



# Western Australian creative industries: COVID-19 impacts

Prepared for:

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# 1 Introduction

The Department of Local Government, Sport and Cultural Industries (DLGSC) Culture and the Arts commissioned a survey to assess COVID-19 impacts on employment and revenue in the creative industries in Western Australia.

The review investigated a broad range of creative industries. For the purpose of this survey the creative industries included the following:

- Film, TV and radio
- Photography, writing and publishing
- Fashion, jewellery and textile design
- Performing arts venue operation
- Visual arts, music, theatre and comedy
- Dance, circus, opera and orchestra
- Interactive VR/AR/XR artists
- Games publishing and development
- Libraries, art galleries and museums
- Set, lighting and production design

See Appendix 1 and 2 for a full breakdown of respondents by creative industry category.

The purpose of the study was to gather critical data for a statistically reliable survey on the employment and revenue impacts of COVID-19 on the broader creative industries across WA. Specific areas of impact included:

- The number of jobs lost
- The types of jobs and work impacted
- Measuring lost revenue by business entity type
- Measuring lost revenue by industry category
- Reporting on access to COVID-19 support packages

The scope of this study covers COVID-19 support packages that were announced and received by business entities in the quarterly period between 1 April to 30 June 2020. Further detail on these packages is provided in Appendix 4.

## 2 Key findings

Respondents surveyed reported the following impacts from COVID-19 in the quarterly period from 1 April to 30 June 2020:

### Workforce

- The respondents to the survey identified a 59% decrease in employment overall compared to expected levels of employment for the period (1 April to 30 June).
- This decrease includes jobs retained through JobKeeper support.
- Casual and freelance/contract jobs showed significant decreases.
- In contrast, full time and part time jobs showed relatively minor decreases. These employment types were supported by COVID-19 support packages.
  - Casual jobs with partnerships, companies and not-for-profit organisations fell by 75%
  - Freelance / contract jobs fell by 78%
  - Full-time jobs fell 8%
  - Part time jobs only decreased by 1%.
- The greatest drops in expected versus actual employees was for work in partnerships, companies and not-for-profit organisations working in the following creative industry categories:
  - Comedians (down 96%)
  - Music venue operation (down 91%)
  - Producers (down 81%)
  - Circus performers (down 70%), and
  - Theatre company operation (down 61%).

### Revenue

- 34% of business entities reported NIL revenue for the period.
- 83% of business entities posted lower than expected earnings for the period.
- Before receiving COVID-19 financial support, actual revenue was 34% of expected revenue, on average.
- After receiving COVID-19 financial support, actual revenue rose to 56% of expected revenue, on average.
- After receiving COVID-19 financial support, Freelancers' (without an ABN) and Partnerships' actual revenue was 34% of expected revenue. This was the greatest shortfall in actual revenue against expected revenue for business types.
- Not-for-profit organisations were able to recover the greatest percentage of lost revenue with COVID-19 financial support in the period, at 83% of expected revenue after support, increasing from 56% before support.
- The industry categories with the greatest shortfall in actual revenue against expected revenue before receiving COVID-19 support were:
  - Film/video post-production and Animation production (98% decrease)
  - Circus performer (98% decrease)
  - Dancer/choreographer (93% decrease), and
  - Musician/composer (92% decrease).
- The industry categories with the greatest shortfall in actual revenue against expected revenue after receiving COVID-19 support were:
  - Film/video post-production and animation production (92% decrease)
  - Music venue/arena operation (86% decrease)
  - Library/archive operation (81% decrease), and
  - Dancer/choreographer (81% decrease).

## **COVID-19 Support Packages**

- 61% of business entities reported receiving no revenue through COVID-19 support packages.
- Of those that did, they received \$11,173, on average for the period, accounting for 39% of total revenue.
- Access to support packages was highest among companies (58%) and not-for-profit organisations (52%).
- Access to support packages was lowest among freelancers (19%) and sole traders (38%).
- 79% of COVID-19 support received by business entities came from the Federal Government and 9% from the State Government of Western Australia.
- Industry categories that were least likely to receive COVID-19 support packages were:
  - Library/Archive operation
  - Museum operation
  - Games development/design and publishing
  - Producers
  - Fashion, jewellery, textile design.

## **JobKeeper**

- Overall, 36% of business entities received JobKeeper assistance for employees.
- Companies were most likely to receive JobKeeper support (55%) followed by not-for-profits (45%).
- 60% of business entities did not apply for JobKeeper.

## **JobSeeker**

- Of those unemployed or seeking work in the creative industries during the period, 41% did not receive the JobSeeker allowance.

## **Alternative revenue sources to cover losses**

### **Business entities**

- 85% of companies and 85% of partnerships drew on alternative revenue sources to help cover costs compared to 50% of not-for-profit organisations.
- Business reserves were drawn on 66% of companies, 48% of partnerships and 40% of not-for-profit organisations drew on business reserves.
- 44% of partnerships and 42% of companies drew on personal savings compared to just 4% of not-for-profit organisations.

### **Individual respondents**

- 74% of unemployed persons, 67% of sole traders and 65% of freelancers drew on personal savings to cover personal expenses due to lost income.
- 31% of unemployed persons, 26% of students and 20% of freelancers borrowed funds from family and friends to help cover personal expenses.

### 3 Methodology

When designing the research methodology, the DLGSC needed to find a dynamic approach to reach the target audience. An innovative questionnaire was designed with capacity to capture the portfolio careers of multiple jobs that creative workers regularly have. A collaborative approach was undertaken to liaise with creative industry peak bodies to promote the survey to their networks. This section describes the population, sampling and data collection approach, and the respondent profile.

#### 3.1 Population

The population was defined as all individuals, freelancers, businesses and organisations engaged in a selection of creative industries who create, perform, produce or present artistic or cultural works. It included individuals and business entities that were operating in the sector or seeking work as of 20 February 2020 or at any time during the quarter from 1 April to 30 June 2020.

The population covered a broad range of creative industries, including:

- Film, TV and radio
- Photography, writing and publishing
- Fashion, jewellery and textile design
- Performing arts venue operation
- Visual arts, music, theatre and comedy
- Dance, circus, opera and orchestra
- Interactive VR/AR/XR artists
- Games development and publishing
- Libraries, art galleries and museums
- Set, lighting and production design

#### 3.2 Sampling approach

Ideally a Western Australian creative industries workforce population database would exist, and a random sample of contacts would be selected and invited to take part in a survey. As this database did not exist, a collaborative approach was developed to reach the population.

To reach and involve as many people in the population as possible, within resource capacity and timeframes, the DLGSC sent direct email invitations to contacts in its database and partnered with 22 peak bodies to promote the survey through partners' networks.

As a Western Australian creative industry workforce count that includes second and third jobs does not exist, DLGSC had to cross reference data from the Australian Bureau of Statistics and industry surveys to establish an understanding of the workforce population prior to the first COVID-19 case in the State. Although high response rates were achieved for the industry categories surveyed, it is important to note that all findings from the survey reflect those that responded, and caution should be used in generalising to the entire creative industries workforce.



The DLGSC and partner organisations used various communication channels to promote the survey, including email signatures and social media promotions (see Appendix 5).

### 3.3 Data collection

Survey responses were collected online from 4 August to 8 September 2020.

The questionnaire was designed with the project team from the DLGSC to address the information objectives. When designing the questionnaire, the research team had to consider the complexity of employment arrangements within the creative industries sector. Individuals often earn income from multiple roles both within and outside of the creative industries sector. For example, an individual may work part-time in retail, part-time in an arts organisation, and also receive income as a freelance artist trading without an ABN. In addition to earning income from multiple sources, work is often fluid. An individual may hold a permanent part-time role and at the same time have multiple short-term contracts.

The questionnaire was designed so that a respondent with a creative industry portfolio career consisting of multiple jobs could answer with respect to each of the jobs or contracts they undertook during the period. This was an innovative approach to capturing the complexity and richness of creative industry employment that is missed in the Australian Census, which captures only main job data.

In an attempt to understand the complexity of employment in the creative industries sector, and to streamline the survey design to minimise respondent burden, respondents were initially asked two questions:

- Q1. On 20 February, prior to the first case of COVID-19 in Western Australia, how were you involved in the creative industries sector?
- Q2. For the quarterly period from 1 April to 30 June 2020, how were you involved in the creative industries sector?

For each question, respondents could choose a single response or multiple responses from the following options:

- Freelancer – without an ABN
- Sole trader – with an ABN (this includes contractors)
- Partner in a partnership
- Company owner or manager (i.e. CEO, General Manager, Executive Director, etc)
- General manager in not-for-profit organisation (i.e. CEO, General Manager, Executive Director, etc)
- Employee
- Unemployed / seeking work in creative industries
- Retired
- Student
- Volunteer
- I was not involved in the creative industries sector
- Other – please specify

To be included in the dataset, respondents had to have been involved in the creative industries sector as of 20 February 2020 prior to the first case of COVID-19 in Western Australia, or at some time during the quarter from 1 April 2020 to 30 June 2020.

Respondents who answered that they were a freelancer, sole trader, partner, company owner or manager, general manager in a not-for-profit organisation, employee or unemployed person were directed to relevant sections of the questionnaire, as follows:

Questionnaire Section	Respondent Type
Section 1: Involvement in Creative Industries	All respondents
Section 2: Freelancers	Freelancer
Section 3: Sole Traders	Sole Trader
Section 4: Partnerships	Partners in a partnership
Section 5: Company <sup>1</sup>	Company owner or manager
Section 6: Not-for-profit organisation	Manager of a not-for-profit organisation
Section 7: Employees	Employees
Section 8: Unemployed	Unemployed / seeking work in cultural industries
Section 9: Personal Finance	All respondents
Section 10: Demographics	All respondents

In this study, “unemployed” refers to individuals who were unemployed in the creative industries sector or specifically seeking work in the creative industries sector. They may have employment in another industry sector.

### 3.4 Respondent Profile | Individual Respondents

Surveys were submitted by 1,670 individual respondents. Respondents represented a cross section of the community (see Table 1). After accounting for non-response and opt out responses<sup>2</sup>, of those who provided demographic information:

- 77% of individual respondents were from the Perth metropolitan area, 22% were from regional Western Australia and 1% were from outside of Western Australia.
- 30% were male, 69% were female and 1% were self-described gender.
- 1% were Aboriginal and / or Torres Strait Islander.
- 7% had a disability or impairment.
- 3% mainly speak a language other than English at home.

<sup>1</sup> Respondents could complete a response for up to two companies that they owned or managed.

<sup>2</sup> Non response and opt out responses were from respondents who did not wish to provide personal demographic information or who did not complete the final demographic section of the survey.



**Table 1: Demographic Profile**

	% of respondents
<b>Location</b>	
Base: all individual responses, excludes no response and prefer not to say	1296
Perth metro	77%
Regional WA	22%
Outside WA	1%
<b>Age</b>	
Base: all individual responses, excludes no response and prefer not to say	1291
14-34 years	27%
35-54 years	45%
55+ years	28%
<b>Gender</b>	
Base: all individual responses, excludes no response and prefer not to say	1282
Male	30%
Female	69%
Self-described	1%
<b>Diversity</b>	
Base: all individual responses, excludes no response and prefer not to say	1247
Disability	7%
Aboriginal and / or Torres Strait Islander	1%
Mainly speak a language other than English at home	3%

## Employment Type

The sample included a cross section of freelancers, sole traders, partners, company owners, managers, employees, unemployed persons, retirees, students and volunteers.

- In the quarterly period from 1 April to 30 June, 38% were sole traders and 34% were employees (see Table 2).
- Of the sole traders, 61% were creative artists making original work (see Appendix 2).
- Of the employees, 31% worked in a library, 8% in a performing arts company and 6% in a museum (see Appendix 1).

**Table 2: Individual respondents' employment or involvement in the creative industries sector**

	As of 20 February 2020		1 April to 30 June 2020	
	Number of respondents	% of respondents	Number of respondents	% of respondents
Freelancer – without an ABN	139	8%	123	7%
Sole trader – with an ABN	714	43%	631	38%
Partner in a partnership	53	3%	51	3%
Company - owner / CEO / General Manager	144	9%	133	8%
Not-for-profit – CEO / General Manager	114	7%	112	7%
Employee	625	37%	575	34%
Unemployed / seeking work in creative industries	65	4%	132	8%
Retired	31	2%	19	1%
Student	81	5%	76	5%
Volunteer	117	7%	114	7%
Other	63	4%	69	4%
Not involved in the creative industries sector	7	0%	41	2%
<b>Total individual respondents</b>	<b>1,670</b>		<b>1,670</b>	

### 3.5 Respondent Profile | Business Entities

Individual respondents completed responses on behalf of 1,216 business entities.

Business entities includes freelancers, sole traders, partnerships, companies and not-for-profit organisations (see Table 3). Freelancers are individuals who trade without an ABN, while sole traders are individuals who trade with an ABN. This distinction has relevance for COVID-19 support package eligibility.

The sample included a cross section of businesses by industry category (see Table 4). Where an industry category population and/or sample size was lower than nine respondents, the industry category was grouped with a related industry category for anonymisation purposes. Such examples include Archive operation grouped with Library operation, and Animation production grouped with Film/video post-production services. Where an industry category could not be grouped with a similar category, such as Orchestra, Opera and Musical Production operation, it has been grouped with the relevant Other/unspecified industry category.

- 60% of all business entities were sole traders and 13% were freelancers.
- 48% of business entities were mainly involved in the sector as creative artists. Of these business entities:
  - 18% were Visual artist/sculptor/XR artists;
  - 10% were Musician/composers; and,
  - 6% were Writer/poet/playwright/screenwriters.
- 6% were mainly involved in Film/TV production.
- 6% were mainly involved in Performing arts company operation.
- 5% were mainly involved in Community arts operation.

**Table 3: Profile of business entities by type of business**

	Number of business entities	% of business entities
Freelancer – without an ABN	159	13%
Sole trader – with an ABN	730	60%
Partnership	58	5%
Company	151	12%
Not-for-profit organisation	118	10%
<b>Total business entities</b>	<b>1,216</b>	

**Table 4: Profile of business entities by industry category**

	Number of business entities	% of business entities
Creative artist making original work (visual artist, musician, etc)	584	48%
Performing arts company operation	58	5%
Performing arts venue operation	43	4%
Art Gallery operation	22	2%
Museum operation	9	1%
Library/Archive operation	11	1%
Community arts operation	55	5%
Film/TV production	69	6%
Film/video post-production and Animation production	18	1%
Games development/design and publishing	45	4%
Music production, studio operation, sound recording	12	1%
Book/Journal/Magazine publishing	21	2%
Fashion, jewellery, textile design	32	3%
Professional photographic services	38	3%
Arts administration	36	3%
Arts education & training	24	2%
Festival operation	15	1%

	<b>Number of business entities</b>	<b>% of business entities</b>
Other	26	2%
Unspecified	98	8%
<b>Total business entities</b>	<b>1,216</b>	

Q. Which type of work have you / your partnership / company / organisation mainly been involved in within creative industries? Single response. Base: All business entities (n= 1,216)

A detailed profile of business entity respondents showing the breakdown of involvement by business type and category is provided in Appendix 2.

### **Not-for-profits**

- Of the not-for-profits, 16% were involved in Community arts operation, 14% were involved in Performing arts company operation and 11% were Creative artists (visual artists, writers, etc).

### **Companies**

- Of the companies, 15% were Creative artists (producers, musicians, visual artists, etc), 13% were involved in Film and TV production and 11% were involved in Performing arts company operations.

### **Partnerships**

- Of the partnerships, 17% were Creative artists (writers, circus performers, musicians, dancers, etc), 12% were Visual artists/sculptors, 10% were involved in Performing arts company operation, and 9% were involved in Art gallery operation.

### **Sole traders**

- Of the sole traders, 61% were Creative artists.
  - Of these 61%, 22% were Visual artists/sculptors, and 13% were Musicians/composers.

### **Freelancers**

- Of the freelancers, 55% were Creative artists.
  - Of these 55%, 26% were Visual artists/sculptors, 8% were Actors, and another 8% were Musicians/composers.
- 8% were involved in Games development/design.

## 4 COVID-19 impacts on the workforce

In the quarterly period from 1 April to 30 June 2020, employment reduced by 59% overall compared to the levels expected by the respondents to the survey. COVID-19 appears to have had the greatest impact on sole traders, freelancers and casual employees. COVID-19 support packages helped to retain full time and part time jobs, but casual and freelance/contract jobs exhibited significant decreases.

- There was a 5% drop in sole traders in the creative industries in the April to June quarter compared to before COVID-19 was detected in Western Australia (see Table 5).
- In the same period, there was a 4% increase in unemployment.
- There was a 59% reduction in expected levels of employment compared to actual levels of employment overall (see Table 6).
- While just 1% of freelancers left the sector in the quarterly period from 1 April to 30 June 2020, for those who remained, casual jobs with partnerships, companies and not-for-profit organisations fell by 75% and freelance / contract jobs fell by 78%. Part time jobs only fell 1% and full-time jobs fell 8% (see Table 6).
- Partnerships, companies and not-for-profit organisations, experienced the greatest drops in expected versus actual employees (see Appendix 3) if involved in work as: Comedians (down 96%), Music venue operation (down 91%), Producers (down 81%), Circus performers (down 70%) and Theatre company operation (down 61%).

**Table 5: Impact of COVID-19 on type of involvement in creative industries**

% of individual respondents, column%	On 20 Feb 2020	1 April to 30 June 2020	Net change (% points)
Base: All individual respondents	1,670	1,670	
Freelancer – without an ABN	8%	7%	-1
Sole trader – with an ABN	43%	38%	-5
Partner in a partnership	3%	3%	0
Company owner or manager	9%	8%	-1
General manager in not-for-profit organisation	7%	7%	0
Employee	37%	34%	-3
Unemployed / seeking work in creative industries	4%	8%	4
Retired	2%	1%	-1
Student	5%	5%	0
Volunteer	7%	7%	0
Other	4%	4%	0
Not involved in the creative industries sector	0%	2%	2

Q. On 20 February, prior to the first case of COVID-19 in Western Australia, how were you involved in the creative industries sector? For the quarterly period from 1 April to 30 June 2020, how were you involved in the creative industries sector?

**Table 6: Expected versus actual employees in partnerships, companies and not-for-profit organisations, 1 April to 30 June 2020 – by employment status<sup>3</sup>**

Number of employees	Expected	Actual	Net change (%)
Full time	622	571	-8
Permanent part time	258	255	-1
Casual	1,374	302	-78
Freelance / contractors	1,305	325	-75
<b>Total number of employees</b>	<b>3,559</b>	<b>1,453</b>	<b>-59</b>

Q. For the quarterly period from 1 April to 30 June 2020, what was your EXPECTED number of employees (including yourself)? Please enter the total number of people who you expected to employ during this time.

Q. In the quarterly period from 1 April to 30 June 2020, what was your ACTUAL number of employees (including yourself)? Please include any employees who were receiving JobKeeper in your total employee numbers.

<sup>3</sup> Please note: Figures are based on data from survey respondents only. Table 6 includes data provided about expected and actual employees in 188 business entities that employ one or more employees. This includes partnerships, companies and not-for-profit organisations. Modelling to extrapolate the data to provide industry estimates was beyond the scope of this work, however, net change in positions may be indicative of changes in employee numbers in partnerships, companies and not-for-profit organisations within the sector.

## 5 COVID-19 impacts on revenue

### 5.1 COVID-19 impacts on business entities

This section discusses the impact of COVID-19 on business entities during the quarterly period from 1 April to 30 June 2020. Business entities includes freelancers, sole traders, partnerships, companies and not-for-profit organisations within the cultural industries sector.

- 83% of business entities posted lower than expected earnings for the period (see Table 7).
  - The average expected revenue was \$51,286 compared to average actual revenue of \$17,494, and \$28,775 after receiving COVID-19 financial support (see Table 8)<sup>4</sup>.
  - After receiving COVID-19 financial support, actual revenue was 56% of expected revenue (see Table 8).
  - 34% of business entities posted no actual revenue (see Table 9).
- Not-for-profit organisations were able to recover the greatest percentage of lost revenue with COVID-19 financial support in the period.
  - The average actual revenue for not-for-profit organisations excluding COVID-19 support was 56% of expected revenue.
  - After COVID-19 support average revenue for not-for-profit organisations increased to 83% of expected revenue. This is an increase of 27%.

### 5.2 COVID-19 impacts on creative industry categories

This section discusses the impact of COVID-19 on creative industry categories during the quarterly period from 1 April to 30 June 2020. Detailed tables of creative industry categories are in Appendix 3. Some industry categories surveyed could not be reported against due to their small population size.<sup>5</sup> These categories, such as Orchestra, Opera and Musical production operation, have been grouped into the 'Other/unspecified' category relevant to their industry sector.

- The seven industry categories where all business entities reported lower than expected revenue were (see Appendix 4):
  - Set / production / costume / lighting design
  - Comedian
  - Dance/ballet company operation
  - Music venue/arena operation
  - Theatre operation
  - Music production, studio operation, sound recording
  - Arts education & training
- The industry categories with the greatest shortfall in actual revenue against expected revenue in the period from 1 April to 30 June 2020 before receiving COVID-19 support were (see Appendix 3):
  - Film/video post-production and Animation production – earned 2% of expected revenue
  - Circus performer – earned 2% of expected revenue
  - Dancer/choreographer – earned 7% of expected revenue
  - Musician/composer – earned 8% of expected revenue
  - Music production, studio operation, sound recording – earned 8% of expected revenue
  - Music venue/arena operation – earned 9% of expected revenue
  - Actor – earned 10% of expected revenue

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<sup>4</sup> Note: two outliers were removed from the dataset where actual revenue exceeded expected revenue by an exceptional amount (i.e. increases of 714% and 272%).

<sup>5</sup> Note: a population size of nine at the minimum was required for industry category groupings in this report so as to preserve the anonymity of respondents. Any industry category with a population or sample size of eight or less was grouped into the relevant Other/unspecified category.

- The industry categories closest to achieving their expected revenue before receiving COVID-19 support were (see Appendix 3):
  - Dance/ballet company operation – earned 71% of expected revenue
  - Games development/design and publishing – earned 71% of expected revenue
  - Performing arts company operation – earned 63% of expected revenue
  - Theatrical company operation – earned 52% of expected revenue
  - Book/Journal/Magazine publishing – earned 51% of expected revenue
- After receiving COVID-19 support packages, the industry categories with the greatest shortfall in actual revenue against expected revenue were (see Appendix 3):
  - Film/video post-production and animation production – earned 8% of expected revenue
  - Music venue/arena operation – earned 14% of expected revenue
  - Library/archive operation – earned 19% of expected revenue
  - Dancer/choreographer – earned 19% of expected revenue
- After receiving COVID-19 support packages, the industry categories closest to achieving their expected revenue were (see Appendix 3):
  - Dance/ballet company operation – earned 91% of expected revenue
  - Community arts operation – earned 90% of expected revenue
  - Theatre operation – earned 87% of expected revenue
  - Performing arts company operation – earned 84% of expected revenue

**Table 7: Actual versus expected revenue in creative industries, 1 April to 30 June 2020**

% of business entities, row%	Base: all business entities	Lower than expected	As expected,	Higher than expected
All business entities	896	83%	13%	5%
Freelancer – without an ABN	114	76%	21%	3%
Sole trader – with an ABN	570	84%	12%	4%
Partnership	31	90%	6%	3%
Company	104	85%	8%	8%
Not-for-profit organisation	77	75%	12%	13%

Q. For the quarterly period from 1 April to 30 June 2020, how much revenue did [you / your partnership / company / organisation] EXPECT to earn from activities in creative industries? What was your ACTUAL revenue from activities in creative industries? Revenue includes the value of all contracts, sales, commissions, grants, subsidies or any other funds earned, including COVID-19 support packages. Excludes unsure and no response.

**Table 8: Expected versus actual revenue in creative industries, 1 April to 30 June 2020 – by business entity**

	Expected revenue (average)	Actual revenue Excludes COVID-19 support		Actual revenue With COVID-19 support	
		Average	% of expected	Average	% of expected
<b>All business entities</b>	<b>\$51,286</b>	<b>\$17,494</b>	<b>34%</b>	<b>\$28,775</b>	<b>56%</b>
Freelancer – without an ABN	\$9,758	\$1,319	14%	\$3,335	34%
Sole trader – with an ABN	\$17,176	\$3,504	20%	\$8,308	48%
Partnership	\$52,897	\$12,466	24%	\$18,190	34%
Company	\$143,430	\$22,675	16%	\$40,540	28%
Not-for-profit organisation	\$247,597	\$138,827	56%	\$206,724	83%

Q. For the quarterly period from 1 April to 30 June 2020, how much revenue did [you / your partnership / company / organisation] EXPECT to earn from activities in creative industries? What was your ACTUAL revenue from activities in creative industries? Revenue includes the value of all contracts, sales, commissions, grants, subsidies or any other funds earned, including COVID-19 support packages. Excludes unsure and no response.

**Table 9: Expected versus actual revenue in creative industries, 1 April to 30 June 2020 – revenue bands**

<b>% of business entities, column%</b>	<b>Expected revenue</b>	<b>Actual Revenue</b>	<b>Net change (% points)</b>
Base: All business entities	908	908	
NIL	8%	34%	+26
\$1 to \$1,000	15%	19%	+4
\$1,001 to \$10,000	37%	27%	-10
\$10,001 to \$20,000	12%	7%	-5
\$20,001 to \$30,000	7%	2%	-5
\$30,001 to \$50,000	5%	2%	-3
\$50,001 to \$100,000	6%	3%	-3
Over \$100,000	9%	5%	-3
Unsure	1%	1%	0

Q. For the quarterly period from 1 April to 30 June 2020, how much revenue did [you / your partnership / company / organisation] EXPECT to earn from activities in creative industries? What was your ACTUAL revenue from activities in creative industries? Revenue includes the value of all contracts, sales, commissions, grants, subsidies or any other funds earned, including COVID-19 support packages. Excludes no response.

## 6 Access to COVID-19 financial support

### 6.1 COVID-19 Support Packages

The scope of this study covers COVID-19 support packages that were announced and received by business entities in the quarterly period between 1 April to 30 June 2020. The list of support packages available during this time period is summarised below. Further detail on these packages is provided in Appendix 4.

**Table 10: COVID-19 Support Packages available in the period between 1 April to 30 June 2020**

COVID-19 Support Package	Provider	Eligible entities						
		NFP	Company	Partnership	Sole trader	Freelancer	Employee	Unemployed
JobKeeper - Support for employers to continue paying their employees	Australian Government	✓	✓	✓	✓		✓	
JobSeeker - Support for workers and households - Coronavirus supplement	Australian Government				✓	✓	✓	✓
Arts Industry Support Package— supporting Indigenous visual arts centres	Australian Government	✓	✓	✓	✓			
Event Cancellation Relief for Arts and Culture Organisations	Lotterywest & DLGSC	✓						
Sector Support for Resilient Culture and Arts Organisations	Lotterywest & DLGSC	✓						
Rent Relief for tenants in Government-owned buildings	DLGSC	✓	✓	✓	✓			
Arts U-15k Grant Program	DLGSC	✓	✓	✓	✓	✓		
Contemporary Music Fund Grant Program (U-15k category)	DLGSC	✓	✓	✓	✓	✓		
Aboriginal Art Acquisition program and State Art Collection Archive initiative	Art Gallery of WA				✓	✓		
Bright Ideas Sustainability Fund	Screenwest					✓		
Taking Care of Business – Production Company and Producer Support Package	Screenwest		✓	✓	✓			
Taking Care of Business 'Fix it in Post' Fund	Screenwest		✓	✓	✓			

Please note that the scope of this study does not include COVID-19 support packages that were announced by the Australian Government but not received by entities between 1 April to 30 June 2020, or COVID-19 support packages announced after 30 June 2020.

**Table 11: COVID-19 Support Packages announced but not received between 1 April to 30 June 2020**

COVID-19 Support Package	Announced
Arts Industry Support Package - Support Act: crisis relief to artists, crew and music workers	9 April 2020
Arts Industry Support Package—crisis relief for regional arts	9 April 2020
Australia Council 2020 Resilience Fund: Survive, Adapt, Create	9 April 2020
The Restart Investment to Sustain and Expand (RISE) Fund	25 June 2020
Show Starter Loan Scheme	25 June 2020
Temporary Interruption Fund (TIF)	25 June 2020
COVID-19 Arts Sustainability Fund	25 June 2020
Location Incentive to attract large budget international film and television productions to Australia over the next seven years	17 July 2020
Support for Australia's national cultural institutions during COVID-19	26 Sep 2020



## 6.2 Access to COVID-19 Support Packages

In this section, business entities includes freelancers, sole traders, partnerships, companies and not-for-profit organisations within the cultural industries sector.

- 39% of business entities received COVID-19 support packages (see Table 12).
  - Access was highest among companies (58%) and not-for-profit organisations (52%).
  - Access was lowest among freelancers (19%) and sole traders (38%).

**Table 12: Access to COVID-19 support packages among business entities**

	<b>All business entities</b>	<b>Freelancer</b>	<b>Sole trader</b>	<b>Partnership</b>	<b>Company</b>	<b>Not-for-profit</b>
Base: Business entities	896	118	570	29	100	79
Received COVID-19 Support	39%	19%	38%	48%	58%	52%
Did not receive COVID-19 Support	61%	81%	62%	52%	42%	48%

Q. Approximately, how much of your [partnership / company / organisation's] revenue was from COVID-19 support packages (grants and subsidies, including JobKeeper contributions)? Excludes unsure and no response.

## 6.3 Revenue from COVID-19 Support Packages

In the quarterly period from 1 April to 30 June 2020:

- 61% of business entities reported that they received no revenue through COVID-19 support packages (see Table 13).
- Of those that received support, they received \$11,173, on average. This accounted for 39% of total revenue (see Table 13).
- Not-for-profit organisations received the highest level of COVID-19 support, \$67,897 per organisation on average, representing 33% of total revenue (see Table 14).
- 79% of COVID-19 support received by business entities came from the Federal Government and 9% from the State Government of Western Australia (see Table 15).

Industry categories that were most likely to receive COVID-19 support packages were (see Appendix 3):

- Dance / ballet company operations
- Theatre company operations
- Circus performers
- Professional photographic services
- Music production, studio operation and sound recording

Industry categories that were least likely to receive COVID-19 support packages were (see Appendix 3):

- Library/Archive operation
- Museum operation
- Games development/design and publishing
- Producers
- Fashion, jewellery, textile design

Among business entities that received COVID-19 support packages, the industry categories with the highest ratio of COVID-19 support to total revenue, were (see Appendix 3):

- Circus performers – 96% of total revenue was from COVID-19 support
- Musicians / composers – 82%
- Film/video post-production and animation production – 71%
- Theatre operation – 70%

**Table 13: Approximate revenue from COVID-19 support packages**

	% of business entities
Base: All business entities	896
NIL	61%
\$1 to \$1,000	5%
\$1,001 to \$10,000	23%
\$10,001 to \$20,000	4%
\$20,001 to \$30,000	1%
\$30,001 to \$50,000	1%
\$50,001 to \$100,000	2%
Over \$100,000	2%

Q. Approximately, how much of your [partnership / company / organisation's] revenue was from COVID-19 support packages (grants and subsidies, including JobKeeper contributions)? Excludes unsure and no response.

**Table 14: Average revenue from COVID-19 support packages - by business type**

	Base: number of business entities	Average value of COVID-19 support	Average% of total revenue
<b>All business entities</b>	<b>1,216</b>	<b>\$11,173</b>	<b>39%</b>
Freelancer – without an ABN	159	\$1,978	59%
Sole trader – with an ABN	730	\$4,373	53%
Partnership	58	\$5,724	31%
Company	151	\$17,865	44%
Not-for-profit organisation	118	\$67,897	33%

Q. Approximately, how much of your [partnership / company / organisation's] revenue was from COVID-19 support packages (grants and subsidies, including JobKeeper contributions)? Excludes no response.

**Table 15: Source of COVID-19 support packages among business entities that received support**

	All business entities	Freelancer	Sole trader	Partnership	Company	Not-for-profit
Base: Business entities that received COVID-19 support	337	21	204	13	58	41
Federal government	79%	80% <sup>6</sup>	80%	83%	88%	79%
State government	9%	14%	7%	8%	6%	9%
Local government	2%	1%	3%	3%	1%	2%
Other funding source	8%	5%	10%	7%	5%	8%

Q. What percentage of your COVID-19 support packages (grants, subsidies, etc) came from each of the following sources? Excludes no response.

<sup>6</sup> It is noted that 15% of freelancers reported that they accessed JobKeeper (see Table 15). As JobKeeper was not directly available to freelancers, it may be possible that they accessed JobKeeper via employment with another business entity.

## 6.4 JobKeeper statistics

- Overall, 36% of business entities in the cultural industries sector received JobKeeper assistance for employees (see Table 16).
  - Companies were most likely to receive JobKeeper support (55%) followed by not-for-profit organisations (45%).
- 60% of business entities did not apply for JobKeeper.
- 3% of business entities applied but did not receive JobKeeper.

**Table 16: Access to JobKeeper among business entities, 1 April to 30 June 2020**

% of business entities	All business entities	Sole trader	Partnership	Company	Not-for-profit
Base: business entities, excludes no response	761	555	27	99	80
Applied and received JobKeeper	36%	32%	30%	55%	45%
Applied but did not receive JobKeeper	3%	3%	4%	4%	4%
Did not apply for JobKeeper	60%	65%	63%	40%	50%
Unsure	<1%	0%	4%	1%	1%

Q. Did you apply for the JobKeeper allowance for any employees?

Q. And, how many of your employees received the JobKeeper allowance (including yourself) in each of the following months: April, May and June?

## 6.5 JobSeeker statistics

- Among individual respondents who indicated they were unemployed or seeking work in the creative industries in the period between 1 April and 30 June 2020, 59% did not receive the JobSeeker allowance (see Table 17).
- Further research is needed to understand why these respondents did not receive JobSeeker. Due to the flexible and fluid nature of work in creative industries, described as a “portfolio career”, it is possible that respondents were only unemployed or seeking work for some of the time during the quarterly period from 1 April to 30 June 2020. This may be why they did not apply or qualify for JobSeeker support.

**Table 17: JobSeeker allowance received by individual respondents who were unemployed or seeking work in the cultural industries sector from 1 April to 30 June 2020**

	% respondents
Base: Individual respondents who were unemployed or seeking work in the creative industries in the period between 1 April to 30 June 2020, excludes no response	112
Received JobSeeker	41%
Did not receive JobSeeker	59%

Q. Did you receive the JobSeeker Allowance?

## 6.6 Source of funding to cover lost revenue

Companies and partnerships were much more likely to draw on alternative revenue sources to meet business expenses than not-for-profit organisations. The most popular funding sources were business and personal reserves.

- 85% of companies and 85% of partnerships drew on alternative revenue sources to help cover costs compared to 50% of not-for-profit organisations (see Table 18).
- 66% of companies, 48% of partnerships and 40% of not-for-profit organisations drew on business reserves.
- 44% of partnerships and 42% of companies drew on personal savings compared to just 4% of not-for-profit organisations.

Sole traders and freelancers, similar to those who were unemployed, were more likely to draw on personal savings to cover lost revenue.

- 74% of unemployed persons, 67% of sole traders and 65% of freelancers drew on personal savings to cover personal expenses due to lost income (see Table 19).
- 31% of unemployed persons, 26% of students and 20% of freelancers borrowed funds from family and friends to help cover personal expenses.

**Table 18: Business financing to fund lost revenue, 1 April to 30 June 2020**

% of respondents	Partnership	Company	Not-for-profit
Base: Business entities, excludes no response.	27	96	80
Business reserves or savings	48%	66%	40%
Personal reserves or savings	44%	42%	4%
Superannuation	19%	16%	4%
Credit cards	19%	16%	1%
Family and friends	11%	11%	0%
Bank loan	7%	6%	0%
Other	4%	9%	6%
None of these – didn't need to draw on alternative sources	15%	15%	50%

Q. In the quarterly period from 1 April to 30 June 2020, did you draw on any of the following sources to fund the [partnership / business / organisation's] expenses due to lost revenue?

**Table 19: Personal financing to fund lost income, 1 April to 30 June 2020**

% of respondents	Sole Traders	Freelancers	Employees	Unemployed	Students
Base: Individual respondents, excludes no response	551	109	560	122	57
Personal reserves or savings	67%	65%	34%	74%	58%
Credit cards	18%	15%	10%	16%	9%
Family and friends	12%	20%	6%	31%	26%
Superannuation	11%	15%	6%	7%	7%
Bank loan	1%	1%	1%	1%	4%
Other	10%	10%	4%	11%	7%
None of these – didn't need to draw on alternative sources	21%	20%	56%	11%	28%

Q. In the quarterly period from 1 April to 30 June 2020, did you draw on any of the following sources to fund your personal expenses due to lost income?

## 7 Sole Traders and Freelancers | summary

This section considers the impacts of COVID-19 among freelancers who traded without an ABN compared to sole traders who traded with an ABN during the period from 1 April to 30 June 2020.

### Main type of work

Sole traders and freelancers mostly work as creative artists who create original work (see Table 20).

- 61% of sole traders mainly worked as creative artists. The top three industry sub-categories were:
  - Visual artist/sculptor/XR artists (22% of sole traders)
  - Musicians/composers (13%)
  - Writers/poets/playwrights/screenwriters (8%)
- 55% of freelancers mainly worked as creative artists. The top three industry sub-categories were:
  - Visual artist/sculptor/XR artists (26% of freelancers)
  - Musicians/composers (8%)
  - Actors (8%)
- 10% of freelancers mainly worked in Film and TV production.
- 8% mainly worked in Games development, design and publishing.

**Table 20: Main types of involvement in creative industries among sole traders and freelancers<sup>7</sup>**

Sole Traders		Freelancers	
Base: all sole trader respondents	730	Base: all freelancer respondents	159
Visual artist/sculptor/XR artist	22%	Visual artist/sculptor/XR artist	26%
Musician/composer	13%	Film/TV production	10%
Writer/poet/playwright/screenwriter	8%	Musician/composer	8%
Actor	4%	Actor	8%
Film/TV production	4%	Games development/design and publishing	8%
Professional photographic services	4%	Writer/poet/playwright/screenwriter	5%
Dancer/choreographer	3%	Fashion, jewellery, textile design	4%
Circus performer	3%	Community arts operation	3%
Community arts operation	3%	Film/video post-production and animation	3%
Games development/design and publishing	3%	Arts education & training	3%
Fashion, jewellery, textile design	3%		
Arts administration	3%		

See Appendix 2 for a full list of industry categories.

### COVID-19 impacts on the workforce

- The proportion of sole traders in the cultural industries sector fell by 5 percentage points from 43% before COVID-19 (as of 20 Feb 2020) to 38% in the quarterly period from 1 April to 30 June 2020 (see Table 5).
- In the same time period, the proportion of freelancers fell by 1 percentage point, down from 8 to 7%.

### COVID-19 impacts on revenue

In the quarterly period from 1 April to 30 June 2020:

- 76% of freelancers reported their revenue as lower than expected compared to 84% of sole traders (see Table 7).

<sup>7</sup> Table shows industry categories mentioned by 3% or more respondents.

- Among freelancers, average actual revenue before COVID-19 support packages was \$1,319 compared to \$3,504 among sole traders (see Table 8).
- Among freelancers, average actual revenue after COVID-19 support packages was \$3,335 compared to \$8,308 among sole traders (see Table 8).

### **Access to COVID-19 financial support**

In the quarterly period from 1 April to 30 June 2020:

- 19% of freelancers accessed COVID-19 support packages compared to 38% of sole traders (see Table 13).
- On average, COVID-19 support packages accounted for 59% of revenue earned by freelancers compared to 53% by sole traders (see Table 14).
- The average value of COVID-19 support was \$1,978 among freelancers compared to \$4,373 among sole traders (see Table 14).
- Among respondents who received COVID-19 support packages, freelancers reported that they received 80% of their support, on average, from the Federal Government<sup>8</sup>. This was the same for sole traders (see Table 15).

### **Source of funding to cover lost revenue**

In the quarterly period from 1 April to 30 June 2020:

- 80% of freelancers and 79% of sole traders needed to draw on alternative income sources to cover their losses (Table 19).
- Both drew on personal reserves and savings to similar levels.
  - 65% of freelancers drew on personal savings compared to 67% of sole traders
- Freelancers were more likely to borrow funds from family and friends.
  - 20% of freelancers borrowed from family and friends compared to 12% of sole traders

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<sup>8</sup> Note small sample size. There were only 21 freelancers that reported receiving COVID-19 support packages.

## Appendix 1 | Profile of employee respondents

**Table 21: Main work of employer, by industry category – column%**

% of employee respondents	Employees
Base: Employee respondents	654
Creative artist - subtotal	4%
Visual artist/sculptor/XR artist	0%
Actor	1%
Director	0%
Producer	1%
Set/production/costume/lighting design	0%
Dancer/choreographer	0%
Musician/composer	1%
Writer/poet/playwright/screenwriter	0%
Circus performer	0%
Comedian	0%
Other / unspecified	1%
Performing arts company operation - subtotal	8%
Dance/ballet company operation	2%
Theatrical company operation	2%
Other / unspecified	4%
Performing arts venue operation - subtotal	4%
Music venue/arena operation	0%
Theatre operation	2%
Other / unspecified <sup>9</sup>	2%
Art Gallery operation	6%
Museum operation	3%
Library/Archive operation	31%
Community arts operation	4%
Film/TV production	1%
Film/video post-production and Animation production	0%
Games development/design and publishing	3%
Music publishing	0%
Music production, studio operation, sound recording	0%
Book/Journal/Magazine publishing	1%
Fashion, jewellery, textile design	0%
Professional photographic services	0%
Arts administration	3%
Arts education & training	4%
Festival operation	1%
Other	4%
Unspecified	24%

<sup>9</sup> Orchestra, Opera and Musical Productions were collapsed into the Other/Unspecified category due to low numbers in the population/sample.

## Appendix 2 | Profile of business entities

**Table 22: Main work in creative industries, by industry category and business type – column%**

% of business entities	All business entities	Not-for-profit	Company	Partnership	Sole trader	Freelancer
Base: Business entities	1,216	118	151	58	730	159
Creative artist - subtotal	48%	11%	15%	29%	61%	55%
Visual artist/sculptor/ XR artist	18%	6%	3%	12%	22%	26%
Actor	3%	0%	0%	0%	4%	8%
Director	1%	0%	0%	0%	2%	2%
Producer	1%	0%	3%	0%	2%	1%
Set/production/costume/ lighting design	1%	0%	0%	2%	2%	0%
Dancer/choreographer	2%	0%	1%	2%	3%	1%
Musician/composer	10%	1%	3%	2%	13%	8%
Writer/poet/playwright/ screenwriter	6%	3%	1%	5%	8%	5%
Circus performer	2%	0%	1%	5%	3%	1%
Comedian	1%	0%	1%	0%	1%	2%
Other / unspecified	2%	2%	4%	2%	2%	1%
Performing arts company operation - subtotal	5%	14%	11%	9%	2%	3%
Dance/ballet company operation	1%	3%	2%	2%	1%	0%
Theatrical company operation	1%	4%	3%	2%	1%	2%
Other / unspecified <sup>10</sup>	2%	7%	6%	5%	1%	1%
Performing arts venue operation - subtotal	4%	9%	8%	0%	2%	2%
Music venue/arena operation	1%	1%	4%	0%	1%	0%
Theatre operation	1%	3%	2%	0%	1%	1%
Other / unspecified	1%	6%	2%	0%	1%	1%
Art Gallery operation	2%	5%	1%	9%	1%	1%
Museum operation	1%	0%	1%	2%	1%	1%
Library/Archive operation	1%	5%	1%	0%	0%	1%
Community arts operation	5%	16%	2%	10%	3%	3%
Film/TV production	6%	2%	13%	3%	4%	10%
Film/video post-production and Animation production	1%	1%	1%	2%	2%	3%
Games development/design and publishing	4%	1%	6%	2%	3%	8%
Music production, studio operation, sound recording	1%	0%	4%	2%	1%	0%
Book/Journal/Magazine publishing	2%	3%	2%	2%	2%	1%
Fashion, jewellery, textile design	3%	0%	1%	3%	3%	4%
Professional photographic services	3%	0%	3%	2%	4%	2%
Arts administration	3%	7%	2%	2%	3%	0%
Arts education & training	2%	1%	1%	0%	2%	3%
Festival operation	1%	5%	1%	3%	1%	0%
Other	2%	3%	6%	0%	1%	2%
Unspecified	8%	17%	22%	21%	4%	3%

<sup>10</sup> Orchestra, Opera and Musical Productions were collapsed into the Other/Unspecified category due to low numbers in the population/sample.



**Table 23: Main work in creative industries, by industry category and business type – row%**

% of business entities	Base: business entities	Not-for- profit	Company	Partnership	Sole trader	Freelancer
Creative artist - subtotal	584	2%	4%	3%	76%	15%
Visual artist/sculptor/XR artist	222	3%	2%	3%	73%	19%
Actor	42	0%	0%	0%	71%	29%
Director	15	0%	0%	0%	80%	20%
Producer	18	0%	22%	0%	72%	6%
Set/production/costume/lighting design	16	0%	0%	6%	94%	0%
Dancer/choreographer	25	0%	4%	4%	84%	8%
Musician/composer	117	1%	3%	1%	84%	11%
Writer/poet/playwright/screenwriter	72	4%	1%	4%	79%	11%
Circus performer	24	0%	4%	13%	79%	4%
Comedian	9	0%	22%	0%	44%	33%
Other / unspecified	24	8%	25%	4%	54%	8%
Performing arts company operation - subtotal	58	28%	28%	9%	29%	7%
Dance/ballet company operation	11	27%	27%	9%	36%	0%
Theatrical company operation	18	28%	22%	6%	28%	17%
Other / unspecified	29	28%	31%	10%	28%	3%
Performing arts venue operation - subtotal	43	26%	28%	0%	40%	7%
Music venue/arena operation	13	8%	46%	0%	46%	0%
Theatre operation	14	21%	21%	0%	43%	14%
Other / unspecified <sup>11</sup>	16	44%	19%	0%	31%	6%
Art Gallery operation	22	27%	9%	23%	36%	5%
Museum operation	9	0%	22%	11%	56%	11%
Library/Archive operation	11	55%	9%	0%	27%	9%
Community arts operation	55	35%	5%	11%	40%	9%
Film/TV production	69	3%	28%	3%	43%	23%
Film/video post-production and Animation production	18	6%	6%	6%	61%	22%
Games development/design and publishing	45	2%	20%	2%	47%	29%
Music production, studio operation, sound recording	12	0%	50%	8%	42%	0%
Book/Journal/Magazine publishing	21	19%	14%	5%	52%	10%
Fashion, jewellery, textile design	32	0%	6%	6%	66%	22%
Professional photographic services	38	0%	11%	3%	79%	8%
Arts administration	36	22%	8%	3%	67%	0%
Arts education & training	24	4%	8%	0%	67%	21%
Festival operation	15	40%	7%	13%	40%	0%
Other	26	15%	35%	0%	38%	12%
Unspecified	98	20%	34%	12%	30%	4%

<sup>11</sup> Orchestra, Opera and Musical Productions were collapsed into the Other/Unspecified category due to low numbers in the population/sample.

## Appendix 3 | Tables showing revenue and employment impacts in detail

**Table 24: Expected versus actual employees in partnerships, companies and not-for-profit organisations, 1 April to 30 June 2020 – by industry category<sup>12</sup>**

Note: the number of expected and actual employees was very low in some industry categories, such as actors, directors and dancers employed by creative artists, as these professions tend to be employed directly by performing arts companies.

Number of employees	Expected	Actual	Net change (%)
Creative artist making original work - subtotal	415	97	-77%
Visual artist/sculptor/XR artist	65	52	-20%
Actor	0	0	-
Director	0	0	-
Producer	21	4	-81%
Set/production/costume/lighting design	2	1	-50%
Dancer/choreographer	0	0	-
Musician/composer	18	11	-39%
Writer/poet/playwright/screenwriter	21	14	-33%
Circus performer	10	3	-70%
Comedian	25	1	-96%
Other / unspecified	253	11	-96%
Performing arts company operation - subtotal	900	364	-60%
Dance/ballet company operation	232	110	-53%
Theatrical company operation	114	44	-61%
Other / unspecified	554	210	-62%
Performing arts venue operation - subtotal	1064	295	-72%
Music venue/arena operation	647	56	-91%
Theatre operation	118	82	-31%
Other / unspecified	299	157	-47%
Art Gallery operation	61	33	-46%
Museum operation	2	0	-100%
Library/Archive operation	92	68	-26%
Community arts operation	227	147	-35%
Film/TV production	174	126	-28%
Film/video post-production and Animation production	8	7	-13%
Games development/design and publishing	41	37	-10%
Music production, studio operation, sound recording	37	18	-51%
Book/Journal/Magazine publishing	61	35	-43%
Fashion, jewellery, textile design	14	7	-50%
Professional photographic services	16	15	-6%
Arts administration	135	81	-40%
Arts education & training	8	8	0%
Festival operation	114	67	-41%
Other	190	49	-74%
<b>Total number of employees</b>	<b>3,559</b>	<b>1,453</b>	<b>-59%</b>

Q. For the quarterly period from 1 April to 30 June 2020, what was your EXPECTED number of employees (including yourself)? Please enter the total number of people who you expected to employ during this time.

Q. In the quarterly period from 1 April to 30 June 2020, what was your ACTUAL number of employees (including yourself)? Please include any employees who were receiving JobKeeper in your total employee numbers.

<sup>12</sup> Please note: Figures are based on data from survey respondents only. Table 7 includes data provided about expected and actual employees in 188 business entities that employ one or more employees. This includes partnerships, companies and not-for-profit organisations. Modelling to extrapolate the data to provide industry estimates was beyond the scope of this work, however, net change in positions may be indicative of changes in employee numbers in partnerships, companies and not-for-profit organisations within the sector.

**Table 25: Actual versus expected revenue in creative industries, 1 April to 30 June 2020 – by industry category**

% of business entities, row%	Base: all business entities	Lower than expected	As expected	Higher than expected
All business entities	896	83%	13%	5%
Creative artist making original work - subtotal	476	86%	11%	4%
Visual artist/sculptor/XR artist	177	77%	18%	5%
Actor	28	86%	14%	0%
Director	15	87%	13%	0%
Producer	17	94%	6%	0%
Set/production/costume/lighting design	13	100%	0%	0%
Dancer/choreographer	20	95%	0%	5%
Musician/composer	102	94%	4%	2%
Writer/poet/playwright/screenwriter	62	81%	11%	8%
Circus performer	23	87%	9%	4%
Comedian	9	100%	0%	0%
Other / unspecified	10	100%	0%	0%
Performing arts company operation - subtotal	42	90%	2%	7%
Dance/ballet company operation	10	100%	0%	0%
Theatrical company operation	10	90%	0%	10%
Other / unspecified	22	86%	5%	9%
Performing arts venue operation - subtotal	35	100%	0%	0%
Music venue/arena operation	13	100%	0%	0%
Theatre operation	13	100%	0%	0%
Other / unspecified	9	100%	0%	0%
Art Gallery operation	15	73%	13%	13%
Museum operation	7	71%	14%	14%
Library/Archive operation	6	83%	17%	0%
Community arts operation	44	75%	9%	16%
Film/TV production	59	83%	15%	2%
Film/video post-production and Animation production	12	75%	25%	0%
Games development/design and publishing	35	26%	60%	14%
Music production, studio operation, sound recording	9	100%	0%	0%
Book/Journal/Magazine publishing	17	65%	24%	12%
Fashion, jewellery, textile design	26	88%	8%	4%
Professional photographic services	32	88%	13%	0%
Arts administration	30	80%	17%	3%
Arts education & training	17	100%	0%	0%
Festival operation	13	85%	8%	8%
Other	21	76%	19%	5%

Q. For the quarterly period from 1 April to 30 June 2020, how much revenue did [you / your partnership / company / organisation] EXPECT to earn from activities in creative industries? And, what was your ACTUAL revenue from activities in creative industries? Revenue includes the value of all contracts, sales, commissions, grants, subsidies or any other funds earned, including COVID-19 support packages.

Table shows row percentages. Excludes unsure and no response.

**Table 26: Expected versus actual revenue in creative industries, 1 April to 30 June 2020 – by industry category**

	Expected revenue (average)	Actual revenue Excludes COVID-19 support		Actual revenue With COVID-19 support	
		Average	% of expected	Average	% of expected
<b>All business entities</b>	<b>\$51,286</b>	<b>\$17,494</b>	<b>34%</b>	<b>\$28,775</b>	<b>56%</b>
Creative artist making original work - subtotal	\$20,143	\$6,086	30%	\$10,602	53%
Visual artist/sculptor/XR artist	\$23,643	\$10,843	46%	\$15,468	65%
Actor	\$15,839	\$1,536	10%	\$4,069	26%
Director	\$18,100	\$4,000	22%	\$10,867	60%
Producer	\$16,188	\$3,156	19%	\$3,875	24%
Set/production/costume/lighting design	\$22,083	\$5,042	23%	\$9,333	42%
Dancer/choreographer	\$21,632	\$1,605	7%	\$4,158	19%
Musician/composer	\$12,873	\$1,059	8%	\$5,750	45%
Writer/poet/playwright/screenwriter	\$25,700	\$8,242	32%	\$12,839	50%
Circus performer	\$18,958	\$458	2%	\$10,292	54%
Comedian	\$13,556	\$3,000	22%	\$3,667	27%
Other / unspecified	\$21,250	\$2,600	12%	\$6,300	30%
Performing arts company operation - subtotal	\$201,598	\$127,939	63%	\$170,244	84%
Dance/ballet company operation	\$299,150	\$212,950	71%	\$273,150	91%
Theatrical company operation	\$98,650	\$51,350	52%	\$68,550	69%
Other / unspecified	\$204,167	\$123,929	61%	\$169,667	83%
Performing arts venue operation - subtotal	\$171,842	\$34,041	20%	\$86,118	50%
Music venue/arena operation	\$219,385	\$19,500	9%	\$29,846	14%
Theatre operation	\$55,107	\$14,321	26%	\$48,107	87%
Other / unspecified	\$264,227	\$75,000	28%	\$201,000	76%
Art Gallery operation	\$54,250	\$14,214	26%	\$15,393	28%
Museum operation	\$23,417	\$8,417	36%	\$8,500	36%
Library/Archive operation	\$4,688	\$875	19%	\$875	19%
Community arts operation	\$43,929	\$20,917	48%	\$39,345	90%
Film/TV production	\$92,307	\$14,412	16%	\$20,095	22%
Film/video post-production and Animation production	\$104,885	\$2,423	2%	\$8,269	8%
Games development/design and publishing	\$24,459	\$17,389	71%	\$18,622	76%
Music production, studio operation, sound recording	\$96,313	\$7,929	8%	\$37,125	39%
Book/Journal/Magazine publishing	\$50,824	\$26,059	51%	\$38,088	75%
Fashion, jewellery, textile design	\$45,308	\$13,180	29%	\$17,460	39%
Professional photographic services	\$29,767	\$7,000	24%	\$15,867	53%
Arts administration	\$153,121	\$65,603	43%	\$121,431	79%
Arts education & training	\$7,789	\$868	11%	\$2,263	29%
Festival operation	\$151,864	\$30,955	20%	\$56,500	37%
Other	\$61,053	\$13,425	22%	\$28,200	46%

**Table 27: Average revenue from COVID-19 support packages - by industry category**

	Base: number of business entities	Average value of COVID-19 support	Average% of total revenue
Creative artist making original work - subtotal	584	\$4,537	43%
Visual artist/sculptor/XR artist	222	\$4,624	30%
Actor	42	\$2,661	65%
Director	15	\$6,867	63%
Producer	18	\$719	19%
Set/production/costume/lighting design	16	\$4,292	46%
Dancer/choreographer	25	\$2,553	61%
Musician/composer	117	\$4,691	82%
Writer/poet/playwright/screenwriter	72	\$4,597	36%
Circus performer	24	\$9,833	96%
Comedian	9	\$667	18%
Other / unspecified	24	\$3,700	59%
Performing arts company operation - subtotal	58	\$42,305	25%
Dance/ballet company operation	11	\$60,200	22%
Theatrical company operation	18	\$17,200	25%
Other / unspecified	29	\$45,738	27%
Performing arts venue operation - subtotal	43	\$54,257	63%
Music venue/arena operation	13	\$12,375	41%
Theatre operation	14	\$33,786	70%
Other / unspecified	16	\$126,000	63%
Art Gallery operation	22	\$1,179	8%
Museum operation	9	\$83	1%
Library/Archive operation	11	\$0	0%
Community arts operation	55	\$18,429	47%
Film/TV production	69	\$5,939	30%
Film/video post-production and Animation production	18	\$5,846	71%
Games development/design and publishing	45	\$1,597	9%
Music production, studio operation, sound recording	12	\$18,429	50%
Book/Journal/Magazine publishing	21	\$12,029	32%
Fashion, jewellery, textile design	32	\$4,280	25%
Professional photographic services	38	\$4,000	25%
Arts administration	36	\$55,828	46%
Arts education & training	24	\$1,395	62%
Festival operation	15	\$25,545	45%
Other	26	\$14,775	52%

Q. Approximately, how much of your [partnership / company / organisation's] revenue was from COVID-19 support packages (grants and subsidies, including JobKeeper contributions)? Excludes no response.

**Table 28: Proportion of business entities reporting NIL revenue from COVID-19 support packages**

	% of business entities reporting NIL COVID-19 support
<b>All business entities</b>	<b>61%</b>
Creative artist making original work - subtotal	63%
Visual artist/sculptor/XR artist	66%
Actor	61%
Director	47%
Producer	81%
Set/production/costume/lighting design	58%
Dancer/choreographer	58%
Musician/composer	66%
Writer/poet/playwright/screenwriter	58%
Circus performer	38%
Comedian	78%
Other / unspecified	50%
Performing arts company operation - subtotal	26%
Dance/ballet company operation	20%
Theatrical company operation	30%
Other / unspecified	27%
Performing arts venue operation - subtotal	62%
Music venue/arena operation	75%
Theatre operation	64%
Other / unspecified	45%
Art Gallery operation	79%
Museum operation	83%
Library/Archive operation	100%
Community arts operation	55%
Film/TV production	54%
Film/video post-production and Animation production	77%
Games development/design and publishing	83%
Music production, studio operation, sound recording	43%
Book/Journal/Magazine publishing	53%
Fashion, jewellery, textile design	81%
Professional photographic services	43%
Arts administration	50%
Arts education & training	79%
Festival operation	64%
Other	45%

Q. Approximately, how much of your [partnership / company / organisation's] revenue was from COVID-19 support packages (grants and subsidies, including JobKeeper contributions)? Excludes no response.

## Appendix 4 | COVID-19 Support Packages, 1 April to 30 June 2020

### Australian Government Support

#### **JobKeeper - Support for employers to continue paying their employees**

**Summary:** Wage subsidy where employers received a payment of \$1,500 per fortnight per eligible employee, to be passed on to the employee. JobKeeper Payments are paid in respect of each eligible employee who was employed at 1 March 2020 and is currently employed by the business.

**Timeline:** Commenced 30 March 2020. First payments to be received by businesses in the first week of May. Variations applied from 28 September 2020.

**Eligibility:**

Employers will be eligible for the subsidy if:

- They are businesses structured through companies, partnerships, trusts and sole traders.
- their business has an aggregated turnover of less than \$1 billion (for income tax purposes) and estimate their GST turnover has fallen or will likely fall by 30% or more; or
- their business has an aggregated turnover of \$1 billion or more (for income tax purposes) and estimate their GST turnover has fallen or will likely fall by 50% or more; or
- their business is not subject to the Major Bank Levy.
- For charities registered with the Australian Charities and Not-for-profits Commission (ACNC), they will be eligible for the subsidy if they estimate their GST turnover has fallen or will likely fall by 15% or more relative to a comparable period.
- This lower turnover decline test does not apply to universities and non-government schools that are registered charities, who will remain subject to the turnover decline tests set out above for other not-for-profits and businesses.

Eligible employees are employees who:

- are currently employed by the eligible employer (including those stood down or re-hired);
- were employed by the employer at 1 March 2020;
- are full-time, part-time, or long-term casuals (a casual employed on a regular basis for longer than 12 months as at 1 March 2020);
- are at least 16 years of age;
- are an Australian citizen, the holder of a permanent visa, a Protected Special Category Visa Holder, a non-protected Special Category Visa Holder who has been residing continually in Australia for 10 years or more, or a Special Category (Subclass 444) Visa Holder; and
- are not in receipt of a JobKeeper Payment from another employer.

#### **JobSeeker - Support for workers and households - Coronavirus supplement**

**Summary:** Expanding eligibility to income support payments and establishing a new, time-limited Coronavirus supplement to be paid at a rate of \$550 per fortnight on top of the standard income support payment.

**Timeline:** 22 March 2020

**Eligibility:** Existing and new recipients of:

- JobSeeker Payment, Partner Allowance, Widow Allowance, Sickness Allowance and Wife Pension
- Youth Allowance for job seekers, students and apprentices
- Austudy for students and apprentices

- ABSTUDY for students getting Living Allowance
- Parenting Payment partnered and single
- Farm Household Allowance
- Special Benefit.

In addition, there is temporarily expanded eligibility for:

- a permanent employee who has been stood down or lost your job
- a sole trader, self-employed, a casual or contract worker whose income has reduced
- caring for someone who is affected by coronavirus.

The following have been waived:

- asset testing for 6 months from 25 March 2020, except for Farm Household Allowance and Special Benefit
- liquid asset test waiting period, newly arrived residents waiting period, and seasonal work preclusion period.

The partner income test was temporarily relaxed, providing the applicants partner earns less than \$3,068 per fortnight, or \$79,762 per annum (up from \$48,000).

### **Arts Industry Support Package— supporting Indigenous visual arts centres**

**Summary:** Payments of up to \$85,000 will be made to each IVAIS-funded Indigenous Art Centre, spread across 2019–20 and 2020–21. Payments of up to \$70,000 will be made to each IVAIS-funded Indigenous Art Fair in 2020–21.

**Timeline:** Art Centres will receive the funds across two payments—one in 2019–20 and one in 2020–21. Art Fairs will receive one payment in 2020–21.

**Eligibility:** Indigenous Art Centres and Indigenous Art Fairs that already receive funding through the Indigenous Visual Arts Industry Support (IVAIS) Program.

## **Lotterywest/DLGSC**

### **Event Cancellation Relief for Arts and Culture Organisations**

**Summary:** For not-for-profit culture and arts organisations experiencing immediate financial hardship as a result of an event or program that has been cancelled between 16 March 2020 and 15 September 2020 due to COVID19 restrictions on mass gatherings. Funding initially capped at \$5 million.

**Timeline:** Applications open 24 April to 13 May 2020.

Grants approved 19 June 2020. Payments due to be processed by 31 June 2020.

**Eligibility:** The following organisations are eligible to apply:

1. Not-for-profit organisations (incorporated associations) operating in the arts and culture sector
2. DLGSC multi-year funded arts organisations in the Arts Organisations, Investment Program and Major Performing Arts Companies (National Partnership Organisations).

### **Sector Support for Resilient Culture and Arts Organisations**

**Summary:** For culture and arts organisations at risk of collapse during the period covered by the State of Emergency (16 March 2020 to 15 September 2020) due to COVID-19 restrictions to maintain staff, pivot operations, collaborate, develop new ways of working, innovate, maintain viability and build resilience as appropriate for future recovery. Funding available initially capped at \$8 million.

**Timeline:** Applications open 24 April to 13 May 2020.

Grants approved 19 June 2020. Payments due to be processed by 31 June 2020.

**Eligibility:** The following organisations are eligible to apply:

1. Not-for-profit organisations (incorporated associations) operating in the arts and culture sector
2. DLGSC multi-year funded arts organisations in the Arts Organisations, Investment Program and Major Performing Arts Companies (National Partnership Organisations).



## Department of Local Government, Sport and Cultural Industries

### **Rent Relief for tenants in Government-owned buildings**

**Summary:** Over \$3 million in rent relief in the form of waived rental payments for arts small businesses and not-for-profit groups in Government-owned buildings for six months through DLGSC.

**Timeline:** From 30 March to 30 September 2020

**Eligibility:** Arts small businesses and not-for-profit groups who are tenants in Government-owned buildings.

### **Arts U-15k Grant Program**

**Summary:** Under \$15,000 quick response program for individual artists or practitioners through the DLGSC.

**Timeline:** Reopened 6 May 2020 – ongoing.

**Eligibility:** For individual artists or practitioners - for activities permissible in COVID-19 restrictions.

### **Contemporary Music Fund Grant Program (U-15k category)**

**Summary:** Under \$15,000 quick response program for individual artists or practitioners through the DLGSC.

**Timeline:** reopened 6 May 2020 – ongoing.

**Eligibility:** For individual artists or practitioners - for activities permissible in COVID-19 restrictions.

## Art Gallery of Western Australia

**Summary:** A targeted acquisition program to purchase existing works from Aboriginal Art Centres and independent Aboriginal and/or Torres Strait Islander artists for the State Art Collection (up to \$525,000 in total). A payment of \$2,000 each to 350 WA artists will receive \$2,000 towards creating a State Art Collection archive

**Timeline:** Announced 25 May 2020.

**Eligibility:**

- 15 independent Aboriginal and Torres Strait Islander artists and from 25 Aboriginal art centres.
- All living Western Australian artists represented in the State Art Collection.

## Screenwest

### **Bright Ideas Sustainability Fund**

**Summary:** A one-time special purpose practitioner initiative (up to \$5,000) aimed at creating new methods of sustainability for the WA screen production industry.

**Timeline:** Applications open 31 March to 14 April 2020.

Successful projects announced 22 May 2020. Payments due to be processed by 31 June 2020.

**Eligibility:** The initiative is designed for below-the-line crew, and directors.

### **Taking Care of Business – Production Company and Producer Support Package**

**Summary:** A one-time special purpose sustainability fund for production companies and producers to sustain their business during the COVID-19 crisis.

**Timeline:** Applications open 31 March to 14 April 2020.

Successful projects announced 10 June 2020. Payments due to be processed by 31 June 2020

**Eligibility:**

- (up to) \$75,000 for well-established, high-volume production companies that have significant and well-established infrastructure and overheads in place.
- (up to) \$30,000 for production companies that have moderate infrastructure and overheads.

- (up to) \$15,000 for production companies/producers that have made a significant contribution to the industry and have at a minimum a producer, co-producer or associate producer credit, or confirmed market commitment to at least one theatrical or television production within the last 12 months.
- (up to) \$7,500 for emerging producers/production companies that have no employees, minimal overheads, and have made a consistent contribution to the screen industry within the past two years.

### **Taking Care of Business ‘Fix it in Post’ Fund**

**Summary:** A one-time special purpose sustainability fund aimed at assisting post production companies to develop or repurpose their business and to continue to contribute to the screen industry during the COVID-19 crisis.

**Timeline:** Applications open 9 April to 21 April 2020.

Successful projects announced 10 June 2020. Payments due to be processed by 31 June 2020

#### **Eligibility:**

- (Up to) \$25,000 for busy, well-established post production companies that: have significant and well-established infrastructure and overheads in place; have more than two fulltime/part time employees; can demonstrate considerable and consistent, year to year work on multiple productions in WA for a minimum of three years prior to application date; and, can demonstrate a substantial impact on a slate of projects due to COVID-19.
- (Up to) \$10,000 For Western Australian post- production companies that have: moderate infrastructure and overheads; can demonstrate considerable and consistent, year to year work on multiple productions in WA for a minimum of three years prior to application date; and, can demonstrate a substantial impact on a slate of projects due to COVID-19.

## **Additional Government COVID-19 Support Packages**

The following Australian Government COVID-19 relief packages did not incorporate payments that could have been received during the 1 April to 30 June 2020 time period of the scope of this study:

### **Announced 9 April 2020**

- Arts Industry Support Package - Support Act: crisis relief to artists, crew and music workers
- Arts Industry Support Package—crisis relief for regional arts
- Australia Council 2020 Resilience Fund with the following three streams:
  - Survive: Small grants for individuals, groups and organisations to offset or recoup money lost due to cancelled activity.
  - Adapt: grants for individuals, groups and organisations to adapt their arts practice and explore new ways of working.
  - Create: grants for individuals, groups and organisations to continue to create artistic work and/or develop creative responses in this time of disruption.

### **Announced 25 June 2020**

- The Restart Investment to Sustain and Expand (RISE) Fund
- Show Starter Loan Scheme
- Temporary Interruption Fund (TIF)
- COVID-19 Arts Sustainability Fund

**Announced 17 July 2020**

- Location Incentive to attract large budget international film and television productions to Australia over the next seven years

**Announced 26 September 2020**

- Support for Australia's national cultural institutions during COVID-19

## Appendix 5 | Communications

The DLGSC and partner organisations used various communication channels to promote the survey, including email signatures and social media promotions.

Email Signature Promotion	 The graphic for the email signature promotion features a background image of numerous open paint cans in various colors (blue, green, yellow, red, purple). Overlaid on the right side is a pink rectangular box containing the text: "Help us understand and measure the impact of COVID-19 on revenue and employment in the creative industries in WA". Below this, a black rectangular box contains the text: "Please complete a survey today at <a href="http://www.catalyse.com.au/studies">www.catalyse.com.au/studies</a> ". At the bottom, there are three logos: CATALYSE, the Department of Local Government, Sport and Cultural Industries, and THE CHAMBER OF ARTS AND CULTURE WESTERN AUSTRALIA.
Social Media Promotion	 The graphic for the social media promotion features the same background image of paint cans. It has a pink rectangular box at the top with the text: "Help us understand and measure the impact of COVID-19 on revenue and employment in the creative industries in WA". Below this, a black rectangular box contains the text: "Complete a short survey today". At the bottom, there are three logos: CATALYSE, the Department of Local Government, Sport and Cultural Industries, and THE CHAMBER OF ARTS AND CULTURE WESTERN AUSTRALIA.