



House of Commons
Digital, Culture, Media and
Sport Committee

Impact of COVID-19 on DCMS sectors: First Report

Third Report of Session 2019–21

*Report, together with formal minutes relating
to the report*

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Digital, Culture, Media and Sport Committee

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Summary

Sport, culture and tourism all operate to some extent by bringing people together for shared experiences. All have been hit hard by the Covid-19 crisis. While this report focuses on sectors within the Department for Digital, Culture, Media and Sport's remit, it is important to remember that their difficulties will spill into the wider economy, and the health and wellbeing of the population as a whole.

Recreational and elite sport have been interrupted during the Covid-19 outbreak, with serious financial implications across both sectors. Physical activity is a vital part of the UK's fight against the virus, and we call on Government to ensure that marginalised groups including BAME communities and women are not left behind in efforts to get the UK back to sport and fitness. We also argue that the Covid-19 crisis presents an opportunity for football, in particular, to 'reset' and to introduce essential reforms to financial models, management structures and diversity and inclusion that will benefit the game in the long term.

Each year, more people attend the theatre than go to a league football match, yet while considerable effort has been made to resume professional football, the Government's roadmap for when theatres will reopen has been vague and slow-coming. We welcome the Government's announcement of a £1.57 billion support package for the arts, but it was too late for many in the sector and on its own will not be enough to stop mass redundancies and the permanent closure of our cultural infrastructure. We therefore argue that the performing arts need a sector-specific deal that includes:

- An extension to the furlough scheme for affected businesses until mass gatherings are permitted under the Government's and Devolved Administrations' Covid-19 guidelines;
- Continued workforce support measures, including enhanced measures for freelancers and small companies;
- Clear, if conditional, timelines for when they will be able to reopen, and technological solutions to enable audiences to return without social distancing;
- Long-term structural support to rebuild audience figures and investment in an uncertain economic climate. This should involve new, sector-specific tax reliefs as well as an extended VAT cut for the sector.

Since the start of the outbreak, the tourism sector has been at the mercy of other Departments' announcements on border closures, quarantine periods and 'air bridges'. We call on DCMS to utilise advertising and enhanced data tools to promote 'staycations' and stimulate the return of domestic tourists to our coastal towns and visitor attractions.

Finally, we examine how effectively DCMS has advocated for the sectors under its remit during this crisis. With many vital Government support schemes due to end, or not sufficiently covering those working in these sectors in the first place, we argue that DCMS's position within Government, and a fundamental lack of understanding about how DCMS sectors and their workforces are structured, has hampered the support provided by Government during the outbreak.

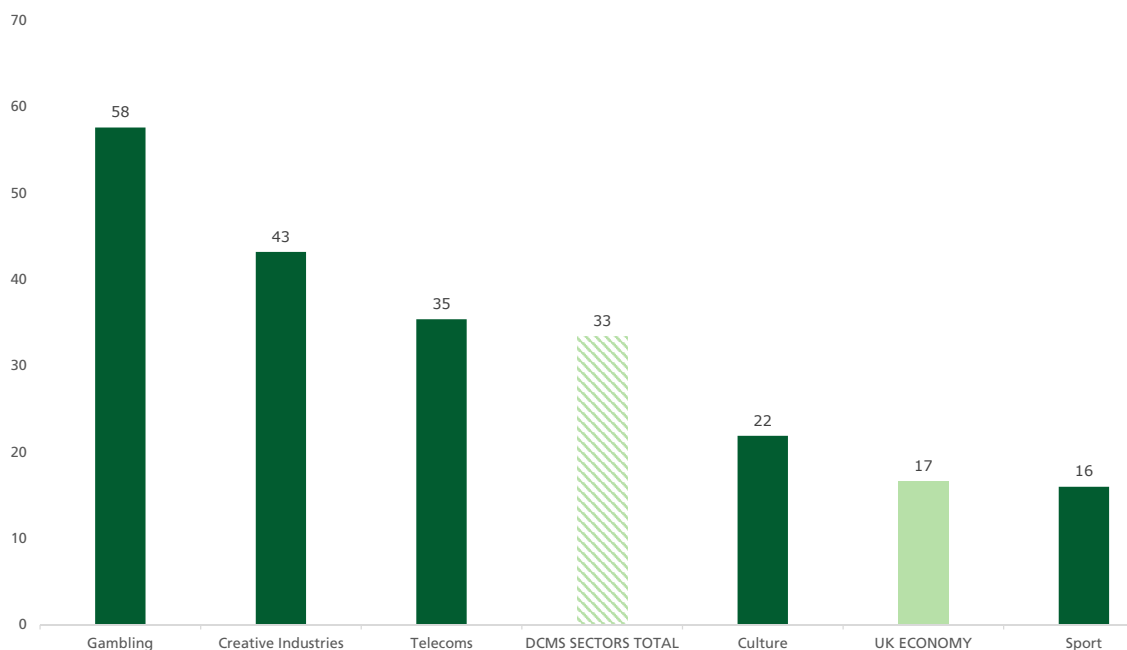
Digital exclusion has left individuals and communities isolated during this crisis, and Ministers told us that although they wanted to do more to help, they have been limited by resources. We therefore call on HM Treasury to ensure DCMS is sufficiently resourced to take the lead on tackling digital exclusion across Government.

1 Introduction

The DCMS sectors

1. The remit of the Department for Digital, Culture, Media and Sport (DCMS) spans a wide range of policy areas and economic sectors, from grassroots and professional sports to gambling and lotteries, from museums and the arts to telecoms and data protection.¹ In 2018, these sectors contributed more than £224 billion or 11.7% of Gross Value Added (GVA), to the UK economy.² DCMS also oversees some of the fastest growing industries: between 2017 and 2018, the creative industries' GVA increased by 7.4%, more than five times the growth rate of the UK economy as a whole, which stood at 1.4%. This continued the trend seen since 2010, as illustrated in Figure 1.³

Figure 1: % Change in Gross Value Added 2010–2018



Source: DCMS Sectors Economic Estimates 2018 (provisional)

The rate of growth in the DCMS sectors extends to employment. In 2019, there were 5.3 million jobs across the DCMS sectors (accounting for 15.7% of the UK total), and since 2011 most sectors have experienced an above average increase in the number of jobs available, as illustrated in Figure 2.⁴

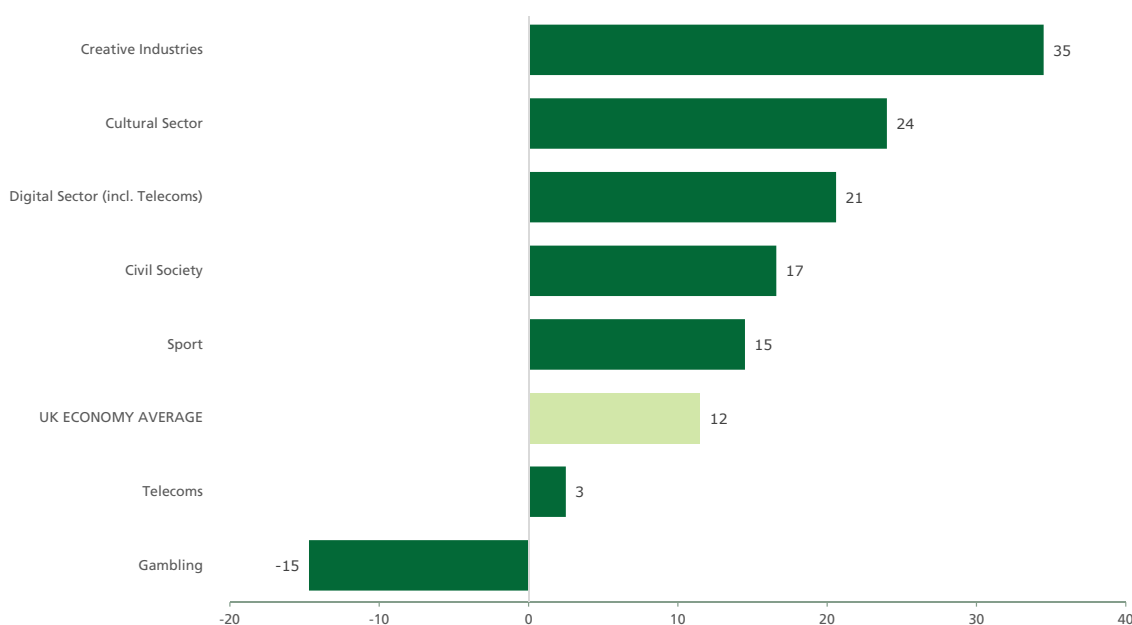
1 The considerable overlap between economic measurements related to the DCMS sectors is explored in the Department's economic estimates, footnoted below.

2 Department for Digital, Culture, Media and Sport, [DCMS Sectors Economic Estimates 2018 \(provisional\): Gross Value Added](#) (5 February 2020), p4

Tourism is excluded from the 2018 calculation owing to "substantial revisions to the base data and methodology used to construct the tourism satellite account"; however, in 2017 its GVA stood at £59.6 billion.

3 Department for Digital, Culture, Media and Sport, [DCMS Sectors Economic Estimates 2018 \(provisional\): Gross Value Added](#) (5 February 2020), p9

4 Department for Digital, Culture, Media and Sport, ['DCMS Sectors Economic Estimates 2019: Employment'](#), accessed 18 June 2020

Figure 2: % Change in Total Employment 2011–2019

Source: DCMS Sectors Economic Estimates 2019: Employment

Yet DCMS remains one of the smallest departments by both budget and staffing, and has seen the highest turnover of Secretaries of State of any Department: the Rt Hon Oliver Dowden MP is the ninth since May 2010.⁵ Moreover, structural features within these sectors have rendered them highly vulnerable during the Covid-19 crisis, as we shall explore throughout this report.

2. The organisations that comprise the digital, culture, media and sport sectors, and the goods and services they provide, are highly heterogenous. As such, and in line with experiences across the wider economy, some have been less impacted by the measures introduced to curb the spread of Covid-19 than others. However, with 68% of respondents to DCMS’s own survey reporting that their businesses’ ability to trade as a viable entity is under threat, it is clear that Covid-19 presents serious challenges across the DCMS sectors.⁶ Parallels between the sectors illustrate why some have been, and will continue to be, particularly hard hit by loss of income, uncertainty about reopening and long-term disruptions to the workforce or supply chain. For example, tourism and live events are both highly seasonal industries, and the loss of income incurred due to cancellations or closures over spring and summer will not be replaced until 2021—at which point income will be further affected by many bookings being deferrals rather than new business.⁷ Many of the sectors also bring people together to share in communal experiences, be that at a football match, a concert or a hotel restaurant, to which continued social distancing measures present an existential challenge.⁸ It is also clear that these sectors are highly interconnected—tourists are attracted by the cultural events on offer; broadcasting and streaming generate much-needed income for sports and creatives, yet also need these events to fill their schedules—which means problems in one reverberate across the economy.⁹

5 Institute for Government, [Whitehall Monitor 2020](#), (20 January 2020), p 8, 19

6 Department for Digital, Culture, Media and Sport, [‘DCMS Business Survey - Headline Measures’](#), accessed 1 July 2020

7 VisitBritain ([CVD0159](#)), Tracy Brabin MP ([CVD0189](#))

8 Production Services Association ([CVD0104](#))

9 The Really Useful Group Ltd ([CVD0167](#)), S4C ([CVD0372](#))

3. The sectors under DCMS's remit have benefited to varying extents from the emergency business support measures announced by HM Treasury.¹⁰ Indeed, 55% of respondents to a DCMS survey said that they had accessed Government support to mitigate financial pressures of the outbreak.¹¹ Sector-specific emergency funding packages have also been made available by the numerous non-departmental public bodies that distribute Government funding and funds for good causes generated by National Lottery revenue, as illustrated in Table 1.

Table 1

DCMS's Non-Departmental Public Bodies–Emergency Funding	
Arts Council England¹²	£160m
Individual Practitioners' Fund	£20m
Organisations outside the National Portfolio	£50m
National Portfolio Organisations	£90m
British Film Institute¹³	£4.6m
Production Continuation Fund	£2m
Film & TV Emergency Relief Fund	£0.5m
BFI Fan Covid-19 Resilience Fund	£1.3m
BFI Funded Features	£0.8m
Historic England Emergency Response Fund¹⁴	£5m
Emergency Response Fund	£2m
Emergency Heritage at Risk Response Fund	£3m
National Lottery Community Fund¹⁵	£500m
Government Charities Fund	£200m ¹⁶
Funding Decisions for 6 months	£300m
National Lottery Heritage Fund¹⁷	£50m
Sport England¹⁸	£210m
Community Emergency Fund	£35m
Sector Partner Funding	£5m
Sector Simulation	£55m
Funding Rollover	£115m

In this report, we will examine how effectively these measures have addressed the distinct needs of certain sectors under DCMS's remit.

10 See Appendix for details of these measures and their eligibility criteria.

11 Department for Digital, Culture, Media and Sport, '[DCMS Business Survey - Headline Measures](#)', accessed 1 July 2020

12 Arts Council England, '[Data Report: Emergency Funding Report](#)', accessed 6 July 2020

13 British Film Institute, '[BFI sets out support for UK industry impacted by COVID-19 crisis](#)', accessed 6 July 2020

14 Historic England, '[Covid-19 Emergency Response Fund](#)' and '[Covid-19 Emergency Heritage at Risk Response Fund](#)', accessed 6 July 2020

15 National Lottery Community Fund, '[Learn about applying for emergency COVID-19 funding in England](#)' and '[Statement from Dawn Austwick, CEO, The National Lottery Community Fund: Our funding approach in response to COVID-19](#)', accessed 6 July 2020

16 This figure may rise by an additional £110 million, which the Government has held back to address emerging priorities.

17 National Lottery Heritage Fund, '[Emergency Fund](#)', accessed 6 July 2020

18 Sport England, '[Funding, Innovation and Flexibility](#)', accessed 6 July 2020

4. The many and varied sectors under the remit of the Department for Digital, Culture, Media and Sport are integral to the UK's national life and identity, as well as being vital drivers of economic growth and employment. Yet many parts of these sectors face an existential threat due to Covid-19 and the continued uncertainty that accompanies it.

Our inquiry

5. We launched our inquiry in April to gather experiences from the diverse sectors under our remit on how Covid-19 was affecting them.¹⁹ This followed evidence we gathered on the impact of Covid-19 on the charity and voluntary sector, which we covered separately in our report 'The Covid-19 crisis and charities'. In that report, we expressed concerns about the suitability of HM Treasury's business support schemes to third-sector organisations, and the scale of Government support for the charity sector at a time of diminished income and increased demand. We revisit these themes in this report, albeit in the context of different sectors, as we examine why the Government has consistently failed to recognise the scale of the challenge that Covid-19 presents to tourism, sport and culture, or the risk that losing them presents to the UK's recovery from the crisis.

6. The majority of written evidence to our inquiry focused on culture, which we have broadly defined as including the creative industries, tourism and civil society.²⁰ A significant number of contributions, especially those from local government bodies, dealt with cross-sector issues, again illustrating the interconnected nature of the DCMS sectors. We heard from a high number of individuals, including people working in the live events sector and its supply chains.²¹ To supplement this evidence, we took oral evidence from witnesses representing sports bodies, cultural organisations and artists, leading tourism attractions and civil society. A breakdown of the evidence we received is detailed in Figure 3.

We thank everyone who contributed to our inquiry. As they did so, organisations and individuals were adjusting to new ways of working and facing immense personal and professional pressures. We were struck by the dire situations outlined by so many who feel that they, or the industry they work in, have fallen through the cracks of the Government's response to Covid-19. We also note the passion and commitment demonstrated for the UK's sports, art forms and cultural institutions.

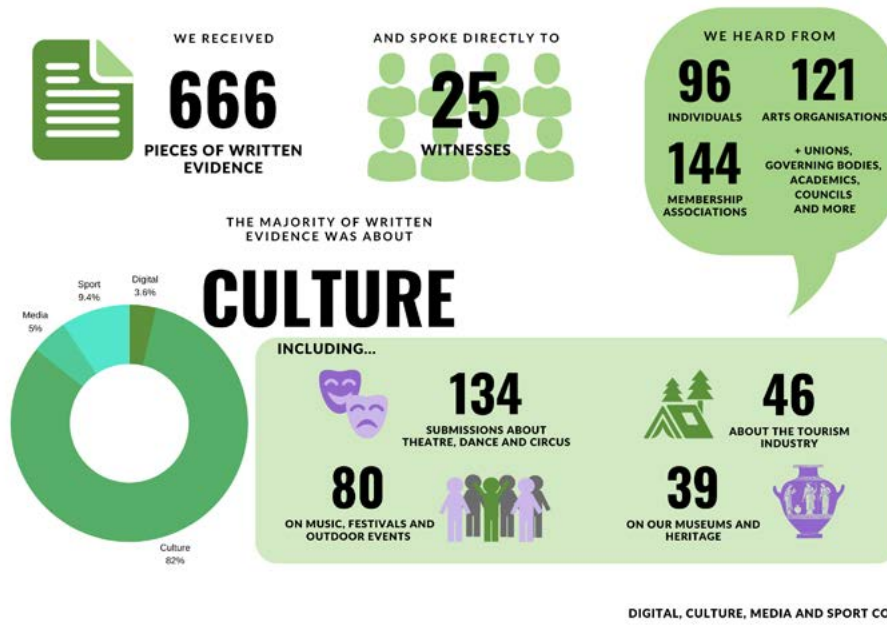
19 Alongside our work on this topic we have continued to gather evidence for our inquiries on 'The Future of Public Service Broadcasting' and 'Broadband and the Road to 5G'. As such, this report does not cover the media or telecoms sectors in detail; however, we intend to continue to monitor the impact of Covid-19 on these sectors over the coming months. Our Sub-Committee on Online Harms and Disinformation has also been examining disinformation during Covid-19, detailed in our separate report on the topic.

20 The relatively low proportion of submissions from civil society organisations is in large part due to our ate piece of work on the charity sector, which received more than 70 submissions from charities, umbrella groups and civil society.

21 DCMS defines the creative industries as: advertising and marketing; architecture; crafts; design (product, graphic and fashion design); film, TV, radio and photography; IT, software and computer services; publishing; museums, galleries and libraries; music, performing and visual arts.

Figure 3

DURING OUR INQUIRY ON THE IMPACT OF COVID-19...



7. The purpose of this report is to scrutinise how effectively the Government is dealing with the challenges facing the sport, creative and tourism sectors, and to inform DCMS’s approach as it works with those sectors on their reopening and longer-term recovery. We also draw lessons from these industries, and DCMS’s work on digital exclusion, to assess how effectively it has advocated for its sectors across Government. We recognise that this is an evolving picture, and that for some sectors the full impact of Covid-19 might not be fully known until 2021 or later. Therefore, we will continue to gather evidence and scrutinise the Government’s funding, policies and performance in the coming months. We will consider whether to publish a further report based on that evidence.

2 Sport

The impact of Covid-19 on recreational sport

Physical activity

8. Physical inactivity is responsible for one in six UK deaths, and is estimated to cost the country £7.4 billion every year.²² Before the Covid-19 pandemic, Sport England’s 2018–19 ‘Active Lives’ survey identified record levels of activity among adults in the UK: 63.3% of adults (28.6 million) were undertaking an average of 150+ minutes per week, an increase on the previous year of 400,000.²³ Since the Covid-19 crisis began, Sport England has commissioned weekly surveys to find out how adults’ activity levels have been impacted by the lockdown restrictions.²⁴ In the week commencing 30 March, Sport England found that there had been “massive disruption in the physical activity behaviours of adults and children”: 31% of adults did more activity compared to pre-lockdown, and 41% did less. In their ninth weekly survey, covering the week commencing 15 June, Sport England found that 28% of adults did more compared to pre-lockdown and 25% did less.

9. Yet, in some ways, the benefits of daily physical activity have increased in profile during lockdown. This is partly owing to the Government’s messaging around the freedom to exercise outside, but is also because of the explosion of free online fitness content such as The Body Coach’s weekday ‘PE with Joe’ sessions, and Kate and Rio Ferdinand’s ‘Ferdinand Fitness’ workouts and challenges.²⁵ Although Sport England found that 53% of adults had been encouraged to exercise by the Government’s guidance during lockdown, differences in activity levels continue between demographics: older people, those on lower incomes and those with disabilities or long-term health conditions have all found it harder to be active during the pandemic.²⁶ Some submissions have voiced concerns about how participation in physical activity by women and people from BAME groups will be affected.²⁷ Ali Donnelly, Marketing Director of Sport England’s ‘This Girl Can’ campaign, told us that at the beginning of March 2020 more women than ever were active, but that the Covid-19 crisis has prompted an exacerbation of gender inequalities in terms of activity levels, and that “people who stand to benefit the most struggle the most” to be active.²⁸ This is reiterated by the Sport for Development Coalition who told us that the:

direct risk on health and economic situation is worse for women. They are more likely to be exposed to COVID-19 with 2.5 million of the 3.2 million workers in highest risk roles are women. Women are also doing the bulk of unpaid care (for children, elderly, disabled or vulnerable relatives) and proportionately more childcare, reinforcing stereotypical gender roles.²⁹

10. Sport England’s Active Lives survey has consistently found that Black and Asian individuals are the most inactive of all ethnic groups. The groups with the lowest levels

22 Sport England ([CVD0032](#))

23 Sport England, [Active Lives Adult Survey November 2018/19 Report](#) (April 2020), p 3

24 Q88

25 YouTube, ‘[The Body Coach TV](#)’, and ‘[Ferdinand Fitness](#)’, accessed 30 June 2020

26 Sport England ([CVD0032](#))

27 Royal Yachting Association ([CVD0491](#)), The FA ([CVD0671](#)), Sporting Equals ([CVD0615](#))

28 Q507

29 Sport for Development Coalition ([CVD0665](#))

of participation are Asian females and Black females: in 2018/19, 63% of White British women were active compared with 53% of Black women and 49% of Asian (excluding Chinese) women.³⁰ With Type II Diabetes more prevalent in BAME communities, and a link identified between Covid-19 and Type II Diabetes, we are concerned that decreased opportunities for physical activity during and after this crisis will exacerbate Covid-related deaths within BAME groups and communities.³¹ Submissions have also raised the issue of fear of returning to group physical activity.³² We were told by the ‘This Girl Can’ campaign that women strongly associate exercise with fear as an emotion: fear of performing badly, fear of how they look, fear of the opportunity cost associated with exercise.³³ All of these are likely to be exacerbated by the virus and possible risks of transmission when getting back to exercise after lockdown.

11. We are concerned that a lack of confidence, and a fear of being in close proximity with people from outside their own household, will affect people’s return to group sports, particularly those that take place indoors (such as indoor exercise classes), those that require physical contact (such as rugby), and those that require participants to be in close proximity for extended periods of time (such as rowing). We support requests from the sport sector for clear and effective public messaging from the Government to ensure people feel safe returning to group physical activity. To help to get the UK moving again, the Department for Digital, Culture, Media and Sport should fund advertisements, based on the ‘This Girl Can’ model, using realistic content about how to get back to exercise without fear. In the medium-to-long term, we recommend that DCMS establishes a fund to invest specifically in helping those people whose activity levels have been adversely affected by the lockdown restrictions—including older people, BAME people, disabled people, women, people from lower socio-economic backgrounds and those unable to access physical activity content online—to ensure that the progress that was being made in physical activity levels within these groups is not set back by Covid-19.

Financial impact on organisations

12. Initially, social distancing necessitated the cancellation of nearly all recreational sport bar solo running, walking and indoor household-only exercise. Early June saw a limited re-opening of some distanced sports including tennis and fishing, and in July, some other recreational team sports, such as cricket, were able to return once guidance was approved.³⁴ While some commercial gyms have adapted by moving training content online, shifting to digital content and systems has been harder for subsidised leisure centres, and places renewed emphasis on the importance of people having access to the internet—as we shall explore further in chapter 5.³⁵ For many community sports organisations, school-based delivery has been compromised by closures, the ability to fundraise has been curtailed

30 Sport England, [Active Lives Adult Survey](#), (April 2020), p 12

31 BDA, [‘Improving the quality of care for ethnic minority communities’](#), accessed 3 July 2020

32 London Sport ([CVD0129](#)), Croydon Council, Croydon Sport, Physical Activity & Health Network, Croydon Sport Clubs ([CVD0516](#)), Sport England ([CVD0032](#)), The Rugby Football Union ([CVD0455](#)), Centre for Sport and Human Rights, Women in Sport, World Players Association, FARE Network, Mission 89 ([CVD0589](#))

33 Q514

34 Department for Digital, Culture, Media and Sport, [‘Digital, Culture, Media and Sport Secretary’s statement on coronavirus \(COVID-19\): 9 July 2020’](#), accessed 13 July 2020

35 Q87, Sport for Development Coalition ([CVD0665](#))

and, in some cases, corporate sponsors have pushed back delivering their commitments due to financial pressures.³⁶ In April 2020, one in four community sports clubs in London were “unsure” as to whether they would still exist in October.³⁷ Sport England told us that:

Shrinking reserves, continued costs and a long-term loss of income risk the financial viability of an increasing number of community sport organisations.³⁸

13. Sport England’s emergency funding package, launched at the end of March, was over-subscribed, and its CEO told us in May that it was “probably [going to] have to look at extending” its funding streams to help clubs through this crisis.³⁹ There is general consensus that this funding was well distributed to those who qualified, with the Royal Yachting Association stating that Sport England’s “clear and decisive action” focusing on specific objectives set an example to DCMS and other arms-length bodies.⁴⁰ Other organisations such as the England and Wales Cricket Board (ECB) and the Rugby Football Union (RFU) have introduced their own support packages to assist recreational clubs within their own sports, but many clubs have still been left with significant shortfalls.⁴¹ While some have benefited from business support grants put in place by the Government, Tom Harrison, CEO of the ECB, told us that:

clubs that are listed as community amateur sports clubs do not qualify for those loans [...] Some local borough councils are not awarding those loans to clubs that fit in that category. That is a bit of an issue for us. We have about 4,000 clubs that do not qualify anyway for that.⁴²

14. Leisure facilities, such as swimming pools, gyms, football pitches and sports halls, are vital to local communities in providing accessible and cost-effective facilities for physical and mental wellbeing. Many are council-run. Local authorities are responsible for around one-third of the UK’s swimming pools, almost 20% of health and fitness facilities and 31% of grass pitches.⁴³ Yet there are concerns about the future of local authority funding for sport and leisure facilities in light of increased budgetary pressures resulting from the Covid-19 crisis.⁴⁴ Ukactive reports that some “local authorities are attempting to withhold funding from suppliers within the physical activity sector”,⁴⁵ and its CEO Huw Edwards told us that it might not be viable for up to one-third of facilities to reopen.⁴⁶ The Government has announced that gyms, indoor swimming pools and leisure centres can reopen from 25 July with measures such as timed booking systems and “enhanced cleaning”.⁴⁷ However, these come with a cost, and the loss of any facilities or community

36 Youth Sport Trust ([CVD0135](#))

37 London Sport ([CVD0129](#))

38 Sport England ([CVD0032](#))

39 Q86

40 Sport Works ([CVD0027](#)), Royal Yachting Association ([CVD0491](#)), The FA ([CVD0671](#)), England and Wales Cricket Board ([CVD0555](#))

41 Qq59, 63

42 Q59

43 Local Government Association, ‘[Coronavirus: LGA warns leisure providers falling between support packages](#)’, accessed 7 July 2020

44 InSport Intelligence ([CVD0689](#)), London Sport ([CVD0129](#)), Sport and Recreation Alliance ([CVD0176](#)), Croydon Council, Croydon Sport, Physical Activity & Health Network, Croydon Sport Clubs ([CVD0516](#))

45 ukactive ([CVD0130](#))

46 Q598

47 Department for Digital, Culture, Media and Sport, ‘[Digital, Culture, Media and Sport Secretary’s statement on coronavirus \(COVID-19\): 9 July 2020](#)’, accessed 13 July 2020

programmes would have a significant impact on health and community infrastructure.⁴⁸ This would go against one of the key tenets of the 2015 Sport Strategy, to increase participation by BAME communities, and women and girls.⁴⁹ Moreover, children lose up to 74% of their fitness over the summer holidays, with those from the poorest backgrounds affected most, so maximising provision of leisure facilities over the summer is crucial.⁵⁰

15. The cessation of community sport countrywide during lockdown has hit under-represented groups the hardest. While we welcome the announcement that some recreational sports teams can now resume play, we are concerned about gyms and leisure centres. These facilities act as community hubs, often providing subsidised facilities to those who most need them, but have been the last sport sector to re-open. Following huge levels of uncertainty, it is essential that leisure facilities are protected and have the funds to ensure that the necessary hygiene and social distancing measures can be put in place to re-open fully. The worst outcome would be for local authority funding shortfalls to translate into leisure centre closures; if this were to happen, the Government would risk abrogating its own 2015 Sport Strategy commitment to increase participation in sport by under-represented groups. DCMS's Sport Working Group must work with local councils to ensure necessary funding is in place to preserve leisure centre facilities. This must be done with urgency so that leisure centres are fully operational in August to provide crucial fitness opportunities for children during the school holidays.

Looking ahead

16. The long-term impact of the Covid-19 crisis on activity and participation levels is unclear.⁵¹ However, fitness levels are crucial to the UK's response to the pandemic. As we have highlighted, inequalities in accessing exercise have been exacerbated by the crisis, and we are concerned that decreased opportunities for physical activity will exacerbate Covid-related deaths within BAME communities and among other demographics in society. Therefore, obtaining and processing data to increase exercise levels and boost people's resilience to the virus will be vital in addressing health inequalities. London Sport told us that developing long-term indicators that enable a better understanding of health inequalities will help to form a "targeted, long-term sectoral response".⁵² Sport England has repurposed its "immediate 'horizon-scanning' work [...] to better understand how current trends might continue to shape people's lives in the post-Covid-19 world".⁵³

17. We recognise the importance of 'horizon-scanning' work to ensuring people maintain and increase their activity levels, which in turn will boost their resilience to the virus. However, smaller organisations are unlikely to have the resources available to collect data, analyse it and then act on that insight. We believe that Sport England is in the best position to continue this work. We call on DCMS to provide Sport England with the necessary resources for it to prioritise data collection, so that long-term indicators can be developed to help the sports sector better understand the needs of its audiences.

48 Sport England (CVD0032)

49 UK Government, [Sporting Future: A New Strategy for an Active Nation](#) (December 2015), p 22

50 ukactive, ['Together: How ukactive Kids members are rising to the challenges posed by Coronavirus'](#), accessed 2 July 2020

51 London Sport (CVD0129), RestartSailing (CVD0342), Tennis & Rackets Association (CVD0249)

52 London Sport (CVD0129)

53 Sport England (CVD0032)

The impact of Covid-19 on elite sport

Financial impact

18. The Covid-19 outbreak had an immediate and significant impact on elite sport. On 9 March, the Secretary of State for Digital, Culture, Media and Sport stated that it was “very premature” to be talking about the cancellation of sporting events. However, on 16 March, the Government said that “large gatherings should not take place”.⁵⁴ By this point, a significant number of elite sports had already cancelled or postponed competitions, but it was not until 23 March that the Prime Minister announced that gatherings of more than two people, as well as all social events, would be stopped.⁵⁵ The global spread of the pandemic put UK Sport—the UK’s high-performance sports agency that supports athletes on their journeys to the Olympic and Paralympic Games—in need of a £53.4 million extension in Government funding to ensure that British athletes are able to qualify for and attend the delayed Tokyo Games.⁵⁶ We were pleased when, on 26 June, the Secretary of State wrote to UK Sport to confirm that the funding agreement and underwrite would be rolled over.⁵⁷

19. Elite sport faces a mixed picture as the UK emerges from lockdown. Some sports, such as Premier League football, have resumed behind closed doors. However, Rick Parry, Chairman of the English Football League (EFL), told us that for clubs in his leagues, playing games behind closed doors is financially “almost neutral, and for many clubs, it could actually cost them to play because they will have the cost of staging games”.⁵⁸ He told us:

We are looking at ways of streaming our product via iFollow, which is a hugely successfully EFL streaming platform, so we would be able to recoup some money that way, but it wouldn’t make up the whole shortfall.⁵⁹

20. Cricket has been one of the latest sports to restart, with matches at county level only due to start in August. At the national level, the England and Wales Cricket Board (ECB) told us that if it is “unable to play any cricket in 2020, COVID-19 could cost the game as much as £380m through lost income”, and that even in the best case scenario of cricket returning in August 2020, the game is still set to lose approximately £100 million.⁶⁰ Since giving evidence, the ECB has put in a huge effort to bring back test cricket in order to fulfil its broadcast obligations, which will mean some mitigation of financial losses. The British Horseracing Authority estimates that racing is expected to lose around £100 million “with losses continuing to be incurred owing to a limited programme in the aftermath of resumption and reduced income streams”.⁶¹

21. The first rugby matches are due to be played on 15 August as part of the Gallagher Premiership, but the Rugby Football Union (RFU) has described the impact of Covid-19 on the game as “devastating”.⁶² Although the RFU tells us that it and many of its clubs

54 UK Government, ‘[COVID-19 guidance for mass gatherings](#)’, accessed 27 April 2020

55 UK Government, ‘[Prime Minister’s statement on coronavirus \(COVID-19\): 23 March 2020](#)’, accessed 27 April 2020

56 UK Sport ([CVD0298](#))

57 UK Sport, ‘[UK Sport receives Government assurance on Tokyo funding](#)’, accessed 3 July 2020

58 Q37

59 Q37

60 England and Wales Cricket Board ([CVD0555](#))

61 British Horseracing Authority ([CVD0457](#))

62 Rugby Football Union ([CVD0455](#))

have benefited from some of the Government support schemes, such as the Coronavirus Job Retention Scheme (CJRS) and VAT/PAYE deferral schemes, the RFU itself does not expect to recover financially for “four to five years” on the assumption that the autumn internationals are able to go ahead later in the year.⁶³ This is because the majority of revenue is made on match days from ticketing and hospitality.⁶⁴ Bill Sweeney, CEO of the RFU, told us that:

If the autumn internationals go ahead, we will still lose something like £32 million in revenue through to the end of the next financial year. If the internationals go ahead but are behind closed doors, that will be a negative impact of £85 million. If the games are cancelled entirely, that will be £107 million on top of the £15 million we have already lost.⁶⁵

22. With no clear messaging from the Government about when spectators can expect to return to sporting events, we support calls from elite sports organisations for the Government to extend its financial assistance for those organisations that are unable to generate revenue until mass gatherings are permitted. We recommend that DCMS works with HM Treasury to identify organisations within the professional sport sector that remain unable to generate revenue until mass gatherings are permitted again, and to ensure that the systems that have helped them survive the crisis thus far, such as the Coronavirus Job Retention Scheme and the VAT and PAYE deferral period, are extended beyond the current cut-off dates, and backdated where they have already come to an end (such as the VAT payments deferral scheme).

A football reset?

23. Towards the beginning of the crisis, the Premier League was hit by controversy when a number of its clubs, including Tottenham and Liverpool, decided to use the CJRS and furlough non-playing staff while continuing to pay players’ wages in full. The Premier League remains the highest paying football league in the world, at nearly £3.2 million per player in 2019, so it is no surprise to us that some clubs—particularly Liverpool, the world’s seventh richest football club—faced fierce backlash.⁶⁶

24. English Football League (EFL) clubs also suffered pay-related problems, as they tried to negotiate player wage deferrals with the Professional Footballers’ Association (PFA). In May, EFL Chairman Rick Parry told us that clubs’ “cash hole towards autumn looks pretty grim”; at that point, the EFL and PFA had agreed that clubs could defer up to a maximum of 25% of players’ wages for April, under certain conditions.⁶⁷ The PFA and EFL also agreed to form a working group to focus on the short-term (May and June) and medium-term position (July onwards).⁶⁸ Elaborating on pre-existing problems with EFL finances, Mr Parry told us that ‘parachute payments’⁶⁹ from the Premier League are “an evil that need to be eradicated” and that:

63 Rugby Football Union ([CVD0455](#))

64 Rugby Football Union ([CVD0455](#))

65 Q61

66 Sporting Intelligence, ‘[Global Sports Salaries Survey 2019](#)’, accessed 2 July 2020

67 English Football League, ‘[EFL Statement: Joint statement from the EFL and the PFA](#)’, accessed 2 July 2020

68 English Football League, ‘[EFL Statement: Joint statement from the EFL and the PFA](#)’, accessed 2 July 2020

69 Parachute payments were created to ensure a ‘soft landing’ for teams relegated from the Premier League. They were first introduced during the 2006/07 season and work in tandem with significantly smaller ‘solidarity payments’ which are distributed between all other English Football League clubs each season. The value of parachute payments varies each season and are based on the Premier League’s broadcasting revenues.

Six clubs in the Championship are in receipt of parachute payments, giving them an average of £40 million a club; the other 18 clubs get £4.5 million each, so they are struggling to keep up.⁷⁰

However, Mr Parry told us that he sees this period as an opportunity for a reset of football's business model as “the EFL model financially was not great before the virus”⁷¹ and that the introduction of “salary caps and cost controls are essential”.⁷² Indeed, in 2018, wages in the Championship amounted to 106% of turnover and in League One and League Two to 80% to 90% of turnover.⁷³ Mr Parry told us:

I think there is a need for a reset—I wouldn't call it a bailout, I'd call it a restructuring, a rethinking. For me, it is overdue and necessary.⁷⁴

25. In recent years, a number of EFL clubs have faced huge financial difficulties. Bury FC, for example, was expelled from the EFL in August 2019 after its financial issues escalated, including the owner failing to pay debts and staff.⁷⁵ After a series of financial issues, Bolton Wanderers was taken over by administrators in May 2019 due to an unpaid tax bill of approximately £1.2m.⁷⁶ During the 2017–18 season, Premier League clubs made £4.8 billion with combined operating profits (before transfers) of £900 million, whereas the 72 clubs in the Championship, League One and League Two made combined losses of £411 million.⁷⁷

26. Mr Parry told us that the Premier League has informed the EFL that if it is able to resume its season (as the Premier League has done, behind closed doors), the Premier League would be in a position to talk “about support for the lower leagues”, but that as of the beginning of May, discussions about financial assistance had been “limited”.⁷⁸ However, when Richard Masters, Chief Executive of the Premier League, appeared before us on 30 June, he told us that the Premier League had not had “a specific approach from the EFL”⁷⁹ and that despite meeting with them every week during this period, “it has not been a topic of discussion”.⁸⁰

27. The current football business model is not sustainable. The Covid-19 crisis has shone a stark light on the financial issues within football, specifically in the leagues below the Premier League. The Premier League is the main income generator of English football. If it does not step up to help the English Football League, many more clubs will follow in Bury FC's footsteps. The EFL needs also to ensure it develops a more sustainable financial model.

70 Q25

71 Q11

72 Q24

73 Q11

74 Q25

75 Oral evidence taken on 21 October 2019, [HC \(2017–19\) 72](#), Qq1–2

76 '[Bolton Wanderers appoint administrators and face 12-point deduction](#)', BBC Sport, 13 May 2019

77 '[Bury expelled from the Football League](#)', Financial Times, 28 August 2019

78 Q27

79 Q397

80 Q398

Racial equality in football

28. Since the death of George Floyd and the ‘Black Lives Matter’ protests in early June, efforts have been made to raise awareness about lack of diversity within football’s (and other sports’) boards and management structures. No Premier League club and virtually no English Football League club has a black owner, chairman or chief executive. England footballer Raheem Sterling has highlighted that the problem goes beyond boards; for example, he noted that Frank Lampard and Steven Gerrard have top coaching jobs while Ashley Cole and Sol Campbell do not.⁸¹ The flying of a ‘White Lives Matter’ banner above Burnley during a match in June emphasises the distance that football has to travel to stamp out racism. Indeed, the problem goes well beyond football: the FA, Rugby Football Union, England and Wales Cricket Board, Lawn Tennis Association, England Golf, UK Athletics and British Cycling have one black board member between them. Only 3% of board members of national governing bodies are black, and 64% of funded national governing bodies have no BAME board members.⁸²

29. The FA has written an open letter to ‘English football’ calling for a voluntary code for ‘Equality In Football Leadership’ to which every level of club—grassroots, semi-professional or elite—would be able to sign up. The Code would involve clubs at all levels of the game committing to achieving diversity, and “ensuring that their boardrooms and backroom staff better reflect the communities they serve”.⁸³ The UK’s leading charity for racial equality in sport, Sporting Equals, has proposed going further and introducing targets to ensure that all publicly funded sports organisations in Britain have at least 20% BAME representation on their boards.⁸⁴ The charity proposes that Government updates the Code for Sport Governance to tackle the problem.

Homophobia in football

30. Football has long had a problem with homophobia. In 2013, Stonewall launched an annual campaign to “kick out” homophobia in football. When Premier League teams including Manchester United, Arsenal and Chelsea showed solidarity with Stonewall’s pro-LGBT Rainbow Laces campaign 18 months ago, they received thousands of homophobic responses on social media.⁸⁵

31. We asked Premier League Chief Executive Richard Masters what he was doing to change the situation. He said that the conditions are right for more footballers to come out, and that if a gay player did wish to speak openly about their sexuality, they would be “embraced by the game”.⁸⁶ Eniola Aluko, ex-England women’s footballer, agreed, adding that the first ‘out’ footballer would be “widely praised, applauded, lauded and respected”.⁸⁷ This left us questioning why, if this was the case, so few footballers have felt able to go public about their sexuality—this June, former footballer Thomas Beattie became only the second male professional player from the UK (after Justin Fashanu) to come out as

81 [‘Raheem Sterling says black players have ‘no representation on coaching staff’](#), The Telegraph, 9 June 2020

82 [‘Sports organisations ‘should have 20% BAME board members’ to tackle racism’](#), The Guardian, 12 June 2020

83 The FA, [‘A LETTER TO ENGLISH FOOTBALL FROM PAUL ELLIOTT, CHAIR OF OUR INCLUSION ADVISORY BOARD’](#), accessed 3 July 2020

84 [‘Sports organisations ‘should have 20% BAME board members’ to tackle racism’](#), The Guardian, 12 June 2020

85 [‘Premier League clubs’ Rainbow Laces posts draw homophobic responses’](#), The Guardian, 7 December 2018

86 Q471

87 Q593

gay.⁸⁸ It is essential that steps are taken to understand what barriers stand in the way of gay footballers, and how much of the responsibility lies with clubs and how much with fans. To that end, we plan to continue the work by our predecessor Committee in looking at opportunities to amend the Football Offences Act 1991 to make homophobic chanting illegal.

32. We firmly believe that football must use its response to the Covid-19 crisis to ‘reset’. The crisis has shone a light on the culture of unfair pay in football. The decision by some Premier League clubs to furlough non-playing staff was deplorable, and we welcomed its reversal. Parachute payments must become a thing of the past, and considerable work must be done to advance work on salary caps. DCMS should engage with the Premier League and the EFL to learn lessons from abroad on policies such as salary caps, which may seem radical to those inside UK football, but seem to work well elsewhere.

33. Football must also become more representative. The fact that no Premier League club and virtually no English Football League club has a black owner, chair or chief executive, is a fundamental inequality at the heart of the game. We do not believe that the voluntary initiative proposed by the FA will motivate clubs to act with sufficient speed. Instead, we recommend that DCMS revises the Code for Sport Governance, adding targets for BAME representation on boards. We also wish to record our dismay at the slow progress in kicking out homophobia from football. It is crucial that everyone involved in the game is clear about the remaining barriers to players coming out. The Covid-19 crisis is an opportunity to improve a number of areas within football, and to this end we will continue to pursue opportunities in this Parliament to introduce legislation outlawing homophobic chanting at matches.

Disproportionate impact on women’s elite sport

34. Over recent years, women’s elite sports have been consistently underfunded compared to men’s. In many cases, the financial models for broadcasting and ownership differ from those in male sports. The Covid-19 crisis has highlighted, and in some cases even exacerbated, this inequality. Before the crisis, women’s sport accounted for just 4% of sports media coverage in the UK.⁸⁹ The Sports Minister, Nigel Huddleston MP, told the media in May that the Government is “alive to the pressures faced by women’s sports and are fully committed to helping them recover so we don’t lose any of the great momentum that has built up”.⁹⁰ While we acknowledge and welcome the Premier League’s “gesture” of giving approximately £1 million to the women’s professional football game to assist them with setting up a testing system, the assistance came somewhat late in the day and has not prevented women’s competitions being cancelled this season.⁹¹

35. Although professional men’s sport is beginning to return behind closed doors, women’s sporting events this summer have been largely cancelled. While the FA took an early decision to void all tiers of the women’s football season below the National League, and to cancel the Women’s Super League season, the men’s game (via the Premier League)

88 Beattie, 33, represented Hull City at youth level before going on to play in the United States, Canada and Singapore.

89 Sport for Development Coalition ([CVD0665](#))

90 ‘Women’s sport being left behind in lockdown: After so much progress, there are fears budget cuts will see teams fold, livelihoods lost and fewer girls take to pitches across the country’, The Daily Mail, 20 May 2020

91 Q415

has returned without fans in attendance.⁹² The Rugby Football Union ended the women's season while the (men's) Premiership was simply postponed to 15 August 2020. British women's cycling races such as the Women's Tour and the Tour de Yorkshire were simply cancelled, while the Union Cycliste Internationale has announced new tour dates for the Tour de France.⁹³ Other high profile sporting events that would usually have generated a significant amount of coverage and publicity for female elite athletes, such as the Tokyo 2020 Olympic and Paralympic Games and The Hundred have also been postponed or cancelled.

36. The lack of visibility of women's sport this summer risks undoing work to improve funding for women's elite sport. Cancellation of women's events is likely to reduce the number of women being inspired to take part in sporting activities. *In its response to this report, the Government should outline how it intends to support women's sport post-crisis and ensure that, going forward, men's elite sports are not further prioritised at the expense of the women's game.*

92 Centre for Sport and Human Rights, Women in Sport, World Players Association, FARE Network, Mission 89 ([CVD0589](#))

93 Centre for Sport and Human Rights, Women in Sport, World Players Association, FARE Network, Mission 89 ([CVD0589](#))

3 Culture and the Creative Industries

37. In this chapter, we outline the challenges facing parts of our creative industries in the wake of the Covid-19 outbreak. While each sub-sector of the creative industries faces distinct challenges, the performing arts were some of the first to be affected by social distancing.⁹⁴ Now, even as other sectors of the economy reopen, cultural institutions face an uncertain future given the potential for extended or renewed closures in the face of subsequent waves of the pandemic, and changing audience habits.⁹⁵

38. The importance of access to cultural events was crystallised by theatre company Border Crossings, which told us:

The current crisis does not make our cultural life something that should be put on hold until things are “back to normal”. We have to recognise that we are undergoing a fundamental change in the way we live—we have to imagine a different future. It will be from the cultural sector that the essential new ideas emerge.⁹⁶

39. After months of raising concerns about the cultural sector with DCMS Ministers, we were encouraged by the Government’s announcement on 5 July of a £1.57 billion support package for cultural, arts and heritage institutions.⁹⁷ As our evidence demonstrates, such support was urgently needed. Currently there is little detail on how this support will be distributed. We trust the analysis in this report will help the Government and associated public bodies to make distribution choices that achieve maximum benefit for the whole cultural sector.

The impact of Covid-19 on the performing arts

40. On 16 March, the Prime Minister said that people “should avoid pubs, clubs, theatres and other such social venues” to slow the spread of Covid-19, before banning all public gatherings from 23 March.⁹⁸ While venues had been taking precautionary measures and experiencing declining demand in the weeks prior, these announcements resulted in theatres, concert halls and grassroots music venues immediately ‘going dark’ with no roadmap for when they would reopen.⁹⁹

94 Alexandra Park and Palace Charitable Trust (APPCT) ([CVD0197](#))

95 Sheffield Performer and Audience Research Centre ([CVD0316](#))

96 Border Crossings ([CVD0266](#))

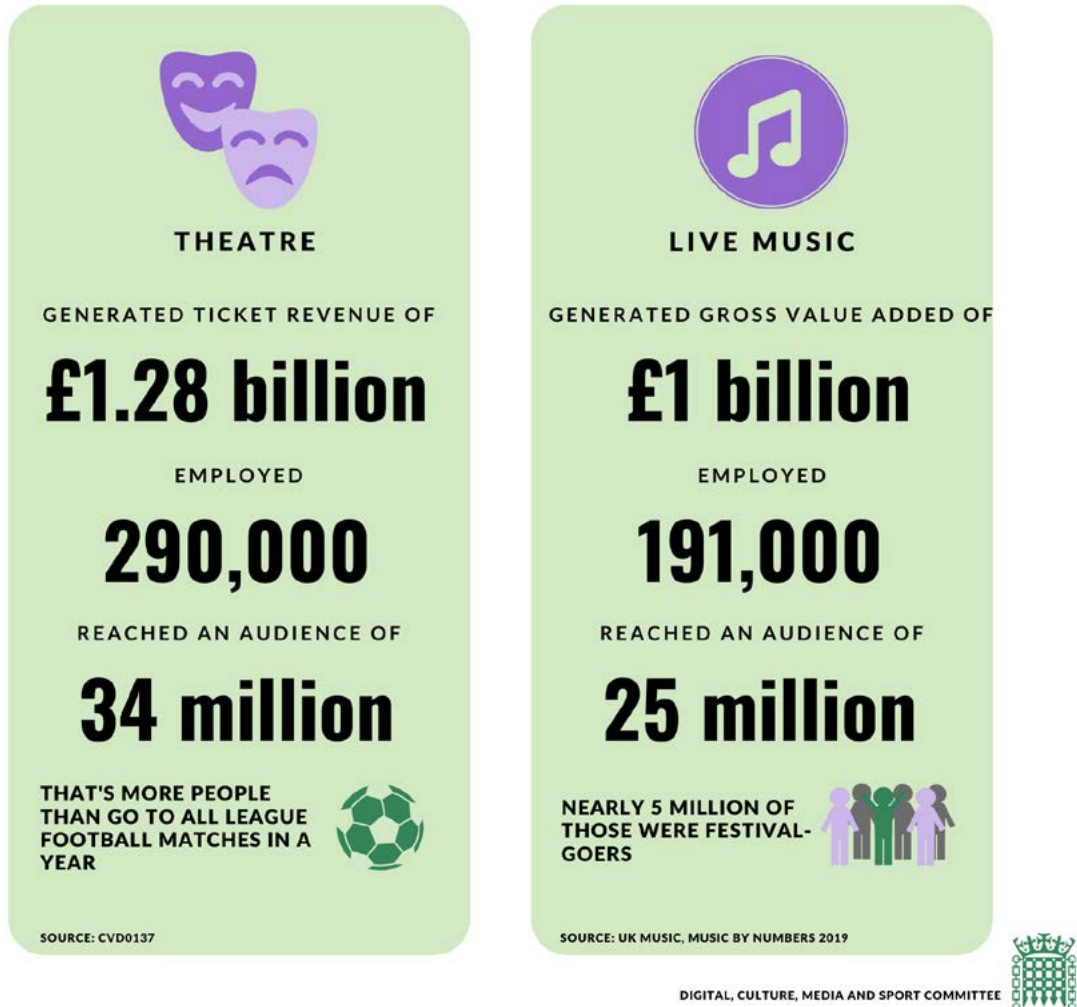
97 Department for Digital, Culture, Media & Sport and HM Treasury, ‘[£1.57 billion investment to protect Britain’s world-class cultural, arts and heritage institutions](#)’, (accessed 5 July 2020)

98 Prime Minister’s Office, ‘[PM statement on coronavirus: 16 March 2020](#)’ and ‘[PM address to the nation on coronavirus: 23 March 2020](#)’, accessed 22 June 2020

99 The Civic, Stourport ([CVD0036](#)), UK Music ([CVD0179](#))

Figure 4

IN 2018, THE PERFORMING ARTS...



Theatre

41. Enforced cancellations and indefinite closures caused immediate financial pressures for performing arts organisations. In the first 12 weeks of lockdown, more than 15,000 theatrical performances were cancelled with a loss of more than £303 million in box office revenue.¹⁰⁰ A joint submission by the representative bodies for professional theatre across the four UK nations estimates the total loss of income will be some £630 million because:

All theatres, including those whose funding model includes an element of public subsidy, are heavily reliant on income from ticket sales. In addition to the loss of performance fees and box office sales, theatres and theatre companies have suffered loss of income from all associated/secondary income (including bar/restaurant/café sales, event hire fees, and theatre rental income).¹⁰¹

100 UK Theatre and Society of London Theatre / Federation of Scottish Theatres / Creu Cymru / Theatre and Dance Northern Ireland ([CVD0137](#))

101 UK Theatre and Society of London Theatre / Federation of Scottish Theatres / Creu Cymru / Theatre and Dance Northern Ireland ([CVD0137](#))

42. There are just under 1,100 theatres in the UK, with more than half operating as charities.¹⁰² The Theatres Trust estimates that at the start of the outbreak approximately 35% of theatre charities held less than one month's reserves, and 59% held less than three months' reserves.¹⁰³ Julian Bird, CEO of UK Theatre and the Society of London Theatre, told us that 70% of theatres and production companies risk going out of business by the end of this year, and that this figure is consistent no matter where in the country they are located, or whether they operate on a subsidised or fully commercial business model.¹⁰⁴ This was echoed in evidence from Shakespeare's Globe, which warns that "without emergency funding and the continuation of the Coronavirus Job Retention Scheme, we will spend down our reserves and become insolvent".¹⁰⁵ The permanent closure of theatres in Southampton, Southport, Leicester and Bromsgrove has already been announced.¹⁰⁶ The Theatres Trust warns:

This erosion of cultural infrastructure could have long lasting impact on access to the arts, careers in the creative sectors and the UK's position as a world leader in this sector and as a major contributor to tourism.¹⁰⁷

Live Music

43. The Music Venue Trust estimates that 93% of the grassroots venue network faces permanent closure, with 86% of venues reporting that their core threat stems from an inability to meet commercial rent demands.¹⁰⁸ Grassroots music venues, as well as recording studios, act as research and development incubators of Britain's highly successful music industry and are an invaluable part of the UK's cultural musical heritage.¹⁰⁹ Without them, as Horace Trubridge of the Musicians' Union told us, "we have a real hiatus in the traffic of artists from the bedroom to the venue to the record deal to the festival stage at Glastonbury".¹¹⁰ At the other end of the scale, the National Arenas Association projects that the 23 UK arenas it represents will lose almost £235 million worth of ticket sales over a six-month period.¹¹¹ Union Chapel, a renowned music venue in north London, told us it "will not survive [...] beyond Spring 2021 if the current situation continues without further government intervention".¹¹² The Association of British Orchestras also warns that "the UK's orchestras are facing an existential crisis" because:

With touring having dried up from January, the national shutdown being implemented in March, and the prospect of restrictions on mass gatherings lasting to the end of the year, they face up to a year of lost income from concerts, tours, recordings and commercial activity.¹¹³

102 Q303

103 Theatres Trust ([CVD0131](#))

104 Q283

105 Shakespeare's Globe ([CVD0174](#))

106 UK Theatre and Society of London Theatre ([CVD0259](#)), Theatres Trust ([CVD0131](#))

107 Theatres Trust ([CVD0131](#))

108 Music Venue Trust ([CVD0433](#))

109 UK Music ([CVD0179](#))

110 Q310

111 UK Music ([CVD0179](#))

112 Union Chapel Project ([CVD0385](#))

113 Association of British Orchestras ([CVD0047](#))

44. The UK's thriving festival and live events sector has been particularly badly hit, with UK Music estimating that "90% of all festivals in 2020 will be cancelled".¹¹⁴ The Association of Independent Festivals says that 92% of its members face permanent collapse and 98.5% are not covered by cancellation insurance, despite having already incurred an average sunk cost of £375,000 per event.¹¹⁵ The seasonality of the industry means that cancellations over spring and summer mean a complete loss of income for the year ahead, which could have devastating consequences for the SMEs and self-employed workers in the live events supply chain.¹¹⁶ This is reflected in evidence we have received from lighting and sound technicians, equipment suppliers and providers of safety and site management, with the director of an audio consultancy stating:

Given the lead time for organising large events I am now resigned to my company having no work at all this year, and therefore no income. My business will inevitably be wound up or become bankrupt.¹¹⁷

Such losses will impact the sector's ability to resume in the long-term, as evidence from a supplier of video equipment to major festivals such as Glastonbury states:

If a large proportion of suppliers do not survive we will not be able to support the demand for live events and meetings in the future.¹¹⁸

The loss of live music during Covid-19 has brought into clearer view the concerns of musicians, songwriters and composers, regarding their earnings from the streaming of recorded music. This matter was raised with the Secretary of State when he appeared before us.¹¹⁹ *The Department should investigate how the market for recorded music is operating in the era of streaming to ensure that music creators are receiving a fair reward.*

Creative workforce

45. The cancellation of cultural events and closure of venues has had knock-on effects across the creative workforce, with theatres including the Birmingham Hippodrome and the National Theatre announcing redundancies in June.¹²⁰ The impact on the self-employed workforce has been even more immediate. Office for National Statistics (ONS) figures indicate that just over 30% of the creative industries workforce is self-employed, compared to the UK average of 15%, yet levels vary significantly by sector: in 2018, for example, 72% of the music industry was self-employed, as was some 70% of the theatre workforce.¹²¹ Evidence from Tracy Brabin MP, the Shadow Minister for the Cultural Industries, details the economic impact that the loss of work has had on cultural freelancers: declining

114 UK Music ([CVD0179](#))

115 The Association of Independent Festivals (AIF), The Association of Festival Organisers (AFO) and the British Arts Festivals Association (BAFA) ([CVD0329](#))

116 The Association of Festival Organisers ([CVD0018](#))

117 Sound Hound Ltd ([CVD0029](#))

118 Mr Mason ([CVD0031](#))

119 [Oral evidence taken on 22 April 2020, HC \(2019–21\) 157, Qq37–39](#)

120 ['Coronavirus: More than 60 staff at Birmingham Hippodrome face redundancy'](#) and ['Coronavirus: 250 front-of-house staff at National Theatre made redundant'](#), *The Stage*, 8 June 2020 and 3 July 2020

121 UK Theatre and Society of London Theatre ([CVD0259](#)), UK Music ([CVD0179](#))

income, uncertainty around maternity allowance or eligibility for mortgages, the inability to recoup money already spent on equipment, rehearsals and touring, and concerns about decreased work opportunities in the long term.¹²²

46. It is highly probable that financial pressure will cause people to leave the creative industries for alternative employers: 19% of respondents to a Musicians' Union survey said that they were considering abandoning their careers as musicians, while 17% of respondents to an Equity survey are now working outside the entertainment industry, with a further 20% actively looking for other work outside theatre.¹²³ Concerns about talent drain extend beyond the performing arts to other parts of the UK's vibrant creative economy. The British Film Institute told us:

There are already significant skills gaps and shortages across film and TV, for example production accountants, and these risk the continued growth of sector. With job insecurity highlighted by recent events, these shortages will become even more pronounced and widespread and potential new entrants to the sector will be put off. There is going to be a loss of labour capacity within the industry which could impact its ability to recover post Covid-19.¹²⁴

47. There are concerns that pressures on the creative workforce will also impact on diversity and inclusion within the cultural sector. Dr Dave O'Brien from the University of Edinburgh told us that the creative industries workforce remains "highly exclusive" because of "the role of social networks, the need for financial resources to support low or no pay jobs and business risk taking, and the cultural elements in commissioning and hiring decisions". He argued that:

COVID-19 will unquestionably make these issues worse. There will be fewer cultural organisations, whether in the arts, in media, music, film and TV, publishing, or in museums; There will be fewer job and project opportunities; Competition for those opportunities will intensify; the winners will be those who already have economic, social, and cultural resources.¹²⁵

The National Theatre, which is "modelling very substantial redundancies in our workforce of over 1,200 posts", recognises that "almost two-thirds of our staff are under 40" and therefore there are "very real concerns about a generation facing mass youth unemployment".¹²⁶ Andrew Miller, the Government's Disability Champion for Arts and Culture, highlights that the threats presented by the pandemic "to health, livelihoods, social care and creativity are all frighteningly magnified for disabled people", and that failing to consider disabled workers' needs in the recovery of this sector could threaten recent progress the UK has made in becoming "a recognised global leader in disability arts".¹²⁷ Likewise, Theatre Peckham shares a "fear that the number of people from culturally diverse backgrounds will be forced to leave the industry resulting in long-

122 Tracy Brabin MP ([CVD0189](#))

123 Musicians' Union ([CVD0165](#)), Equity ([CVD0299](#))

124 British Film Institute ([CVD0177](#))

125 Dr David O'Brien ([CVD0230](#))

126 The National Theatre ([CVD0469](#))

127 Andrew Miller ([CVD0281](#))

term loss and undoing the vital impact which we have made over the years”.¹²⁸ Caroline Norbury MBE, CEO of the Creative Industries Federation, told us that “there is a real danger that the attention we have put into diversity and inclusion measures will suffer as a result” of Covid-19. She said:

We need to be on the front foot to make sure that we do not let diversity and inclusion become a ‘nice to have’. For simple business reasons, they have to be central. The creative industries have a global market opportunity. If we are to take advantage of that, we need a workforce that is diverse and can understand what it means to work in a global market. It is a central business challenge as much as a moral obligation.¹²⁹

Engagement work

48. The Covid-19 crisis has also impacted the important work that arts organisations do in communities. In 2018/19, 77% of adults and 96% of children engaged with the arts,¹³⁰ and cultural activity has proven benefits for health and wellbeing, as our predecessor Committee explored in its 2018 inquiry on the social impact of participation in culture and sport.¹³¹ Prior to the outbreak, Arts Council England put understanding “the role of culture in building and sustaining communities” at “the heart” of its next 10-year strategy, yet there are concerns that this ambition is now under threat.¹³² Engagement work has already been disrupted during lockdown, with Orchestras Live estimating that more than 5,000 public engagement opportunities have been lost, and there is a risk that cuts arts organisations make due to Covid-19 will hit talent development and/or education and participation programmes in the long run.¹³³ As an example, a consortium of regional theatre venues that do not receive funding from Arts Council England, but conduct development and outreach work that typically reaches more than 445,000 participants, states that “without funding intervention, our commitment to studio, artist development and community and education work is likely to be heavily eroded at best and wiped out at worst”.¹³⁴

Digital arts

49. Many arts organisation have responded to this period of enforced closure by making productions available for streaming online or through partnerships with broadcasters.¹³⁵ The Old Vic Theatre is staging virtual performances of its production of ‘Lungs’ starring Matt Smith and Claire Foy, Wigmore Hall has partnered with the BBC to broadcast live concerts and Union Chapel has streamed live gigs by Laura Marling around the world.¹³⁶ Such initiatives require organisations having access to the necessary digital infrastructure and, as the National Theatre observes, “the current period has laid bare the disparity

128 Theatre Peckham ([CVD0419](#))

129 Q322

130 Department for Digital, Culture, Media and Sport, ‘[Taking Part Survey: England](#)’, and ‘[Taking Part Survey: England](#)’, (19 September 2019)

131 Digital, Culture, Media and Sport Committee, Eleventh Report of Session 2017–19, [Changing Lives: the social impact of participation in culture and sport](#), HC 734

132 Gerri Moriarty ([CVD0403](#))

133 Orchestras Live ([CVD0353](#))

134 Norwich Theatre, Birmingham Hippodrome, Mayflower Theatre, Newcastle Theatre Royal, and Marlowe Theatre ([CVD0301](#))

135 Shakespeare’s Globe ([CVD0174](#))

136 The Old Vic ([CVD0302](#)), Musicians’ Union ([CVD0248](#)), Union Chapel Project ([CVD0385](#))

in digital capability between larger and smaller organisations”.¹³⁷ Moreover, digital productions are not without cost, and although the Old Vic is a notable exception, much of this content is being made available free, with audiences encouraged to make donations. Mr Bird told us that “the levels of donation for those free streams of performances has been remarkably low”,¹³⁸ and the Association of British Orchestras told us that digital content “can never replace the power and earning potential of live performances and commercial activity”.¹³⁹ Furthermore, Manchester Literature Festival states that smaller organisations are finding it “difficult to monetise digital content particularly at the moment when so many big cultural institutions are providing content for free”.¹⁴⁰

The UK’s creative environment

50. The Secretary of State told us that he had commissioned officials within the Department to establish what of “the core architecture” of the creative industries the Government “really have to support” through this crisis.¹⁴¹ However, this risks missing the highly interconnected nature of the creative industries, including the prevalence of co-productions and the fact that supply chains and artists often work across sectors.¹⁴² Immersive theatre company Teatro Vivo stresses the contribution that smaller arts organisations make to larger ones, stating:

Big institutions rely on the creativity of small companies to create the thriving artistic climate that the UK has. We also connect the different areas of the arts community that large organisations struggle to reach alone. We enable large organisations to work with us to reach those who wouldn’t usually enter their buildings. There is a great deal of theatre that happens in and with local communities who don’t access the Arts in any other way, and it is at just as much risk as the mainstream work that makes the headlines in this time of crisis.¹⁴³

This means that insolvencies or decreasing work opportunities in one part of the industry will have consequences across the cultural ecology on which the UK’s cultural reputation is based. Phoebe Waller-Bridge’s BAFTA, Emmy and Golden Globe winning BBC show ‘Fleabag’ started life as a one-woman play which she performed in London and at the Edinburgh Fringe Festival. As the Fringe Society’s evidence states:

The work presented at the Fringe is seen and bought by other festivals, venues and curators across the UK and the world, which leads to numerous years of work for those artists, scriptwriters, stage designers, etc.¹⁴⁴

However, with the 2020 festival cancelled, the Fringe Society warns that its future is under threat due to the £1.5 million deficit, while other festival stakeholders, such as independent venues, face a £21 million deficit.¹⁴⁵

137 The National Theatre ([CVD0469](#))

138 Q292

139 Association of British Orchestras ([CVD0047](#))

140 Manchester Literature Festival ([CVD0215](#))

141 [Oral evidence taken on 22 April 2020, HC \(2019–21\) 157, Q40](#)

142 Cornwall Museums Partnership ([CVD0223](#)), New Wolsey Theatre ([CVD0417](#))

143 Teatro Vivo ([CVD0232](#))

144 Edinburgh Festival Fringe Society ([CVD0092](#))

145 Edinburgh Festival Fringe Society ([CVD0092](#))

51. The Covid-19 crisis presents the biggest threat to the UK’s cultural infrastructure, institutions and workforce in a generation. The loss of performing arts institutions, and the vital work they do in communities by spreading the health and education benefits of cultural engagement, would undermine the aims of the Government’s ‘levelling up’ agenda and Arts Council England’s next 10-year strategy, and reverse decades of progress in cultural provision and diversity and inclusion that we cannot afford to lose. *In addition to the emergency funding already announced, the performing arts need a sector-specific recovery deal that includes continued workforce support measures, including enhanced measures for freelancers and small companies; clear, if conditional, timelines for reopening, and technological solutions to enable audiences to return without social distancing; and long-term structural support to rebuild audience figures and investment in time of economic uncertainty.*

Government and non-departmental support for the performing arts

Employment and business support measures

52. The Coronavirus Job Retention Scheme (CJRS) has benefited many organisations within the creative industries, with the Theatres Trust, Really Useful Group and many in the performance supply chain describing it as a “lifeline”.¹⁴⁶ The Mercury Theatre Colchester told us that CJRS has enabled Essex’s only full-time producing theatre “to save numerous jobs and retain skills” which it observes is “particularly needed for those [...] outside London and the major cities”.¹⁴⁷ However, the scheme is due to end after October 31 and the Chancellor has ruled out any further changes or extensions.¹⁴⁸ We have heard stark warnings that closing the scheme before cultural institutions are back at full capacity will lead to widespread redundancies.¹⁴⁹ The Really Useful Group recommends that “the scheme should remain for companies in sectors where the recovery is in the longer term, such as the Events, Performing Arts, Entertainment Technology, TV & Film Sectors”.¹⁵⁰

53. The limits of the Self-Employment Income Support Scheme (SEISS) have had a serious impact on creative workers, who are significantly more likely to be self-employed than the general population.¹⁵¹ Although HM Treasury estimated that SEISS would cover 95% of those who receive the majority of their income from self-employment, the evidence we have received indicates this is not so in the creative sector. The Treasury Committee has done important work to understand why certain categories of self-employed workers are missing out on Government support,¹⁵² and we have also heard from creative freelancers who are struggling because of the way their work is structured and remunerated.¹⁵³ Directors UK, which represents film and TV directors, questioned the Government’s

146 Theatres Trust ([CVD0131](#)), The Really Useful Group Ltd ([CVD0167](#)), Souvenir Scenic Studios ([CVD0081](#)), Professional Lighting and Sound Association ([CVD0120](#)), Theatre Peckham ([CVD0419](#)), ArtWorks Cymru ([CVD0490](#))

147 Mercury Theatre Colchester ([CVD0200](#))

148 HM Treasury, ‘Chancellor’s statement on coronavirus (COVID-19): 29 May 2020’, accessed 2 June 2020

149 Southbank Centre ([CVD0269](#))

150 The Really Useful Group Ltd ([CVD0167](#))

151 Tracy Brabin MP ([CVD0189](#)) and ExcludedUK ([CVD0449](#))

152 Treasury Committee, Second Report of Session 2019–21, [Economic impact of coronavirus: Gaps in support](#), HC 454

153 Authors’ Licensing and Collecting Society (ALCS), Directors UK, Equity, The British Equity Collecting Society (BECS), The Design and Artists Copyright Society (DACS), The Musicians’ Union, The Royal Society of Literature, The Society of Authors, The Writers’ Guild of Great Britain (WGGB) ([CVD0409](#))

rationale for restricting eligibility for SEISS to those earning £50,000 or less a year. With its research finding that “nearly half of respondents (43%) are not eligible for support as they earn just a few thousand more than the cap allows”, it argues:

The Government has justified the cap by stating that those who earn over the £50,000 threshold earn an average of £200,000. Our member research clearly shows this not to be the case. The spread of profit/earnings for all those working as Ltd/PSCs and sole traders combined, ranges predominantly from £20,000-£70,000. With the largest number (21%) falling into the £40–50,000 grouping, closely followed by £50–60k (17%).¹⁵⁴

UK Music also argues that “the existing schemes do not recognise the portfolio nature of many careers in the music industry”.¹⁵⁵ Horace Trubridge from the Musicians’ Union gave us the example of those who teach for local authorities or music education hubs on the equivalent of zero-hours contracts. He said:

They make up their income over the course of the year by playing some live gigs or creating some shows or whatever, but that does not amount to 50% of their overall income. Because they are on the zero-hours contracts for their PAYE work, their salaried work, they cannot be furloughed, and because they earn less than 50% of their overall income from their gigs, they cannot qualify for the SEISS either.¹⁵⁶

Many in the live events supply chains and television industries are ineligible for support because they operate under personal service companies (PSCs) or limited companies, and receive remuneration through dividends. This might be through no choice of their own: Viva La PD, which represents screen producers and directors, states that “many professionals in television have had to establish PSCs as a contracting modality prescribed by production companies”.¹⁵⁷

54. The Secretary of State and Ministers have been unable to provide us with any concrete figures for how many people working in the DCMS sectors have not been covered by Government’s employment support measures, despite our repeated requests.¹⁵⁸ The Minister for Digital and Culture, Caroline Dinenage MP, did tell us that the number “varies from sector to sector” but “in some cases it is around 30% to 35%”.¹⁵⁹ This chimes with the Institute for Fiscal Studies’ estimation that 38% of self-employed people are ineligible for SEISS.¹⁶⁰

154 Directors UK ([CVD0208](#))

155 UK Music ([CVD0179](#))

156 Q307

157 Viva La PD ([CVD0297](#))

158 [Oral evidence taken on 22 April 2020, HC \(2019–21\) 157](#), Qq33–34, Qq346–350

159 Q350

160 The Ivors Academy of Music Creators ([CVD0578](#))

55. We have been told that the raft of other business support measures have also failed to cater to the needs of the creative industries. The Coronavirus Business Interruption Loan Scheme (CBILS) is of limited applicability because taking out a loan is not financially viable for the many small creative businesses that typically operate on small margins.¹⁶¹ Some 87% of respondents to a UK Theatre survey said that they would not be accessing the CBILS because “boards simply cannot accept the risk of taking on debt when future income remains unpredictable”.¹⁶² Likewise, take up of the Bounce Back Loan Scheme within the creative industries is unclear, given that the 12-month interest-free period might end before all sectors—especially the highly seasonal events industry—have returned to full capacity.¹⁶³ A number of schemes, including the Local Authority Discretionary Grants and the Retail, Hospitality and Leisure Grant (RHLG), require businesses to occupy properties to be eligible. However, this excludes any businesses with a rateable value of £51,000 or over, and those not covered by the business rate regime—such as a number of theatres, festivals and outdoor events such as fairs and circuses.¹⁶⁴ The Theatres Trust explains that many theatres’ rateable value puts them over this limit, stating:

Theatres are by design large buildings in town centre locations and have a higher rateable value than other leisure and hospitality organisations of a similar scale of operation. [...] Using Rateable Value as a proxy to assess the scale of these businesses and their level of resilience does not work for theatres and we would propose an increase in the limit, potentially targeted at cultural venues or venues operated by charities.¹⁶⁵

With many festivals also not eligible to pay business rates, UK Music states:

Only 1% of businesses surveyed in the events sector said they had been successful in accessing the RHLG, this raises questions on how effectively the current system has been supporting these businesses to date.¹⁶⁶

Caroline Norbury from the Creative Industries Federation stressed that when it comes to designing policy interventions to support the creative industries, the variety seen across the sector means that “one size does not fit all” and therefore greater “flexibility is the key”.¹⁶⁷

56. The Coronavirus Job Retention Scheme and the Self-Employment Income Support Scheme have been a lifeline for all those in the creative industries who have been eligible for them. However, the closure of the schemes in October and the fact too many self-employed people have missed out on support to date, means the future of our creative workforce remains at significant risk. From October 2020 at the latest, the Government should introduce flexible, sector specific versions of the CJRS and SEISS guaranteed for the creative industries until their work and income returns to sustainable levels. Any

161 UK Music (CVD0179), Theatres Trust (CVD0131), Museums Association, National Museum Directors’ Council, Association of Independent Museums, Art Fund, The Heritage Alliance, the National Trust, the English Civic Museums Network and the University Museums Group (CVD0188)

162 UK Theatre and Society of London Theatre / Federation of Scottish Theatres / Creu Cymru / Theatre and Dance Northern Ireland (CVD0137)

163 APL Event Ltd (CVD0100)

164 UK Music (CVD0179), Association of Circus Proprietors of Great Britain (CVD0226), The Association of Independent Showmen (CVD0396), Festival of Thrift (CVD0454)

165 Theatres Trust (CVD0131)

166 UK Music (CVD0179)

167 Q326

such measures should account for the differences in timeframes for the easing of Covid-19 restrictions across the four nations. Support for the self-employed, in particular, should be urgently reviewed and amended so that it covers people who have been excluded to date. The Treasury Committee’s report, ‘Economic impact of coronavirus: Gaps in support’, proposed practical solutions for how this might be achieved, which we endorse.

Sector support package

57. Throughout our inquiry, we heard calls for Government to increase its direct support for the cultural sectors, with evidence pointing to the disparity in support between the UK and other nations. For example, UK Music told us that:

The Netherlands and Switzerland have respectively announced £261 million and £227 million funds targeting support to their cultural sectors. Germany has led the way with a generous support package worth €50 billion, that covers artists and small businesses. If the UK does not match these, our artists will exit this crisis from a lower base and therefore be at a disadvantage to their international competitors.¹⁶⁸

In early June, Caroline Norbury also noted the difference between England and the other UK nations, stating that Scotland, Wales and Northern Ireland have been “able to bring in sector-specific support—which is also happening in other European countries—in a way that we have not here in this country”.¹⁶⁹ When we put these concerns to the Minister for Digital and Culture, she explained that although for Government “the first issue was to keep people in employment”, she recognised the need to consider the support arts organisations need to reopen. She went on to tell us:

It is important that we start to rebuild consumer trust and confidence in getting out again and going to enjoy these incredible venues and the great artistic fare they have to offer. Even if they need to be supported financially in the interim and in the initial period, I would like to see that happen.¹⁷⁰

58. On 5 July, the Government announced a £1.57 billion rescue package for the cultural and heritage sector. The package includes £880 million in grants and some £270 million in loans, and although, as we have demonstrated, loans are often not practical for smaller arts organisations, it is encouraging the Government has anticipated this and confirmed that any repayable finance will be made “on generous terms tailored for cultural institutions to ensure they are affordable”.¹⁷¹ On announcing the package, the Government stated that “further details will be set out when the scheme opens for applications in the coming weeks”. This had echoes of the Government’s previous announcement of £750 million in support for charities: despite those funds being announced on 8 April, eligibility criteria and application guidance was not published for the £200 million of it distributed by the National Lottery Community Fund until 22 May, and by 3 July it was reported that only 1% of that money had actually been paid out to charities.¹⁷² Moreover, it is unclear how the

168 UK Music ([CVD0179](#))

169 Q329

170 Qq361–362

171 Department for Digital, Culture, Media & Sport and HM Treasury, ‘[£1.57 billion investment to protect Britain’s world-class cultural, arts and heritage institutions](#),’ (accessed 5 July 2020)

172 ‘[Only 1 per cent of £200m of emergency government funding has been paid out to charities](#)’, Third Sector, 3 July 2020

support will benefit those individuals and small companies in the creative supply chains: on 7 July, the Minister for Digital and Culture told MPs that the best way to support freelancers would be getting institutions back up and running; however, this ambition is directly undermined by the Government's own restrictions around reopening.¹⁷³

59. We welcome the Government's commitment to provide £1.57 billion in funding for our cultural and heritage sectors; however, whether it is enough to safeguard the cultural sector will ultimately depend on how long institutions remain closed or subject to social distancing, and we are concerned that freelancers and small companies will continue to fall through the gaps of Government support. It is also regrettable that it took so long for the package to be announced, as the uncertainty inevitably led to closures and redundancies in the cultural sector that might otherwise have been avoided.

60. The Government must learn from the shortcomings of previous support schemes, including those for charities and self-employed people, to ensure this package is tailored to the unique characteristics of the cultural sector and its workers, and reaches them promptly. The Government must recognise the interconnected nature of the cultural sector and should not restrict support to well established, high profile, institutions: it is essential that cultural freelancers and small companies in the creative industries supply chain are also eligible for direct support. To reduce uncertainty, the Government must publish eligibility criteria and application guidance as soon as possible, and ensure that the funding reaches recipients no later than October 2020.

Industry-backed proposals

61. The performing arts sectors have put forward a number of proposals for ways in which their recovery might be further supported. Many sectors called for a temporary cut to VAT on tickets for up to three years.¹⁷⁴ It is positive that the temporary 5% VAT rate for the hospitality industry will extend to the performing arts; however, it covers just six months.¹⁷⁵ We have also heard calls for Government to incentivise private investment in commercial theatre, which even before the pandemic was considered a high-risk option for investors.¹⁷⁶ Theatre Tax Relief was introduced in 2014 to allow those staging productions to claim deductions on their taxable profits and tax credits against losses.¹⁷⁷ The League of Independent Producers recommends that the rate be extended to 50% for at least three years, and that the definition of 'core expenditure' is explicitly extended to cover productions that were interrupted by Covid-19 closures, marketing activities and operating costs.¹⁷⁸ It argues:

173 HC Deb, 7 July 2020, [col 859 \[Commons Chamber\]](#)

174 The Association of Circus Proprietors of Great Britain ([CVD0226](#)), Festivals Edinburgh ([CVD0286](#)), Music Venue Trust ([CVD0433](#))

175 HM Revenue and Customs, '[VAT: reduced rate for hospitality, holiday accommodation and attractions](#)', accessed 13 July 2020

176 The Association of Circus Proprietors of Great Britain ([CVD0226](#)), Festivals Edinburgh ([CVD0286](#)), Music Venue Trust ([CVD0433](#)), The League of Independent Producers ([CVD0213](#))

177 At present, qualifying productions can claim an 80% reduction on taxable profits and, where that results in a loss, a tax credit of 25% for touring productions and 20% for other productions. The relief can be claimed on 'core expenditure' involved with producing and closing a show—however, crucially, development and running costs are currently excluded. See: HMRC, '[Theatre Tax Relief](#)', accessed 26 May 2020

178 The League of Independent Producers ([CVD0213](#))

This would mitigate losses already sustained by the sector such that productions that were affected by Covid-19 are more likely resume performances once theatres re-open. It would also provide producers and investors with greater confidence to ensure that new and larger-scale productions are greenlit whilst the sector rebuilds its audience, thus ensuring greater employment.¹⁷⁹

Festivals Edinburgh also calls for “less restrictive” gift aid rules and tax and match-funding incentives to encourage philanthropy.¹⁸⁰

62. A new Cultural Investment Participation Scheme (CIPS), or so-called Culture Bond, for both not-for-profit and commercial theatre has also been suggested. The scheme would have two strands: a charitable version whereby the Government would invest up to 50% of the theatre’s operating costs in return for a social return and economic participation in the institution; and a commercial version, whereby Government would provide up to 30% of a production’s total capitalisation, as long as 70% is met by private investors, in return for a share in subsequent profits.¹⁸¹ UK Theatre and the Society of London Theatre estimate that the package of measures it has proposed will cost approximately £330 million for every three months that closures continue, and state that the scheme:

would ensure the swift economic recovery of the sector in the twelve-month period following the full re-opening of venues, with built-in incentives to private investors and philanthropists and whilst providing the government with in-kind social benefit and a potential financial return from the activities of both charitable and commercial organisations within the sector.¹⁸²

In early June, the Minister for Digital and Culture confirmed that DCMS was considering the CIPS and tax relief measures, and “thrashing out with the Treasury right now which will work, which can be delivered at pace and which can be delivered without massive overheads”.¹⁸³

63. In certain cases, venues and recording studios that have hosted some of the UK’s most eminent musicians could be classed as ‘assets of cultural value’. Such buildings might not qualify for listing on architectural grounds but are an invaluable part of the UK’s cultural musical heritage, and the Covid-19 crisis has put extra pressure on these assets. To protect grassroots music venues from permanent closure, the Music Venue Trust recommends “encouraging community ownership of freeholds”, which Government could support through a minor change to the Social Investment Tax Relief and by ensuring its manifesto pledge to a £150 million Community Ownership Fund is extended to cultural assets.¹⁸⁴ It states that the current crisis “presents an urgent need to undertake this work, as many of these premises may otherwise be lost to residential development”—an issue closely related to the existing ‘Agent of Change’ planning guidance.¹⁸⁵ UK Music also observes that although “fiscal incentives have been used to great effect to support creative sectors”,

179 The League of Independent Producers ([CVD0213](#))

180 Festivals Edinburgh ([CVD0286](#))

181 UK Theatre and Society of London Theatre ([CVD0259](#))

182 UK Theatre and Society of London Theatre ([CVD0259](#))

183 Q332

184 Music Venue Trust ([CVD0433](#))

185 Music Venue Trust ([CVD0433](#))

at present “there is no equivalent scheme for the commercial music industry”. It therefore makes the case that “the introduction of a tax credit for the music industry would educate investors and pump prime inflows of capital.”¹⁸⁶

64. To further combat the negative effects of closure, and to stimulate long-term recovery, the Government should introduce other fiscal measures. We recommend the cut in VAT on ticket sales for theatre and live music be extended beyond January 2021, for the next three years. The Government should increase Theatre Tax Relief to 50% for the next three years and broaden the definition of ‘core expenditure’ in line with the industry’s proposals. It should introduce a Music Tax Relief, modelled on existing reliefs such as the Orchestra Tax Relief. The Government should also develop a system to save ‘Assets of Cultural Value’ along the lines of the regime for ‘Assets of Community Value’. This would allow a moratorium on the sale of a building while stakeholders seek an alternative bidder to maintain the asset as a cultural business. The Government should also build on recent ‘Agent of Change’ planning reform to protect cultural assets by tightening planning regulations around change of use from venues or music studios to residential and other developments.

Emergency support by non-departmental public bodies

65. At the start of the crisis, non-departmental public bodies including Arts Council England (ACE) and the National Lottery Heritage Fund (NLHF) announced emergency funds to support their sectors. These were largely welcomed, and the speed of implementation and additional flexibility shown by funding bodies in relaxing grant conditions was particularly praised.¹⁸⁷ However, there were concerns about the extent and timing of such support. Caroline Norbury from the Creative Industries Federation described ACE’s £160 million emergency pot as “a drop in the ocean”.¹⁸⁸ Moreover, the fund supports recipients through to September 2020, although Derby Theatre told us that “is not the next 3 weeks we are concerned with but the next 3 years”.¹⁸⁹ ACE received nearly 14,000 applications from individuals and organisations outside its portfolio, with 71.1% of them ultimately receiving support,¹⁹⁰ but it still acknowledges it:

does not have the resources to secure the income of individuals or the future of shuttered organisations through an extended lockdown, nor the ability to support the costs of reopening under changed circumstances.¹⁹¹

66. Others have questioned the fairness of the eligibility criteria for ACE’s funding, which requires organisations outside its portfolio to demonstrate “a track record in publicly funded culture”.¹⁹² The Civic, a multi-function venue in Stourport states that this “immediately barred organisations that had not been part of the ‘club’, meaning good venues/organisations/practitioners were excluded by dint of the fact they had never been successful in securing funding of that type”.¹⁹³ The Association of Circus Proprietors of

186 UK Music ([CVD0179](#))

187 Culture East Sussex ([CVD0108](#)), Torbay Culture ([CVD0224](#))

188 Q325, Theatres Trust ([CVD0131](#))

189 Derby Theatre ([CVD0164](#))

190 Arts Council England, [Data Report: Emergency Response Funds for Individuals and for Organisations outside of the National Portfolio](#) (June 2020), p 3

191 Arts Council England ([CVD495](#))

192 Arts Council England, [‘Financial support for organisations outside of the National Portfolio’](#), accessed 27 May 2020

193 The Civic, Stourport ([CVD0036](#))

Great Britain told us that “commercial circus, precisely because it has not needed help in the past has been forgotten and ignored in this crisis”.¹⁹⁴ Similarly, UK Music states that “it is unfortunate that monies intended for [grassroots music venues] was not protected, and that ACE support is focused on organisations with a track record of public funding” as contemporary music does not have such an established track-record of public funding as other performing arts.¹⁹⁵ Others are concerned that the distribution of ACE’s funding will exacerbate inequalities between subsidised and non-subsidised arts organisations.¹⁹⁶ The Little Theatre Guild highlights that none of its 115 community-based, amateur theatres “receive any financial support from The Arts Council”.¹⁹⁷

67. There are concerns that in suspending existing funds and drawing on reserves, ACE will have depleted capacity to fund the arts in the future. The Association of British Orchestras states:

Arts Council England’s emergency support package is welcome, but this is simply a smash-and-grab raid on lottery reserves and lottery funds that would have been spent in other areas, and as a result there will be an inevitable contraction in the lottery funding available for future projects.¹⁹⁸

While ACE has announced its project grants will reopen from late July, and has held back more than half of this year’s budget for it, there are still concerns about the long-term implications for arts funding.¹⁹⁹ The Paul Hamlyn Foundation expresses concern that the re-appropriation of ACE funds “could result in a greater than usual demand on trusts and foundations that commit funds to the arts sector when things return to normal”.²⁰⁰ Moreover, with £143 million or 90% of ACE’s emergency fund coming from National Lottery funding, the longer term impact on returns for good causes of the competition to find the next operator of the Lottery, and of Covid-19 itself, remains to be seen.²⁰¹

68. Lessons must be learnt from Arts Council England’s emergency funding when it comes to distributing the additional Government support. Support cannot be limited to organisations with a track record of public funding. Although recipients must be able to demonstrate they will use public monies appropriately, such a restrictive criterion risks excluding vital parts of the cultural ecology, including whole sectors that have historically had less engagement with funding bodies such as contemporary music, circus and amateur theatre. *In allocating additional sector funding, the Government must ensure support reaches cultural sectors and institutions that are in need, irrespective of whether they have previously received subsidy. It must also ensure an equitable distribution of cultural resources across all parts of the UK—north and south, rural and urban—and support for BAME and disabled artists and audiences.*

194 Association of Circus Proprietors of Great Britain ([CVD0226](#))

195 UK Music ([CVD0179](#))

196 Felixstowe Spa Pavilion Theatre ([CVD0254](#))

197 Little Theatre Guild (LTG) ([CVD0025](#))

198 Association of British Orchestras ([CVD0047](#))

199 Arts Council England, ‘[Arts Council National Lottery Project Grants](#)’, accessed 2 July 2020

200 UK Theatre and Society of London Theatre ([CVD0259](#))

201 National Lottery Distributors ([CVD0138](#))

Restarting the performing arts

69. Aside from the financial pressures, the other main challenge for the performing arts has been the question of how and when they will reopen safely. The Government's Covid-19 recovery strategy and subsequent announcements by Ministers were clear that cultural venues will be some of the last places to reopen as lockdown is lifted.²⁰² The UK is not alone in this: in New York, the Broadway League recently announced that all its theatres will remain dark until January 2021.²⁰³ The DCMS-led Cultural Renewal Taskforce is tasked with “identifying creative ways to get these sectors up and running again”.²⁰⁴ Yet the long period of uncertainty has been a challenge for institutions such as the Wales Millennium Centre, which told us, “we need to understand as soon as possible how long our closure might last whilst social distancing measures are in place. This timescale is essential for staff retention and forward planning”.²⁰⁵

70. On 25 June, the Secretary of State announced a five-stage plan for the return of live performance in theatres in England; however, unlike the Government's May 2020 ‘Plan to Rebuild’, it contained no indicative timescales or public health targets for when each stage might commence.²⁰⁶ On 9 July, the Secretary of State announced that outdoor performances, stage 3 of the plan, could resume from 11 July; however, UK Theatre and Society of London Theatre continued “to urge the government to publish ‘no earlier than’ dates for initial indoor performances with a socially distanced audience and most importantly for full venue reopening (stages 4 and 5 respectively) to allow theatres and producers to plan and prepare”.²⁰⁷ On 17 July, it was announced that indoor performances with socially distanced audiences in England could resume from 1 August. As our evidence illustrates, the ability to plan and prepare is important because the performing arts will face multiple challenges when reopening.

Challenges

Lead times for performance

71. The lead times involved in tours and productions, not to mention any costs incurred in making spaces Covid-secure, mean cultural organisations will require significant time to prepare ahead of reopening. Horace Trubridge told us that “three months is an absolute minimum” for musicians to arrange a tour.²⁰⁸ Meanwhile theatre companies will need to rehearse productions and build up advance sales, whether developing new work or restaging shows that were interrupted by the lockdown.²⁰⁹ Evidence from Andrew Lloyd-Webber's production company, the Really Useful Group, explains that:

202 Cabinet Office, ‘OUR PLAN TO REBUILD: The UK Government's COVID-19 recovery strategy’, (11 May 2020)

203 ‘Broadway Will Remain Closed Through the Rest of the Year’, The New York Times, 29 June 2020

204 Department for Digital, Culture, Media and Sport, ‘Culture Secretary announces Cultural Renewal Taskforce’, accessed 2 July 2020

205 Wales Millennium Centre (CVD0275)

206 ‘Government roadmap to reopen UK arts venues dismissed as ‘meaningless’’, The Guardian, 26 June 2020

207 Official London Theatre ‘Culture Secretary issues guidance on reopening theatres including plans to trial safe indoor performances’, , accessed 13 July 2020

208 Q313

209 The Really Useful Group Ltd (CVD0167)

For a typical West End production, rehearsals must start at least three months before a production opens to the public and if any development work or set build is required this will need to start at least six months prior.²¹⁰

Receiving houses, such as Norwich Theatre, which hosts touring work rather than staging its own, will be dependent on other parts of the theatre ecology to reopen. It states:

We are reliant on producers being comfortable that touring their productions will be financially viable for them. At present in our largest venue, we have no available product until January 2021.²¹¹

These lead times mean that July and August are crunch times for organisations committing to their Christmas seasons, which means continued uncertainty about reopening could have devastating consequences far beyond the end of this year.²¹² As Julian Bird told us:

Christmas is absolutely essential for theatres. It is the time when most theatres are at their maximum capacity: pantomimes, Christmas musicals, Christmas shows. It is also the lifeblood for most theatres across the country annually. It is the time when they have more audiences in and when they can make profit that they use later in the year for other productions and for all that community education work.²¹³

Indeed, the New Wolsey Theatre in Ipswich observes that sales for its pantomime, which brings in 25% of its annual turnover, have “unsurprisingly [...] stalled”.²¹⁴

Social distancing

72. Performance venues, like many hospitality businesses, have been clear that it will not be economically viable to reopen while any form of social distancing remains. Julian Bird from UK Theatre and Society of London Theatre told us that even at one metre distancing, theatre capacity will be reduced to 30% to 35%.²¹⁵ Theatre Royal Plymouth, which generates 91% of revenue through trading activity and receives 9% in subsidy, explains:

Social distancing and only selling 30/50% of available seats is not financially viable for the larger scale venues which rely on 70/80% attendance year round to cover costs.²¹⁶

Similarly, Horace Trubridge from the Musicians’ Union told us that live music’s economic model will not allow any form of social distancing, whether seated or standing. He told us that venues “need to sell 70% or 80% of the tickets just to break even on these gigs” and concluded: “I do not see it being a viable alternative”.²¹⁷ The Institute of Theatre Consultants also observes that any form of social distancing will impact the audience’s experience of a live performance. It states:

210 The Really Useful Group Ltd ([CVD0167](#))

211 Norwich Theatre ([CVD0447](#))

212 Mid-Scale Producing Theatres ([CVD0441](#))

213 Q296

214 New Wolsey Theatre ([CVD0417](#))

215 Q285

216 Theatre Royal Plymouth ([CVD0113](#))

217 Q312

Furthermore, the separation of audience members (even sitting as couples or more in a household grouping) would be such as to deaden the audience's reactions and enjoyment of the experience. A theatre audience forms a closely interrelated and inter-reactive community, without that the ability to bond with the performance is severely diminished.²¹⁸

73. Technological solutions could enable audiences to return safely without social distancing. The Really Useful Group has called on the Government to learn “from the management strategies that have been employed in other territories such as South Korea”. Its Seoul production of ‘The Phantom of the Opera’ has been able to continue throughout the pandemic because of a rigorous test, track and trace process.²¹⁹ Leading event promoter Festival Republic proposes a similar initiative, called the ‘Full Capacity Plan’, whereby audiences will be required to obtain an app-verified negative Covid-19 test before attending an event.²²⁰ Richard Masters from the Premier League told us that while football is also considering similar technological alternatives to social distancing, it is “not working with other industries” on them at present. However, he told us that if cross-sector initiatives were developed, the Premier League “would be willing participants”.²²¹

INTERNATIONAL COMPARISONS: THEATRE IN SOUTH KOREA

Using an app, theatres in South Korea assess whether patrons present a risk to other audience members based on their travel to places with known cases and whether they have been tested for Covid-19. This information has to be presented with the ticket before the patron enters the theatre, with high-risk individuals refused entry. Theatres also use hygiene controls, including mandatory mask-wearing, and temperature checks to keep staff and audiences safe.

74. Physical proximity is also an issue for performers. While guidance for the resumption of sports and TV and film production was first published in May, the performing arts had to wait until 9 July.²²² Theatre company Border Crossings argues that as “any performance that requires physical contact between performers will be hard to achieve under current regulations”, DCMS should “explore the arts as a priority area for continuous testing of personnel, on the lines being applied in football”.²²³

Audience attitudes

75. The willingness of audiences to return to live events will be central to the recovery of the performing arts, and Professor Stephanie Pitts and Dr Sarah Price from the University of Sheffield state that “arts organisations must not be expected to attract full audiences as soon as lockdown is lifted”.²²⁴ Indigo’s ‘After the Interval National Audience Survey’ found that only 19% of people would feel safe returning to live events because venues had

218 Institute of Theatre Consultants ([CVD0308](#))

219 The Really Useful Group Ltd ([CVD0167](#))

220 Concert Promoters’ Association ([CVD0603](#))

221 Qq451-454

222 Department for Business, Energy & Industrial Strategy, ‘[Working safely during coronavirus \(COVID-19\)](#)’, accessed 13 July 2020

223 Border Crossings ([CVD0266](#))

224 Sheffield Performer and Audience Research Centre ([CVD0316](#))

reopened and 42% are not considering booking for four months.²²⁵ Moreover, there are concerns that key groups more vulnerable to Covid-19, including BAME audiences, will be reluctant to return.²²⁶ The Park Theatre in north London states:

It will be vital that audiences feel confident returning to live events, in particular the over 70s who are a vulnerable group and traditionally make up a significant portion of many audiences.²²⁷

Furthermore, Andrew Miller, the Government's Disability Champion for Arts and Culture, highlights that:

It seems highly likely that enhanced safety measures coupled with incentives will be needed to draw possibly reluctant disabled audiences back into the habit of live event attendance. As disabled people account for 12% of the national audience for cultural events in England, this is a significant and vital challenge for the sector to address.²²⁸

Arts Council England also highlights the wider economic factors that could impact audience attendance in the months and years to come, stating:

Economic contraction could affect future levels of discretionary income that households will have available to spend on arts and cultural activities. International tourism will also be affected for some time, and this will have a severe impact on organisations with usually high numbers of foreign visitors and audiences.²²⁹

76. Since lockdown began, we and many others in the cultural sector have been warning DCMS about the challenges of resuming live performance. The £1.57 billion of support from Government will only tide the cultural sector over for so long and will not be sufficient to compensate for a loss of the Christmas season. The Cultural Renewal Taskforce has been slow to demonstrate meaningful progress. The fact it was only established two months after lockdown means valuable planning time for the return of live performance has been lost. Moreover, telling venues they can reopen with just a few days' or weeks' notice does not address the lead times for performance, the challenges of social distancing or the concerns about audience behaviours. *To provide more certainty and allow for forward planning the Government should, no later than 1 August, publish 'no earlier than' dates for stage 5 of its plan to reopen performing arts venues.*

77. We are concerned that innovative technology-based solutions are being explored across the theatre, sports and festivals sectors without full collaboration between them. This is exactly the issue the Cultural Renewal Taskforce was set up to address. *The Cultural Renewal Taskforce must co-ordinate cross-sector work on technological solutions for mass gatherings, ensuring the sports and entertainment sectors work together, alongside NHS Test and Trace, to develop a universal, technological solution to enable the safe return of ticket holders to events.*

225 Indigo, 'After the Interval National Audience Survey', accessed 22 June 2020

226 Plymouth Culture ([CVD0408](#))

227 Park Theatre ([CVD0061](#))

228 Andrew Miller ([CVD0281](#))

229 Arts Council England ([CVD495](#))

Insurance

78. As well as highlighting problems that organisations face in making insurance claims due to Covid-19, submissions from across the music, theatre and screen sectors call on Government to back a pandemic indemnity scheme, similar to the Pool Re scheme established during the IRA bombing campaign in the City of London in the early 1990s or the Flood Re scheme, to ensure tours and productions are covered should any further Covid-19 related cancellations occur.²³⁰ This is needed because, as the Association of British Orchestras explains, “insurance companies have confirmed that due to Covid-19 exclusions, orchestras forced to cancel concerts under these circumstances will not be covered by insurance”.²³¹ Similarly, LW Theatres states:

Every promoter, producer, and hirer of our venues has told us that they are unable to secure sufficient insurance for events/shows going forward. We need the government to back an insurance policy to enable content to reach us in the short to medium-term.²³²

This mirrors concerns from across the TV production industry. Trade association Pact states that “the one thing stopping all UK production from returning is the lack of liability cover”.²³³ While discussions on a new pandemic reinsurance scheme are under way, they will inevitably take time. To address the immediate need, Pact recommends that “Government set up a short-term fund guaranteeing to cover potential COVID-19 losses with industry also contributing to the loss were it to occur”.²³⁴

79. Government must address the urgent need for the UK’s cultural industries to be covered by adequate insurance. Without it, efforts to resume filming, touring and live performance are doomed to failure. Alongside working with the insurance industry to introduce a long-term pandemic reinsurance scheme, the Department for Digital, Culture, Media and Sport should establish an emergency fund to guarantee coverage for TV and film productions, stage productions, concerts and tours interrupted or abandoned due to Covid-19.

230 British Film Institute ([CVD0177](#)), UK Theatre and Society of London Theatre / Federation of Scottish Theatres / Creu Cymru / Theatre and Dance Northern Ireland ([CVD0137](#)), The Really Useful Group Ltd ([CVD0167](#)), ITV plc ([CVD0309](#)), Producers Alliance for Cinema and Television (PACT) ([CVD0362](#)), Seabright Productions ([CVD0382](#))

231 Association of British Orchestras ([CVD0047](#))

232 LW Theatres ([CVD0217](#))

233 Producers Alliance for Cinema and Television (PACT) ([CVD0362](#))

234 Producers Alliance for Cinema and Television (PACT) ([CVD0362](#))

4 Tourism

80. Like live performance, tourism was among the first sectors to be hit by the Covid-19 crisis. On 17 March, the Foreign and Commonwealth Office (FCO) advised against all non-essential international travel.²³⁵ This guidance was extended “indefinitely” after an initial 30-day period.²³⁶ The FCO has now updated its travel guidance; while it still advises against all but essential international travel, it now includes a list of over 60 exempt countries and territories.²³⁷ Both domestic and inbound tourism heavily depend on the Easter period and May bank holidays to kick-start the summer season, so when the lockdown initially came into force at the end of March, the tourism industry ground to a halt. In the South West of the UK alone it is estimated that £1.7 billion in turnover was lost between February and April.²³⁸

The impact of Covid-19 on inbound tourism

81. Tourism is the UK’s third largest service export.²³⁹ Before the pandemic, VisitBritain forecast that the UK would see international visitor numbers totalling 39.7 million in 2020, with visitors spending £26.6 billion—a record high, and an increase of 6.6% from 2019.²⁴⁰ By mid-April, VisitBritain had revised these forecasts down by more than 50%.²⁴¹ Yet, as acting CEO for VisitBritain/VisitEngland Patricia Yates told us, every time the modelling is updated, “the figures get worse”.²⁴² Indeed, by early June the figures had again been revised downward.²⁴³

82. Crucially, these forecasts assume that inbound tourism will start to recover in August 2020, although a number of factors could affect this, including any quarantining requirements. Patricia Yates said that mutual agreements between the UK and countries such as France, Germany, Italy and Spain would be most important to the recovery of the UK’s inbound tourism market.²⁴⁴ Such mutual agreements, commonly referred to as ‘air bridges’, were first mentioned back in April 2020, but there was little communication from the Government regarding its plans and an announcement was not made until 26 June 2020. ABTA, the trade association for tour operators and travel agents, told us that to help to manage the issue of quarantining periods:

it will be important that relevant scientific advice is communicated in an open and transparent manner, to both businesses and travellers, and there

235 Foreign and Commonwealth Office, [‘Travel Advice against all non-essential travel: Foreign Secretary’s statement, 17 March 2020’](#), accessed 24 June 2020

236 [‘CORONAVIRUS: FOREIGN OFFICE ADVISES AGAINST ALL TRAVEL ‘INDEFINITELY’](#), The Independent, 6 April 2020

237 Foreign and Commonwealth Office, [‘Coronavirus \(COVID-19\): countries and territories exempt from advice against ‘all but essential’ international travel’](#), accessed 6 July 2020

238 TDA, Visit Cornwall, Destination Plymouth, English Riviera BID Company, Visit Devon, Visit Somerset and Visit Dorset (CVD0331)

239 VisitBritain (CVD0159)

240 VisitBritain (CVD0159)

241 VisitBritain (CVD0159)

242 Q184

243 On 3 June 2020, VisitBritain revised their forecasts. They now predict 16.8m international visits (a decline of 59%) and spending to fall to £10.6bn (a decline of 63%). Compared to pre-Covid forecasts, this now represents a loss of 25.3m visits and £19.7bn spend. VisitBritain, [‘2020 tourism forecast’](#), accessed 3 July 2020

244 Q202

should be a clear review process to assess whether the regime is effective, and how it interacts with other control measures such as testing and contact tracing.²⁴⁵

83. **The issue of quarantine periods is beyond our remit, so we will limit our comments to saying that the timing and guidance about quarantining have been far from clear. Whilst we understand that there was considerable uncertainty around how the pandemic developed internationally, the tourism sector was in limbo for over two months with no certainty as to whether an international visitor market would exist for the rest of 2020. As of July 2020, the Government has announced a list of ‘low risk’, exempt countries from quarantining on arrival in England. We wholeheartedly support calls for the Department for Culture Media and Sport to work with the Foreign and Commonwealth Office and the Department for Transport to clearly communicate information about international travel agreements to the tourism sector, including the science behind the decisions and the plans for reviewing the effectiveness of the agreements.**

The impact on visitor attractions

84. Visitor attractions, defined by VisitBritain as a “permanently established excursion destination” where “it is feasible to charge admission for the sole purpose of sightseeing”, are an important part of the tourism sector.²⁴⁶ Between 2013 and 2018, visitor numbers to English attractions increased by 2% to 5% per year, and many tourist attractions are heavily dependent on footfall from international visitors.²⁴⁷ Bernard Donoghue, Director of the Association of Leading Visitor Attractions (ALVA), told us that in 2017:

more visitors went to the [Victoria and Albert Museum], the Science Museum and the Natural History Museum combined than went to Venice, more people went to the British Museum than to the whole of Belgium, and more people went to the National Theatre, the Southbank Centre and the Royal Festival Hall than to the whole of Hong Kong.²⁴⁸

Yet he also stated that “our international market looks like it has largely stopped for the rest of this year and, for those visitor attractions who are almost entirely dependent on inbound tourists, as opposed to domestic ones, that is extraordinarily concerning”.²⁴⁹

85. Indeed, a joint submission from the museums sector told us that the Covid-19 crisis has resulted in “an immediate cash flow crisis in the museum and heritage sector” because “many organisations were operating with low reserves in advance of anticipated peak season income over the spring and summer” and therefore “some museums are at risk of cash insolvency within a matter of weeks”.²⁵⁰ There are concerns that, if attractions such as museums or galleries go bankrupt as a result of the Covid-19 crisis, collections could be liquidated and sold as financial assets, which would “reverse decades of hard-

245 ABTA ([CVD0283](#))

246 VisitBritain, ‘[Visitor Attraction Trends in England 2018](#)’, accessed 26 June 2020

247 VisitBritain, ‘[Visitor Attraction Trends in England 2018](#)’, accessed 26 June 2020

248 Q217

249 Q217

250 Museums Association, National Museum Directors’ Council, Association of Independent Museums, Art Fund, The Heritage Alliance, the National Trust, the English Civic Museums Network and the University Museums Group ([CVD0188](#))

won development and investment, and the potentially irretrievable loss of public access to much of our nation’s heritage”.²⁵¹ Raising a concern that the existing systems to manage ‘collections at risk’ could be overwhelmed by a high volume of closures, the Collections Trust proposed:

a swift temporary change in legislation so that, if an Accredited museum were to become insolvent, its accessioned collections could not be liquidated as financial assets for, say, a year. This would allow time for museum sector stakeholders to respond in the way they would in normal times, seeking to work with administrators and creditors in order to transfer, where possible, items of particular significance to other museums or archives, and thus retain them for public benefit.²⁵²

86. Many attractions, particularly museums, have diversified their offering during the lockdown period, including the 15 DCMS-sponsored museums and galleries. A joint submission from museums sector bodies observes that “the current crisis has highlighted the importance of museum digital services—both collections digitisations and online outreach”.²⁵³ However, these activities have not generated revenue and not all museums have been able to embrace this form of engagement: the Cornwall Museums Partnership told us “remote access to collections’ information is impossible for most museums here due to a lack of IT infrastructure; this undermines museums’ ability to share their collections online”.²⁵⁴

Table 2

Digital provision in DCMS-sponsored museums during Covid-19	
British Museum	Increased digital offering
Geffrye Museum	Increased digital offering
Horniman Museum	Collection online
Imperial War Museum	Increased digital offering
National Gallery	Collection online
National Museums Liverpool	Collection online
National Portrait Gallery	Collection online
Natural History Museum	Increased digital offering
Royal Armouries	Increased digital offering

251 Museums Association, National Museum Directors’ Council, Association of Independent Museums, Art Fund, The Heritage Alliance, the National Trust, the English Civic Museums Network and the University Museums Group ([CVD0188](#))

252 Collections Trust ([CVD0338](#))

253 Museums Association, National Museum Directors’ Council, Association of Independent Museums, Art Fund, The Heritage Alliance, the National Trust, the English Civic Museums Network and the University Museums Group ([CVD0188](#))

254 Cornwall Museums Partnership ([CVD0223](#))

Digital provision in DCMS-sponsored museums during Covid-19	
Royal Museums Greenwich	Collection online
Science Museum Group	Increased digital offering
Sir John Soane's Museum	Increased digital offering
Tate Galleries	Increased digital offering
Victoria and Albert Museum	Increased digital offering
Wallace Collection	Collection online

87. From 4 July, visitor attractions, including heritage sites, museums and galleries started to reopen. However, Bernard Donoghue told us that reopening would not be financially viable for some visitor attractions if they had to operate under-capacity in order to adhere to social distancing measures.²⁵⁵ That said, research conducted by ALVA in early June showed that consumer confidence in visitor attractions was returning, albeit more quickly for outdoor attractions than indoor: 34% said that they would return to country parks and nature reserves “as soon as the opportunity arises” (compared to 26% in May), whereas only 15% said that they would return to museums and art galleries at the same rate (compared to 9% in May).²⁵⁶

88. International tourism to the UK had halved by April 2020 and has continued to decline. Visitor attractions, including museums and galleries, are being hit hard as a result. Not only are these organisations facing an end to the Coronavirus Job Retention Scheme in October, they have also largely depleted their financial reserves and are looking at the prospect of only being able to open at a reduced capacity with social distancing measures in place. Losing these important spaces, and the valuable collections they hold, would be a significant loss to our cultural identity. To secure collections at risk from museum insolvencies, the Department for Digital, Culture, Media and Sport should introduce a temporary change to legislation to ensure that if an accredited museum becomes insolvent as a result of the Covid-19 crisis, the institution's collections cannot be liquidated for financial assets for the first 12 months.

The impact of Covid-19 on domestic tourism

89. A significant proportion of the UK tourism industry comes from domestic holidaymakers. In 2019, domestic tourists spent £91.6 billion: £24.7 billion on overnight stays and £67 billion on day trips.²⁵⁷ VisitBritain forecasts that the domestic tourism spend will total £69.5 billion in 2020, a drop of around one-quarter on the previous year.²⁵⁸ This is a greater loss than the predicted fall in inbound tourism spending (£22 billion compared to £19.7 billion), but lower in percentage terms.²⁵⁹ These figures have since been revised for

255 Q219

256 Association of Leading Visitor Attractions, '[ALVA Attractions Recovery Tracker Wave 3](#)', and '[ALVA Attractions Recovery Tracker Wave 2](#)', accessed 26 June 2020

257 VisitBritain, '[2020 tourism forecast](#)', accessed 24 June 2020

258 VisitBritain, '[2020 tourism forecast](#)', accessed 24 June 2020

259 VisitBritain, '[2020 tourism forecast](#)', accessed 24 June 2020

England following the re-opening of the hospitality sector on 4 July.²⁶⁰ Although many in the tourism industry hope that domestic tourism may be able to help fill the gap left by the decrease in inbound tourism, public confidence remains relatively low.²⁶¹ In late May, Patricia Yates from VisitBritain told us that just:

19% of people [in the UK] are thinking about booking a domestic holiday for the summer [...] if you ask the same question in Italy, there they are talking about 43% of their domestic audience holidaying domestically.²⁶²

90. On 8 July, the Chancellor announced that VAT on hospitality and tourism, including tourist attractions, will be cut from 20% to 5% for six months.²⁶³ The Secretary of State for Digital, Culture, Media and Sport then urged people to “get out there and play their part” and “make the most of this summer safely”,²⁶⁴ while the Prime Minister said this will be a “great, great year for people to have a staycation”.²⁶⁵ However, there have still been calls for a Destination Management Organisation- or Government-led ‘staycation’ campaign to help build consumer confidence and encourage the British public to book a domestic holiday.²⁶⁶

91. Coastal communities, in particular, will be hard hit by the decline of the tourism industry. In normal times, coastal tourism in the UK is worth £17.1 billion, but in 2020 this is expected to drop to £10.3 billion.²⁶⁷ Around 15% to 20% of employment in coastal communities is dependent on the tourism industry, although this figure can be over 50% in ‘holiday hotspots’ such as St Ives or Newquay in Cornwall.²⁶⁸ Around 29% of coastal tourism businesses generate more than half their annual turnover in July and August alone, but the earlier market is also significant: by May, 7% of coastal businesses had already been forced to close permanently as a result of the Covid-19 crisis.²⁶⁹ Coastal tourism businesses have also seen a significant reduction in advance bookings, further implying that consumer confidence is much lower than usual.²⁷⁰

260 On 30 June, VisitBritain updated their forecasts for 2020 domestic tourism in England. They estimate that domestic tourism spending will total £39.2bn (down 48% from £75.9bn in 2019). This figure is comprised of £10.0bn from overnight tourism (down from £19.5bn in 2019) and £29.1bn from day trips (down from £56.4bn). (VisitBritain, ‘[2020 tourism forecast](#)’, accessed 7 July 2020)

261 In coastal communities alone, 37% of all visitor spend comes from international visitors (National Coastal Tourism Academy ([CVD0526](#)))

262 Q186

263 HC Deb, 8 July 2020, [col 977 \[Commons Chamber\]](#)

264 Department for Digital, Culture, Media and Sport, ‘[Digital, Culture, Media and Sport Secretary’s statement on coronavirus \(COVID-19\): 9 July 2020](#)’, accessed 13 July 2020

265 ‘[Boris Johnson urges Britons to follow his example and have a ‘staycation’ this summer - despite ministers opening up ‘air bridges’ for people to go abroad](#)’, MailOnline, 13 July 2020

266 British Holiday and Home Parks Association ([CVD0675](#)), VisitBritain ([CVD0159](#)), Bournemouth, Christchurch and Poole (BCP) Destination Management Board ([CVD0178](#)), TDA, Visit Cornwall, Destination Plymouth, English Riviera BID Company, Visit Devon, Visit Somerset and Visit Dorset ([CVD0331](#))

267 National Coastal Tourism Academy ([CVD0526](#))

268 National Coastal Tourism Academy ([CVD0526](#))

269 Q235

270 National Coastal Tourism Academy ([CVD0526](#))

92. Domestic tourism businesses face a number of challenges. Many businesses are concerned about cash flow next year as a result of postponed bookings.²⁷¹ Deferrals will have an adverse impact on cashflow either because part or all of the bookings will have already been paid for and the income therefore spent elsewhere, or because people will be paying for a 2021 holiday at 2020 prices.²⁷²

Support for the tourism industry

93. In usual times inbound, outbound and domestic tourism is worth more than £145 billion to the UK economy and employs more than 3.3 million people.²⁷³ The Coronavirus Job Retention Scheme (CJRS) was described as “a tremendous help” and “a lifeline” which has “[enabled] many businesses to survive”.²⁷⁴ Even so, the benefits for some parts of the tourism industry have been hampered by the lack of flexibility in the scheme. For example, businesses that needed to keep up with the maintenance of their sites such as caravan sites or listed buildings were unable to furlough 100% of their staff. This means that they have had to continue paying wages despite having no income.²⁷⁵ Although some flexibility has been introduced—such as the ability to bring workers back gradually—there have been calls, particularly from charitable visitor attractions, for furloughed staff to be able to volunteer their time back to the organisation so that they can help prepare for reopening.²⁷⁶ We are also concerned that some seasonal workers do not qualify for the CJRS: the British Holiday and Home Parks Association told us that seasonal workers who started in late February/early March but had been neither paid, nor reported to HMRC by 17 March, were ineligible for it.²⁷⁷

94. The Covid-19 crisis provides an opportunity to address further the issue of seasonality in the tourism industry.²⁷⁸ While some businesses are looking to extend their opening this year, Sam Richardson, Academy Director of the National Coastal Tourism Academy, told us that support will need to go further. She said:

Many businesses—over 20%—are looking at how they extend their opening this year, so that they can claw back some of the lost revenue. We could really help them, with significant investment in consumer research, product development and training, particularly around digital skills within our sector. But that will take strong leadership, and it will need marketing support.²⁷⁹

271 National Coastal Tourism Academy ([CVD0526](#)), British Holiday and Home Parks Association ([CVD0675](#))
 272 British Holiday and Home Parks Association ([CVD0675](#)), Bournemouth, Christchurch and Poole (BCP) Destination Management Board ([CVD0178](#)), Visit Dorset ([CVD0331](#))
 273 ABTA ([CVD0283](#))
 274 Stay Blackpool ([CVD0070](#)), Milton Keynes Parks Trust ([CVD0076](#)), Bournemouth, Christchurch and Poole (BCP) Destination Management Board ([CVD0178](#))
 275 British Holiday and Home Parks Association ([CVD0675](#))
 276 North Wales Science Ltd (Xplore! Science Discovery Centre) ([CVD0346](#))
 277 British Holiday and Home Parks Association ([CVD0675](#)), Visit Dorset ([CVD0195](#))
 278 National Coastal Tourism Academy ([CVD0526](#)), British Holiday and Home Parks Association ([CVD0675](#)), TDA, Visit Cornwall, Destination Plymouth, English Riviera BID Company, Visit Devon, Visit Somerset and Visit Dorset ([CVD0331](#)), Institute of Tourist Guiding, British Guild of Tourist Guides, Association of Professional Tourist Guides, and Driver Guides Association ([CVD0180](#))
 279 Q235

Evidence has suggested that programmes such as the Tourism Data Hub, which was proposed under the Tourism Sector Deal, could collect data about visitor intention, analyse it, and share it with the industry to enable businesses and Destination Management Organisations to adapt their marketing and their product offering.²⁸⁰

95. Seasonal workers in the tourism industry are falling between the cracks in the Coronavirus Job Retention Scheme. We recommend that DCMS works with the tourism sector and HM Treasury to review the measures in place to support tourism businesses and seasonal workers to ensure they fully meet the needs of the sector. We repeat the recommendation first made in our report on ‘The Covid-19 crisis and charities’ that the Government revisit the terms of the furlough scheme in its final few months to allow for greater flexibility for staff to volunteer their time back to their organisations.

96. The capacity constraints that arise from the requirements of social distancing make yield management and smoothing out demand more important than ever. The Eat Out to Help Out programme will help shift some demand to trough days. Doubtless attractions, transport providers and lodgings will re-examine their own promotional programmes to maximise yield in these circumstances, and where relevant, attractions will look at their opening hours/days. DCMS needs to go further in supporting work to reduce the seasonality of the UK tourism industry. This will matter next year, as well as in 2020, due to the problem of booking deferrals and concomitant loss of income for a second year in a row. In its response to this report, DCMS should set out its plans for supporting an extension of the holiday season. As a matter of urgency, DCMS should introduce a Tourism Data Hub to assess visitor intention for 2021 so that the industry can plan ahead for next year.

The social and cultural benefits of tourism

97. The impact of reviewing the support on offer to the tourism sector will extend far beyond just supporting businesses. As Bernard Donoghue eloquently put it:

Culture and tourism aren’t just where you grow jobs, although we are very good at that. The sector is also where you grow people, in terms of their intellectual curiosity, their engagement with their locality and their understanding of their place in the world. The social and cultural benefits of tourism are as important as the economics.²⁸¹

The tourism sector is also responsible for a significant amount of environmental and heritage conservation across the country, and research has shown that visiting British heritage is the primary reason that overseas visitors come to the UK.²⁸² Overseas visitors’ experience of Britain can also be seen as contributing to ‘soft power’; and school trips and exchanges are important to cultural understanding. Though not tourism in the pure sense, inbound business travel also contributes in similar ways, as well as facilitating trade and investment growth. The British Holiday and Home Parks Association told us that site owners across the country have been responsible for a considerable amount of conservation work in their local areas, including footpath conservation and the creation

280 VisitBritain ([CVD0159](#))

281 Q221

282 The National Trust ([CVD0184](#))

and maintenance of wildflower meadows.²⁸³ The National Trust, among its other projects, is heavily involved in flood mitigation work with the Environment Agency in the north of England.²⁸⁴ However, its Director-General Hilary McGrady told us that as a result of the Covid-19 crisis the National Trust has:

had to stop all non-essential projects—absolutely stop them all. The only ones that are continuing to go are those that we are committed to from a contractual point of view, and we are even withdrawing from some of those.²⁸⁵

She told us that the Trust was looking at losses of approximately £200 million in 2020 as result of the COVID-19 crisis.²⁸⁶ The Trust has since announced that over 200 members of staff are at risk of redundancy, thus risking further delays to the Trust’s vital conservation work.²⁸⁷

98. Tourism is an incredibly important force within the UK economy; however, it is more than just the sum of its parts, and it demonstrates vital links to culture, heritage and environmental work. Moreover, tourism is an essential part of many peoples’ lives, and the prospect of some time away from home has, we are sure, been a beacon of hope for many people during the lockdown period. *We urge DCMS to launch a national campaign to restore consumer confidence in the domestic UK holiday market. If done quickly, there is still time to boost the end of the summer—plus the autumn and 2021—market. Such a campaign will be hugely beneficial in assisting the tourism industry in clawing back some of the business it has lost during the lockdown period and will help to fill the hole left by the sharp decrease in international visitors to the UK.*

283 British Holiday and Home Parks Association ([CVD0675](#))

284 Q264

285 Q265

286 Q245

287 [‘More than 200 National Trust jobs under threat due to coronavirus’](#), ITV, 16 June 2020

5 The role of the Department for Digital, Culture, Media and Sport

99. In this chapter we examine how effectively the Department for Digital, Culture, Media and Sport has fulfilled its objectives and role within Government during the Covid-19 outbreak.²⁸⁸ At a time when digital access is more important than ever for the UK's health, work and education, we examine what DCMS has done to tackle digital exclusion—a stated policy priority for Ministers—during the Covid-19 crisis. We then analyse how effectively DCMS has communicated the needs of the sectors under its remit to the rest of Government, and principally HM Treasury.

Digital exclusion

100. To participate effectively online, individuals need devices on which to access the internet, affordable and reliable data and connections, and the skills and motivation to use these safely. Without these, individuals are digitally excluded. In the UK, 1.9 million households, or approximately 7% of the population, do not have internet access, and 11.9 million people lack the digital skills Government considers essential for going online.²⁸⁹ During the Covid-19 outbreak, this has limited the effectiveness of measures to combat the spread of the virus. Liz Williams MBE, CEO of FutureDotNow, estimates that between 175,000 and 500,000 of those who received letters instructing them to shield have no internet access, and yet because the letters “were peppered with references to websites”, those individuals would find it “incredibly difficult” to do so.²⁹⁰

101. People's reliance on digital platforms to work, study and shop during the Covid-19 outbreak has brought the urgency of tackling digital exclusion to the fore. Liz Williams explained what life has been like for the one in five adults who cannot access online services. She told us:

they are not able to order food online, they cannot access online healthcare and banking, and they cannot connect with friends and family. What that has meant during Covid-19 is that they have effectively been shut off in ways that those of us who are connected have not had to suffer.²⁹¹

Nicola Wallace Dean, from the social enterprise Starting Point in Stockport, told us what this has meant for individuals without internet access who are shielding in her community:

288 The Department's objectives are:

Global: Drive international trade, attract investment and promote shared values around the world – promoting the UK as a great place to live, work and visit

Growth: Grow an economy that is creative, innovative and works for everyone

Digital Connectivity: Drive the UK's connectivity, telecommunications and digital sectors

Participation: Maximise social action, cultural, sporting and physical activity participation

Society: Make our society safe, fair and informed

EU Exit: Help deliver a successful outcome to Brexit

Agile & Efficient: Ensure DCMS is fit for the future with the right skills, culture and connections to realise our vision and live our values as “One DCMS”

Department for Digital, Culture, Media and Sport, [‘DCMS: Single Departmental Plan - 2019’](#), accessed 29 June 2020

289 Q111

290 Q113

291 Q111

The only way they can currently communicate in our community is by putting a piece of paper in their window asking for one of the community organisers to contact them. One of those people has just had a hip replacement and is absolutely terrified of getting any support through social services and district nurses because she does not want to get coronavirus. She is in a situation where she is dragging herself across the floor to put a note on a piece of paper in her window to ask somebody to contact her because her phone line is down.²⁹²

102. During the Covid-19 outbreak, DCMS has worked across Government to develop policy interventions to tackle digital exclusion. For example, the Secretary of State told us that he worked with the Department for Education to provide devices to vulnerable children to enable them to study at home.²⁹³ However, Helen Milner, CEO of Good Things Foundation, told us that DCMS could be doing more to promote digital inclusion across Government. She said:

It is a shame because DCMS has the policy lead for digital inclusion but has no money. What we have at the moment is a number of Departments that recognise that there are digitally excluded people in the country who need specific support, aligned with their own policy areas, but DCMS is not able to co-ordinate and bring them together, playing that powerful convening role at a time when we are seeing digital exclusion having such a huge effect on the poorest and the most socially excluded people in our society.²⁹⁴

103. It has been made clear to us that tackling digital exclusion requires resource that DCMS does not have. Liz Williams told us that “DCMS is not a large budget holding Department, therefore its ability to lean into this is significantly hampered”.²⁹⁵ Likewise, Helen Milner suggested that to strengthen its convening power and ability to lead cross-Government work on this policy area, “DCMS needs a budget for digital inclusion, a proper budget, and maybe with that budget you could say that it has an obligation to work with the other Departments”.²⁹⁶ Indeed, the Minister for Digital and Culture told us she has had difficulty “finding money that could go into [tackling digital exclusion] that would not be regarded as tokenism”.²⁹⁷

104. The impact that this lack of resource has had on DCMS’s work on digital exclusion is illustrated by the DevicesDotNow campaign, which delivers internet-connected devices to digitally excluded individuals. We were told by Permanent Secretary Sarah Healey that DCMS was working with the campaign; however, Liz Williams later confirmed that although Ministers have written letters to industry encouraging them to donate devices and made “supportive statements” in the press, “the Government have not funded the campaign”.²⁹⁸ She explained that to deliver devices to 10,000 of the most vulnerable people

292 Q170

293 [Oral evidence taken on 22 April 2020, HC \(2019–21\) 157, Q42](#)

294 Q147

295 Q136

296 Q155

297 Q354

298 Q116

DevicesDotNow required a minimum of £2 million, and that as well as providing direct funding DCMS could help the campaign to secure other sources of funding by making digital inclusion a clear cross-Government priority.²⁹⁹

105. Throughout the Covid-19 crisis, vulnerable people across the country have suffered as a result of being excluded from digital services and communication. Yet initiatives to tackle the issue, such as the DevicesDotNow campaign, have been limited by a lack of both direct and charitable funding. The Department for Digital, Culture, Media and Sport’s commitment to tackling digital exclusion and co-ordinating work on it across Government urgently needs to be supported by adequate resource from HM Treasury.

106. People who cannot afford access to data are digitally excluded.³⁰⁰ We were told that the 25 million customers on pay-as-you-go mobile contracts have been particularly vulnerable to data poverty during the Covid-19 crisis because of high data charges and a lack of access to alternative places, such as libraries, to access the internet.³⁰¹ Helen Milner said that “right now people are having to make a choice between data and food” and told us about “a single mother on universal credit, who is saying to the children that they can only eat twice a day now because she has to spend more on data so that the children can do some home schooling”.³⁰²

107. Digital deprivation has widened health and cultural inequalities during the Covid-19 crisis. As we explored in chapter 2, digital exclusion has also impacted the equality of provision of sports services, thus further increasing the risks and burden of the Covid-19 crisis for those from lower socio-economic backgrounds.³⁰³ To address this inequality, some sports organisations have been providing data vouchers to those facing financial barriers to internet access.³⁰⁴ **We commend the work done by cultural and fitness organisations, both before and during the Covid-19 crisis, to move access to content and facilities online. In the immediate future, DCMS should work with HM Treasury to develop a data voucher scheme, to give those with limited access to the internet due to financial constraints the ability to access online cultural and physical activity content.**

108. The Government has already worked with telecommunications companies to reduce some data charges during the pandemic. On 18 March, the Department for Health and Social Care announced that mobile networks had agreed to provide customers with free online access to NHS websites, so that accessing the latest NHS health information about coronavirus would not incur any data charges.³⁰⁵ Furthermore, DCMS secured commitments from the UK’s major internet and mobile companies to provide NHS workers with sufficient calls and data, and to support vulnerable customers and those who struggle to pay their bills.³⁰⁶ Yet more could be done. Helen Milner recommended

299 Q117

300 Qq154, 169

301 Q156

302 Q154

303 London Sport ([CVD0129](#)), Youth Sport Trust ([CVD0135](#)), Sport England ([CVD0032](#)), Croydon Council, Croydon Sport, Physical Activity & Health Network, Croydon Sport Clubs ([CVD0516](#)), Sporting Equals ([CVD0615](#))

304 Sport for Development Coalition ([CVD0665](#))

305 Department of Health and Social Care, ‘[Mobile networks remove data charges for online NHS coronavirus advice](#)’, accessed 11 May 2020

306 Department for Digital, Culture, Media and Sport, ‘[Government agrees measures with telecoms companies to support vulnerable consumers through COVID-19](#)’ and ‘[Industry and Government Joint Statement on Telecommunications Support for the NHS](#)’, accessed 5 May 2020

that the telecoms industry explore data gifting, as happens in Australia, where individuals can donate mobile data to charities, and wi-fi sharing, by issuing guidance on how people might easily and safely share their home broadband connections with neighbours.³⁰⁷ Over the coming year, Ofcom intends to monitor “where households have difficulty paying for communications services, in particular in relation to broadband and consider if any measures are needed to support consumers who are financially vulnerable”.³⁰⁸

109. While we welcome Ofcom’s focus on affordability of broadband services, and the measures introduced across the telecoms industry to make websites and mobile data available to those who need it during the Covid-19 outbreak, more needs to be done to support all those experiencing data poverty, and particularly pay-as-you-go users. The Government and Ofcom should work with telecommunications companies to facilitate data gifting and wi-fi sharing. Ofcom’s work on affordability of internet connectivity should also tackle the poverty premium associated with pay-as-you-go mobile services.

Advocacy across Government

110. The Department for Digital, Culture, Media and Sport states that its role is to “protect and promote our cultural and artistic heritage”, and this includes to the rest of Government. The Secretary of State told us that throughout the Covid-19 crisis he has ensured the industries under his remit “are well represented across Government”, and that he will “continue to fight hard” in this regard.³⁰⁹ However, Newcastle City Council argues that the wellbeing and recovery of the DCMS sectors “shouldn’t just be the responsibility of DCMS but of all Government Departments”, because culture has a “reach and impact on many aspects of life which include employment, the wider economy including tourism, health & wellbeing, including obesity, mental health, social inclusion, community cohesion and education”.³¹⁰

111. Fulfilling its responsibilities to the sectors under its remit has required DCMS to maintain dialogue with stakeholders from across a wide range of industries. The Permanent Secretary Sarah Healey told us in mid-April that there had been close to “100 roundtables with different aspects of DDCMS stakeholders in order to properly understand some of the issues that they are facing”.³¹¹ While much of the evidence we received echoes regional theatre operator HQ Theatre in welcoming DCMS’s “frequent and timely engagement with the industry”, it also questions how effectively listening to concerns has translated to action.³¹² For example, a joint submission by festival sector bodies states:

Despite this positive engagement, there is a sense that once issues have been escalated to Ministerial level, Government has not taken meaningful action to protect our sector and has not made any sector specific interventions.³¹³

307 Q156

308 Ofcom, [Plan of Work 2020/21](#) (30 April 2020), p 30

309 [Oral evidence taken on 22 April 2020, HC \(2019–21\) 157, Q35](#)

310 Newcastle City Council ([CVD0427](#))

311 [Oral evidence taken on 22 April 2020, HC \(2019–21\) 157, Q75](#)

312 HQ Theatres ([CVD0073](#))

313 The Association of Independent Festivals (AIF), The Association of Festival Organisers (AFO) and the British Arts Festivals Association (BAFA) ([CVD0329](#))

It evidences this by outlining the cross-industry discussions that took place on changing the requirements around customer refunds requirements, and describes the Government's rejection of proposed measures as "perfunctory at best considering it was the culmination of eight weeks of discussion and presenting data and evidence".³¹⁴

112. Throughout this inquiry we have questioned Ministers and civil servants about the limits of HM Treasury-designed schemes, including the CJRS and SEISS, for individuals and organisations working in the DCMS sectors. We were initially reassured by the Secretary of State that he had "not reached the end of the road" in making representations to the Treasury about potential flexibility in the self-employment scheme; however, in a follow up letter, he rowed back from this pledge, stating that "HMT has difficult decisions to make and will have to draw a line somewhere on each of its schemes".³¹⁵ Likewise, the Minister for Digital and Culture told us that although solutions to address gaps in provision have been proposed, "they are not without risk and they are not without fraud potential. That is why Treasury has found that they are not workable or are expensive to administer".³¹⁶ When we asked the Director for the Covid-19 Economic Response and Arts, Heritage and Tourism, Emma Squire, whether DCMS has been effective in advocating on behalf of its sectors to the Treasury, she replied:

Our focus has been on sharing all of the evidence we have been gathering with the Treasury on where the gaps are, rather than trying to design solutions to those gaps.³¹⁷

Yet, the Minister for Digital and Culture also told us that DCMS has "found it quite difficult to get robust data" on the scale of those gaps in eligibility for Government support.³¹⁸

113. The scale and severity of such gaps has led some to question why Government as a whole, and HM Treasury specifically, has failed to respond to the needs, or understand the value of, the DCMS sectors during this crisis. The Tourism Management Institute questions why the "value of tourism to the economy [...] never seems to register strongly with BEIS or Treasury" and states "this is bizarre when tourism spend drives vast swathes of UK plc—aviation, manufactured products, construction, transport, logistics etc".³¹⁹ On the creative industries, Caroline Norbury told us that, for HM Treasury, there is an "awful lot more to be learned about the complexity of the sector" and that the diversity of the creative industries makes it difficult to provide the "simple messages" that Government wants.³²⁰ Likewise, PRS for Music told us:

The COVID-19 crisis has highlighted a general lack of understanding of the structures and economics of the cultural sector, and the interdependencies and the composite income streams of individual creators, performers and

314 The Association of Independent Festivals (AIF), The Association of Festival Organisers (AFO) and the British Arts Festivals Association (BAFA) ([CVD0329](#))

315 Digital, Culture, Media and Sport Committee, [Letter from Rt Hon Oliver Dowden MP, Secretary of State for DCMS, re evidence follow-up, 20 May 2020](#), (5 June 2020)

316 Q358

317 Q359

318 Q350

319 Tourism Management Institute ([CVD0426](#))

320 Q321

the small businesses in the sector. This lack of understanding has, in our view, presented in barriers to the public sector designing and ultimately implementing specific measures to support the cultural sectors.³²¹

This is further illustrated by evidence we have received from the circus and fairground sectors, which argues that in using rateable value as a basis for many support schemes the Government has neglected itinerant, non-property base sectors.³²² The Association of Independent Showmen argues that this is indicative of a wider problem: “the homogeneity of treatment for completely different sectors”.³²³ This concern also applies to many festivals.

114. The Government has been too slow to respond to the needs of the sectors under the Department for Digital, Culture, Media and Sport’s remit during the Covid-19 outbreak. In its response, DCMS has been hampered by its overall spending power, a lack of robust data on ineligibility for support and a fundamental misunderstanding across Government of the needs, structures and vital social contribution of sectors such as the creative industries.

Taskforces and working groups

115. The Cultural Renewal Taskforce and accompanying ministerial-led working groups provide an opportunity for Government to better understand the needs of the DCMS sectors.³²⁴ Yet there have been widespread concerns about diversity of representation on these groups, with the Director of the National Rural Touring Forum stating:

I am noting the lack of diversity in the groups I have sat on. There has been a lack of scales of employment and contracted positions. Primarily it has been leaders of organisations like myself.³²⁵

Indeed, sector support organisation One Dance UK observes that “freelancers do not feel directly represented in the taskforce or working group structure”.³²⁶ After the taskforce was announced, BAME artists published an open letter to the Secretary of State calling for their views to be heard.³²⁷ However, Stage Sight, which promotes diversity among the offstage workforce in the performing arts, argues:

it really shouldn’t need open letters and pressure to realise representation within a contemporary society must include those from all backgrounds in terms of gender, class, race and disability.³²⁸

To maintain trust and confidence in the Taskforce’s work, Andrew Miller recommends that “Equalities Impact Assessment and Monitoring is applied to all the key decisions of

321 PRS For Music ([CVD0497](#))

322 The Association of Independent Showmen ([CVD0396](#)), Zippos Circus ([CVD0123](#)), The Association of Circus Proprietors of Great Britain ([CVD0226](#)), Chris Barltrop ([CVD0228](#)), Circus of Horrors Ltd ([CVD0410](#))

323 The Association of Independent Showmen ([CVD0396](#))

324 Department for Digital, Culture, Media and Sport, ‘[Cultural Renewal Taskforce and supporting Working Groups](#)’, accessed 29 June 2020

325 National Rural Touring Forum ([CVD0395](#))

326 One Dance UK ([CVD0444](#))

327 Young Vic, ‘[AN OPEN LETTER TO THE CULTURE SECRETARY FROM BLACK, ASIAN & ETHNICALLY DIVERSE THEATRE ARTISTIC DIRECTORS AND CULTURAL LEADERS ON THE IMPORTANCE OF PROTECTING REPRESENTATION IN THE SECTOR](#)’, accessed 13 July 2020

328 Stage Sight ([CVD0388](#))

the Taskforce”.³²⁹ On an organisational level, a consortium of mid-scale theatres from around the country observes that the groups’ work is focused on larger organisations and venues, so argues that “regional and community-focused organisations need to be included”.³³⁰ Similarly, there have been concerns that music is not considered a priority as it is not represented on the taskforce, just on the working groups.³³¹ **The Cultural Renewal Taskforce and working groups demonstrate a worrying lack of diversity of representation. To ensure that sectors remain accessible to all as they reopen, it is essential that all decisions and proposals by the Cultural Renewal Taskforce and its working groups are accompanied by full equality impact assessments and monitoring.**

116. We have also received calls for better joint-working and dialogue between the creative workforce and DCMS, to inform and assist policymaking during and beyond the current crisis. In a joint submission, nine creative trades unions and copyright collecting societies—representing more than 330,000 members, many of them freelance—express disappointment that DCMS has not properly heard their concerns or those of creative freelancers.³³² Describing the appointment of the taskforce and working group as “opaque”, they propose that DCMS forms a ‘UK Creators Council’—a roundtable along the lines of the existing Creative Industries Council—which would advise Government including on issues relating to creative freelancers and SMEs. While the proposal has been discussed with Government over the past 18 months, the Authors’ Licensing & Collecting Society says it “is needed now more than ever” so that Government can hear directly from creators.³³³ **Forming a ‘Creators Council’ could boost confidence across the sector and ensure its views are represented at a time when many of the creative industries workforce are struggling to stay in the sector. We recommend that DCMS forms a Creators Council as a mechanism for better dialogue with the creative workforce to understand its needs and viewpoints as we emerge from this crisis.**

329 Andrew Miller ([CVD0281](#))

330 Mid-Scale Producing Theatres ([CVD0441](#))

331 Sheffield City Region Mayoral Combined Authority ([CVD0459](#))

332 The Authors’ Licensing and Collecting Society (ALCS), Directors UK, Equity, The British Equity Collecting Society (BECS), The Design and Artists Copyright Society (DACS), The Musicians’ Union, The Royal Society of Literature, The Society of Authors, The Writers’ Guild of Great Britain (WGGB) ([CVD0409](#))

333 The Authors’ Licensing and Collecting Society ([CV0035](#))

Conclusions and recommendations

Introduction

1. The many and varied sectors under the remit of the Department for Digital, Culture, Media and Sport are integral to the UK's national life and identity, as well as being vital drivers of economic growth and employment. Yet many parts of these sectors face an existential threat due to Covid-19 and the continued uncertainty that accompanies it. (Paragraph 4)

Sport

2. We are concerned that a lack of confidence, and a fear of being in close proximity with people from outside their own household, will affect people's return to group sports, particularly those that take place indoors (such as indoor exercise classes), those that require physical contact (such as rugby), and those that require participants to be in close proximity for extended periods of time (such as rowing). We support requests from the sport sector for clear and effective public messaging from the Government to ensure people feel safe returning to group physical activity. *To help to get the UK moving again, the Department for Digital, Culture, Media and Sport should fund advertisements, based on the 'This Girl Can' model, using realistic content about how to get back to exercise without fear. In the medium-to-long term, we recommend that DCMS establishes a fund to invest specifically in helping those people whose activity levels have been adversely affected by the lockdown restrictions—including older people, BAME people, disabled people, women, people from lower socio-economic backgrounds and those unable to access physical activity content online—to ensure that the progress that was being made in physical activity levels within these groups is not set back by Covid-19.* (Paragraph 11)
3. The cessation of community sport countrywide during lockdown has hit under-represented groups the hardest. While we welcome the announcement that some recreational sports teams can now resume play, we are concerned about gyms and leisure centres. These facilities act as community hubs, often providing subsidised facilities to those who most need them, but have been the last sport sector to re-open. Following huge levels of uncertainty, it is essential that leisure facilities are protected and have the funds to ensure that the necessary hygiene and social distancing measures can be put in place to re-open fully. The worst outcome would be for local authority funding shortfalls to translate into leisure centre closures; if this were to happen, the Government would risk abrogating its own 2015 Sport Strategy commitment to increase participation in sport by under-represented groups. *DCMS's Sport Working Group must work with local councils to ensure necessary funding is in place to preserve leisure centre facilities. This must be done with urgency so that leisure centres are fully operational in August to provide crucial fitness opportunities for children during the school holidays.* (Paragraph 15)
4. We recognise the importance of 'horizon-scanning' work to ensuring people maintain and increase their activity levels, which in turn will boost their resilience to the virus. However, smaller organisations are unlikely to have the resources

available to collect data, analyse it and then act on that insight. We believe that Sport England is in the best position to continue this work. *We call on DCMS to provide Sport England with the necessary resources for it to prioritise data collection, so that long-term indicators can be developed to help the sports sector better understand the needs of its audiences.* (Paragraph 17)

5. With no clear messaging from the Government about when spectators can expect to return to sporting events, we support calls from elite sports organisations for the Government to extend its financial assistance for those organisations that are unable to generate revenue until mass gatherings are permitted. *We recommend that DCMS works with HM Treasury to identify organisations within the professional sport sector that remain unable to generate revenue until mass gatherings are permitted again, and to ensure that the systems that have helped them survive the crisis thus far, such as the Coronavirus Job Retention Scheme and the VAT and PAYE deferral period, are extended beyond the current cut-off dates, and backdated where they have already come to an end (such as the VAT payments deferral scheme).* (Paragraph 22)
6. The current football business model is not sustainable. The Covid-19 crisis has shone a stark light on the financial issues within football, specifically in the leagues below the Premier League. The Premier League is the main income generator of English football. If it does not step up to help the English Football League, many more clubs will follow in Bury FC's footsteps. The EFL needs also to ensure it develops a more sustainable financial model. (Paragraph 27)
7. We firmly believe that football must use its response to the Covid-19 crisis to 'reset'. The crisis has shone a light on the culture of unfair pay in football. The decision by some Premier League clubs to furlough non-playing staff was deplorable, and we welcomed its reversal. Parachute payments must become a thing of the past, and considerable work must be done to advance work on salary caps. *DCMS should engage with the Premier League and the EFL to learn lessons from abroad on policies such as salary caps, which may seem radical to those inside UK football, but seem to work well elsewhere.* (Paragraph 32)
8. Football must also become more representative. The fact that no Premier League club and virtually no English Football League club has a black owner, Chair or chief executive, is a fundamental inequality at the heart of the game. We do not believe that the voluntary initiative proposed by the FA will motivate clubs to act with sufficient speed. Instead, *we recommend that DCMS revises the Code for Sport Governance, adding targets for BAME representation on boards.* We also wish to record our dismay at the slow progress in kicking out homophobia from football. It is crucial that everyone involved in the game is clear about the remaining barriers to players coming out. The Covid-19 crisis is an opportunity to improve a number of areas within football, and to this end we will continue to pursue opportunities in this Parliament to introduce legislation outlawing homophobic chanting at matches. (Paragraph 33)
9. The lack of visibility of women's sport this summer risks undoing work to improve funding for women's elite sport. Cancellation of women's events is likely to reduce the number of women being inspired to take part in sporting activities. *In its response to*

this report, the Government should outline how it intends to support women's sport post-crisis and ensure that, going forward, men's elite sports are not further prioritised at the expense of the women's game. (Paragraph 36)

Culture and the Creative Industries

10. *The Department should investigate how the market for recorded music is operating in the era of streaming to ensure that music creators are receiving a fair reward. (Paragraph 44)*
11. *The Covid-19 crisis presents the biggest threat to the UK's cultural infrastructure, institutions and workforce in a generation. The loss of performing arts institutions, and the vital work they do in communities by spreading the health and education benefits of cultural engagement, would undermine the aims of the Government's 'levelling up' agenda and Arts Council England's next 10-year strategy, and reverse decades of progress in cultural provision and diversity and inclusion that we cannot afford to lose. In addition to the emergency funding already announced, the performing arts need a sector-specific recovery deal that includes continued workforce support measures, including enhanced measures for freelancers and small companies; clear, if conditional, timelines for reopening, and technological solutions to enable audiences to return without social distancing; and long-term structural support to rebuild audience figures and investment in time of economic uncertainty. (Paragraph 51)*
12. *The Coronavirus Job Retention Scheme and the Self-Employment Income Support Scheme have been a lifeline for all those in the creative industries who have been eligible for them. However, the closure of the schemes in October and the fact too many self-employed people have missed out on support to date, means the future of our creative workforce remains at significant risk. From October 2020 at the latest, the Government should introduce flexible, sector specific versions of the CJRS and SEISS guaranteed for the creative industries until their work and income returns to sustainable levels. Any such measures should account for the differences in timeframes for the easing of Covid-19 restrictions across the four nations. Support for the self-employed, in particular, should be urgently reviewed and amended so that it covers people who have been excluded to date. The Treasury Committee's report, 'Economic impact of coronavirus: Gaps in support', proposed practical solutions for how this might be achieved, which we endorse. (Paragraph 56)*
13. *We welcome the Government's commitment to provide £1.57 billion in funding for our cultural and heritage sectors; however, whether it is enough to safeguard the cultural sector will ultimately depend on how long institutions remain closed or subject to social distancing, and we are concerned that freelancers and small companies will continue to fall through the gaps of Government support. It is also regrettable that it took so long for the package to be announced, as the uncertainty inevitably led to closures and redundancies in the cultural sector that might otherwise have been avoided. (Paragraph 59)*
14. *The Government must learn from the shortcomings of previous support schemes, including those for charities and self-employed people, to ensure this package is tailored to the unique characteristics of the cultural sector and its workers, and reaches them promptly. The Government must recognise the interconnected nature of the cultural*

sector and should not restrict support to well established, high profile, institutions: it is essential that cultural freelancers and small companies in the creative industries supply chain are also eligible for direct support. To reduce uncertainty, the Government must publish eligibility criteria and application guidance as soon as possible, and ensure that the funding reaches recipients no later than October 2020. (Paragraph 60)

15. *To further combat the negative effects of closure, and to stimulate long-term recovery, the Government should introduce other fiscal measures. We recommend the cut in VAT on ticket sales for theatre and live music be extended beyond January 2021, for the next three years. The Government should increase Theatre Tax Relief to 50% for the next three years and broaden the definition of 'core expenditure' in line with the industry's proposals. It should introduce a Music Tax Relief, modelled on existing reliefs such as the Orchestra Tax Relief. The Government should also develop a system to save 'Assets of Cultural Value' along the lines of the regime for 'Assets of Community Value'. This would allow a moratorium on the sale of a building while stakeholders seek an alternative bidder to maintain the asset as a cultural business. The Government should also build on recent 'Agent of Change' planning reform to protect cultural assets by tightening planning regulations around change of use from venues or music studios to residential and other developments. (Paragraph 64)*
16. *Lessons must be learnt from Arts Council England's emergency funding when it comes to distributing the additional Government support. Support cannot be limited to organisations with a track record of public funding. Although recipients must be able to demonstrate they will use public monies appropriately, such a restrictive criterion risks excluding vital parts of the cultural ecology, including whole sectors that have historically had less engagement with funding bodies such as contemporary music, circus and amateur theatre. In allocating additional sector funding, the Government must ensure support reaches cultural sectors and institutions that are in need, irrespective of whether they have previously received subsidy. It must also ensure an equitable distribution of cultural resources across all parts of the UK—north and south, rural and urban—and support for BAME and disabled artists and audiences. (Paragraph 68)*
17. *Since lockdown began, we and many others in the cultural sector have been warning DCMS about the challenges of resuming live performance. The £1.57 billion of support from Government will only tide the cultural sector over for so long and will not be sufficient to compensate for a loss of the Christmas season. The Cultural Renewal Taskforce has been slow to demonstrate meaningful progress. The fact it was only established two months after lockdown means valuable planning time for the return of live performance has been lost. Moreover, telling venues they can reopen with just a few days' or weeks' notice does not address the lead times for performance, the challenges of social distancing or the concerns about audience behaviours. To provide more certainty and allow for forward planning the Government should, no later than 1 August, publish 'no earlier than' dates for stage 5 of its plan to reopen performing arts venues. (Paragraph 76)*
18. *We are concerned that innovative technology-based solutions are being explored across the theatre, sports and festivals sectors without full collaboration between them. This is exactly the issue the Cultural Renewal Taskforce was set up to address. The Cultural Renewal Taskforce must co-ordinate cross-sector work on technological*

solutions for mass gatherings, ensuring the sports and entertainment sectors work together, alongside NHS Test and Trace, to develop a universal, technological solution to enable the safe return of ticket holders to events. (Paragraph 77)

19. Government must address the urgent need for the UK's cultural industries to be covered by adequate insurance. Without it, efforts to resume filming, touring and live performance are doomed to failure. *Alongside working with the insurance industry to introduce a long-term pandemic reinsurance scheme, the Department for Digital, Culture, Media and Sport should establish an emergency fund to guarantee coverage for TV and film productions, stage productions, concerts and tours interrupted or abandoned due to Covid-19. (Paragraph 79)*

Tourism

20. The issue of quarantine periods is beyond our remit, so we will limit our comments to saying that the timing and guidance about quarantining have been far from clear. Whilst we understand that there was considerable uncertainty around how the pandemic developed internationally, the tourism sector was in limbo for over two months with no certainty as to whether an international visitor market would exist for the rest of 2020. As of July 2020, the Government has announced a list of 'low risk', exempt countries from quarantining on arrival in England. *We wholeheartedly support calls for the Department for Culture Media and Sport to work with the Foreign and Commonwealth Office and the Department for Transport to clearly communicate information about international travel agreements to the tourism sector, including the science behind the decisions and the plans for reviewing the effectiveness of the agreements. (Paragraph 83)*
21. International tourism to the UK had halved by April 2020 and has continued to decline. Visitor attractions, including museums and galleries, are being hit hard as a result. Not only are these organisations facing an end to the Coronavirus Job Retention Scheme in October, they have also largely depleted their financial reserves and are looking at the prospect of only being able to open at a reduced capacity with social distancing measures in place. Losing these important spaces, and the valuable collections they hold, would be a significant loss to our cultural identity. *To secure collections at risk from museum insolvencies, the Department for Digital, Culture, Media and Sport should introduce a temporary change to legislation to ensure that if an accredited museum becomes insolvent as a result of the Covid-19 crisis, the institution's collections cannot be liquidated for financial assets for the first 12 months. (Paragraph 88)*
22. Seasonal workers in the tourism industry are falling between the cracks in the Coronavirus Job Retention Scheme. *We recommend that DCMS works with the tourism sector and HM Treasury to review the measures in place to support tourism businesses and seasonal workers to ensure they fully meet the needs of the sector. We repeat the recommendation first made in our report on 'The Covid-19 crisis and charities' that the Government revisit the terms of the furlough scheme in its final few months to allow for greater flexibility for staff to volunteer their time back to their organisations. (Paragraph 95)*

23. The capacity constraints that arise from the requirements of social distancing make yield management and smoothing out demand more important than ever. The Eat Out to Help Out programme will help shift some demand to trough days. Doubtless attractions, transport providers and lodgings will re-examine their own promotional programmes to maximise yield in these circumstances, and where relevant, attractions will look at their opening hours/days. DCMS needs to go further in supporting work to reduce the seasonality of the UK tourism industry. This will matter next year, as well as in 2020, due to the problem of booking deferrals and concomitant loss of income for a second year in a row. *In its response to this report, DCMS should set out its plans for supporting an extension of the holiday season. As a matter of urgency, DCMS should introduce a Tourism Data Hub to assess visitor intention for 2021 so that the industry can plan ahead for next year.* (Paragraph 96)
24. Tourism is an incredibly important force within the UK economy; however, it is more than just the sum of its parts, and it demonstrates vital links to culture, heritage and environmental work. Moreover, tourism is an essential part of many peoples' lives, and the prospect of some time away from home has, we are sure, been a beacon of hope for many people during the lockdown period. *We urge DCMS to launch a national campaign to restore consumer confidence in the domestic UK holiday market. If done quickly, there is still time to boost the end of the summer—plus the autumn and 2021—market. Such a campaign will be hugely beneficial in assisting the tourism industry in clawing back some of the business it has lost during the lockdown period and will help to fill the hole left by the sharp decrease in international visitors to the UK.* (Paragraph 98)

The role of the Department for Digital, Culture, Media and Sport

25. Throughout the Covid-19 crisis, vulnerable people across the country have suffered as a result of being excluded from digital services and communication. Yet initiatives to tackle the issue, such as the DevicesDotNow campaign, have been limited by a lack of both direct and charitable funding. The Department for Digital, Culture, Media and Sport's commitment to tackling digital exclusion and co-ordinating work on it across Government urgently needs to be supported by adequate resource from HM Treasury. (Paragraph 105)
26. We commend the work done by cultural and fitness organisations, both before and during the Covid-19 crisis, to move access to content and facilities online. *In the immediate future, DCMS should work with HM Treasury to develop a data voucher scheme, to give those with limited access to the internet due to financial constraints the ability to access online cultural and physical activity content.* (Paragraph 107)
27. While we welcome Ofcom's focus on affordability of broadband services, and the measures introduced across the telecoms industry to make websites and mobile data available to those who need it during the Covid-19 outbreak, more needs to be done to support all those experiencing data poverty, and particularly pay-as-you-go users. *The Government and Ofcom should work with telecommunications companies to facilitate data gifting and wi-fi sharing. Ofcom's work on affordability of internet connectivity should also tackle the poverty premium associated with pay-as-you-go mobile services.* (Paragraph 109)

28. The Government has been too slow to respond to the needs of the sectors under the Department for Digital, Culture, Media and Sport's remit during the Covid-19 outbreak. In its response, DCMS has been hampered by its overall spending power, a lack of robust data on ineligibility for support and a fundamental misunderstanding across Government of the needs, structures and vital social contribution of sectors such as the creative industries. (Paragraph 114)
29. The Cultural Renewal Taskforce and working groups demonstrate a worrying lack of diversity of representation. *To ensure that sectors remain accessible to all as they reopen, it is essential that all decisions and proposals by the Cultural Renewal Taskforce and its working groups are accompanied by full equality impact assessments and monitoring.* (Paragraph 115)
30. Forming a 'Creators Council' could boost confidence across the sector and ensure its views are represented at a time when many of the creative industries workforce are struggling to stay in the sector. *We recommend that DCMS forms a Creators Council as a mechanism for better dialogue with the creative workforce to understand its needs and viewpoints as we emerge from this crisis.* (Paragraph 116)

Appendix 1: Government funding during Covid-19

List of schemes

- [Coronavirus Job Retention Scheme](#)
- [Claim back Statutory Sick Pay](#)
- [Deferred VAT payments](#)
- [Deferred 2nd VAT payment](#)
- [Business Rate Holidays for 2020/21](#)
- [Small Business Grant](#)
- [Retail, Hospitality and Leisure Grant](#)
- [Discretionary Grant Fund](#)
- [Self-Employed Income Support Scheme](#)
- [Coronavirus Business Interruption Loan Scheme](#)
- [Coronavirus Future Fund](#)
- [Bounce Back Loan](#)
- [Coronavirus Large Business Interruption Loan Scheme](#)
- [Covid-19 Corporate Financing Facility](#)

Support and eligibility³³⁴

[Coronavirus Job Retention Scheme](#): Any business can claim up to 80% of employee salaries if they cannot maintain operations. Until 1 July, employees were unable to carry out work for the organisation from which they are furloughed. Changes to scheme on 1 July mean they will be able to work for any amount of time and claim for hours not worked. From 1 August, employers will be required to contribute towards the furloughed wage, with their contributions being gradually increased. The scheme ends on 31 October 2020.

[Claim back Statutory Sick Pay](#): for employees eligible for coronavirus sick pay, for up to two weeks, for employers with fewer than 250 employees in February 2020.

[Deferred VAT payments](#): from May to June to after 30 June.

[Deferred 2nd Self-Assessment payment](#): for 2019/20 until after 31 July, without penalty as long as made before 31 January 2021.

334 All information taken from [HM Government](#) website, accessed 24–25 June 2020

Business Rate Holidays for 2020/21: for shops, restaurants, cafés, bars or pubs, cinemas or live music venues, assembly or leisure properties (for example, sports club, gym or spa), hospitality properties (for example, hotels, guest houses or self-catering accommodation).

Small Business Grant: One-off cash grant of £10,000 for small businesses that are based in England, occupy property, are eligible for small business rate relief (including tapered relief) or rural rate relief on 11 March 2020.

Retail, Hospitality and Leisure Grant: One-off cash grant of £10,000 for businesses with a property with a rateable value of £15,000 or under; or of £25,000 for businesses with a property that has a rateable value of over £15,000 but less than £51,000; if they are:

- based in England
- in the retail, hospitality or leisure sector (shop, restaurant, café, bar or pub, cinema or live music venue, estate agent or letting agency, assembly or leisure property - for example, a bingo hall, a sports club, a gym or spa; hospitality property - for example, a hotel, a guest house or self-catering accommodation).

Discretionary Grant Fund: for small and micro businesses. Managed by local authorities. Grants of £25,000, £10,000 or any amount under £10,000 for businesses that:

- are based in England
- have relatively high ongoing fixed property-related costs
- occupy property (or part of a property) with a rateable value or annual mortgage/rent payments below £51,000
- were trading on 11 March 2020
- and can show that their business has suffered a significant fall in income due to coronavirus.

Self-Employed Income Support Scheme: a taxable grant worth 80% of an individual's average monthly trading profits, paid out in a single instalment covering 3 months' worth of profits, and capped at £7,500 in total. Scheme has been extended to August 2020.

Coronavirus Business Interruption Loan Scheme: helps small and medium-sized businesses to access loans and other kinds of finance up to £5 million. The Government guarantees 80% of the finance to the lender and pays interest and any fees for the first 12 months.

Coronavirus Future Fund: will issue convertible loans between £125,000 to £5 million to innovative companies that are facing financing difficulties due to the coronavirus outbreak.

Bounce Back Loan: enables smaller businesses to access finance more quickly during the coronavirus outbreak. Small and medium-sized businesses can borrow between £2,000 and up to 25% of their turnover. The maximum loan available is £50,000. The Government guarantees 100% of the loan and there will not be any fees or interest to pay for the first 12 months. After 12 months the interest rate will be 2.5% a year.

[Coronavirus Large Business Interruption Loan Scheme](#): helps medium and large businesses to access loans and other kinds of finance up to £200 million. The Government guarantees 80% of the finance to the lender if the business

- is based in the UK
- has an annual turnover of over £45 million
- has not received support under the Bank of England's [COVID-19 Corporate Financing Facility](#) (which will buy short term debt from large companies).

[Covid-19 Corporate Financing Facility](#): buys short term debt from large companies, which make a material contribution to the UK economy.

Formal minutes

Monday 20 July 2020

Julian Knight, in the Chair

Kevin Brennan	Clive Efford
Steve Brine	Rt Hon Damian Hinds
Alex Davies-Jones	John Nicolson

Draft Report (*Impact of COVID-19 on DCMS sectors: First Report*), proposed by the Chair, brought up and read.

Ordered, That the draft Report be read a second time, paragraph by paragraph.

Paragraphs 1 to 116 read and agreed to.

Summary agreed to.

Appendix agreed to.

Resolved, That the Report be the Third Report of the Committee to the House.

Ordered, That the Chair make the Report to the House.

Ordered, That embargoed copies of the Report be made available, in accordance with the provisions of Standing Order No.134.

[Adjourned till Tuesday 21 July at 9.00 a.m.]

Witnesses

The following witnesses gave evidence. Transcripts can be viewed on the [inquiry publications page](#) of the Committee's website.

Tuesday 05 May 2020

Tom Harrison, Chief Executive, England and Wales Cricket Board; **Rick Parry**, Chairman, English Football League; **Bill Sweeney**, Chief Executive Officer, Rugby Football Union [Q1–84](#)

Dame Katherine Grainger, Chair, UK Sport; **Tim Hollingsworth OBE**, Chief Executive, Sport England [Q85–110](#)

Friday 15 May 2020

Liz Williams MBE, Chief Executive, FutureDotNow [Q111–144](#)

Helen Milner OBE, Chief Executive, Good Things Foundation [Q145–168](#)

Nicola Wallace Dean, Community Organiser, Starting Point [Q169–183](#)

Tuesday 19 May 2020

Bernard Donoghue, Director, Association of Leading Visitor Attractions; **Samantha Richardson**, Director, National Coastal Tourism Academy; **Patricia Yates**, Acting Chief Executive Officer, VisitBritain [Q184–244](#)

Hilary McGrady, Director General, National Trust; **Ros Pritchard OBE**, Director General, British Holiday and Home Parks Association [Q245–281](#)

Tuesday 09 June 2020

Julian Bird, Chief Executive, UK Theatre and Society of London Theatre; **Caroline Norbury MBE**, Chief Executive, Creative Industries Federation; **Horace Trubridge**, General Secretary, Musicians' Union [Q282–330](#)

Caroline Dinenage MP, Minister for Digital and Culture, Department for Digital, Culture, Media and Sport; **David Knott**, Director, Office for Civil Society, Department for Digital, Culture, Media and Sport; **Emma Squire**, Director, Covid-19 Economic Response and Arts, Heritage and Tourism, Department for Digital, Culture, Media and Sport [Q331–392](#)

Tuesday 30 June 2020

Richard Masters, Chief Executive, Premier League [Q393–484](#)

Scott Lloyd, Chief Executive, Lawn Tennis Association [Q485–505](#)

Ali Donnelly, Executive Director, Digital, Marketing and Communications, Sport England, Marketing Director, This Girl Can [Q506–535](#)

Tuesday 07 July 2020

Paul Monekosso Cleal OBE, Adviser and non-executive director, sport/
health sector [Q536–575](#)

Eniola Aluko, Former England Women’s footballer [Q576–595](#)

Huw Edwards, Chief Executive, ukactive [Q596–617](#)

Published written evidence

The following written evidence was received and can be viewed on the [inquiry publications page](#) of the Committee's website.

CVD numbers are generated by the evidence processing system and so may not be complete.

- 1 1066 Country Marketing ([CVD0527](#))
- 2 21 Group Libraries Network Community Benefit Society Limited ([CVD0337](#))
- 3 A Thousand Cranes Theatre for Children ([CVD0253](#))
- 4 Abdulrahman Sambo, Dr Yusuf, Ali Imran, Professor Muhammad, Ali Zaidi, Dr Syed, and Zeeshan Shakir, Dr Muhammad ([CVD0570](#))
- 5 ABTA ([CVD0283](#))
- 6 ABTA - The Travel Association ([CVD0004](#))
- 7 ACEVO, Association of Chief Executives of Voluntary Organisations, and Charity Finance Group ([CVD0041](#))
- 8 Acme ([CVD0647](#))
- 9 Action for Children's Arts ([CVD0339](#))
- 10 Active Cornwall ([CVD0407](#))
- 11 Active Sussex ([CVD0221](#))
- 12 Advertising Association ([CVD0245](#))
- 13 Advice Services Alliance ([CVD0373](#))
- 14 Agate Systems Ltd t/a Axate ([CVD0194](#))
- 15 Age UK ([CVD0348](#))
- 16 The Air Ambulance Service ([CVD0072](#))
- 17 Airbnb ([CVD0690](#))
- 18 Airlines UK ([CVD0057](#))
- 19 Airport Operators Association ([CVD0542](#))
- 20 Alexander, Mr David ([CVD0280](#))
- 21 Alexandra Park and Palace Charitable Trust (APPCT) ([CVD0197](#))
- 22 All-Party Parliamentary Group on General Aviation (Heritage Working Group) ([CVD0102](#))
- 23 Allen, Mr Peter ([CVD0239](#))
- 24 Alliance for Intellectual Property ([CVD0183](#))
- 25 Allsopp, Mr Wayne ([CVD0151](#))
- 26 Amanda Malpass PR Ltd ([CVD0187](#))
- 27 Anstice, Mr Ian ([CVD0293](#))
- 28 Anthology Theatre Productions Ltd ([CVD0156](#))
- 29 Anthony Grimshaw Associates LLP ([CVD0019](#))
- 30 APL Event Ltd ([CVD0100](#))
- 31 Archives and Records Association (UK & Ireland) ([CVD0484](#))

- 32 Art Hub Studios CIC ([CVD0541](#))
- 33 Artists' Union England ([CVD0475](#))
- 34 Arts Catalyst ([CVD0356](#))
- 35 Arts Council England ([CVD0495](#))
- 36 Arts Network ([CVD0320](#))
- 37 artsdepot ([CVD0322](#))
- 38 ArtWorks Cymru ([CVD0490](#))
- 39 Assitej UK ([CVD0110](#))
- 40 Associated Board of the Royal Schools of Music ([CVD0243](#))
- 41 Association for Public Service Excellence ([CVD0591](#))
- 42 Association of British Choral Directors ([CVD0543](#))
- 43 Association of British Orchestras ([CVD0047](#))
- 44 Association of Circus Proprietors of Great Britain ([CVD0226](#))
- 45 Association of Dogs & Cats Homes (ADCH) ([CVD0150](#))
- 46 Association of English Cathedrals ([CVD0474](#))
- 47 Association of Festival Organisers ([CVD0018](#))
- 48 The Association of Illustrators ([CVD0392](#))
- 49 Association of Independent Festivals (AIF), Association of Festival Organisers (AFO), and British Arts Festival Association (BAFA) ([CVD0329](#))
- 50 Association of Independent Museums ([CVD0370](#))
- 51 Association of Independent Promoters ([CVD0648](#))
- 52 Association of Independent Showmen ([CVD0396](#))
- 53 Association of Independent Venue Producers ([CVD0205](#))
- 54 Association of Lighting Designers ([CVD0545](#))
- 55 Association of Play Industries ([CVD0016](#))
- 56 Attitude is Everything ([CVD0588](#))
- 57 AudioUK ([CVD0312](#))
- 58 Authors' Licensing & Collecting Society ([CVD0035](#))
- 59 Authors' Licensing and Collecting Society (ALCS), The British Equity Collecting Society (BECS), Directors UK, The Design and Artists Copyright Society (DACs), Equity, The Musicians' Union, The Royal Society of Literature, The Society of Authors, and The Writers' Guild of Great Britain (WGGB) ([CVD0409](#))
- 60 Aviation Heritage - UK ([CVD0128](#))
- 61 Bacta ([CVD0488](#))
- 62 Barbe, Mr Stephen ([CVD0202](#))
- 63 Barbican ([CVD0152](#))
- 64 Barltrop, Mr Chris ([CVD0228](#))
- 65 Bath Preservation Trust ([CVD0505](#))
- 66 BBC ([CVD0136](#))

- 67 BCre8ive ([CVD0399](#))
- 68 Beecroft, Ms Hilary ([CVD0448](#))
- 69 Betting & Gaming Council (Casinos group) ([CVD0082](#))
- 70 Betting and Gaming Council ([CVD0592](#))
- 71 Beveridge, Professor Robert ([CVD0443](#))
- 72 Bhagwat, Amit ([CVD0654](#))
- 73 Birmingham Museums Trust ([CVD0357](#))
- 74 Birmingham Repertory Theatre ([CVD0684](#))
- 75 Blackheath Halls ([CVD0039](#))
- 76 Bluecoat Display Centre ([CVD0017](#))
- 77 Boiler and Engineering Skills Training Trust ([CVD0380](#))
- 78 Bond ([CVD0122](#))
- 79 Border Crossings Limited ([CVD0266](#))
- 80 Bournemouth, Christchurch & Poole Destination Management Board ([CVD0178](#))
- 81 BPI ([CVD0238](#))
- 82 Brabin MP, Ms Tracy ([CVD0189](#))
- 83 Brighton and Hove City Council ([CVD0534](#))
- 84 Bristol City Council Culture and Creative Industries ([CVD0566](#))
- 85 British Association of Picture Libraries & Agencies (BAPLA) ([CVD0464](#))
- 86 British Copyright Council ([CVD0397](#))
- 87 British Council ([CVD0140](#))
- 88 British Cycling ([CVD0685](#))
- 89 British Destinations ([CVD0666](#))
- 90 British Film Institute ([CVD0413](#))
- 91 British Film Institute ([CVD0177](#))
- 92 British Heart Foundation ([CVD0604](#))
- 93 British Holiday and Home Parks Association ([CVD0675](#))
- 94 British Horseracing Authority ([CVD0457](#))
- 95 The British Library ([CVD0477](#))
- 96 British Marine ([CVD0537](#))
- 97 British Records Association ([CVD0465](#))
- 98 British Science Association / UK Science Festivals Network ([CVD0393](#))
- 99 Broadband Stakeholder Group ([CVD0637](#))
- 100 Bromley Little Theatre ([CVD0324](#))
- 101 Brunt, Mr Antony ([CVD0044](#))
- 102 Buckinghamshire Local Enterprise Partnership, Buckinghamshire Business First, and Visit Buckinghamshire and the Chilterns ([CVD0582](#))
- 103 Business Archives Council ([CVD0610](#))

- 104 Calderdale Metropolitan Borough Council ([CVD0605](#))
- 105 Cambridge Science Centre ([CVD0222](#))
- 106 Cambridgeshire County Advisory Group on Archives and Local Studies ([CVD0485](#))
- 107 Cambridgeshire Historic Churches Trust ([CVD0531](#))
- 108 Camden People's Theatre ([CVD0398](#))
- 109 Camelot UK Lotteries Ltd ([CVD0502](#))
- 110 Cancer Research UK ([CVD0659](#))
- 111 Cao, Dr Zheng Chris and Du, Dr Jun ([CVD0645](#))
- 112 Cardboard Citizens ([CVD0636](#))
- 113 Carewe, Mary ([CVD0291](#))
- 114 Catalyst Science Discovery Centre and Museum. ([CVD0068](#))
- 115 Centre for Ageing Better ([CVD0594](#))
- 116 Centre for Sport and Human Rights, Women in Sport, World Players Association, FARE Network, and Mission 89 ([CVD0589](#))
- 117 Chance to Shine ([CVD0428](#))
- 118 Channel 4 ([CVD0425](#))
- 119 Chapterhouse Theatre Company ([CVD0279](#))
- 120 The Chief Cultural & Leisure Officers Association ([CVD0256](#))
- 121 Chimera ([CVD0065](#))
- 122 Churches Together in England ([CVD0374](#))
- 123 CILIP, UK Library and Information Association ([CVD0067](#))
- 124 Circadian Trust ([CVD0233](#))
- 125 Circomedia - Centre for Contemporary Circus and Physical Theatre ([CVD0463](#))
- 126 Circus of Horrors Ltd ([CVD0410](#))
- 127 City of London Corporation ([CVD0668](#))
- 128 Civic Voice ([CVD0549](#))
- 129 The Civic, Stourport ([CVD0036](#))
- 130 Clinks ([CVD0317](#))
- 131 The Coalition for a Digital Economy (Coadec) ([CVD0219](#))
- 132 Coates, Tim ([CVD0307](#))
- 133 COBA (Association for Commercial Broadcasters and On-demand services) ([CVD0060](#))
- 134 Collections Trust ([CVD0338](#))
- 135 Collective Voice ([CVD0552](#))
- 136 Community Leisure UK ([CVD0216](#))
- 137 Compton Verney House Trust ([CVD0364](#))
- 138 Concert Promoters Association ([CVD0603](#))
- 139 The Contemporary Visual Arts Network ([CVD0366](#))
- 140 Cornwall and Isles of Scilly Local Enterprise Partnership ([CVD0599](#))

- 141 Cornwall Museums Partnership ([CVD0223](#))
- 142 Council for Dance, Drama and Musical Theatre (CDMT) ([CVD0681](#))
- 143 Council for Dance, Drama and Musical Theatre (CDMT) ([CVD0460](#))
- 144 Crafts Council ([CVD0264](#))
- 145 Creative Arts East ([CVD0442](#))
- 146 Creative Diversity Network ([CVD0602](#))
- 147 Creative Industries Federation ([CVD0284](#))
- 148 Creative Industries Policy and Evidence Centre (PEC) ([CVD0487](#))
- 149 Creative Kernow Ltd ([CVD0450](#))
- 150 Creative Scotland ([CVD0586](#))
- 151 Crosslight & Sound Production Services Ltd ([CVD0185](#))
- 152 Croydon Council, Croydon Sport, Physical Activity & Health Network, and Croydon Sport Clubs ([CVD0516](#))
- 153 Crying Out Loud ([CVD0470](#))
- 154 Culturapedia ([CVD0440](#))
- 155 Culture Counts ([CVD0557](#))
- 156 Culture Durham Partnership ([CVD0402](#))
- 157 Culture East Sussex ([CVD0108](#))
- 158 Culture Forum North ([CVD0416](#))
- 159 Cumbria Tourism, and Cumbria LEP ([CVD0662](#))
- 160 Curious Minds ([CVD0086](#))
- 161 Deafinitely Theatre ([CVD0420](#))
- 162 Dent, Dr Tamsyn ([CVD0361](#))
- 163 Department for Digital, Culture, Media and Sport ([CVD0677](#))
- 164 Derby Theatre ([CVD0164](#))
- 165 The Design and Artists Copyright Society (DACS) ([CVD0083](#))
- 166 Diane Modahl Sports Foundation ([CVD0087](#))
- 167 Digital Content Associates Ltd ([CVD0400](#))
- 168 Digital Preservation Coalition ([CVD0611](#))
- 169 Directors UK ([CVD0208](#))
- 170 Disco Beats Evolution Ltd ([CVD0401](#))
- 171 District Councils' Network ([CVD0539](#))
- 172 DMG Media ([CVD0492](#))
- 173 Doc Society, Scottish Documentary Institute, and Sheffield Doc/Fest ([CVD0634](#))
- 174 Dogs Trust ([CVD0368](#))
- 175 Donmar Warehouse ([CVD0169](#))
- 176 Doorstep Arts ([CVD0696](#))
- 177 The Dulwich Players ([CVD0290](#))

- 178 Durham County Council ([CVD0345](#))
- 179 Dynamic Earth ([CVD0568](#))
- 180 East Street Arts ([CVD0257](#))
- 181 Eclipse Theatre Company ([CVD0639](#))
- 182 Edinburgh Festival Fringe Society ([CVD0092](#))
- 183 Edinburgh International Festival ([CVD0687](#))
- 184 The Egg ([CVD0106](#))
- 185 The Embassy Theatre Skegness | Magna Vitae Trust for Leisure and Culture ([CVD0276](#))
- 186 Embracing Complexity ([CVD0218](#))
- 187 Engage, the National Association for Gallery Education ([CVD0556](#))
- 188 England and Wales Cricket Board ([CVD0555](#))
- 189 England's Historic Cities Consortium ([CVD0697](#))
- 190 English Civic Museums Network ([CVD0503](#))
- 191 English National Opera and the London Coliseum ([CVD0506](#))
- 192 Entertainment Sound Specialists ([CVD0117](#))
- 193 Equifax, and Digital Identity Net ([CVD0670](#))
- 194 Equity ([CVD0299](#))
- 195 ESL Technical Services Limited ([CVD0154](#))
- 196 ESL UK ([CVD0270](#))
- 197 Eureka! The National Children's Museum ([CVD0292](#))
- 198 The European Entertainment Corporation LTD ([CVD0642](#))
- 199 Evangelical Alliance UK ([CVD0161](#))
- 200 ExcludedUK ([CVD0449](#))
- 201 Exeter Culture ([CVD0613](#))
- 202 The Extreme Stunt Show Limited TA CIRCUS EXTREME ([CVD0473](#))
- 203 FDA ([CVD0258](#))
- 204 Federation of Racecourse Bookmakers ([CVD0498](#))
- 205 Federation of Small Businesses ([CVD0563](#))
- 206 Felixstowe Spa Pavilion Theatre ([CVD0254](#))
- 207 Festival of Thrift ([CVD0454](#))
- 208 Festivals Edinburgh ([CVD0286](#))
- 209 Fevered Sleep ([CVD0209](#))
- 210 Ffilm Cymru Wales ([CVD0678](#))
- 211 The Film and TV Charity ([CVD0565](#))
- 212 The Football Association ([CVD0671](#))
- 213 The Football Collective ([CVD0576](#))
- 214 Freeman, Charles and Morris, Becki ([CVD0335](#))

- 215 The Friends of the Britannia Panopticon Music Hall Trust (SCIO) ([CVD0306](#))
- 216 Fuel ([CVD0663](#))
- 217 Fuel Productions Limited ([CVD0435](#))
- 218 Fundraising Regulator ([CVD0496](#))
- 219 Future Arts Centres ([CVD0367](#))
- 220 Futures Theatre ([CVD0084](#))
- 221 Gallagher, Stephen ([CVD0114](#))
- 222 GambleAware, Citizens Advice, EPIC Risk Management, Fast Forward, GamBan, GamCare, GAMSTOP, Gordon Moody Association, and YGAM ([CVD0524](#))
- 223 Gatwick Airport Limited ([CVD0508](#))
- 224 Glitch ([CVD0296](#))
- 225 Go To Places ([CVD0294](#))
- 226 Good Things Foundation ([CVD0575](#))
- 227 Gracey, Mr Patrick ([CVD0103](#))
- 228 Great Northern Events NW Ltd/Great Northern Contemporary Craft Fairs ([CVD0196](#))
- 229 Great Yarmouth Borough Council ([CVD0436](#))
- 230 Greater Manchester Combined Authority ([CVD0638](#))
- 231 Green, Mr Mark ([CVD0268](#))
- 232 Greyhound Board of Great Britain (GBGB) ([CVD0351](#))
- 233 Gruner, MS Allison ([CVD0052](#))
- 234 Guild of Media Arts, and York UNESCO Creative City of Media Arts ([CVD0095](#))
- 235 GuildHE, and ukadia ([CVD0561](#))
- 236 Haringey Culture Board ([CVD0350](#))
- 237 Harman, Mr Robert ([CVD0295](#))
- 238 Hastings Borough Council ([CVD0181](#))
- 239 HBAA ([CVD0207](#))
- 240 Head4Arts ([CVD0649](#))
- 241 Health Education England ([CVD0171](#))
- 242 Hedingham Castle ([CVD0118](#))
- 243 Help Musicians ([CVD0650](#))
- 244 The Heritage Alliance ([CVD0406](#))
- 245 Hippodrome Casino ([CVD0246](#))
- 246 Historic England ([CVD0347](#))
- 247 Historic Houses ([CVD0172](#))
- 248 Historic Religious Buildings Alliance ([CVD0522](#))
- 249 Hollinrake MP, Kevin ([CVD0340](#))
- 250 Homeless Link ([CVD0574](#))
- 251 HQ Theatres ([CVD0073](#))

- 252 Hull Truck Theatre ([CVD0676](#))
- 253 IAB UK ([CVD0680](#))
- 254 Imagine Theatre Ltd ([CVD0013](#))
- 255 Imperial Society of Teachers of Dancing ([CVD0277](#))
- 256 Imperial Society of Teachers of Dancing ([CVD0162](#))
- 257 Imperial War Museum ([CVD0237](#))
- 258 Impey Clilverd Sport Limited (ICSport) ([CVD0626](#))
- 259 Inc Arts UK ([CVD0341](#))
- 260 Incorporated Society of Musicians ([CVD0569](#))
- 261 The Inland Waterways Association ([CVD0519](#))
- 262 InSport Intelligence ([CVD0689](#))
- 263 The Institute of Conservation ([CVD0523](#))
- 264 Institute of Theatre Consultants ([CVD0308](#))
- 265 Institute of Tourist Guiding, British Guild of Tourist Guides, Association of Professional Tourist Guides, and Driver Guides Association ([CVD0180](#))
- 266 International Centre for Life Trust ([CVD0166](#))
- 267 ISBA ([CVD0664](#))
- 268 ITN ([CVD0598](#))
- 269 ITV plc ([CVD0309](#))
- 270 The Ivors Academy of Music Creators ([CVD0578](#))
- 271 Jewish Leadership Council ([CVD0429](#))
- 272 JHI Marketing ([CVD0085](#))
- 273 Jo Allan PR Ltd ([CVD0107](#))
- 274 Jones, Dr Susan ([CVD0510](#))
- 275 Julie Clare Productions ([CVD0023](#))
- 276 Kawasaki Motors UK ([CVD0127](#))
- 277 Keep Me Posted Campaign ([CVD0699](#))
- 278 Kent and Medway Cultural Transformation Board ([CVD0572](#))
- 279 Kenton Theatre (Henley-on-Thames) Management Society Limited ([CVD0235](#))
- 280 Kerley, Mr William ([CVD0458](#))
- 281 Kids in Museums ([CVD0282](#))
- 282 The Kiln Rooms Ltd ([CVD0021](#))
- 283 King's College London (Dr Tania de St Croix, Lecturer) ([CVD0597](#))
- 284 Latest TV, Brighton ([CVD0421](#))
- 285 Laureus Sport for Good ([CVD0453](#))
- 286 Lawn Tennis Association ([CVD0691](#))
- 287 The League of Independent Producers ([CVD0213](#))
- 288 Leeds City Council ([CVD0644](#))

- 289 Leeds Culture Trust/Leeds 2023 ([CVD0660](#))
- 290 Leicester Print Workshop, Northern Print, West Yorkshire Print Workshop, and Spike Print Studio ([CVD0513](#))
- 291 Leonard Cheshire ([CVD0520](#))
- 292 Level Playing Field ([CVD0379](#))
- 293 Lewes FC ([CVD0560](#))
- 294 Lewisham Council ([CVD0478](#))
- 295 LGBT+ Consortium ([CVD0038](#))
- 296 Libraries Connected ([CVD0546](#))
- 297 The Library Campaign ([CVD0550](#))
- 298 Lighting Hopsital ([CVD0055](#))
- 299 Little Green Pig ([CVD0204](#))
- 300 Little Theatre Guild (LTG) ([CVD0025](#))
- 301 Liverpool City Region Local Enterprise Partnership ([CVD0658](#))
- 302 Lloyds Bank Foundation for England and Wales ([CVD0132](#))
- 303 Local Government Association ([CVD0134](#))
- 304 Local Hospice Lottery ([CVD0640](#))
- 305 Local Trust ([CVD0369](#))
- 306 Local TV Network - LTVN ([CVD0682](#))
- 307 London Borough of Croydon, and Croydon Culture Network ([CVD0509](#))
- 308 London Borough of Hackney ([CVD0285](#))
- 309 London Sport ([CVD0129](#))
- 310 London Theatre Consortium ([CVD0175](#))
- 311 The Lotteries Council ([CVD0679](#))
- 312 LW Theatres ([CVD0217](#))
- 313 Make It York, and York Cultural Leaders Group ([CVD0631](#))
- 314 Making Music ([CVD0319](#))
- 315 Maldon District Council ([CVD0220](#))
- 316 Manchester Art Gallery, and The Whitworth, University of Manchester ([CVD0564](#))
- 317 Manchester City Council ([CVD0229](#))
- 318 Manchester City Council - Libraries ([CVD0567](#))
- 319 Manchester City Of Literature ([CVD0437](#))
- 320 Manchester International Festival, London International Festival of Theatre, Norfolk & Norwich Festival, Gateshead International Festival of Theatre, Fierce Festival, Transform Festival, Wiltshire Creative, Shubbak - A Window on Contemporary Arab Culture, Dance Umbrella, and Brighton Dome & Brighton Festival ([CVD0562](#))
- 321 Manchester Literature Festival ([CVD0215](#))
- 322 Manchester Museum ([CVD0617](#))
- 323 Market Research Society ([CVD0551](#))

- 324 Marketing Cheshire ([CVD0652](#))
- 325 Marketing Lancashire ([CVD0466](#))
- 326 Mason, Mr ([CVD0031](#))
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