



Western Australian creative industries: COVID-19 impacts

Prepared for:

Department of Local Government, Sport and Cultural Industries

Prepared by:

CATALYSE[®] Pty Ltd

20 November 2020

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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 ¹ | 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 responses², 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.

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

² 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 |
|----------------------------------------------------------------------------|------------------|
| Location | |
| Base: all individual responses, excludes no response and prefer not to say | 1296 |
| Perth metro | 77% |
| Regional WA | 22% |
| Outside WA | 1% |
| Age | |
| Base: all individual responses, excludes no response and prefer not to say | 1291 |
| 14-34 years | 27% |
| 35-54 years | 45% |
| 55+ years | 28% |
| Gender | |
| Base: all individual responses, excludes no response and prefer not to say | 1282 |
| Male | 30% |
| Female | 69% |
| Self-described | 1% |
| Diversity | |
| 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% |
| Total individual respondents | 1,670 | | 1,670 | |

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% |
| Total business entities | 1,216 | |

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% |

| | Number of business entities | % of business entities |
|--------------------------------|------------------------------------|-------------------------------|
| Other | 26 | 2% |
| Unspecified | 98 | 8% |
| Total business entities | 1,216 | |

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 status³

| 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 |
| Total number of employees | 3,559 | 1,453 | -59 |

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.

³ 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)⁴.
 - 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.⁵ 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

⁴ 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%).

⁵ 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 |
| All business entities | \$51,286 | \$17,494 | 34% | \$28,775 | 56% |
| 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

| % of business entities, column% | Expected revenue | Actual Revenue | Net change (% points) |
|----------------------------------------|-------------------------|-----------------------|------------------------------|
| 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

| | All business entities | Freelancer | Sole trader | Partnership | Company | Not-for-profit |
|----------------------------------|------------------------------|-------------------|--------------------|--------------------|----------------|-----------------------|
| 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 |
|------------------------------|-----------------------------------|-----------------------------------|---------------------------|
| All business entities | 1,216 | \$11,173 | 39% |
| 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% ⁶ | 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.

⁶ 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 freelancers⁷

| 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).

⁷ 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 Government⁸. 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

⁸ 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 ⁹ | 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% |

⁹ 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 ¹⁰ | 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% |

¹⁰ 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 ¹¹ | 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% |

¹¹ 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 category¹²

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% |
| Total number of employees | 3,559 | 1,453 | -59% |

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.

¹² 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 |
| All business entities | \$51,286 | \$17,494 | 34% | \$28,775 | 56% |
| 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 |
|-----------------------------------------------------|-------------------------------------------------------|
| All business entities | 61% |
| 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 www.catalyse.com.au/studies ". 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. 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: "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. |