

Music Support Fund – Evaluation Survey results

March 2021

Report by:

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Key Points:

1. **Business closure was a risk** to most Music Support Fund recipients at the time of application (n=41). Views of when closure was a risk varied from within three months of making the application to within six to 12 months of making the application. For six recipients the risk was imminent especially for live music and music creators. Despite these initial concerns, **as of December 2020, 100% (n=47) of businesses who responded to the Music Support Fund evaluation questionnaire were still trading**, albeit at varying levels of success.
2. **All respondents had lost some proportion of income** at the time of applying for the Music Support Fund. A sizable group had lost 100% of income, with a particular impact on single person and micro-businesses (n=17). When commenting on their annual turnover in December 2020, the majority (85%) of respondents noted this is down since the same time last year, either significantly (n=32) or slightly (n=8).
3. The majority of the Music Support Fund was **used to help pay business rent/mortgage**; and to **support the business to pivot** its activity during the pandemic. Those who used the fund to pivot business activity, **95% (n=18) agreed that pivoting the activity of the business helped its survival**. A significant proportion of these **businesses diversified their activities online**, with seven businesses responding to say they built an online presence and five highlighting how they moved to working online.
4. In December 2020, when the Liverpool City Region was in Tier 2 national lockdown restrictions, nearly all of the respondents to Music Support fund evaluation **agreed (98%, n=46)** with the statement ***“The Music Support Fund helped my business address the challenges faced as a direct result of Covid-19”*** and **96% (n=45) agreed “The Music Support Fund has helped you sustain your business through this difficult time”**.

Key Points (Continued):

6. When commenting on **the value of the Music Support Fund**, nine responses highlighted the benefit of having **'time to plan'** for next steps. There were seven responses which linked the Music Support Fund to **aiding the survival of the business**. The Music Support Fund was seen as valuable because it was the **only funding available to some recipients at the time of application** (n=5). One respondent classified the support as a much welcome lifeline, and a funding stream unique to the Liverpool City Region.
7. Businesses had made a total of **74 applications to other funding streams, 64 were successful** and received support. The Council Small Business Grant, Bounce Back Loan and Arts Council England awarded the most applications for financial support. **104 applications were made by businesses for other support packages, and 95 were successful**. The Job Retention scheme, VAT/income tax deferral, Self-employed income support; and the small business grant for businesses in receipt of SBRR awarded the most support packages.
8. **100% of respondents were satisfied** with the **application process** for Music Support Fund.

Background & Methodology



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Background:

Music Support Fund – COVID 19

The Liverpool City Region Combined Authority approved an award of £2m of SIF funding to support the Liverpool City Region Music Industry Sector Development Pilot Project, to deliver a programme of business growth, skills and talent development and associated work to strengthen the LCR music ecosystem. This was approved at its meeting of 20th March 2020.

The LCR Combined Authority approval was for an initial £250,000 to be awarded from SIF 2 with the remaining £1,750,000 to be funded from SIF 3, subject to funding.

However, within days of the approval of the SIF award, on 23rd March 2020 the Prime Minister made announcements to confirm that the country was in effect in lockdown. It became clear that the restrictions imposed by the Government during lockdown and its aftermath, would have a significant impact on the music industry sector and its associated supply chain.

A request for £150,000 of the initial £250,000 be repurposed towards Business Support and Survival was agreed and an emergency fund, the 'LCR Music Industry Support Fund' was established on 15th April 2020 in partnership with Culture Liverpool/UNESCO Music Office within Liverpool City Council. The fund was overseen by the LCR Music Board and Culture Liverpool/ Liverpool City Council were the accountable body for the funding.

Background (Continued):

As a result of this, the LCR Music Industry Support Fund was established to support micro-businesses and SME's with head offices in the LCR, which are directly related to the music sector. Applications for support had to demonstrate;

- how the coronavirus crisis has directly impacted the business;
- that the funding will ensure survival of the business; and
- why the business was not eligible for support from Government at the time of application or that the Government support on offer was not sufficient.

The Fund closed on 30th April 2020, receiving 96 applications in total, with 52 businesses awarded funding from the Music Support Fund. The highest awards granted were £5,000.

Evaluation Methodology:

The Music Support Fund evaluation questionnaire covered areas including...

How has the LCR Music Industry fared during the pandemic?

- Impact on business at time of application?
- Expectations for next 6-12 months from application?

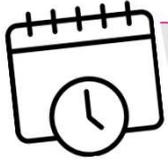
How has the Music Fund helped, if at all?

- Motivations for applying?
- Alternatives funding sources/support available – which have been secured by music businesses?
- Did music fund provide a solution to challenges at the time?
- How satisfied were applicants with the application process?

What has happened since to the business?

- What roles has funding played in safeguarding against redundancies/closures?
- What are the concerns going forward for the music sector?

Evaluation Methodology (Continued):

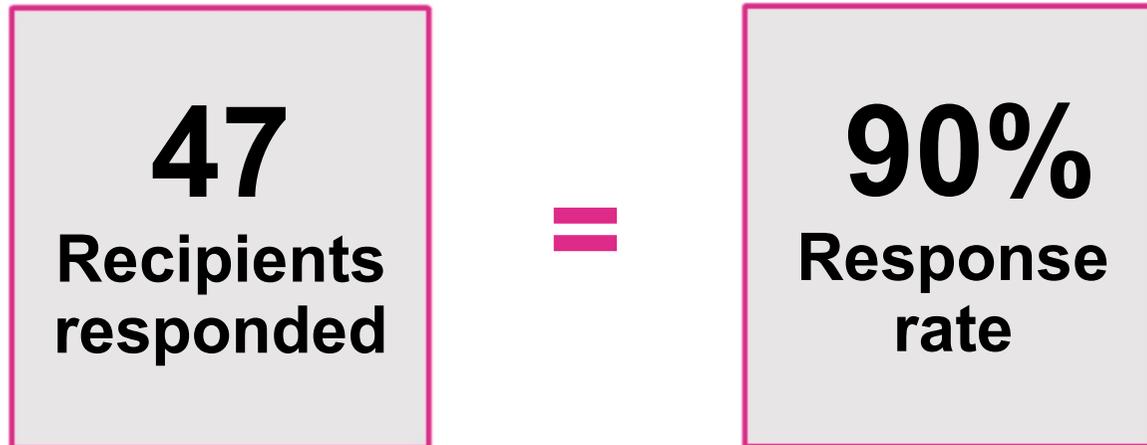


The survey ran from
2nd to 21st December 2020



The survey was conducted
online via Snap Surveys

The online evaluation questionnaire was emailed directly to all 52 recipients of the Music Support Fund on Wednesday 2nd December 2020, this coincided with the Liverpool City Region dropping from Tier 3 lockdown restrictions to Tier 2, which saw some of the restrictions loosen within the city region.



1. Profile of fund recipients



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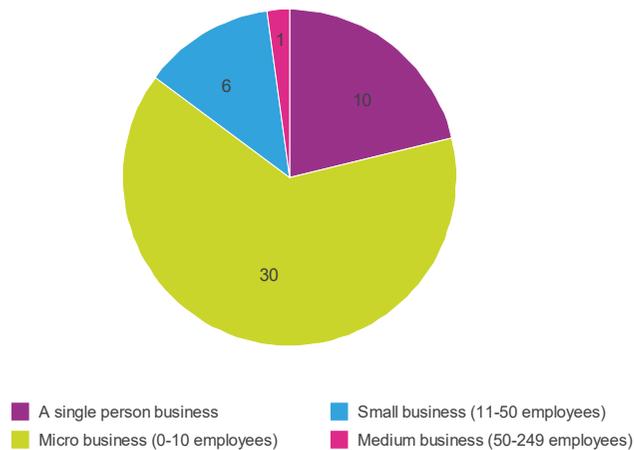
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Majority of support fund recipients classified as a micro business with up to 10 employees.

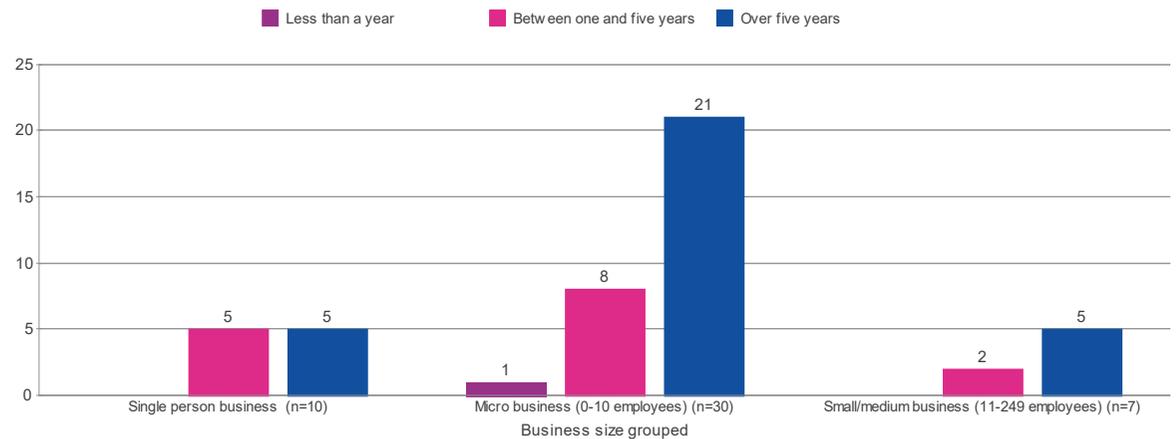
Ten recipients are a single person business* with nine classified as professional earning at least 75% of their income from music related activity (one person classified as semi-professional).

Is your business...?



The majority of recipients are longstanding businesses with 31 trading for over five years. Only one recipient had been trading less than one year and this was a micro business.

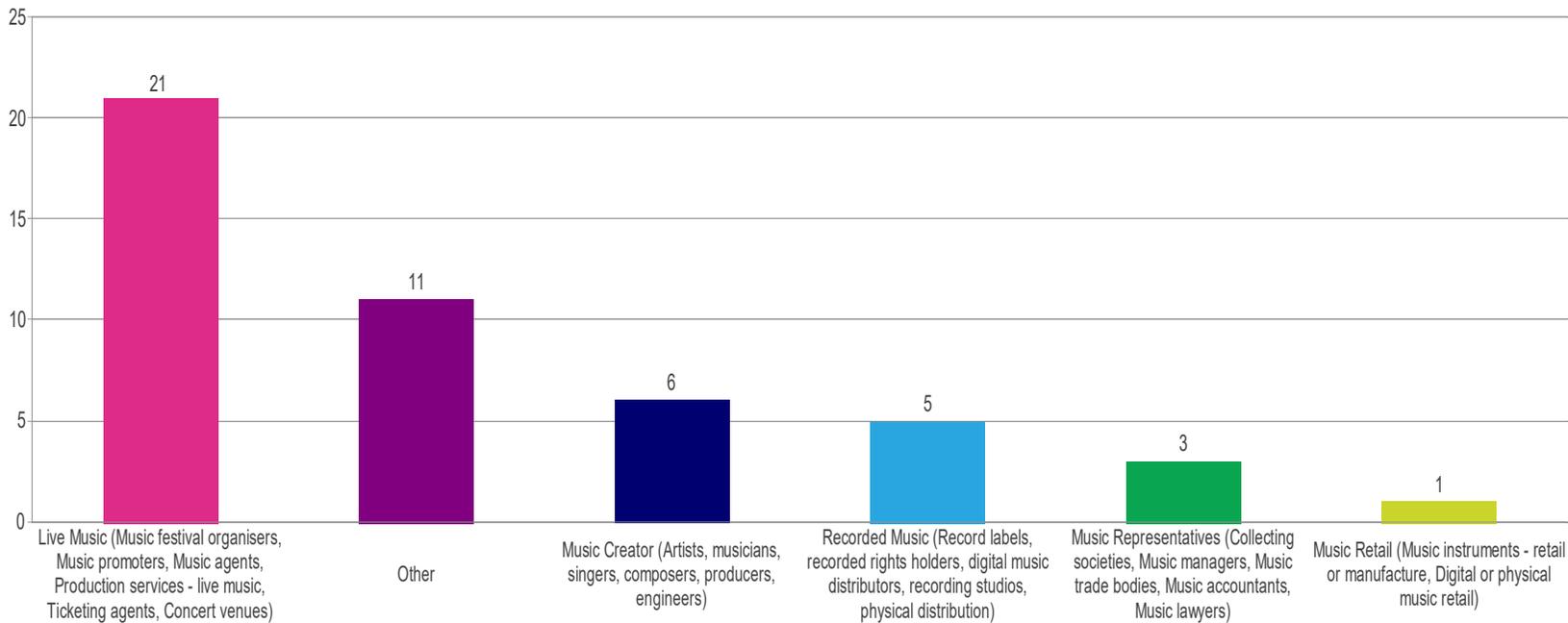
Size of business by length of time trading



* 7 self-employed/sole trader, 2 Directors and 1 part PAYE/part self-employed.

Majority of businesses active within the Live Music sector

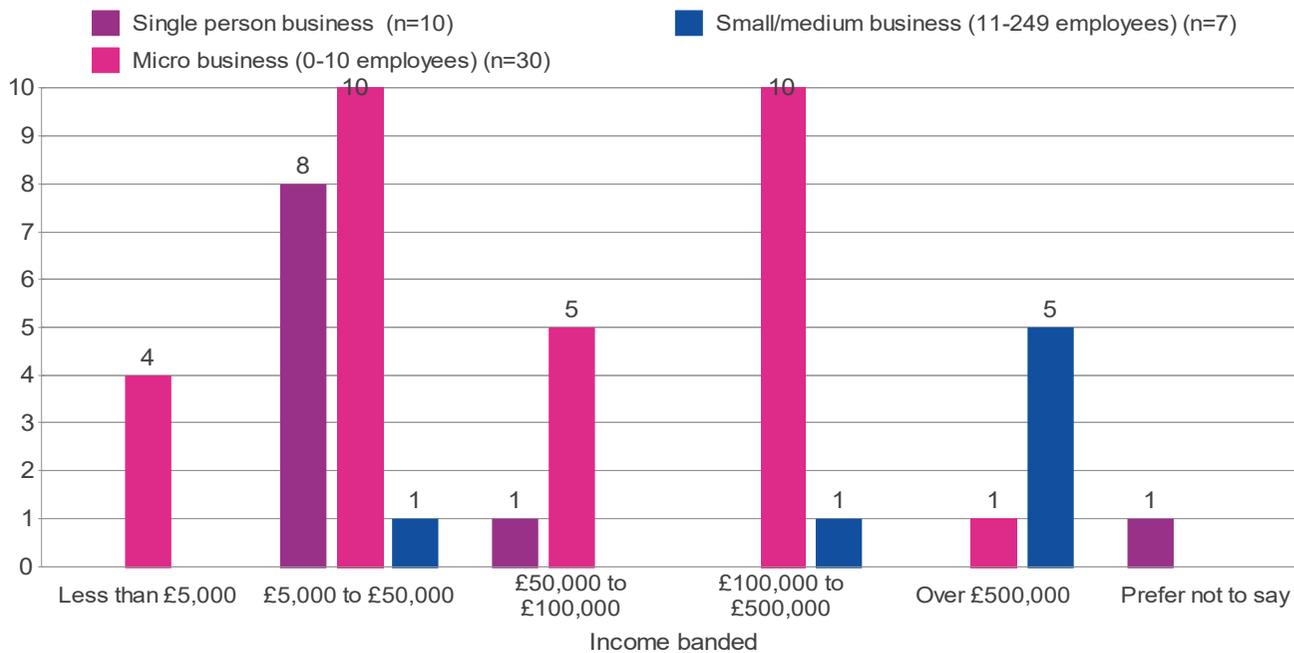
Area of music business works in



- The fund mainly supported businesses involved with live music events, music creators, recorded music, music representatives and music retail.
- Other activities include music schools/ tuition/ education, consultancy and public relations for music, events, festivals and clubs; film, television and radio.

The Music Support Fund primarily supported micro businesses covering a range of different income bands

Size of business by income



Majority of Music Support Fund awarded was between £1,500 and £5,000

The application process required an explanation of how funding awards will be used for business support and survival. Reasons from applicants included to:

- Compensate for loss of earnings/paying wages
- Rent/overheads and bills
- Upgrading/buying new equipment to help the business move online
- Marketing activities

From the £150,000 awarded in total, respondents to the evaluation were awarded £135,750.

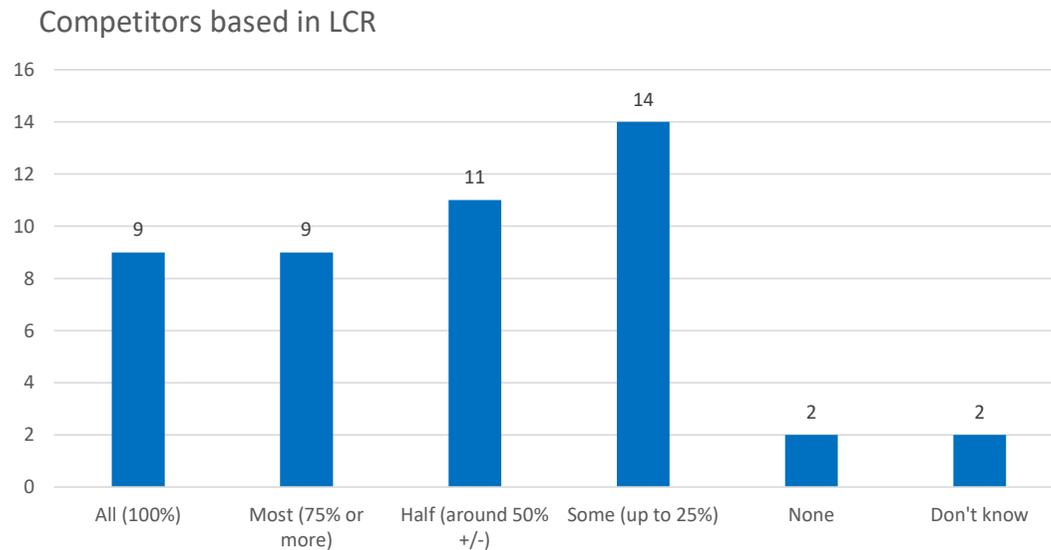
- The level of funding awarded was mostly split between medium value (£1,500 to £2,500) and high value (£3,000 to £5000) across all business sizes.
- Low value payments went to single person or micro businesses.

Value of Music Support Fund awarded	Single person business	Micros business (0-10 employees)	Small/medium business (11-249 employees)	Total
Low (£500 to £1,250)	3	4	-	7
Medium (£1,500 to £2,500)	6	12	2	20
High (£3,000 to £5,000)	1	14	5	20
Total	10	30	7	47

Q2 Is your business...? (Base: 47 respondents) and value of funding awarded.

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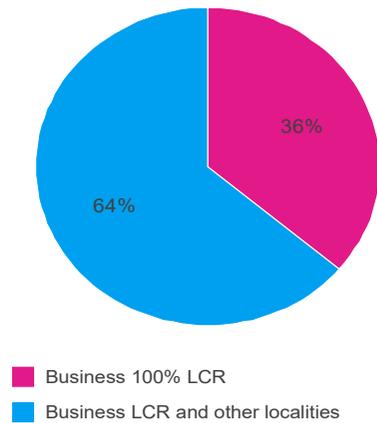
Most recipients have local competitors based within the LCR.



- The majority of businesses have local competitors based in the LCR, with 29 having at least half based here.
- Just two stated that they did not have any competitors based in the city region.
- The Live Music sector tended to state that they have at least some competitors based in the LCR (n=18 out of 21)

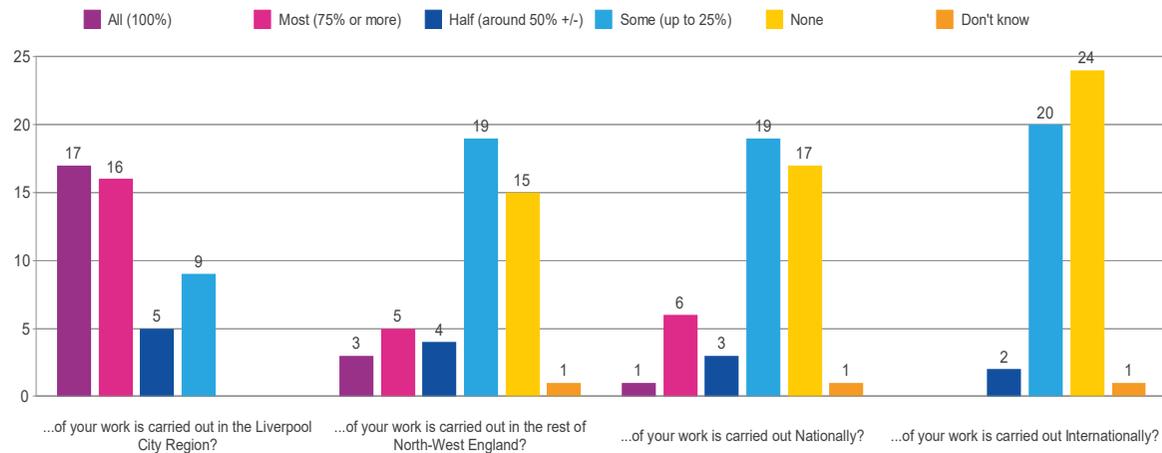
The catchment area of businesses extends wider than the LCR with both national and international reach

Proportion of business based in LCR



- Around a third (n=17) of recipients carry out 100% of their business solely within the LCR. These tended to be micro-businesses (n=11).
- Other businesses have a wider catchment across the North West, nationally and internationally including music creators, recorded music, music representatives and those involved with live music events.

Business reach



2. What impact did the pandemic have on businesses applying for the LCR Music Support Fund?



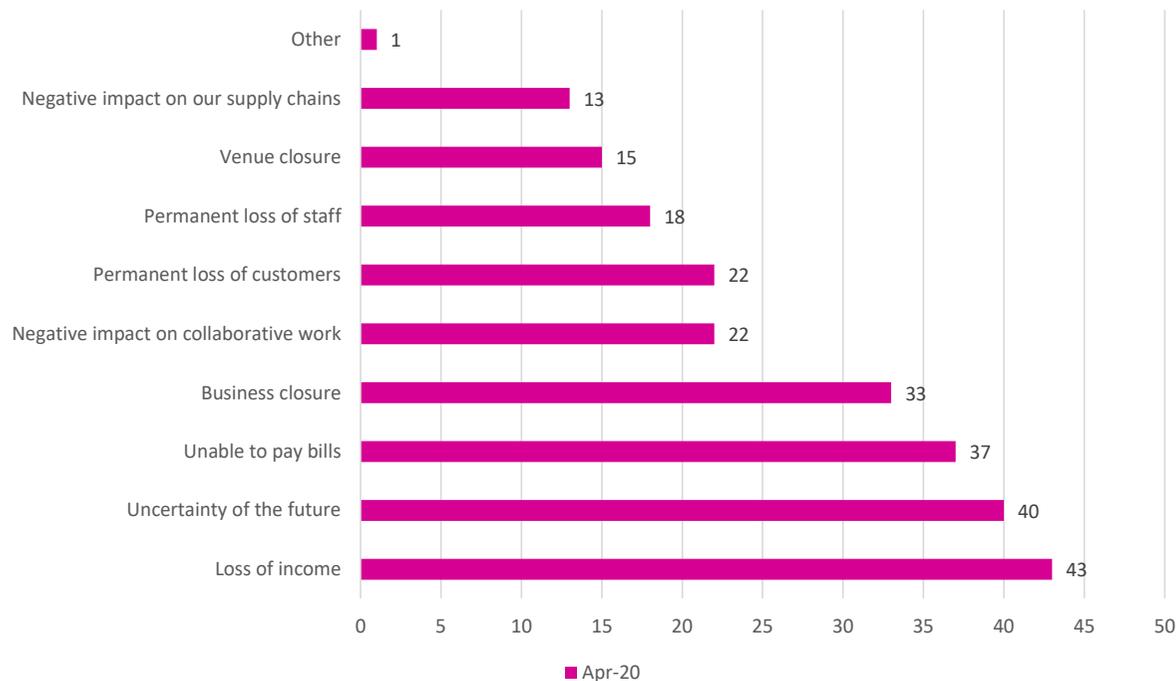
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Loss of income, uncertainty of the future and being unable to pay bills were some of the immediate concerns of businesses during the first lockdown.

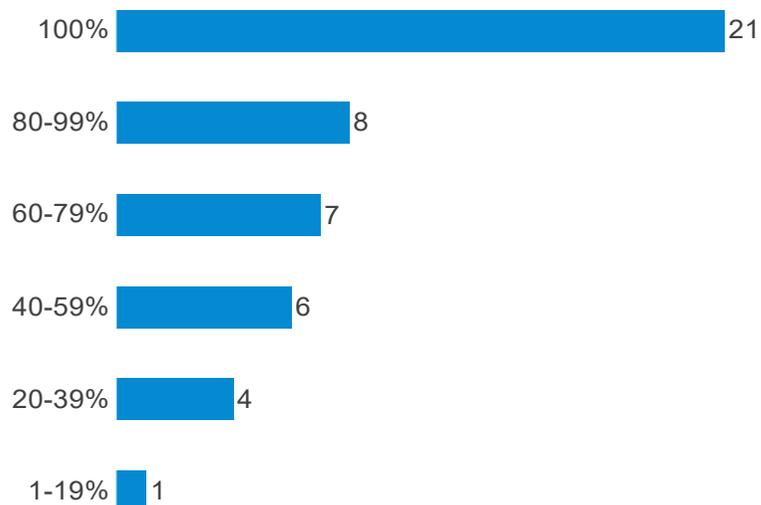
Immediate concern for business during first lockdown



- At the time of applying for the Music Support Fund, businesses faced a number of concerns as a result of the pandemic and subsequent first lockdown.
- When asked to reflect on these concerns during lockdown and the three months that followed: loss of income, uncertainty of the future and being unable to pay bills were the top three concerns.

Impact on income and take up of furlough

Approximate percentage of music related income lost as a direct result of Covid-19 pandemic
Base (n=47)



- All respondents had lost some proportion of income at the time of applying for the Music Support Fund. A sizable group had lost 100% of income, with a particular impact on single person and micro-businesses (n=17).
- Half of businesses (n=18) had furloughed their staff at the time of application.
- Eleven furloughed **all staff** – mainly micro businesses (n=8) and small businesses (n=3).
- Only two single person businesses were able to self-furlough at the time.

Q12: At the time when you applied for the Music Support Fund, approximately what percentage of your music related income had you lost as a direct result of the Covid-19 pandemic (**Base: 47 respondents**)

Q13a: When you applied for the Music Support Fund, had you furloughed any staff? (**Base: 36 respondents**)

Q13b: When you applied for the Music Support Fund, were you able to self-furlough? (**Base: 10 respondents**)

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Risk of business closure was a concern for many recipients of the Music Support Fund



- **Business closure was a risk** to most Music Support Fund recipients at the time of application (n=41). Views of when closure was a risk varied from within three months of making the application to within six to 12 months of making the application. For six recipients the risk was imminent especially for live music and music creators.

Risk of redundancies within businesses

- All recipients of the Music Support Fund with the exception of single person businesses, were asked to comment on redundancies. There were 16 Music Support Fund recipients who had thought about making redundancies at the time of application. None had started the redundancy process, but there was a mixture of planning to do so in the short, medium and long term.
- 21 businesses had not considered planning to make redundancies and these tended to be micro businesses (n=20).

At the point you applied for the Music Support Fund, did you envisage you were going to have to make redundancies?	Count
No, I was not planning to make redundancies	21
Yes, was considering the use of redundancy in the long term	6
Yes, was considering the use of redundancy in the short term	5
Yes, was considering the use of redundancy in the medium term	5
Yes, was starting the redundancy process	-

3. Alternative funding and support.



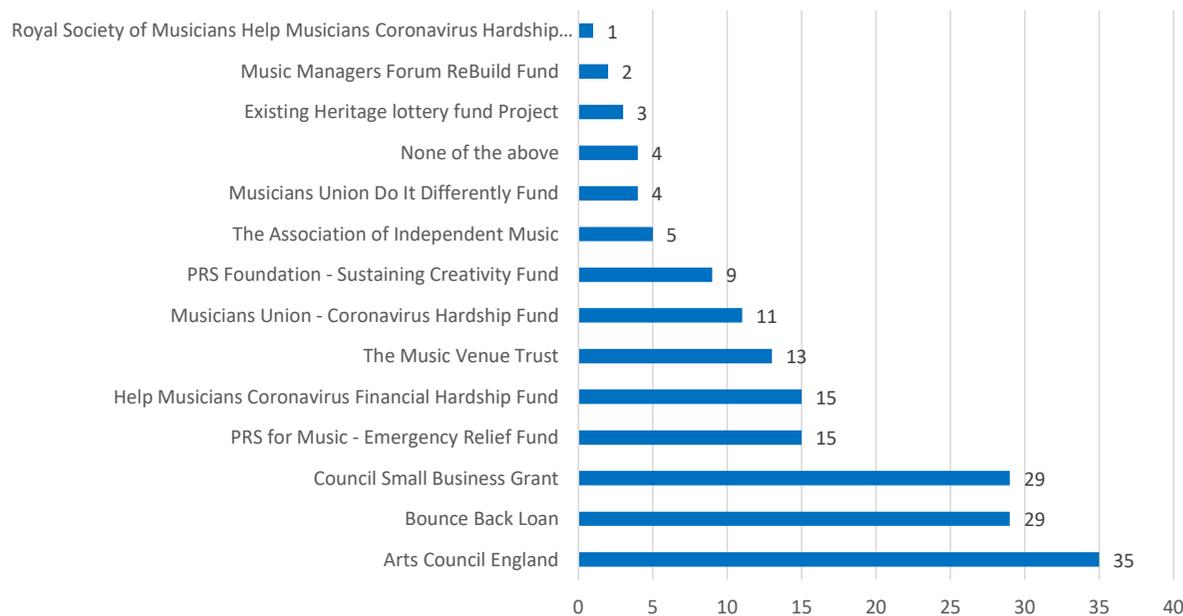
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Awareness of alternative funding sources

Awareness of financial streams available to Music Sector



- Music Support Fund recipients had mixed experiences of applying for public funding prior to the Covid-19 pandemic. Equal balance between those that had experience (n=23) and those with no experience (n=24). Those with no experience tended to be a single person business (n=7).
- Most businesses were aware of a range of other financial streams available to the music sector at the time of application. With awareness greatest for support offered by Arts Council England, the Bounce Back Loan and the Council Small Business Grant.

Q10: Prior to the Covid-19 pandemic, had you experience of applying for public funding for your business? **(Base: 47 respondents)**

Q16: Did you know about financial support streams made available from the following organisations? ? **(Multi-response question. Base: 47 respondents)**

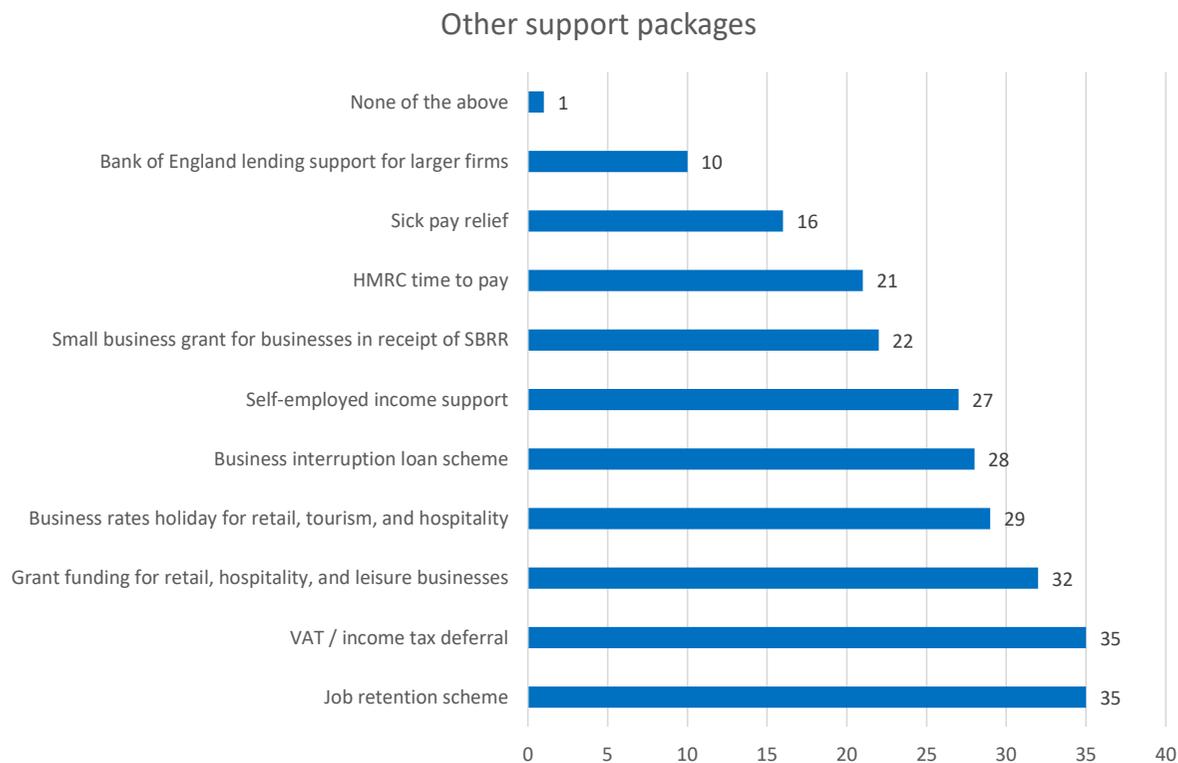
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Take up of alternative funding sources

Have you applied for financial support from any of the following organisations?	Yes applied and received support	Yes applied, but did not receive support	Total applied
Arts Council England	11	8	19
Bounce Back Loan	20	-	20
Council Small Business Grant	21	-	21
PRS for Music –Emergency Relief Fund	1	1	2
Help Musicians Coronavirus Financial Hardship Fund	6	1	7
The Music Venue Trust	1	-	1
Musicians Union – Coronavirus Hardship Fund	1	-	1
The Association of Independent Music	2	-	2
Existing Heritage lottery fund Project	1	-	1
Total	64	10	74

- A total of 74 applications were made to other funding streams, 64 were successful and received support.
- The Council Small Business Grant, Bounce Back Loan and Arts Council England awarded the most applications for financial support.

Awareness of other support packages



- Most businesses were aware of a range of other support packages available to the music sector at the time of application.
- With awareness greatest for support offered by the Job Retention scheme, VAT/income tax deferral; and grant funding for retail, hospitality, and leisure businesses.

Take up of other support packages

Have you applied for any of the financial support made available?	Yes applied and received support	Yes applied, but did not receive support	Total applied
Job retention scheme	19		19
VAT/income tax deferral	16	1	17
Sick pay relief	1		1
Business rates holiday for retail, tourism, and hospitality	8		8
Grant funding for retail, hospitality, and leisure businesses	10	4	14
Small business grant for businesses in receipt of SBRR	11		11
Business interruption loan scheme	9	1	10
HMRC time to pay	9	1	10
Self-employed income support	12	2	14
Total	95	9	104

- A total of 104 applications were made for other support packages, 95 were successful.
- The Job Retention scheme, VAT/income tax deferral, Self-employed income support; and the small business grant for businesses in receipt of SBRR awarded the most support packages.

4. How has the Music Support Fund helped businesses?

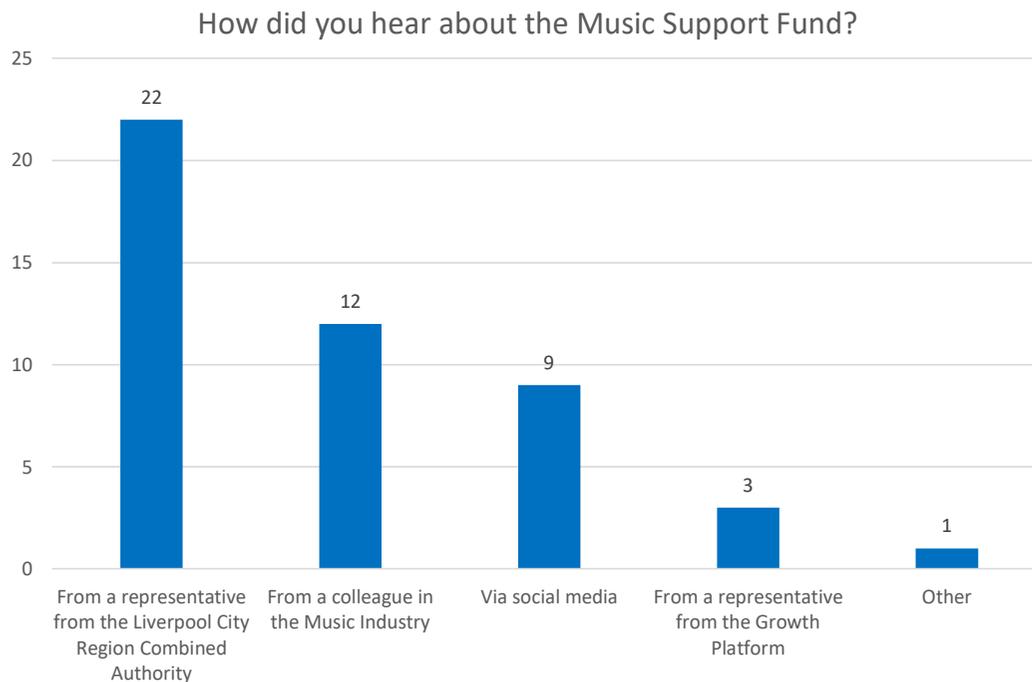


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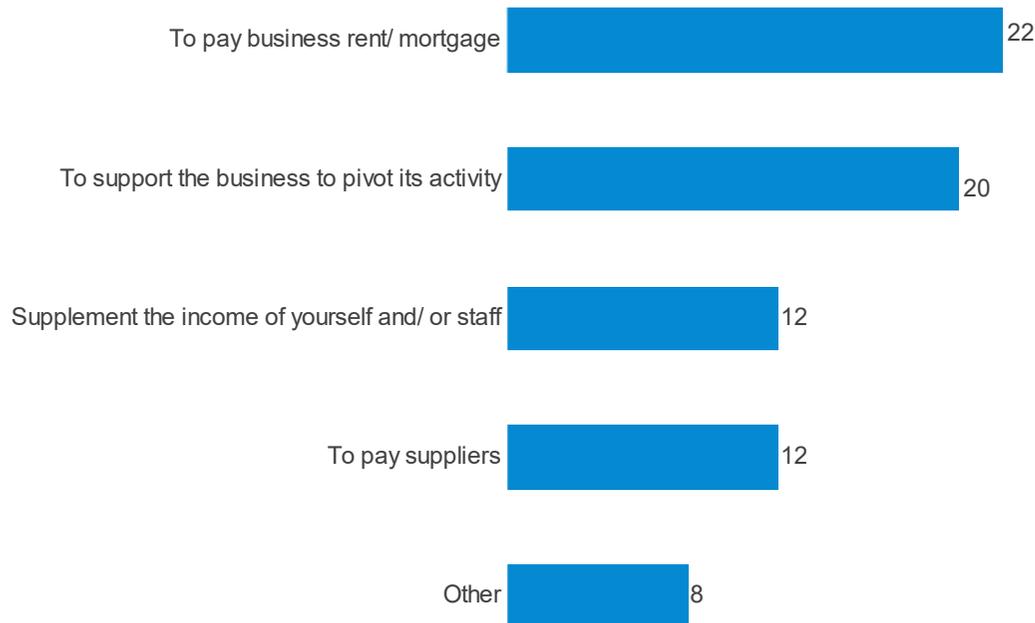
Majority of businesses heard about the Music Support Fund directly from the Liverpool City Region Combined Authority



- Majority of businesses heard about the Music Support Fund directly from the Liverpool City Region Combined Authority (n=22). Other channels included word of mouth within the music industry and social media. The other option was via the Liverpool Business News.
- Single person businesses more likely to find out about the Music Support Fund via colleagues in the music industry and social media and micro businesses via the LCRCA.

Music Support Funds awarded were used mainly to help pay business rent/mortgage or to pivot business activity

How funding was used
Base (n=47)

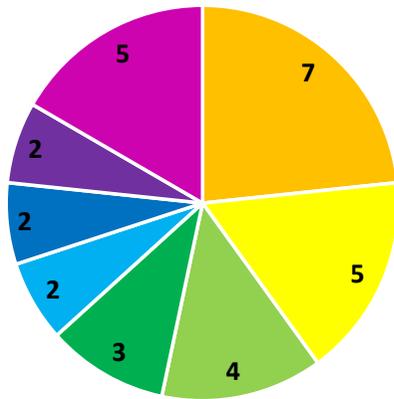


- In line with what was set out within the application forms, the majority of Music Support Funds awarded were used to help pay business rent/mortgage; and to support the business to pivot its activity during the pandemic.
- Paying suppliers and supplementing incomes were also key motivations.
- Other reasons included to purchase equipment, help with marketing business and to cut hourly rates of studio hire for others.

Pivoting activities

20 recipients used the Music Support Fund to support their business to pivot its activity. A significant proportion of these businesses diversified their activities online, with seven businesses responding to say they built an online presence and five highlighting how they moved to working online. Four respondents invested in equipment to enable the business to focus in other areas.

How the activity of the business pivoted (No. of responses).



- Built online presence
- Moved to working online
- Equipment investment
- New business area
- Adapting business to follow covid-safe guidance
- Remote working
- Training
- Other

Pivoting business was a very positive experience for some respondents and a viable long term business option.

“We developed an App that enabled us to teach Globally. Once fully implemented we will roll out the younger age program within the App and offer it free to all Reception departments in all Primary Schools within the Liverpool area. The App brought in nearly £11k in its first month of release which was a business-saving result” – Small business, Music education.

Whilst others felt their pivoting action was not sustainable in the long term.

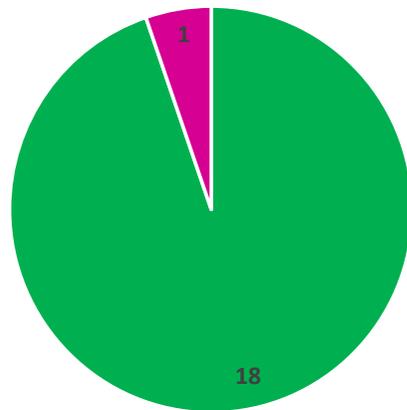
“We moved to online provisions of tuition. Not a viable solution realistically for this industry but it was out of complete necessity” – Micro business, Music education.

Other ways businesses pivoted included individual businesses pursuing non-music related freelance work as a short term alternative or by developing new products.

Q21b Please explain how you pivoted the activity of the business, for example a move to online sales? (Base: 20 respondents; 30 responses)

Pivoting activities helped business survival

Did pivoting the activity of the business help your business survive?



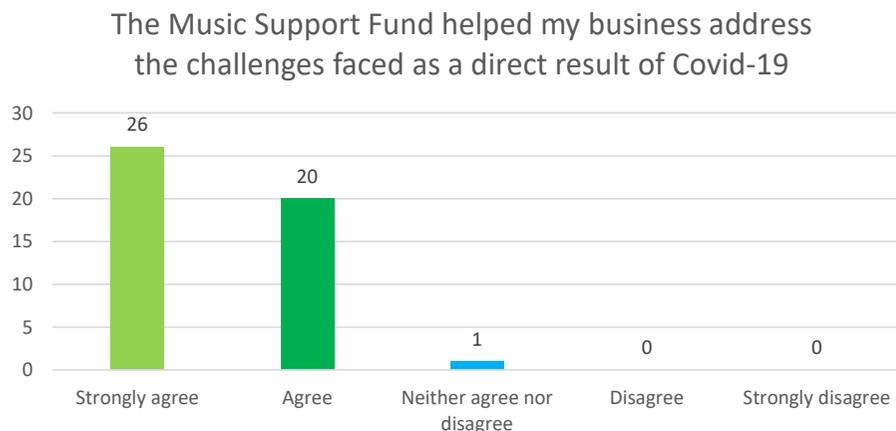
■ Yes ■ No

The majority (95%) those who responded to this question answered “yes”, that pivoting the activity of the business helped its survival.

The one business who answered “no” noted that they used the fund to research different ways of pivoting the business.

“Research to look at other business models” – Micro business, Live Music.

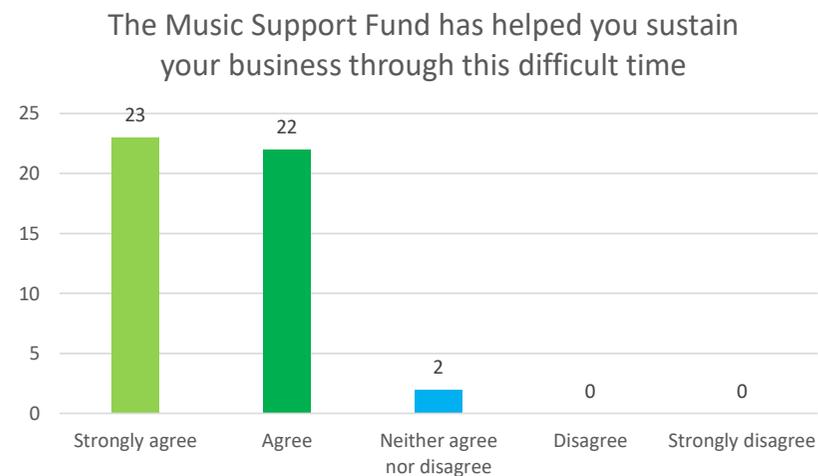
98% agreement “The Music Support Fund helped my business address the challenges faced as a direct result of Covid-19”



- Nearly all Music Support fund recipients either strongly agreed (55%) or agreed (43%) with the statement “*The Music Support Fund helped my business address the challenges faced as a direct result of Covid-19*”.
- One recipient from the Live Music sector neither agreed nor disagreed with the statement.

96% agreement “The Music Support Fund has helped you sustain your business through this difficult time”

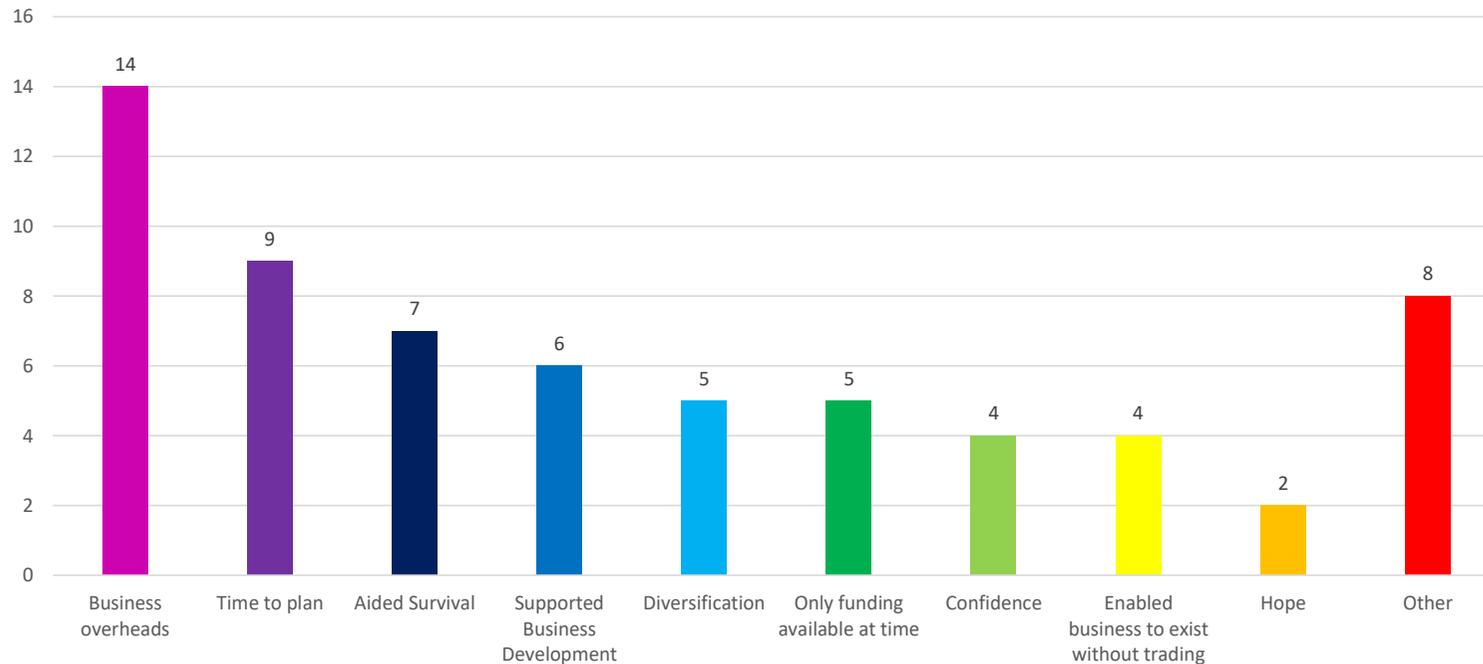
- Strongly agree (49%) or agree (47%) were the answers chosen by the majority of Music Support Fund recipients when considering the statement “*The Music Support Fund has helped you sustain your business through this difficult time*”.
- Two recipients both from the Live Music sector neither agreed nor disagreed with the statement.



Q22 To what extent, do you agree or disagree with the following statement, “The Music Support Fund helped my business address the challenges faced as a direct result of Covid-19”? (Base: 47 respondents)
 Q23 To what extent, do you agree or disagree the Music Support Fund has helped you sustain your business through this difficult time? (Base: 47 respondents)

Value placed on the Music Support Fund

The value the Music Support Fund has brought to your business (No. of responses)



A total of 41 Music Support Fund recipients left 64 comments about the value the fund brought to their business.

Many comments received highlighted how the fund had helped pay businesses overheads (14), with one Live Music micro business stating:

"This funding helped us maintain staff wages at the time" – Micro business, Live Music.

There were nine responses highlighting the benefit of having 'time to plan' for next steps.

"It gave me the chance to re-assess and the time to make more considered decisions for the way forward" - Micro business, Live Music.

Q23 In a few sentences, could you explain the value, if any, the Music Support Fund brought to your business. (Base: 41 respondents; 64 responses)

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Value placed on the Music Support Fund (Continued)

There were seven responses which linked the Music Support Fund to aiding the survival of the business.

“Ultimately, without the financial support, we would have been unable to survive.” Micro business, Live Music

The Music Support Fund was credited with supporting business development (6 responses) and diversification (5 responses).

“Owing to the MSF, I was able to invest time to further myself as a creative technician. When concerts can resume, I will return to the industry: - More qualified, and better equipped to meet the creative demands of the artists with whom I work directly. - With an alternative revenue stream through product sales, so I may better weather any future instability within the industry.” Single Person business, Live Music

“Hugely important. It gave us the confidence to respond positively in the face of great uncertainty, successfully diversifying our revenue streams to negotiate the pandemic.”
Small/ Medium business, Live Music

Five responses shone a light on the fact this was the only funding available to recipients at the time of application .

“The Music Support fund helped to financially support our business at a time when we were not offered or receiving any other government funding.” Micro business, Music Retail

Q23 In a few sentences, could you explain the value, if any, the Music Support Fund brought to your business. (Base: 41 respondents; 64 responses)

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Value placed on the Music Support Fund (Continued)

Giving businesses confidence at a time of uncertainty (4 responses) was one of the values of the Music Support Fund and enabling businesses to exist without trading was another value highlighted (4 responses). Two responses focused on the 'hope' the funding gave.

There were other individual responses which included...

- the benefit of having a clear application process for funding;
- positivity around supporting the wider music community;
- opportunity to take up training;
- the support was welcomed by one recipient, but they felt it wasn't enough.
- another recipient classified the support as a lifeline unique to the Liverpool City region.

"The Music Fund came as a welcome relief in the summer when a lot of my work had dried up. So the value of this helped to keep my business going and to be able to offer help to other businesses and give them a voice during the pandemic. Being able to still have a purpose (or for me, to find a new one with important causes) has been vital and also opened up new contacts and relationships. ." Single Person business, Music Comms & PR

"It was a lifeline when we had very limited options. We're aware this hasn't been available in other regions, and as such, are hugely appreciative of being based in an area that is supporting music venues in this way." Small/ Medium business, Live Music

100% Satisfaction with the Music Support Fund application process

Recipients of the Music Support Fund were asked to rate whether they classified the length of the application form, as being 'Too long' 'Just right' or 'Too short'. All 47 respondents to the evaluation questionnaire rated the length of the application 'Just right' (100%).

Q23 In a few sentences, could you explain the value, if any, the Music Support Fund brought to your business. **(Base: 41 respondents; 64 responses)**

Q24: Generally, when thinking back on the application process for the Music Support Fund, how would you rate the length of the application form? **(Base: 47 respondents)**

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5. Situation as of December 2020 and challenges going forward for the music sector.



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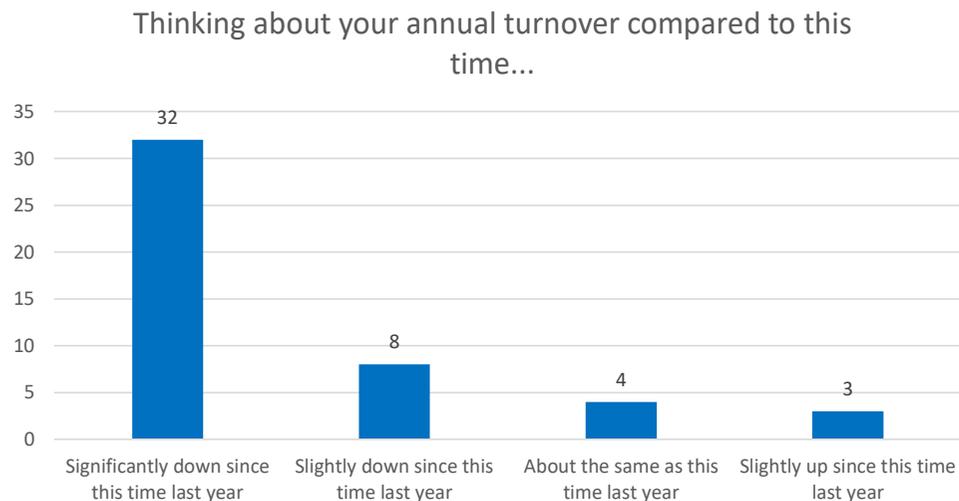
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100% of businesses still trading, but with varied levels of success

All 47 recipients who responded to the Music Support Fund questionnaire were still trading in December 2020.

For the 5 recipients of the Music Support Fund who did not complete the questionnaire, anecdotal evidence reveals that four of the five businesses plan to remain in the music industry going forward, however the level of music related work has differed for these four businesses since application, from no music related work to being able to undertake some music work (depending on the level of restrictions in place). One recipient of the Music Support Fund has not been in touch with the coordinators since being awarded the fund.



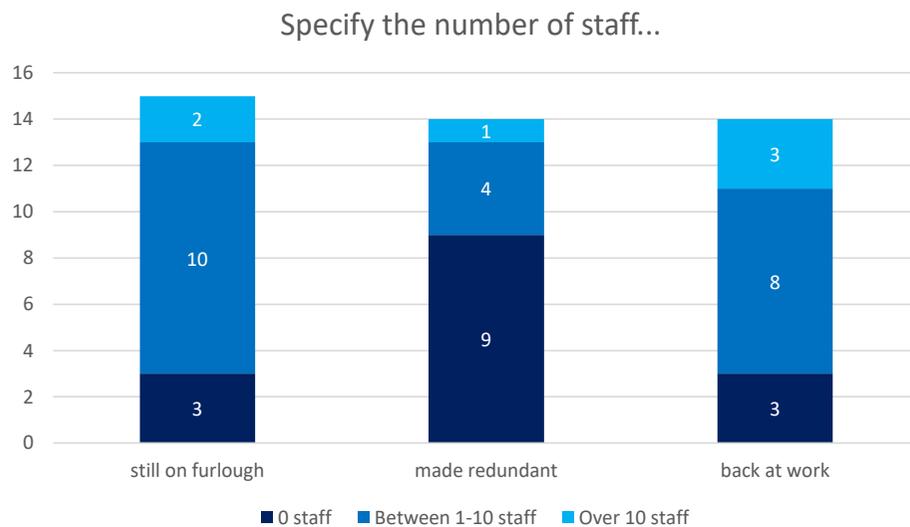
- The majority (85%) of respondents noted that their annual turnover was down since the same time last year, either significantly (n=32) or slightly (n=8).
- Encouragingly a small number (n=3) of the recipients had seen a slight increase in their annual turnover.

Q25: Is your business still trading now? (Base: 47 respondents)

Q26: Thinking about your annual turnover compared to this time last year, would you say it is... ? (Base: 47 respondents)

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Staff and Furlough



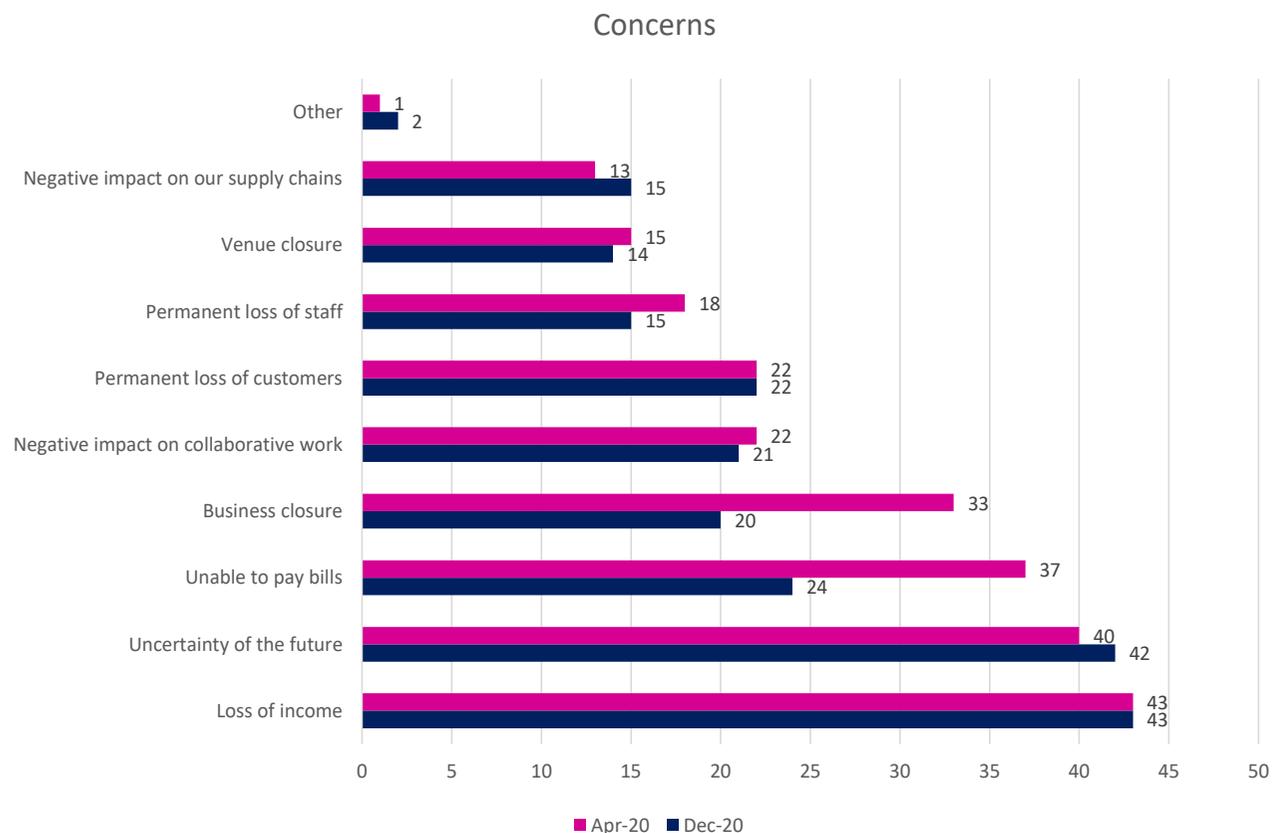
- At point of application for the Music Support Fund, 18 businesses had stated they had furloughed some or all of their staff. In December 2020, 3 of these businesses (micro businesses) stated no staff were on furlough at that time.
- 10 businesses, primarily micro businesses replied saying they had between 1 and 10 staff on furlough, (n=8 micro businesses and n=2 small/ medium businesses).
- Two small/ medium businesses had over 10 staff on furlough in December 2020.
- In total 5 businesses who had furloughed staff at the start of the pandemic had to make redundancies since. There were two micro businesses and two small/ medium businesses who had made between one and two people redundant.
- Eleven businesses mainly from the Live Music sector (n=6) responded to say they had staff back at work.

Q27: You said you had furloughed staff, please specify the number of staff...?

- Still on furlough (**Base: 15 respondents**)
- Made redundant (**Base: 14 respondents**)
- Back at work (**Base: 14 respondents**)

EVIDENCE, RESEARCH
& INTELLIGENCE

Loss of income and uncertain future remain main concerns for future of businesses



- In December 2020, recipients of the Music Support Fund were asked to state their concerns for the future. The answers given reflect closely with the initial concerns felt at the start of the national lockdown.
- However there are two exceptions to this, fewer businesses chose 'Unable to pay bills' and 'Business closure' as concerns for the future.
- This was a snapshot at a point when the Liverpool City Region was under Tier 2 lockdown restrictions. Concerns may have changed as a result of the increase in restrictions introduced in January 2021.

Q11: Thinking back to March 2020 when the national lockdown was introduced. What were your main concerns for your business for the three months that followed? *(Multi-response question.*

Base: 47 respondents) Apr-20

Q28: What are your main concerns for your business in the future? *(Multi-response question.*

Base: 46 respondents) Dec-20

**EVIDENCE, RESEARCH
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Conclusion



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Conclusion

- The Music Support Fund was a welcome source of funding to the Music Sector within the Liverpool City Region at the start of the first national lockdown in April 2020, when business closure was a risk felt by applicants, all of whom had lost some proportion of income at the time of application.
- The flexibility within the funding allowed recipients time to plan for how they could respond to challenges posed and to refocus how they could deliver their activities going forward.
- The funding helped recipients pay their business rent/mortgage and supported many to pivot activity during the pandemic. With those who had used the fund to pivot business activity overwhelmingly agreeing this helped their businesses to survive. Nearly all respondents agreed that fund helped their business address the challenges faced as a direct result of Covid-19.
- The Music Support Fund was seen as valuable because it was the only funding available to a small number of recipients at the time of application (n=5). It gave confidence to some businesses at a time of uncertainty (n=4) and one respondent classified the support as a lifeline, unique to the Liverpool City Region.

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