

Report on AudioUK COVID-19 survey April 2020

AudioUK is the trade body for UK's independent audio production sector, which is made up of around 180 production companies based all around the UK, making radio programmes, podcasts and audiobooks as well as many other types of audio-led content. These companies bring ideas, stories, talent and perspectives from their communities to the attention of UK and worldwide audiences.

To assess the impact of COVID-19 on the UK audio production sector, AudioUK carried out a swift impact survey of the sector from the period 12 – 24 April.

- A total of 47 companies responded, located in every nation and region of the UK. In line with the makeup of the full Audio UK membership, just under half (22) of these companies have their main office outside London.
- AudioUK estimates that the independent production sector has in total around 180-190 companies overall, therefore this survey represents perhaps between 25% and 26% of the overall sector.
- In terms of main areas of production activity, 39 of the responding companies were involved in radio production, 17 involved in podcast production and three in audio book production.
- The majority of companies employed between one and four staff members, with a similar number regarding freelancers, though some employed considerably more.
- Overall 72% of the companies responding had seen a reduction in their business, with around half of those (34% of the total) saying the reduction had been large. Many specifically commented on the postponement of BBC commissioning.
- Government schemes (at the time of asking) were having limited effect – responses were split between yes, no and don't know.
- More than half of companies have ceased work with freelancers– on average laying off five people.

The full quantitative results of the survey are below.

All enquiries to Tim Wilson, Policy & Communications Adviser: tim.wilson@audiouk.org.uk

Note on anonymised results

Respondents were assured of anonymity in their responses, and any data which might cause the company to be identified has been removed.

In particular, for this reason, data on Questions 1, 2 and 15 have not been included here.

Q3: What are your normal areas of activity? (disregarding any impact of COVID-19)

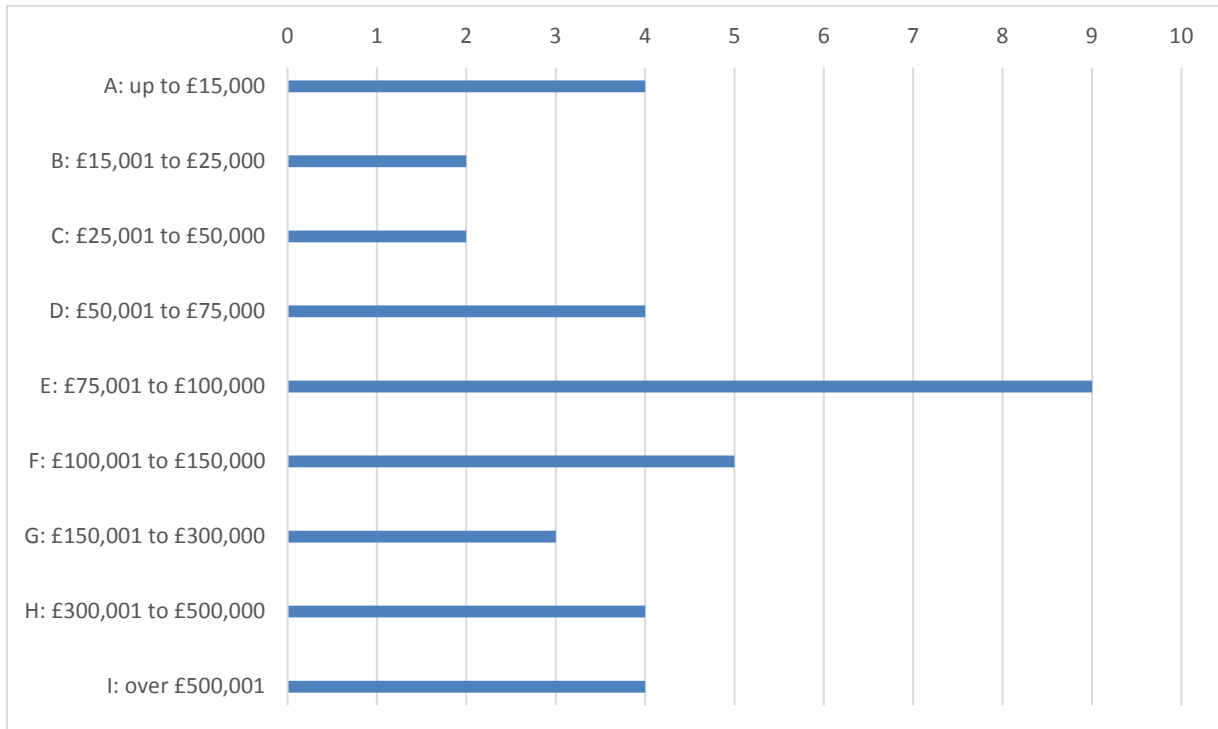
	Main {tick just one please)		Additional (tick all that apply)		Row totals
	ticks	% age of respondents	ticks	% age of respondents	ticks
BBC Radio / Sounds production	32	68%	7	15%	39
Other radio production	7	15%	12	26%	19
Podcast production	17	36%	18	38%	35
Audiobook production	3	6%	7	15%	10
Other audio production (listed below)	4	9%	7	15%	11
Total ticks	63		51		114

Note: a number of companies chose more than one 'main activity' hence total of 63 ticks from 47 respondents

- > apps
- > audio content for sporting bodies
- > audio production that is neither radio or podcast
- > commercial Production
- > corporate/commercial VO
- > I teach audio storytelling
- > museum audio
- > jingles
- > not specified (3)

Q4: What was your last reported annual turnover (excluding VAT)?

Answers ranged from zero (new business) to multi-millions, average £440,000. To preserve confidentiality, detailed amounts are not included here, instead they are grouped by AudioUK membership subscription bands:



Subscription band	Number of respondents
A: up to £15,000	4
B: £15,001 to £25,000	2
C: £25,001 to £50,000	2
D: £50,001 to £75,000	4
E: £75,001 to £100,000	9
F: £100,001 to £150,000	5
G: £150,001 to £300,000	3
H: £300,001 to £500,000	4
I: over £500,001	4
TOTAL (not all companies answered)	37

Q5a: How many full-time staff did you employ on 28 February this year?

[Full-time staff, incl directors, and short-term contracts – 34 companies reported full-time staff]

Full-time staff in company	No of companies	Full-time staff totals
1 to 4	26	39
5 to 9	3	21
10 to 24	3	40
25 to 74	1	25
75+	1	75
Totals	34	200

Q5b: How many part-time staff did you employ on 28 February this year?

[Part-time staff, incl directors, and short-term contracts]

Part-time staff size	No of companies	Part-time staff totals
1 to 4	11	23
5 to 9	1	6
Totals	12	29

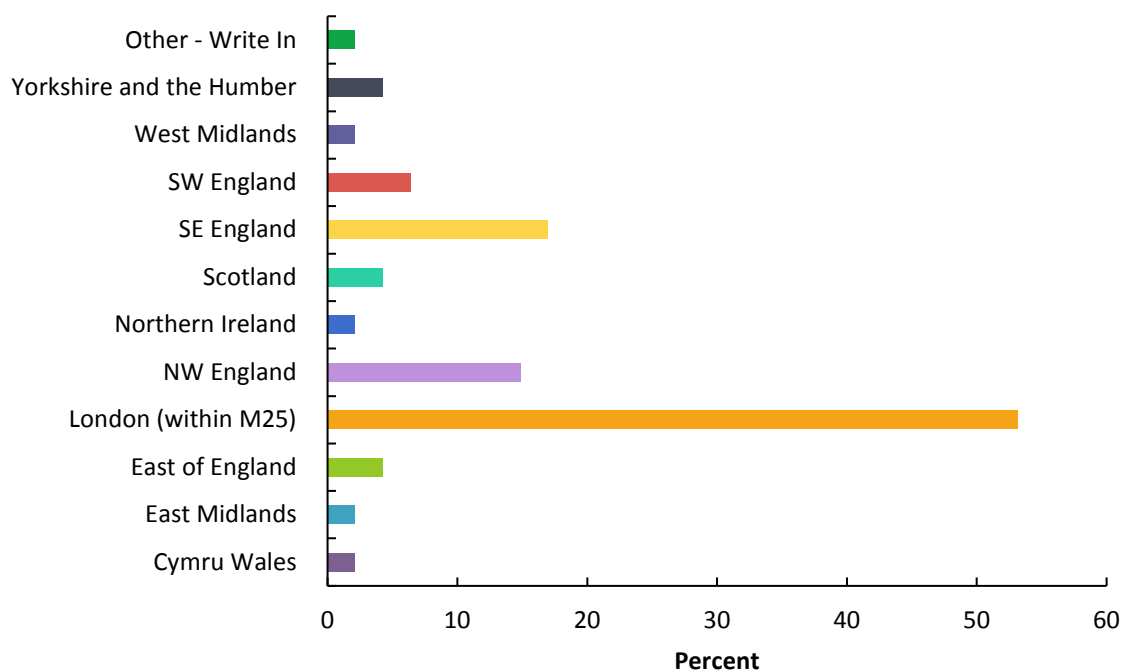
Q5c. How many freelance staff did you employ on 28 February this year?

[Freelance, incl self-employed partners]

No of freelancers in company	No of companies	Freelance totals
1 to 4	19	48
5 to 9	5	32
10 to 24	5	58
25 to 49	1	26
50 plus	1	50
Totals	31	214

Q6. Where is your business located?

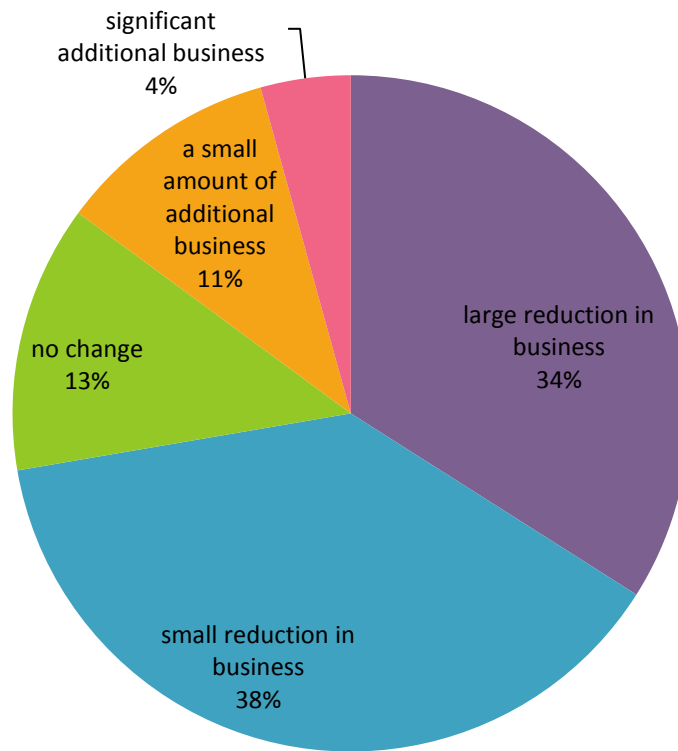
You can choose more than one location if you have multiple offices/studios etc.



Value	Percent	Count
Cymru Wales	2.1%	1
East Midlands	2.1%	1

East of England	4.3%	2
London (within M25)	53.2%	25
NW England	14.9%	7
Northern Ireland	2.1%	1
Scotland	4.3%	2
SE England	17.0%	8
SW England	6.4%	3
West Midlands	2.1%	1
Yorkshire and the Humber	4.3%	2
Other – New York	2.1%	1

Q7. What has been the impact of COVID-19 on your business?

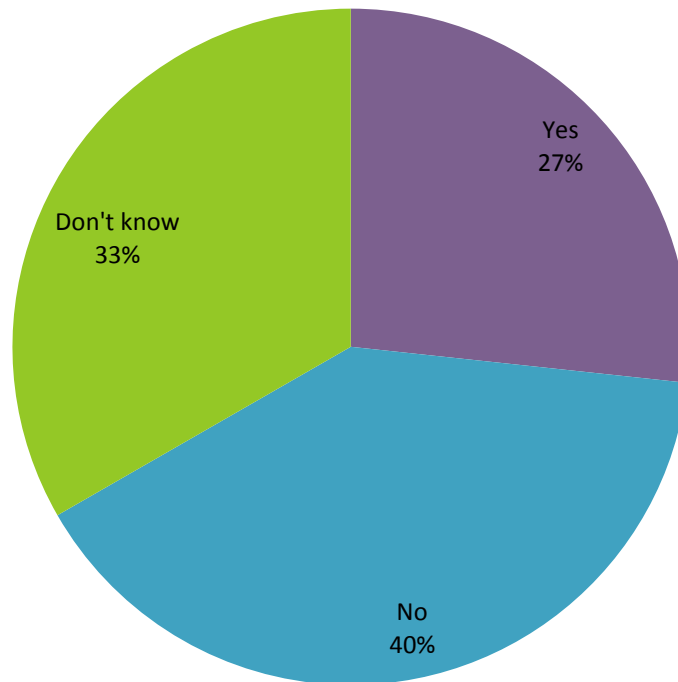


Value	Percent	Count
large reduction in business	34.0%	16
small reduction in business	38.3%	18
no change	12.8%	6
a small amount of additional business	10.6%	5
significant additional business	4.3%	2
	Totals	47

Q8. For the following different types of available support, are you ...?

	Aware of it		Applied for it (if required)	Received support
		% of respondents		
Job retention (furlough) scheme	38	84%	3	1
VAT/Income Tax Deferral	40	89%	8	3
Sick Pay Relief	23	51%		
Business rate exemption	31	69%	2	1
Coronavirus Business Interruption Loan Scheme (CBILS)	30	67%	2	
HMRC time to pay	22	49%		2
Self-assessment deferral	27	60%		1
£10,000 grants to those receiving small business rate relief	24	53%	5	2
Universal Credit	31	69%	1	1
Hardship Fund from Local Authorities	18	40%		
Self Employed Income Support Scheme	28	62%	1	
Arts Council England emergency funding (or equivalent)	26	58%	2	

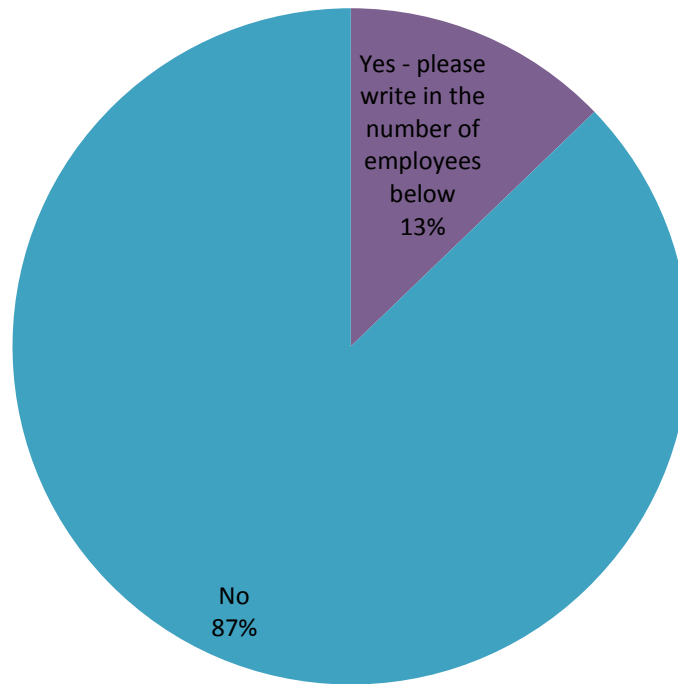
Q9. Do you think the above schemes are effective, for your business?



Value	Percent	Count
Yes	27%	12
No	40%	18
Don't know	33%	15
	Totals	45

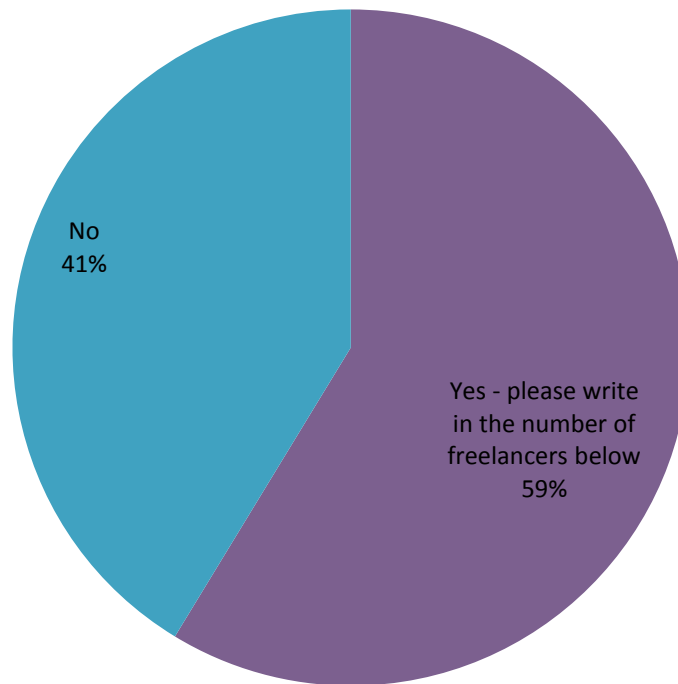
Q10. Have you had to put any staff on 'furlough'?

(defined by the Govt as keeping an employee on the payroll if your business is unable to operate or you have no work for them because of COVID-19).



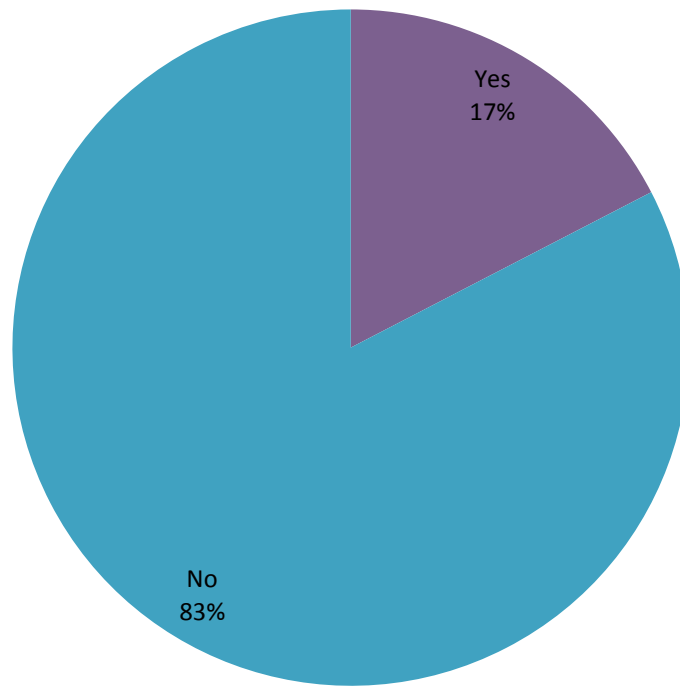
Value	Percent	Count
Yes - please write in the number of employees below	12.8%	6
No	87.2%	41
	Totals	47
<i>Numbers written in:</i>		1, 1, 1, 5, 2, 1

Q11. Have you had to cease work with any freelancers?



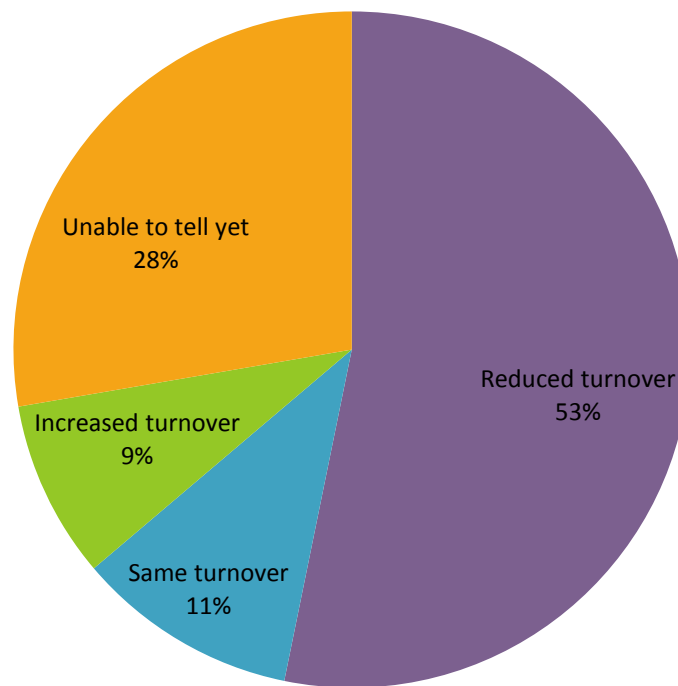
Value	Percent	Count
Yes - please write in the number of freelancers below	58.7%	27
No	41.3%	19
	Totals	46
Numbers written in:	3 or 4, 12, 2 (and reduced days another 3), 2, 2, 4, 2, 4, 2, 8, 4, 5, 6, 15, 2, 3 – a total of 79 affected PLUS comments on next page	

Q13. Have you submitted a bid for the Audio Content Fund special coronavirus round?



Value	Percent	Count
Yes	17.4%	8
No	82.6%	38
	Totals	46

Q14. What do you think the long term effects of the COVID-19 pandemic will be on your business turnover for 2020-21?



Value	Percent	Count
Reduced turnover	53.2%	25
Same turnover	10.6%	5
Increased turnover	8.5%	4
Unable to tell yet	27.7%	13
Totals		47