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Global Business Transformation in a Turbulent Era

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Global Business Transformation in a Turbulent Era

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CHANGES IN THE PUBLIC POLICY OF CULTURAL AND CREATIVE INDUSTRIES AND IN THE CULTURAL BEHAVIOUR CAUSED BY COVID 19 PANDEMIC IN THE SLOVAK REPUBLIC

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ABSTRACT

The COVID 19 pandemic has significant impact on the economic, social and environmental development of the world. To the most affected areas belong cultural and creative industries, where the COVID 19 enhanced the great digital transformation on the one hand, but also the financial constraints on the other hand. Both stimulated the significant changes in the implemented public policies. The paper identifies the challenges raised by the COVID 19 pandemic in the public policy of cultural and creative industries and in behavior of cultural customers on the example of the Slovak Republic and to link them with the already implemented measures by the state as the respond of public policy. They can be seen as a new strategical approach to the development of cultural and creative industries, which the pandemic identified as one of the key weaknesses in the previous policy of the cultural and creative industries.

Keywords: policy of cultural and creative industries, customers, COVID 19 pandemic, challenges

INTRODUCTION

Cultural and creative industries have become integral to economic development policies worldwide over the past two decades. Central to the creative economy are arts and culture, fostering innovation, design, and entrepreneurship. While these industries can drive economic growth, create sustainable jobs, and enhance regional appeal, they have been particularly vulnerable to the COVID-19 pandemic, especially those reliant on in-person interactions.

This paper examines the challenges posed by COVID-19 on public policy and cultural consumer behavior in Slovakia, aligning them with existing state responses. It reviews international measures

addressing the pandemic's impact on cultural industries, categorizes key policy challenges in Slovakia, and presents findings from a 2021 survey on virtual cultural engagement. Additionally, it outlines the Ministry of Culture's responses to pandemic challenges.

Offering insights into policy shifts during and post-pandemic in Slovakia, this article sheds light on longstanding issues within cultural policy. It serves as a reference for countries facing similar challenges, particularly in Eastern Europe, and underscores the need for greater recognition of the economic and societal importance of cultural and creative industries.

LITERATURE REVIEW

Art, culture and the sciences represent an important part of the wealth of the society. From the economic point of view, they belong to the cultural and creative industries, which have their origin in individual creativity, skill and talent and have a potential for wealth and job creation through the generation and exploitation of intellectual property (DCMS, 2001). They include various areas as architecture, fashion, design, advertising, crafts, art market, antiques market, film, video, computer games, music, television, radio, book publishing, software, newspaper and magazine publishing and performing arts (DCMS, 2001; Hesmondhalgh, 2007; Thorsby, 2001).

The development of the cultural and creative industries requires educated consumers, and an educated labour force, that is, people who have a high level of cultural and aesthetic values. Creativity of these people is based on originality, new and useful ideas and thought, and their individuality (Costa Seixas, Roldao, 2009, Borrup, 2010). It presents the potential for original, innovative and new solution to various problems. To develop the creativity, the effective combination of specific resources is needed as intellectual abilities (the synthetic, analytical and practical skills), knowledge, styles of thinking (how to deploy the skills), personality (willingness to overcome obstacles, willingness to take sensible risks, willingness to tolerate ambiguity, and self-efficiency), motivation, and supportive and rewarding of creative ideas environment (Sternberg, 2009). By other words, these industries are developing where the environment is friendly, open, and free, and that is why it fosters freedom, equality between people, and strengthening of cultural and aesthetic perceptions. The increasing demand for diverse content from both diverse audiences and diverse content aggregators such as broadcasters fuels the creative talent of diverse groups. A diverse creative workforce working collaboratively has therefore a great opportunity to make products to meet this demand. (Vaňová, et al., 2016).

However, from the beginning of 2020 and during next two years, the pandemic COVID 19 changed totally the features of environment, where the creative labour force could realise their activities. The implemented protected measures worldwide strictly eliminated the social contacts and the human freedom. The cultural and creative industries were one of the main effected sectors of world economy.

It is clear that the COVID 19 pandemic and the accompanying lockdowns have had a direct financial impact on the cultural and creative industries. Performances by musical artists have been cancelled due to closed venues and social distancing (Khlystova et al., 2022). Theatres, museums and libraries were closed, although some later tried to start functioning using digital technologies, but this was difficult for small cultural institutions to do (Vitálišová et al., 2021; Khlystova et al., 2022; Snowball, Gouws, 2023). Restrictions had a significant impact on the financial results of all kinds of cultural institutions. The film industry could not create and cinemas did not work, although, on the other hand, people spent more time in front of televisions or using subscription videos like Netflix. For example, China's cultural and creative industries, the largest economy and the first country to face the pandemic, saw a 14 percent drop in revenue in the first quarter of 2020 but recorded a growth of 2.2 percent at the end of the year (UNESCO, 2021).

It is no coincidence that in the case of China, even growth was recorded later, because after the first wave of COVID 19, central and local governments in most countries of the world offered various business support plans, which were not only focused on the cultural and creative industries but of course were also important for this sector. For example, in Lithuania, the municipalities of the two largest cities proposed the following financial assistance measures in their plans: waiver of rent tax, real estate tax, reduction of communal fees and the like (Dvorak, 2021). In Germany, direct and indirect support measures for the cultural and creative industries sector were also used: grants and loans; credit aid to preserve liquidity; specific rental agreements due to rent debts for studios, rehearsal rooms, and clubs; tax relief measures with options for deferring tax liabilities and reducing tax advance payments; short-time work allowances as an instrument for bigger and smaller cultural institutions and cultural enterprises (Dümcke, 2021). Dümcke (2021) noted that it is important that financial support measures were used from the beginning of the pandemic, and not retrospectively. Wall-Andrews et al. (2021) noted that due to the specific nature of the cultural and creative industries sector, as many people working in the sector are self-employed or perform contract work as freelancers, governments needed to find measures to protect this category of workers. For example, the Canadian government has two strategies: lowering the criteria and qualifying conditions of specific social protection schemes; the interest-free Canada Emergency Business Account loan

program. To qualify for the loan, the company is required to have paid salaries of at least \$50,000 the previous year (Wall-Andrews et al., 2021)

The impact of the measures resulted in the progressive digital transformation of the cultural and creative industries, especially in a form of innovations in service delivery methods, direct customer interactions, and the proliferation of smart products that enable real-time monitoring and updates (Mergel, Edelmann, Haug, 2019) and establishing virtual culture as a replacement of live cultural events and performances. In the cultural sphere, the effects of digital transformation are evident in fostering the imaginative engagement with spaces and objects, enabling innovative forms of participation, and extracting new forms of value from previously inaccessible archives (Arrigoni, Schofield, Pisanty, 2020). Novel technologies have revolutionized cultural services by challenging and transcending conventional cultural norms within product categories. They introduce cultural meanings that were previously untapped by incumbents, resonating with end customers (Pedeliento et al., 2018). The impacts of digital transformation on cultural institutions go beyond just empowering customers. They also involve encouraging staff to think beyond their immediate service responsibilities, fostering exploration of new and more efficient work methods, and supporting continuous improvement among employees. This transformation promotes a customer-centric mindset and the development of organizational culture (Curtis, 2018).

Of course, as the pandemic progressed, the culture and creative industries sector's product consumption habits changed. It is noted that at the beginning it was a panicked behavior, as consumers needed to cancel purchased tickets to theatres and events, and tourist trips (Billore, Anisimova, 2021; Hu et al., 2021; Khlystova et al., 2022). Habits regarding social distancing and wearing masks also changed, for example, in the beginning, it was necessary to wear a mask when visiting museums and theatres. This was done to ensure quality and safe services for visitors (Burksiene et al., 2022). In some places, registration was required, for example at the Krakow Opera House, in Poland, all seats were not sold in theatres to maintain social distance between theatregoers. In addition, a number of events have moved online and remote concerts and exhibitions have been held (Davies, 2021; Rentschler, Lee, 2021; Khlystova et al., 2022; Mohanty et al., 2022).

METHODOLOGY

The aim of the paper is to identify the challenges raised by the COVID 19 pandemic in the public policy of cultural and creative industries and in behavior of cultural customers on the example of the

Slovak Republic and to link them with the already implemented measures by the state as the respond of public policy.

The first part of the paper, the literature review is focused on identification of the main challenges raised by the COVID 19 pandemic specially focused on the cultural and creative industries based on the international reports and literature resources.

The paper then outlined the policy response to the COVID-19 pandemic in Slovakia, detailing the implemented measures and financial support extended to cultural and creative industry stakeholders. It identified key challenges faced by Slovak cultural policy due to the pandemic, drawing on analytical documents from the Ministry of Culture and Ministry of Finance, as well as insights from structural interviews with representatives of the Institute of Cultural Policy at the Ministry of Culture..

The second part of analysis presents the research results of the questionnaire survey among the cultural customers in the Slovakia conducted in 2021, distributed electronically. The aim of the survey was to evaluated interest of customers in virtual culture as a possible full replacement of live culture. The survey includes the responses of 348 respondents (35,63 % men; 63,51 % women; 0,86% without answer) randomly selected coming from the Slovak Republic. The respondents were randomly selected. The other characteristics of the respondents present table 1.

Age	Number of respondents	%	Education	Number of respondents	%
18 - 30 years	223	64,64%	Grammar school	12	3,48%
31 - 40 years	8	2,32%	Secondary education without high school diploma	21	6,09%
41 - 50 years	69	20,00%	Graduated	253	73,33%
51 - 60 years	35	10,14%	University educated	58	16,81%
60 + years	8	2,32%			
No answer	5	1,45%	No answer	4	1,16%
Total	348	100,87%	Total	348	100,87%

Table 1. Respondents by age and education

The questionnaire used in the survey included 23 questions mapping the behavior of cultural customers before the COVID 19 pandemic and during the COVID 19 pandemic. The questions were scaling, open or combined. For the paper we selected only a few of them, which were processed by Excel and SPSS and with application of mathematical and statistical methods. Beside the basic statistical methods, the behavior of cultural customers in Slovakia during the COVID 19 pandemic in

connection with the use of virtual culture is verified in the paper through the regression analysis implemented and the Pearson correlation coefficient at the 5% level of significance ($\alpha = 0.05$).

The conclusions of the paper summarize the main challenges raised during pandemic period and identified the implemented measures of the Ministry of Culture as a respond to the them in 2022 and 2023.

RESEARCH RESULTS

In the Slovak Republic, the Ministry of Culture oversees cultural policy and creative industries, including heritage preservation, arts, copyright, and national culture promotion. It manages 36 cultural organizations centrally and coordinates activities of 159 others at the regional level. Before the COVID-19 pandemic, Slovakia allocated about 0.76% of GDP for culture, with 1.83% of public expenditure dedicated to cultural and creative industries. In 2018, total public spending on culture reached €645.8 million, with the majority supporting cultural services provided by institutions like theatres and museums. Local and regional governments also play a significant role, contributing 40% of culture financing. However, the pandemic has prompted changes in support for cultural and creative industries, explored further in the following section.

COVID 19 pandemic in the cultural and creative industries in the Slovak

Slovakia swiftly responded to COVID-19, implementing a state of emergency from March to June 2020, with cultural events halted and only essential businesses operating. Despite gradual reopenings, restrictions persisted, with controlled measures in high-risk areas during the second wave. Since August 2020, the cultural and creative sectors have faced financial strain and isolation's emotional toll. However, this adversity spurred innovation, with institutions and artists offering diverse online activities, reaching audiences at home.

However, even as these innovations partially substituted physical engagements in the creative and cultural realms, the representatives of these industries experienced a staggering 80% decline in sales during the first half of 2020 alone. This scenario deteriorated further in the latter half of the year (Press release of the President of SR, 2020). The economic ramifications of COVID 19 on the cultural and creative industries, though profound, lacked official and comprehensive data for analysis. Experts from the Institute of Cultural Policy envisage a return to normalcy not before a two-year period. The Institute of Financial Policy (Pažický, Žudel, 2020) foresees a pandemic-induced 6.7% recession in 2020, leading to a decrease of around 38,000 jobs, accompanied by a subdued inflation of 1.7%.

Gauging the holistic impact of COVID 19 is intricate, given the dynamic nature of the situation and the unpredictable duration of restrictive measures (Muchová, 2020).

The "We Stand by Culture" study surveyed 470 cultural and creative industry representatives during the initial COVID-19 lockdown, revealing varied damages. Individual losses ranged from €1,400 to €2,400, and for entities, €3,100 to €27,200. Respondents advocated for lump-sum financial compensation covering minimum state aid, partial fixed cost coverage, and flexible subsidy adjustments (Bieščad, Svorenčík, Borošová, 2020).

Public cultural and creative organizations faced COVID-19 impacts, but received timely compensation. Additional state budget resources supported institutions like theatres, museums, galleries, and cultural-educational entities, mitigating around 17.4% of their expenses (Ministry of Culture, Ministry of Finance of the Slovak Republic, 2020).

The data from the Institute of Cultural Policy and the aforementioned research validated that those independent of state and public funding were hardest hit. These actors, largely reliant on sporadic subsidies and their own activities (Trexima, 2020).

Financial assistance for those in the cultural and creative sectors occurred in two phases. Initially, the Ministry of Labour, Social Affairs and Family of the Slovak Republic offered a "first aid kit." Later, the Ministry of Culture of the Slovak Republic provided more targeted support based on survey results from industry representatives, refining the assistance mechanisms. The initial measures were part of the First Aid Kit overseen by the Ministry of Labor, Social Affairs, and Family, aimed at safeguarding employment and self-employment during the pandemic. However, stringent rules inadvertently excluded entities with multiple revenue sources. In response to industry backlash, the Ministry of Culture initiated a supporting scheme and reformed these rules to address the aftermath of the second pandemic wave.

During the second wave, the Ministry of Culture conducted a survey to gauge the actual impact on companies, individuals, and non-profits in the cultural and creative sectors. Results were sobering: 79% of companies saw over a 50% drop in income compared to 2019, with nearly half experiencing losses exceeding 80%. Collectively, these sectors lost over €630 million monthly. Individuals and non-profits also suffered significant income reductions.

To address these challenges, the Ministry introduced expanded subsidies and revised rules under Act no. 299/2020 Coll. These measures aim to provide financial aid for uncovered fixed costs and improve

accessibility for industry members. Ongoing negotiations reflect a commitment to assisting non-profits, with plans for further subsidies to mitigate revenue drops and cover costs incurred during 2020. However, challenges remain, including criticism, bureaucratic hurdles, and delays, casting uncertainty on the efficacy of these measures.

The total support for the cultural organisations established by Ministry of Culture presented table 2.

Purpose	Source	Total amount in €
Support of employment in the primary musical schools	Ministry of Education, Science, Research and Sport and Ministry of Labour, Social Affairs and Family.	16 627 593,00
Transfer of COVID contribution for 31 established organisations	Ministry of Culture	6 936 189,00
Loss of income	Ministry of Culture	2 780 764,00
Transfer of additional COVID contributions for RTVS and TASR	Ministry of Culture	2 255 508,00
The total support		28 600 054,00

Table 2. *Support for the cultural organisations established by Ministry of Culture in the Slovak Republic*

The total support for the cultural organisations which are beyond the establishment scope of the Ministry of Culture presented table 3.

Purpose	Source	Total amount in €
First Aid, First Aid +, First Aid++	Ministry of Labour, Social Affairs and Family	65 951 171,41
COVID subsidies for single person – limited liability company	Ministry of Culture	15 673 083,00
Fine Arts Fund	Fund for support arts	8 574 500,00
Subsidy for micro, small and medium enterprises operating in the field of culture and creative industry	Ministry of Economy	7 610 506,00
COVID subsidies for non-profit organizations active in culture	Ministry of Culture	5 901 474,00
COVID subsidy for professionals working in cultural and creative industries	Ministry of Culture	3 448 000,00
Special call 1/20	Fund for support arts	1 122 893,00
Extraordinary COVID transfer of Ministry of Culture to audiovisual fond for support the distribution of audiovisual works and the attendance and operation of cinemas.	Audiovisual Fund	1 000 000,00
COVID help for technical and support professions in parallel	Ministry of Culture	853 200,00
Call 3/2020	Audiovisual Fund	612 900,00
Call 9/2020	Audiovisual Fund	539 800,00
Special call 1/2020	Fund for the support of cultural national minorities	448 812,00
	Ministry of Transport	57 573,65
The total support		111 793 913,06

Table 3. *Support for the cultural organisations beyond the establishment scope of the Ministry of Culture in the Slovak Republic*

COVID-19 has exposed vulnerabilities in the cultural and creative industries but also highlighted opportunities for strategic improvement (Vitálišová, Vaňová, Borseková et al., 2020). A clear definition of these sectors and a consolidated database of their representatives are recommended for collective development. Despite their absence from the Slovak Recovery Plan, these industries are crucial for societal development. Research by Vitálišová et al. (2021) indicates that women and individuals in one-member households are the most vulnerable groups during the pandemic, necessitating targeted support measures. While the Ministry of Culture has initiated collaborative efforts to address the challenges, their efficacy is uncertain due to various obstacles.

Changes in cultural behaviour and cultural offer during COVID 19

During the COVID-19 pandemic, live cultural events were strictly restricted, prompting cultural institutions to explore virtual alternatives, both free and paid. In Slovakia, major state cultural institutions and numerous private and non-profit actors offered virtual cultural events. Research evaluating cultural customer views on virtual culture found that while 74.7% were aware of it, only 36.8% actually engaged with it, indicating that for over 60% of respondents, virtual events did not adequately replace live ones.

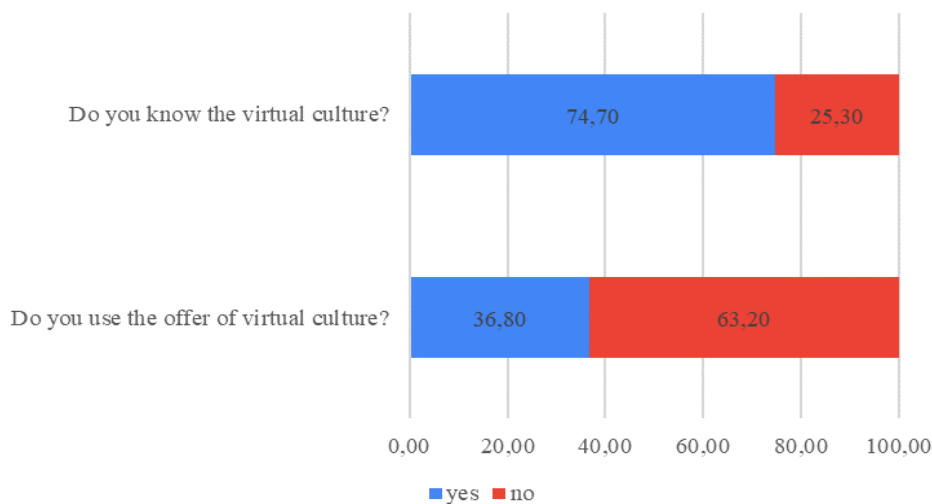


Figure 1. *The awereness on virtual culture*

Control questions confirmed earlier findings. Respondents were asked about their frequency of using virtual culture offerings before and during the COVID-19 pandemic. During the pandemic, 59.80% did not utilize virtual culture. Comparing responses on cultural event attendance before and during COVID-19, positive answers significantly decreased across all options during the pandemic.

How many times during month did you attend some cultural event before COVID 19 pandemic?			How many times did you use the virtual culture?		
less than 2 times	56,61	197	1 - 5 times	33,60	117
3 - 5 times	27,01	94	6 - 10 times	4,60	16
6 - 10 times	4,89	17	11 - 20 times	0,90	3
more than 10 times	1,44	5	More than 20 times	1,10	4
I did not attend the cultural events	10,06	35	No when	59,80	208
Total	100,00	348	Total	100,00	348,00

Table 4. Attendance of cultural events before and during COVID 19 pandemic

We explored changes in cultural behavior by examining which cultural institutions or events respondents visited before and during the COVID-19 pandemic. They could select from predefined options or add their own answers (Table 5).

Respondents	Before COVID	During COVID
Lectures		94
Concerts	12	90
Theatre performance	154	28
No one	24	27
Discussions		27
Museum versus virtual museum	107	20
Gallery versus virtual gallery/exhibition	67	10
Others (musical, concert, virtual Paris)	8	6
Cinema	282	
Castles, manor houses	8	
Total answers	662	302

Table 5. The cultural institutions/events visited by the respondents before and during COVID 19

The COVID-19 pandemic significantly reduced interest in cultural institutions and events, with responses dropping by more than half compared to pre-pandemic levels. As a response, alternative cultural events like lectures, concerts, and discussions gained preference.

Respondents rated virtual cultural events on a scale from 1 to 5, with an average score of 2.95, indicating medium quality. Comparing virtual events to live cultural experiences, most respondents felt that virtual culture was either the same or inferior in quality (Figure 2).

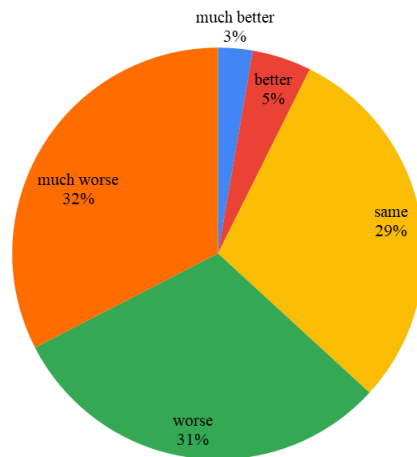


Figure 2. *The quality of virtual culture in comparison to live culture*

The last researched issue was to identify the consequences of live cultural events prohibition during COVID 19 pandemic for the customers. From 321 answers, 52,65 % respondents indicated as problem issues: the loss of social relations and contacts, 19 % respondents - loss of motivation, 4,36 % respondents - the loss of income. 23,99 % respondents did not notice any negative consequence of live cultural events prohibition during COVID 19 pandemic.

The behaviour of cultural customers in Slovakia in relation to the use of virtual culture can be influenced by a number of factors. These factors can be related, on the one hand, to the availability of communication technologies and IT skills of various groups of residents and, on the other hand, to the very relationship of cultural customers to culture. As part of the research results analysis, we examined which factors and to what extent influenced the cultural behaviour of customers in Slovakia during the COVID 19 pandemic.

We verified the influence on the behaviour of cultural customers in Slovakia during the COVID 19 pandemic in relation to the use of virtual culture through the regression analysis implemented and the Pearson's correlation coefficient at the 5% significance level of significance ($\alpha = 0.05$). Research has shown that the use of virtual culture influences the most the attitude of cultural customers toward culture ($r = 0.27$), which is also related to the frequency of visits to cultural institutions ($r = 0.13$) and the funds spent on culture before the COVID 19 pandemic ($r = 0.20$). Customers who have a positive attitude toward culture and before the COVID 19 pandemic visited cultural institutions more often, used the offer of virtual culture earlier and more often than customers who did not "live" culturally before the pandemic. Cultural customers with a higher average monthly income spent more money on culture before the COVID 19 pandemic. Surprisingly, the research showed a negative relationship between the use of virtual culture offers during the COVID 19 pandemic and whether cultural

consumers were guided to culture in childhood ($r = -0.057$) or led and guided their children to culture ($r = -0.027$). This also confirmed the relationship between the attitude toward culture and whether cultural customers were guided toward culture in childhood. A very weak negative dependence was also manifested here. However, this would mean that if we lead our children to culture in childhood, on the contrary, their attitude toward culture in adulthood will be more negative than positive. The research also showed a very weak positive correlation between the use of the virtual culture offer and age ($r = 0.035$) and the level of education ($r = 0.065$). However, it should be added that only 27 (0.19 %) out of the 141 Slovak cities offered virtual culture during the COVID 19 pandemic. In this period, the offer of virtual culture of cities was supplemented directly by cultural institutions of mainly national, but also regional, and local importance. Virtual culture in this period mainly took the form of music concerts, theatre performances, exhibitions, and reading books.

CONCLUSION

The COVID 19 pandemic highlighted in the Slovak Republic the long-term problems in the policy of the cultural and creative industries. To the most serious belong unclear definition of these industries, those was reflected in lack of relevant statistical data describing the situation in the cultural and creative industries. The absence of a strategic approach to the development of cultural and creative industries caused also the weak financial support, often not adequately aimed and used. Even the COVID 19 had a very negative impact on the sector of the creative industry and culture, it brings also the inevitable need to solve these challenges.

Based on the activities and analysis of the Institute of Cultural Policy during COVID 19 pandemic, there were implemented gradually the steps to manage the cultural and creative industries more strategically. The new methodology for the division of cultural policies and economic indicators and the set of aims and measurable indicators for cultural policy in Slovakia were settled. Due to the great vulnerability of the cultural and creative sectors' representatives, the new financial support through the special calls to replace their income was introduced.

The pandemic influenced significantly also the behaviour of cultural customer in the Slovakia. Even the cultural institutions looked for the possibilities how to come closer to customers, the virtual culture had not been seen as an adequate replacement for the live cultural experience.

Although, the research findings are oriented on the Slovak Republic, it can be used as a case study example for countries with the similar economic and social conditions as well as for less-developed countries where the value of the cultural and creative industries is underrated. We realise, that the

focus one country can be perceived as a limitation of the research. On the other, it can be seen as a pilot research that can be a starting point for the comparative research of the topic internationally. As the next step in the research, it would be very beneficially to investigate also the efficiency of the implemented measures and if their framework really met the expectations of the cultural and creative industries' representatives and settled aims of the policy of cultural and creative industries.

By providing these implications, the study not only contributes to academic discourse but also offers actionable insights for policymakers and practitioners aiming to support cultural and creative industries in the wake of global crises.

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