could find no information on crowdfunding of creative industries specifically related to Covid-19.

Online production by private individuals and small enterprises as well as by established cultural organisations has ensured a stream of supply of a wide range of cultural output available digitally, either for free or at low prices. Professional organisations would be paying those they employ; it is not known how much others earn from private initiatives.

Summary and longer term prospects

The UK government brought in various measures to support the creative industries during Covid-19 in addition to its economy-wide package that was also available to them. They corresponded to both efficiency and equity principles, often a combination of the two, as was to be expected.

It seems to me, however, that the willingness to bring in these schemes reflects the major shift in the UK government's attitude to arts subsidy that took place with the creation of the DCMS and its promotion of creative industries in the early 2000s. The creative industries conception changed two things: one was the scope of 'culture' which became more inclusive (for example, by embracing popular cultural activities); the other was that the industries were seen in terms of their contribution to GDP and sources of employment rather than in terms of their intrinsic merits. The case for subsidy to the arts has come to be made as investment in successful enterprises rather than in the culturally-orientated terms adopted earlier on by ACE or as 'lame ducks' which had to be propped up. Investment is an efficiency argument – putting money into the arts pays off in terms of GDP and growth, which, unlike cultural enjoyment and edification, are measurable and are explicitly measured in national statistics.^{xxiv}

Much of the rationale for the emergency government support for the arts is predicated on data on the economic contribution of the creative industries to GDP, to which 'music, arts and culture' was estimated to have contributed just 8% in 2018.^{xxv} Employment figures (for all the creative industries) are also invoked, although as explained above, the data are often misleading

in view of the specific features of artists' labour markets (Towse, 2019). It was easier to support those in employment than the more precarious freelance artists.

There is potential danger in this business-orientated approach, however. Covid-19 has inflicted losses in most sectors of the economy, particularly air transport, hospitality and sport. All have their claims for government support to maintain them during lockdown so that 'life can return to normal' when the disease is under control. The creative industries face competition with them for what are likely to be increasingly scarce government funds.

The main thrust of ACE support has been for organisations rather than artists, although individuals may also benefit under other government-funded schemes for cultural organisations. The larger national arts organisations (the UK's cultural 'crown jewels') were protected by the extension of their existing grants to 2021. They have responded by making existing works available online and creating some new ones while respecting the restrictions of social distancing. Covid-19 may turn out to be a stimulus to produce new artworks using new ways of accessing them. In terms of live arts performances in the long run, it may lead to new layouts of venues. If these prove popular, it could be at the expense of the traditional art forms and performance conventions. On the other hand, there is a serious question whether audiences will switch their preferences in the long term to online viewing rather than going out to live performances. Some art forms, for example, live symphony concerts, were already losing audiences before the pandemic.

Funding creativity by individuals is generally regarded as difficult for governments as the outcome is unpredictable and success is uncertain, something that taxpayers may not appreciate. Nevertheless, DCMS and ACE have responded to the problems of freelance artists during Covid-19, albeit not to universal satisfaction of artists' and their representatives. In view of what we know about the economics of the live performing arts, it is hard to see that the sector as it was at the start of 2020 will survive unscathed. There is a real prospect of the loss of human capital in the performing arts in the long term if the level of demand for cultural activity fails to return to pre-Covid-19 levels.

Turning to broader, long term matters it is likely that GDP will be significantly lower than for some time after the pandemic; though there will be growth, recovery takes time. Both public and private spending on the arts and culture depend on income, suggesting that both supply and demand will be reduced. Governments are likely to have post-pandemic retrenchment policies and that would reduce willingness to offer subsidy. Moreover, there are likely to be many

competing claimants from other sectors for support. Overall, therefore, longer term prospects for the creative industries and for those that work in them are not bright, not just in the UK but in most OECD countries.^{xxvi}

Appendix: Case Study of one orchestra's response to the Covid-19 situation, the Bournemouth Symphony Orchestra

Interview with Anthony Brown, Head of Marketing. 12th November, 2020.

The **Bournemouth Symphony Orchestra** (BSO) was founded in 1893 as the Bournemouth Municipal Orchestra. It has developed a reputation as one of the UK's major orchestras and has worked with many of the world's leading composers, conductors and performers. Originally based in Bournemouth, the BSO moved its offices to Poole in 1979. It made its first recording in 1914. Its off-shoot Bournemouth Sinfonietta was formed in 1969 but disbanded in 1999.

The BSO has established itself with its roster of famous conductors and soloists as the main orchestra of the South West.¹ It tours widely in the region doing concerts and outreach and educational work (it has had an education/outreach department since the 1980s).

In 2019 it did 153 performances in 45 towns and cities, reaching 126,056 concert-goers and with 859 music projects reaching 77,950 children, adults and young people last year.

Economic organisation

Personnel: BSO employs 61 players with extra players/. It hires around 75 freelance players at various points depending on the requirements of the repertoire (a standard in the industry). Conductors are on freelance contracts per concert engagement.

There is an administration team of 36.

BSO's base is at the Lighthouse Poole. It rents space as required for rehearsals and performances. The hall has a seating capacity of 1575.

Finance

Sources of BSO revenues:

¹ https://en.wikipedia.org/wiki/Bournemouth_Symphony_Orchestra

Earned revenue = 35%; Arts Council England = 40%; Local Authorities = 5%; Fundraising = 16%; Education = 3%.

The relatively high (by orchestral standards) ACE grant is because they do extensive touring.

Planning

BSO normally works on a 12-18 month planning process from the start of programming music to marketing, starting to advertise about 6 months prior to the concert season. Planning involves programming repertoire, concert and touring slots, advertising in venues, including prices.

The typical planning period for concert repertoire guest performers and outreach work can vary from 3-18 months.

Finance and activity during Covid-19

Employed players have been continuously employed throughout lockdown and beyond. They did not work at all from 16 March to 10 September. Once concerts recommenced, they were being paid for 40 hours but working only 10 hours a week.

BSO applied for the furlough scheme did not get support; they could not access the emergency funding from DCMS as they were not in a financially critical position - the main criterion that had to be demonstrated.

Its ACE grant runs until 2021. The currently funding round has been extended to April 2022 as part of the policy for Covid-19. The new round will be looked at for the period 2022-2025. (BSO is part of the National Portfolio grant scheme of funding).

Planning began in May 2020 for a series of digital concerts running from 30 September - 16 December 2020 under Chief Conductor Kirill Karabits.² There was to be a series of 12 socially distanced performances at Lighthouse, Poole.

² <https://bsolive.com/press-releases/bournemouth-symphony-orchestra-returns-with-12-symphonic-concerts-this-autumn/>

BSO was performing to live audiences of 285 (the socially-distanced hall capacity) until 5th November. Thereafter, there is just the livestream aspect of performance. Its current series of concerts produce approximately £13,000 per concert.

BSO is currently working for three days per week with rehearsals and the Wednesday livestream concert.

The educational projects continue online.

Beyond Covid-19

The general concern is if audiences will return. BSO has a loyal following across the whole of the South West. The typical audience profile for live concerts is an age-profile of 55-80.

It is a risk in that Covid-19 may well change people's habits and confidence. BSO foresees live audiences will return but it is not a given and they will have to work hard to bringing people back. We will however continue with a digital programme of work and hope that will also reach audiences.

Asked what more could government do to support orchestras, BSO replied 'additional tax break measures, review of current orchestral tax relief. Not sure if additional grant subsidy is the complete answer'.

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