THE CHAMBER
OF ARTS AND CULTURE
WESTERN AUSTRALIA

COVID Financial and Wellbeing Impact Survey Results

March 2022

Chamber of Arts and Culture WA

Ngala kaaditj Whadjuk Noongar moort keyen kaadak nidja boodja

We acknowledge Whadjuk Noongar people as the original custodians of the land on which our office sits.

The Chamber of Arts and Culture WA acknowledges Traditional Owners of Country throughout Western Australia and recognises the continuing connection to lands, waters and communities.

We pay our respect to Aboriginal and Torres Strait Islander cultures; and to Elders both past and present.

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Executive Summary

Diversify WA has set a target for a stronger economy with a target of 150,000 jobs (including 30,000 regional jobs). The State has genuine ambition to be a destination state for education, learning, visiting, doing business and living. The arts and culture industry are a well-educated, well-qualified sector that contributes to all aspects of the States ecology whilst embracing the needs of the many. The industry has demonstrated its ability to pivot, be flexible at a time of rapid change and offer support to the most vulnerable in our communities. All whilst providing high quality cultural experiences that push our creative boundaries and explore the world through new lenses. Yet the investment structure that scaffolds the industry has not changed in over 10 years.

In addition, *A New Approach* recently launched the Big Picture 2: Public Expenditure on Artistic, Cultural and Creative activity in Australia in 2007-08 to 2019-20 which has analysed Government funding of arts and culture. The research found that investment is not keeping pace with population growth, indicating that there has been a 7% decrease in per capita cultural funding by governments over the reported time frame. This had led to Australia falling behind its OECD peers, with Australia currently ranked 23 out of 34 countries for expenditure on culture, recreation and religion. Across the OECD the average expenditure is 1.23 percent of total GDP while the Australian figure is only 0.95 percent. This report demonstrates that we already have a cultural deficit.

The Chamber's COVID Financial Impact and Well-being survey results is calling for a change in the way we value and invest in an industry that forms part of WA's unique identity, its storylines and its ability to connect people and place in every corner of our State. The $76m arts and culture WA recovery plan of which $9m contributed to 'Getting the Show Back on the Road' is a much needed boost for live music and performance. This survey represents the wider arts and culture landscape and demonstrates the cumulative impact of the stagnant funding levels of major organisations, reduced core funding options for smaller companies and independent artists. Worrying trends relating to mental health and well-being of the arts/culture workforce and a marked decline in ability to invest in strategic initiatives, longer term outcomes and innovative practice is a call for change.

This is also a wake-up call for the arts and culture industry. With year on year decline of investment we cannot expect to continue to deliver the same level of services and outcomes as previous years. As a sector we have been our own worst enemy by offering unpaid hours to deliver quality services because of our fundamental believe in the transformational power of art to bring people together, activate communities, encourage civic pride, improve health and well-being that comes from feeling rooted and connect to who we are and where we live. If we do not, as a sector, begin to say enough is enough and bring some reality to the situation investors will continue to expect more for less.

Kim Jameson
Executive Director, Chamber of Arts and Culture WA

Introduction

Western Australia's Covid experience has been different from most of Australia's and the rest of the world, however the impact on many industries has been devastating. For Western Australia's arts and cultural sector the past 2 years has seen events and programs cancelled or postponed, job insecurity increase and organisations approaching crisis levels as venue capacity limits, snap lock-downs and audience hesitancy take a heavy toll.

As we approached the 2-year mark of the pandemic, Western Australia was preparing to re-open its borders to the rest of Australia and the world for the first time since March 2020. Having witnessed the impact that the Omicron wave had on the eastern states of Australia over the previous few months and in preparation of the WA borders re-opening we sought to collect data on the financial and artistic risks the sector is facing over the next 6 months.

The survey takes a snapshot of where the sector is now and the key issues and challenges it will face over the next 6 months.

The survey was circulated on 16 February 2022 almost a month after the date of the border re-opening was delayed by the McGowan Government, and a new date had yet to be announced.

The new border reopening date – 5 March – was announced on 18 February. 139 responses to the survey were received before the new border reopening date announced.

Level 1 public health and social measures introduced on 21 February and Level 2 public health and social measures were introduced state-wide from 12:01am, Thursday 3 March.

The survey closed 3 March 2022.

296 respondents arts and cultural organisations, artists and creative producers, and arts workers responded to the survey representing the diversity of artistic practice and organisation size and structure that make up the WA creative economy.

Respondents were asked to complete the survey in either their capacity as the leader of an arts and culture organisation, as an artist or creative producer, or as an arts administrator. The survey asked different questions of respondents dependent on in what capacity you were responding.

This report outlines the survey results in three sections – responses from arts and culture organisations, responses from artists and creative producers, and responses from arts administrators.

Data Highlights

In February and March 2022 the Chamber of Arts and Culture sent out a survey to get a snapshot of how the arts and culture sector was faring after 2 years of covid and to understand the issues and challenges the sector faces over the next 6 months.

There were 296 respondents to the survey - 135 arts and culture organisations, 103 artists and creative producers and 58 arts administrators.

Western Australia's Creative Economy in Crisis
Without additional government support 74.74% of the organisations surveyed reported that if the next 6 months of programming was cancelled they would not be able to continue operating on current contributed and earned income streams beyond 12 months.
Even with no cancellation of programming over the next 6 months 63.16% of organisations with operating budgets between $250k - $500k and 58.33% of organisations with operating budgets between $500k - $1 million would be operating on reserves or need to cease operations within the next 12 months.
97.95% of organisation respondents are concerned about the potential scaling down or closure of small-to-medium cultural organisations who nurture innovation, experimentation and freshness of creative content.
73.91% of artist respondents predicted their creative productivity would decrease over the next 6 months if there was a covid wave in WA.
Cancelled Events and Programs
61.80% of respondents had already cancelled programs and events for the first 6 months of 2022 (Jan – June 2022).
25.47% of respondents had already cancelled programs and events that had been scheduled to run between March – August 2022.
998,386 audience members at risk over the next six months.

Impact on Employment
8,117 Full Time Equivalent jobs and employment contracts at risk over the next 6 months.
89.01% artist and creative producer respondents had lost income in the past 2 years due to covid.
43.59% of artists respondents practitioners who had lost income have sought work outside the arts and culture sector to supplement lost income
Over the past 2 years 38.60% of arts administrator respondents had lost some of their income from arts administrative work due to covid.
Social Impact Programs at Risk
54.02% of surveyed organisations work with and run programs for Culturally and Linguistically Diverse communities, people with disabilities, school-aged children, seniors, aboriginal youth, remote communities, domestic violence shelters and rehab facilities, hospitals and dementia services. Many of these programs have already been impacted by covid restrictions.
Further cancellation or reduction in these programs will increase the isolation of at risk groups and significantly impact on aboriginal artists' economic and social well-being.
Mental Health and Well-being Crisis
91.84% organisations surveyed are concerned about the well-being of staff and volunteers
58.49% of artist respondents shared that they had experienced mental health issues over the past 2 years as a result of covid.
51.66% of arts worker respondents shared that they had experienced mental health issues over the past 2 years as a result of covid.

Key Findings and Recommendations

KEY FINDINGS	RECOMMENDATIONS
Job Losses	**Invest in a Skilled Workforce**
Western Australia could lose more than 60% of its small to medium organisations within the next 12 months	An immediate **$30m Arts and Culture Recovery Package** to boost and support survival and viability. Minimum level of **$23m per annum investment** to ensure consistent minimum level of organisational and program funding through the Department of Local Government, Sport and Cultural Industries with a mix of Lotterywest funding and consolidated revenue.
Recovery Framework Inadequate	**Equity of Recovery and Long-Term Investment**
The sector's workforce is facing a crisis with burn out, well-being and financial hardship leading to talent flight and economic instability.	**Investment Program ($10m over 4 years)** for organisations to recalibrate business operations and support the development of new business models that are fit for purpose. **$5m Income Support** for sole traders and micro-businesses impacted by event and program delays and cancellations, to cover lost contract income and incurred costs. **Business Development Grants ($0.4m over 4 years)** and Financial Coaching programs to support artists and creative producers to develop and strengthen governance, business management, artistic development and cultural diversity. **$70m (over 4 years) arts and culture state wide stimulus package** that re-activates school and creative learning activities, develops organisations, artists and creative producers to reflect the State's cultural diversity and creates accessible pathways for audiences and participants to actively engage in creative programs.

KEY FINDINGS	RECOMMENDATIONS
Deficient Investment Models	**Review, Align and Recalibrate**
The past 2 years have brought into sharp focus long-term issues with current funding models and have accelerated existing issues around project development and delivery, audience development, digital transformation and the need to strengthen the capacity of artists and creative producers.	Government, grant bodies and investment partners to work with the sector to articulate the models of delivery, identify their true costs and shape investment to meet the need. A living wage for independent artists. A government backed insurance policy for arts and culture events to mitigate and share risk.
Human Impact on Skilled Workforce	**Prevention and Safe working Practices**
There are serious mental health and well-being issues across the sector.	In partnership with relevant agencies develop an **Arts and Culture Mental Health and Well-being Framework** that includes access to mental health services and well-being training to support the industry. In partnership with industry and State Government establish **a Safe Work Framework** that ensures unpaid overtime and undocumented hours are eliminated and the true cost of programs and projects is accounted for (including wages and superannuation costs) in funding applications.
Sector Invisible and Devalued	**Policy Framework Required**
The sector feels undervalued and invisible to government.	A state-wide **Arts, Heritage and Culture Plan** that identifies a clear shared vision and outcomes that are supported by appropriate investment and connects into all tiers of government (Federal, State and Local) across all key departments. Mandate and develop **Local Government Cultural Plans** that reflect their unique cultural place within the state, set a vision for the future, articulate the local human and built cultural assets, identify priorities, and appropriate investment to meet those priorities to generate sustainable outcomes.

Survey Results
Arts and Culture Organisations

135

ARTS & CULTURE ORGANISATIONS RESPONDED TO THE SURVEY

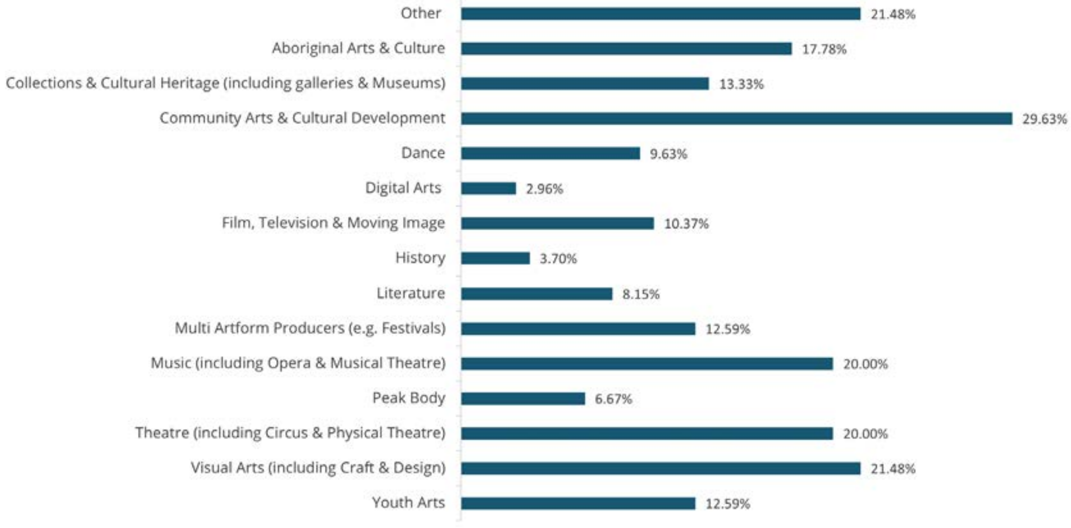
Respondents represented the broad spectrum of arts and cultural practice. Organisations were based across the state, with a good representative spread in the size of operations, both in terms of annual turnover and staff numbers.

The respondent organisations represented both commercial, not-for-profit and state and local government operations.

BREAKDOWN OF RESPONDENTS:

- 51 Not for profit arts and/or cultural organisations that do not primarily identify as a service organisation (37.77%)
- 31 Not for profit organisations that primarily provide services to the sector (22.96%)
- 21 State or local government arts agencies, departments, facilities or venues (15.55%)
- 25 For profit or commercial creative businesses (18.51%)
- 1 Unincorporated program or Artist Run Collective (0.69%)

Graph 1: Arts and Culture Organisation Respondents by Arts Practice



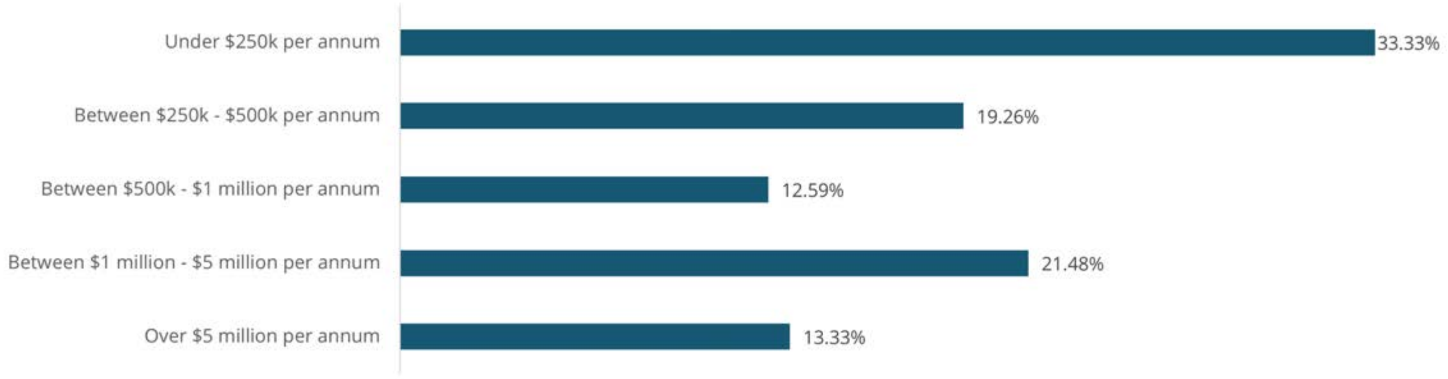
Other disciplines included experimental arts, sciences, radio, design, public art, and arts for children and families (as opposed to Youth/Teens).

Table 1: Survey Question - Where is your organisation based?

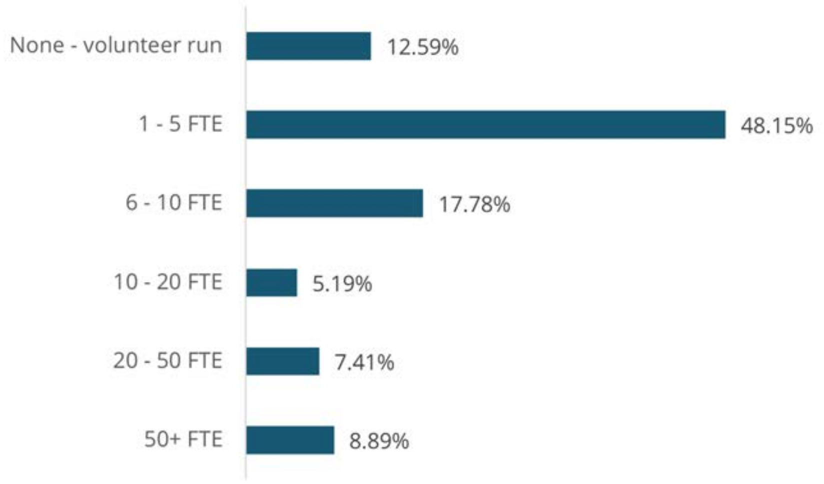
Perth Metro	72.59%	98
Outer Metro	11.11%	15
Regional WA	17.78%	24
Other*	5.19%	7
Total Respondents: 135		

*Other respondents were nationally based and in Fremantle.

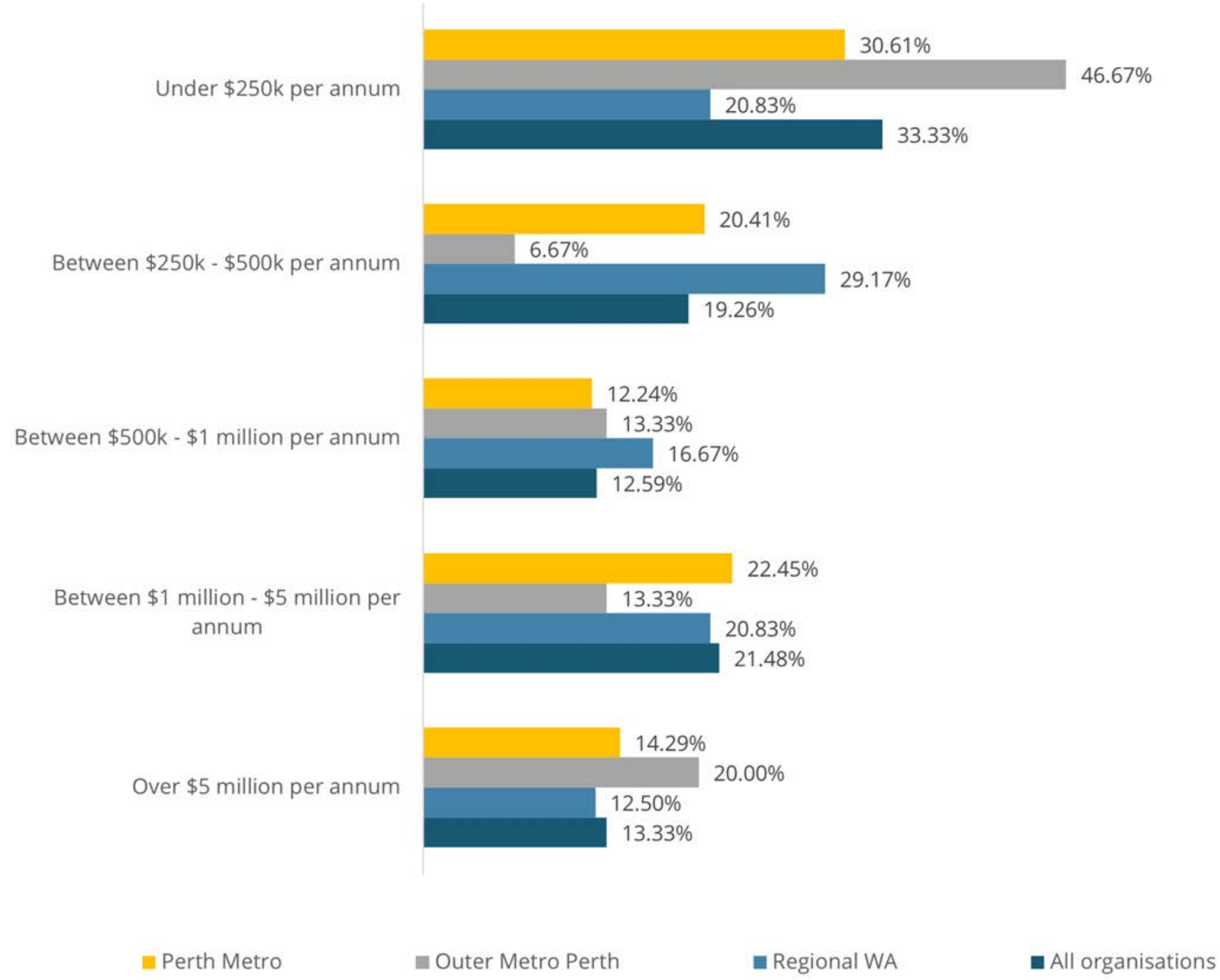
Graph 2: Arts and Culture Organisation Respondents by Turnover



Graph 3: Arts and Culture Organisation Respondents by Full Time Equivilent Staff



Graph 4: Arts and Culture Organisation Respondents Turnover per Region



Financial Impact on Arts and Culture Organisations

31.46M

PROJECTED TOTAL REVENUE AT RISK BETWEEN MARCH - AUGUST 2022

Based on the reported revenue at risk from earned income from programming, box office takings, partnership, sponsorship, philanthropic and donor income and admission fees.

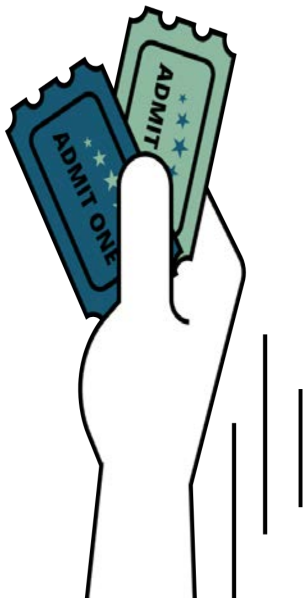
The survey asked arts and culture organisation respondents to share the potential and actual impact of Covid on their programming and on different revenue streams.

- **61.80%** of respondents had already cancelled programs and events for the first 6 months of 2022 (Jan – June 2022).
- **25.47%** of respondents had already cancelled programs and events that had been scheduled to run between March – August 2022.
- **52.83%** reported that cancelling events and programming over the next 6 months would potentially result in lost partnership and sponsorship support.
- **33.96%** reported that cancelling events and programming over the next 6 months would potentially result in lost philanthropic and donor income.

The actual financial losses incurred from already having cancelled events and programs that had been scheduled to run between March – August has most severely impacted the small to medium sector, with:

- **46.15%** of organisations with annual turnovers between $500k - $1 million reporting losses; and
- **36%** of organisations with a turnover of between $1 million - $5 million reporting a loss;
- Compared to **8.33%** of large organisations (turnover of over $5 million per annum) and **25.47%** of organisations overall.

It is also the small to medium sector most at risk of losing partnership and sponsorship and philanthropic and donor investment with the cancellation of events and programs.



We asked respondents to let us know the dollar amount of income at risk and actually lost:

$6,983,760 Potential earned Income and **$2,413,400** in admission fees at risk over the next 6 months.

$1,401,500 in other revenue at risk in the next 6 months (retail sales, etc.)

$4,435,800 in Box Office already lost because of cancelled events in 2022 and **$10,898,240** Box Office at risk over the next 6 months over the next 6 months.

$7,661,150 in Partnership and Sponsorship income and **$2,106,500** in Philanthropic and Donor Income at risk over the next 6 months.

“Our business model is focused on fee for service to schools, libraries, play groups, and disability service orgs. We have lost two bookings so far but our program for the next 6 months is looking like it will need to be substantially postponed - this has a significant impact on both our income and our artists’ incomes.”

- Arts Organisation, with a turnover between $500k - $1 million

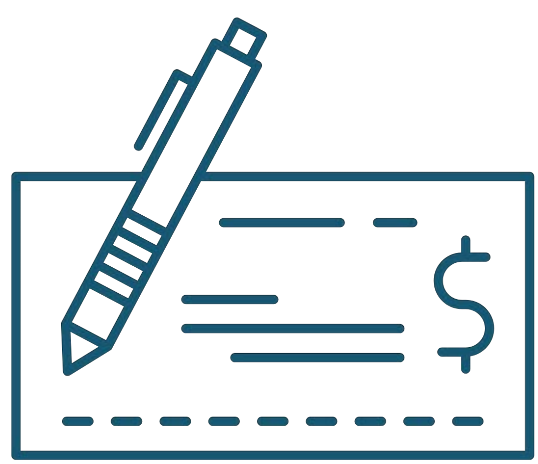


Table 2: Survey Question - Thinking about the next 6 months (March - August), if WA were to experience a Covid wave similar to that experienced by the Eastern States (i.e., exponential case numbers with accompanying venue restrictions/closures, audience hesitancy, staff/volunteers impacted by isolation/quarantine requirements) and you had to cancel all planned events and programs, what income streams would be Impacted? (Tick all that apply)

Breakdown of responses based on organisation size and location of operations.

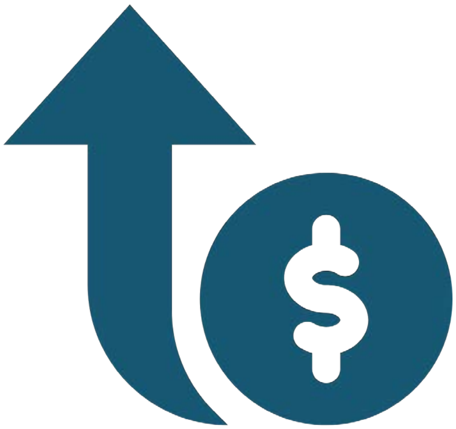
	All Respondents	Very Small T/O less than $250k	Small to Medium T/O $250 -$500k	Medium Turnover $500k - $1m	Medium - Large ($1m - $5m)	Large ($5m +)	Perth Metro	Outer Metro	Regional
Known box office	25.47%	16.67%	25.00%	46.15%	36.00%	8.33%	23.38%	14.29%	31.58%
Potential box office	37.74%	27.78%	30.00%	46.15%	52.00%	41.67%	38.96%	21.43%	31.58%
Potential admission fees	20.75%	25.00%	30.00%	15.38%	16.00%	8.33%	19.48%	14.29%	21.06%
Potential earned income	70.75%	75.00%	90.00%	69.23%	60.00%	50.00%	76.62%	50.00%	57.89%
Potential partnership and sponsorship loss	52.83%	38.89%	45.00%	69.23%	68.00%	58.33%	54.55%	42.86%	42.11%
Potential philanthropic and donor loss	33.96%	22.22%	35.00%	46.15%	44.00%	33.33%	36.36%	14.29%	21.05%
No potential lost or actual income	12.26%	16.67%	5.00%	7.69%	4.00%	33.33%	9.09%	35.71%	21.05%

Respondents noted that the financial impact will not just be felt by the arts and culture sector, with cancelled tours impacting on regional tourism spend as organisations cancel accommodation bookings, and touring groups are not spending money in regional centres on food, etc.

Other financial risks reported:

- Potential loss to earned income through lack of film and television production activity.
- Risk to future grants because of low participation numbers for projects delivered online.

Additional costs being budgeted for because of Covid



$994,800

IN ADDITIONAL COSTS TO ORGANISATIONS OVER THE NEXT 6 MONTHS

Organisations across the board are budgeting for additional costs over the next 6 months. For the 65 organisations who told us the amount – a total of $994,800 in additional costs are being budgeted for.

- Many are using money from their reserves to cover these expenses or are looking at reducing staff levels to cover costs.
- Others reported that as they had cancelled events already, they were not budgeting for these additional costs for the next 6 months.

Respondents also raised concerns that other components of a Covid response should be being budgeted for but a lack of resources meant contingency planning, digital transformation and additional administration costs were either not being undertaken or were being resourced with a reduction in spend across other budget lines.

Table 3: Survey Question - What additional expenses are you budgeting for in the next 6 months?

Breakdown of responses based on organisation size and location of operations.

	All Respondents	Very Small T/O less than $250k	Small to Medium T/O $250 -$500k	Medium Turnover $500k - $1m	Medium - Large ($1m - $5m)	Large ($5m +)	Perth Metro	Outer Metro	Regional
Additional cleaning - office/ venue	47.31%	35.48%	47.37%	50.00%	54.55%	66.67%	46.38%	50.00%	44.44%
Additional staff for compliance	25.81%	16.13%	10.53%	33.33%	27.27%	77.78%	24.64%	40.00%	38.89%
Masks and Rapid Antigen Tests	58.06%	45.16%	63.16%	66.67%	72.73%	44.44%	55.07%	80.00%	55.56%
Additional hygiene products (hand sanitiser, masks, etc.)	73.12%	64.52%	84.12%	66.67%	81.82%	66.67%	72.46%	80.00%	72.22%
COVID communication & signage	46.24%	48.39%	47.37%	50.00%	31.82%	66.67%	42.03%	70.00%	44.44%
Work From Home Costs	44.09%	41.94%	31.58%	25.00%	68.18%	44.44%	47.83%	30.00%	33.33%
Well-being services	39.78%	29.03%	31.58%	50.00%	54.55%	44.44%	40.58%	30.00%	38.89%
Other	12.90%	9.68%	21.05%	16.67%	9.09%	11.11%	11.59	20.00%	11.11%
None	13.98%	25.81%	0.00%	16.67%	9.09%	11.11%	11.59%	20.00%	22.22%

Severity of financial impact on organisations

"The major risk is ending the production of events for good due to hardships, unpredictability and no government support. It's been a successful project for past 7 years but the conditions for keeping it going are getting worse and worse."

The next 6 months could potentially be devastating for Western Australia's arts and cultural ecology and creative economy.

58.17% of organisation respondents expect the financial impact of covid over the next 6 months to be Severe to Extremely Severe. Once again, the small to medium sector is the sector is most at risk with **72.22% of organisations with turnovers between $250k - $500k and 66.67% of organisations with turnovers between $500k - $1million projecting the financial impact to be Severe to Extremely Severe for their organisation.**

Loss of earned revenue is the key concern for organisations, followed by limited cash reserves and end of emergency funding from the state government. Many organisation respondents expressed concern for the overall health of the sector and the artists and creative professionals their organisation support.

Table 4: Survey Question - How severe do you expect the overall financial impact of COVID will be to your organisation over the next 6 months?

	All Respondents	Very Small T/O less than $250k	Small to Medium T/O $250 -$500k	Medium Turnover $500k - $1m	Medium - Large ($1m - $5m)	Large ($5m +)	Perth Metro	Outer Metro	Regional
Extremely severe	27.17%	19.35%	44.44%	25%	22.73%	33.33%	29.41%	27.27%	23.53%
Severe	31%	45.16%	27.78%	41.67%	27.27%	11.11%	30.88%	36.36%	29.41%
A little severe	31%	25.81%	27.78%	33.33%	40.91%	55.56%	33.82%	36.36%	47.06%
Not severe at all	5%	9.68%	0%	0%	9.09%	0%	5.88%	0%	0%

WITH NO ADDITIONAL GOVERNMENT SUPPORT

74.74%

OF ARTS AND CULTURE ORGANISATION RESPONDENTS WILL NOT BE VIABLE WITHIN 12 MONTHS IF THE NEXT 6 MONTHS OF PROGRAMMING IS CANCELLED DUE TO COVID

61.29%

OF ARTS AND CULTURE ORGANISATION RESPONDENTS WITH A TURNOVER BETWEEN $250K - $1MILLION WILL NOT BE VIABLE WITHIN 12 MONTHS EVEN WITH NO EVENT OR PROGRAM CANCELLATIONS

A sector in crisis

Without additional government support 74.74% of the organisations surveyed reported that if the next 6 months of programming was cancelled they would not be able to continue operating beyond 12 months on current contributed and earned income streams. These organisations represent every budget category in all regions.

The most immediate risk is to the small to medium sector with 47.37% of organisations with turnovers between $250k - $500k and 50% of organisations with a turnover between $500k - $1 million reaching this crisis point in under 3 months.

Even more concerning, when asked how long their organisation could continue to operate without additional government support if nothing is cancelled over the next 6 months, **63.16% of organisations in that $250k - $500k size bracket and 58.33% of organisations with operating budgets between $500k - $1 million would be operating on reserves or need to cease operations within the next 12 months.**

The possible loss of up to 50% of our small-to-medium sector could be devastating for the creative economy and audiences. The sector engages with a large and diverse audience across a vast territory, and has a significant impact in the development of both practitioners and audiences across multiple disciplines.[1]

1 A REPORT ON DESKTOP RESEARCH UNDERTAKEN INTO WESTERN AUSTRALIA'S SMALL-TO-MEDIUM ARTS SECTOR (S2M), Chamber of Arts and Culture, 2015

"If we sit tight and do nothing for 6 months we won't bounce back after. If we plan for things that get cancelled, I can't take the financial risk. It feels like a catch-22." - Arts Organisation with turnover under $250k

"Sustainability in an environment where we are constantly trying to do more and do it better when the goalposts are invisible and pandemic fatigue at all levels/in all areas has taken our crisis off the agenda." - Arts Organisation with turnover between $1million - $5million

Table 5: Survey Question - Assuming all events, programming, etc. are cancelled over the next6 months if your organisation does not receive any additional government funding or support, how long will you be able to continue to survive on current contributed and earned income streams (i.e., without accessing reserves)?

	All Respondents	Very Small T/O less than $250k	Small to Medium T/O $250 -$500k	Medium Turnover $500k - $1m	Medium - Large ($1m - $5m)	Large ($5m +)	Perth Metro	Outer Metro	Regional
0 - 3 months	29.47%	18.75%	47.37%	50.00%	22.73%	20.00%	32.86%	36.36%	22.22%
3 - 6 months	13.68%	15.63%	15.79%	0.00%	18.18%	10.00%	12.86%	9.09%	16.67%
6 - 9 months	21.05%	31.25%	15.79%	33.33%	9.09%	10.00%	20.00%	18.18%	22.22%
9 - 12 months	10.53%	3.13%	15.79%	16.67%	4.55%	30.00%	11.43%	0.00%	22.22%
More than a year	25.26%	31.25%	5.26%	0.00%	45.45%	30.00%	22.86%	36.36%	16.67%

Table 6: Survey Question - Assuming no events, programming, etc. are cancelled over the next6 months if your organisation does not receive any additional government funding or support, how long will you be able to continue to survive on current contributed and earned income streams (i.e., without accessing reserves)?

	All Respondents	Very Small T/O less than $250k	Small to Medium T/O $250 -$500k	Medium Turnover $500k - $1m	Medium - Large ($1m - $5m)	Large ($5m +)	Perth Metro	Outer Metro	Regional
0 - 3 months	5.26%	3.13%	10.53%	8.33%	4.55%	0.00%	7.14%	0.00%	5.56%
3 - 6 months	12.63%	21.88%	5.26%	8.33%	4.55%	20.00%	12.86%	18.18%	5.56%
6 - 9 months	6.32%	6.25%	5.26%	16.67%	4.55%	0.00%	7.14%	0.00%	0.00%
9 - 12 months	23.16%	15.63%	42.11%	25.00%	18.18%	20.00%	20.00%	27.27%	38.89%
More than a year	52.63%	53.13%	36.84%	41.67%	68.18%	60.00%	52.86%	54.55%	50.00%

Table 7: Survey Question - How concerned are you around the potential scaling down or closure of small-to-medium cultural organisations who nurture innovation, experimentation and freshness of creative content?

Extremely concerned	57.14%
Very concerned	26.53%
Somewhat concerned	16.33%
Not so concerned	0%
Not concerned at all	0%

Impact on audiences, events and programs

998,386

POTENTIAL AUDIENCE NUMBERS IMPACTED

68 Organisations reported potential lost audience numbers between March - August 2022

As we have seen over the past 2 years actual and anticipated tightening of public health measures result in cancelled events and programs as organisations are forced to make decisions in deep uncertainty.

61.80% of organisations had already cancelled or postponed events and programs initially scheduled for the first 6 months of 2022 (Jan – June 2022), with the small to medium sector disproportionately impacted with **90.91%** of organisations with operating budgets between $500k - $1 million having already cancelled events and programs. Events and programs were cancelled or postponed because of uncertainty (83.34% of organisations reported finding it somewhat to very difficult to plan for the next 6 months) slow ticket sales, the potential health impact on vulnerable communities and government restrictions on in-school programming.

68 organisations reported their potential lost audience numbers for March – August (total potential audience impacted 998,386) and others reported 100% loss of audience and community engagement without reporting the actual audience numbers.

Organisations also reported that a number of venues had cancelled pre-booked programs due to uncertainty. The delay in the WA border reopening also resulted in cancellations as interstate promoters and organisations did not have confidence to maintain plans with the uncertainty around when the WA border would be opened.

When considering operations for the 6 months from March - August, venue capacity limits, staff shortages and poor ticket sales due to audience hesitancy in the face of high daily case numbers were the key concerns and would result in further cancellations and postponement of events and programs. Theatres and seated venues are currently operating at 50% capacity across the state. Organisations of all sizes noted this would result in cancellations.

There is concern about how the sector will inspire confidence in audiences to attend arts and culture events if WA experiences a significant Covid wave, with **94.74%** of organisation respondents expressing concern.

61.80% **OF ALL ORGANISATIONS SURVEYED HAVE CANCELLED OR POSTPONED EVENTS AND PROGRAMS FOR THE FIRST 6 MONTHS OF 2022**

90.91% **OF ORGANISATIONS WITH OPERATING BUDGETS BETWEEN $500K - $1M HAVE CANCELLED OR POSTPONED EVENTS AND PROGRAMS FOR THE FIRST 6 MONTHS OF 2022**

Table 8: Survey Question - Have you cancelled or postponed any events or programs for the first 6 months of 2022?

	All Respondents	Very Small T/O less than $250k	Small to Medium T/O $250 -$500k	Medium Turnover $500k - $1m	Medium - Large ($1m - $5m)	Large ($5m +)	Perth Metro	Outer Metro	Regional
Yes	61.80%	53.33%	57.89%	90.91%	59.09%	71.43%	67.69%	50.00%	61.11%
No	38.20%	46.67%	42.11%	9.09%	40.91%	28.57%	32.31%	50.00%	38.89%

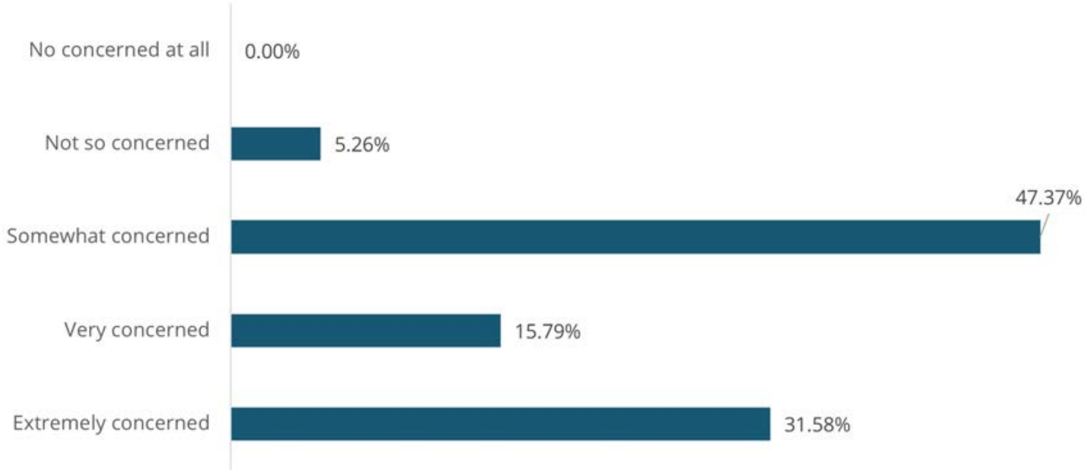
Table 9: Survey Question - Please let us know which of the following would trigger the cancellation / postponement of events/program?

	All Respondents	Very Small T/O less than $250k	Small to Medium T/O $250 -$500k	Medium Turnover $500k - $1m	Medium - Large ($1m - $5m)	Large ($5m +)	Perth Metro	Outer Metro	Regional
50% Venue capacity limits	54.65%	42.86%	58.82%	63.64%	59.09%	62.50%	55.56%	60%	47.06%
75% venue capacity limits	17.44%	17.86%	11.76%	9.09%	22.73%	25%	17.46%	20%	5.88%
Staff shortages dues to forced isolation / quarantine	61.63%	53.57%	70.59%	45.45%	68.18%	75%	58.73%	80%	58.82%
Uncertainty re: border opening	36.05%	32.14%	23.53%	54.55%	40.91%	37.50%	38.10%	20%	29.41%
Poor ticket sales / audience hesitancy	61.63%	64.29%	52.94%	63.64%	68.18%	50%	63.49%	60%	35.29%
Staff / volunteer burnout	50.00%	50%	52.94%	36.36%	72.73%	0%	46.03%	50%	64.71%
Uncertainty re: government plans	54.65%	46.43%	70.59%	63.64%	54.55%	37.5%	52.38%	60%	47.06%
Other	19.77%	21.43%	35.29%	18.18%	9.09%	12.50%	12.70%	40%	41.18%

Other reasons that would trigger cancellations

- Cancellation out of the organisation’s hand (i.e., venues would cancel programs)
- Reduced philanthropic and corporate support
- Restrictions on travel to remote regions
- Anxiety
- Inability to plan
- Increased case-load across the state; concern for staff/audience safety regardless of government mandates.

Graph 5: Survey Question: Please let us know your level of concern around how we inspire confidence in audiences to attend arts and culture events if WA experiences a significant COVID wave.



"We have cancelled our two largest events for the start of the year due to logistical problems, and are holding off planning another 20 (for now) as we don't want to create disappointment and fatigue in the community over continual cancellations." – Regionally based organisation with turnover between $500k - $1million

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"We have cancelled our festival, the Main event we run as well as fundraising events leading up to it. Reasons are all related to the impacts of Covid to our industry: the general uncertainty, financial risk, extra costs and workload to comply, audience hesitancy and the fear of not being able to deliver the quality our audience expects as our resources are limited and we are a Not-for-Profit organisation." - Regionally based organisation with turnover between $1 - $5 million.

"Mature age people often make up the majority at concerts of classical music and not surprisingly they are hesitant to attend a mass gathering like a concert." - Arts Organisation with turnover over $5 million

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"Loss of numbers attending and/or using the library services could mean closures to some of our public libraries as well as staff unemployment." - Cultural Organisation with turnover over $5 million

Social Impacts

54.02%

OF RESPONDENTS RUN PROGRAMS THAT SERVE VULNERABLE POPULATIONS AND/OR ARE DELIVERED IN CONGREGATE SETTINGS

These include

- Programs for blind and deaf audiences
- Youth performing arts programs delivered through residency with CaLD service organisations
- In-school and after-hours school programs, and remote school programs
- Programs with artists with disabilities
- Programs run in disability and rehab settings, and with disability groups and people with disabilities
- Programs delivered in senior living residences and group homes, aged care and programs for over 70's
- Programs delivered in remote communities, and with indigenous artists
- Programs for aboriginal youth
- Defence and veteran programs
- Remote school programs
- Programs delivered in hospitals and health settings
- Low-income family access programs
- Domestic violence shelters programs
- Programs for people living with dementia

The impact that arts and culture organisations have in our communities is well-reported, with the Department of Local Government, Sport and Cultural Industries' Arts and Culture Monitor 2021 Report stating that 87% of survey respondents say that the arts make them feel good and 95% consider it important for children to access arts and cultural activities as part of their education.

The DLGSC report also reveals that the arts is seen to have a valuable role in the community with a Value Index Score of 78[1]. This is the highest score achieved in 13 years, up from a low of 68 in 2013, perhaps reflecting an increased recognition of the value of arts and culture during the pandemic when access and participation has been restricted at times.

1 Arts and Culture Monitor 2021 Survey Report, DLGSC, https://www.dlgsc.wa.gov.au/docs/default-source/culture-and-the-arts/research-hub/wa-arts-and-culture/arts-and-culture-monitor-survey-report-2021.pdf?sfvrsn=feacfff3_11

"Our members would be adrift. Many of us live alone and the choir is like a trusted family that meets at least weekly and shares songs, stories, food etc." **– Perth Metro, operating budget under $250k**

The Australia Council for the Arts cites multiple studies that demonstrate the link between arts and well-being, noting that *"the arts make our individual lives better and build stronger and more cohesive communities. The arts have been shown to improve quality of life in myriad ways, including: increasing mental well-being; addressing loneliness, mental health and ageing; decreasing anxiety and depression; increasing well-being and social inclusion; positive well-being impacts for young people; and treating PTSD and helping communities recover from trauma."*[1]

Survey respondents raised the following key concerns if these event and programs are cancelled or postponed:

- At risk groups not having access to programs will increase isolation, impact mental health and suicide prevention outcomes.
- Children will lose access opportunities, reducing the chance for connection, safe spaces, expression, and development. Organisations will lose connection with schools, putting future programs at risk.
- Not delivering programs will impact the financial health of organisations with the inability to meet funder expected outcomes leading to further income loss.
- The knock-on effect for cancelled programs - not employing artists or arts workers.
- The health and well-being of the sector, staff and audiences.
- Retention of core staff.
- Significant impact on Aboriginal Artists economic and social well-being.

2 Creating Our Future: Spotlight on health and wellbeing, Australia Council, https://australiacouncil.gov.au/advocacy-and-research/creating-our-future/

"[The] key issue is not being able to support vulnerable people at a time when social connection is most necessary." – Perth Metro, operating budget $250k - $500K

"Remote and very remote Aboriginal communities are already very isolated which is why our programs are so valued. The many social and emotional positives experienced during our residencies would be missed especially given the increased levels of stress and anxiety covid is causing." – Regionally based organisation, turnover $250k - $500k

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"The educational benefits would not be realised for regional young people. Filmmakers would lose the opportunity to showcase their work and derive income. Indigenous filmmakers and community will not benefit from their films being showcased. People with disabilities would be unable to access the festival." - Regionally based organisation, turnover $1 – 5 million

Impact on our arts, cultural and creative workforce

8,117

CONTRACTS AT RISK OVER THE NEXT 6 MONTHS

Looking at the next 6 months (March - August 2022) as Western Australia experiences its first major covid wave and public health measures across the state are currently at Level 2 (with capacity limits of 2sqms to a maximum of 150 patrons and 50 per cent capacity for specified entertainment venues with fixed seating that faces forward, like cinemas, theatres and concert halls) the impact of the creative workforce could be devastating.

Table 10: Survey Question - How many Full Time Equivalent (FTE) positions and employment contracts would be impacted and cancelled should programming be reduced over the next 6 months.

	25% of events and programs cancelled	50% of events and programs cancelled	100% of events and programs cancelled
FTE positions impacted	62.5	109.5	170
Number of artist contracts cancelled	3253	3892	6710
Outside contractors cancelled (non-arts contracts)	628	772	975
Number of seasonal worker contracts cancelled	156	217	262

"The biggest financial concern is not necessarily for our organisation [but] is for the industry we support. Without film production occurring in the state, there will be no jobs in our industry." - Arts Organisation with under $250k turnover

"With all our time mitigating immediate issues, long term planning and progress will be halted, meaning longer recovery. So, while we may get through this period, we will be in a much worse position at the end of it and will be unlikely to maintain FTE for the org at its current level beyond 2022 and have to scale back in 2023/24." - Arts Organisation with turnover over between $1 - $5 million

"Artists - particularly those independent, semi-professional, original musicians who are integral to a vibrant music scene - simply drifting away from their craft due to ongoing restrictions and no support. Pubs - the breeding ground of local music - are the first to close and receive no support." - Arts Organisation with turnover between $500k - $1 million

Impact on well-being and mental health

The sector's workforce has been severely impacted over the past 2 years and those leading our arts and culture organisations expressed major concerns for the well-being of their staff and volunteers. Many reported increased staff burnout and the resultant loss of skilled staff and artists will have a lasting impact on the sector.

Organisations are worried about how they will attract volunteers back to sector and the inability to hold professional development opportunities, the decreased opportunities to network with colleagues at events and the increasing incidence of people working from home is leading to increasing isolation of people in the profession.

Respondents also shared their own mental health challenges with the stress of leading their organisation and supporting others taking a toll.

Table 11: Survey Question - How concerned are you about the well-being of staff and volunteers?

Extremely concerned	34.68%
Very concerned	42.86%
Somewhat concerned	14.29%
Not so concerned	8.16%
Not concerned at all	0%

34.14%

OF ARTS AND CULTURE ORGANISATION RESPONDENTS REPORTED EXPERIENCING MENTAL HEALTH CHALLENGES AS A RESULT OF COVID.

"Staff have been working at full capacity since the end of the Perth lock down around early August 2020 when Face-to-face interactions were permitted again. Many have not had a decent break since then, so we are all very tired, physically and also very tired of the continual uncertainty." - Arts Organisation with turnover over between $1 - $5 million

"The mental health of our staff is diminishing rapidly due to the ongoing uncertainly of support for our sector and the reopening of the WA borders." - Arts Organisation with turnover over between $250k - $500k

"My mental health has suffered to the point of burnout, and I've kept pushing through. This has meant many aspects of my work being rushed at the last minute due to low motivation and overwhelm of stress. We've managed to have successful events but at great personal cost." - Arts Organisation with turnover over between $250k - $500k

"The situation with COVID is an insidious mental health situation that has crept up on me (and others I have spoken with). It is demotivating, demoralising and causes a level of anxiety and destabilisation that is constant. I find it difficult to care about work at times as there seems to be no way to support the audiences we represent as our own organisation is so unsupported." - Arts Organisation with turnover over under $250k

Leadership concerns

"As the ED of a non-profit arts organisation right now, I can confidently say has been the toughest gig I've had in my 25yr career."

We asked respondents, how they, as leaders of an organisation felt about the next 6 months. Respondents were anxious about the future and the sustainability of their organisation, felt cast adrift as an industry by government, and were concerned for their own mental health and well-being of that of their staff and artists.

Themes of fatigue and hopelessness were recurrent, with some volunteering their own time to cut back on operational costs and many noting that so much work that has been undertaken in the past 2 years has come to nothing and the next 6 months may be the worst yet.

We asked respondents what their biggest concern was right now, and responses echoed the issues that have been highlighted through-out the survey

- Closing down activities and potentially whole organisations
- Audience hesitancy
- Employee retention
- Health of the staff and communities we work with
- Lack of appropriate government support and base level funding for the arts.
- Art sales
- Loss of cultural heritage – no support from local governments
- That COVID crisis is exacerbating long-term issues with the sector.

There was some optimism and examples of resilience and continuing passion with comments such as,

"[I am] unsure but ready to roll [with] what ever happens and make it work." - Arts Organisation with turnover over between $1 million - $5 million

"I am hopeful the next 6 months will bring some clarity to a new living with COVID environment. I am hopeful the next 6 months will continue to encourage our sector to collaborate more rather than compete. I am hopeful our sector will respond to the need to reconnect to the rest of the world with strong open for business messaging." - Arts Organisation with turnover over between $1 million - $5 million

Table 12: Survey Question - How concerned are you about the impact of COVID and the state government’s responses on your organisation?

Extremely concerned	40.74%
Very concerned	25.93%
Somewhat concerned	24.69%
Not so concerned	7.41%
Not concerned at all	1.23%

Table 13: Survey Question - We asked confident are you in the state government to manage and mitigate the potential impacts of COVID on the arts and culture sector?

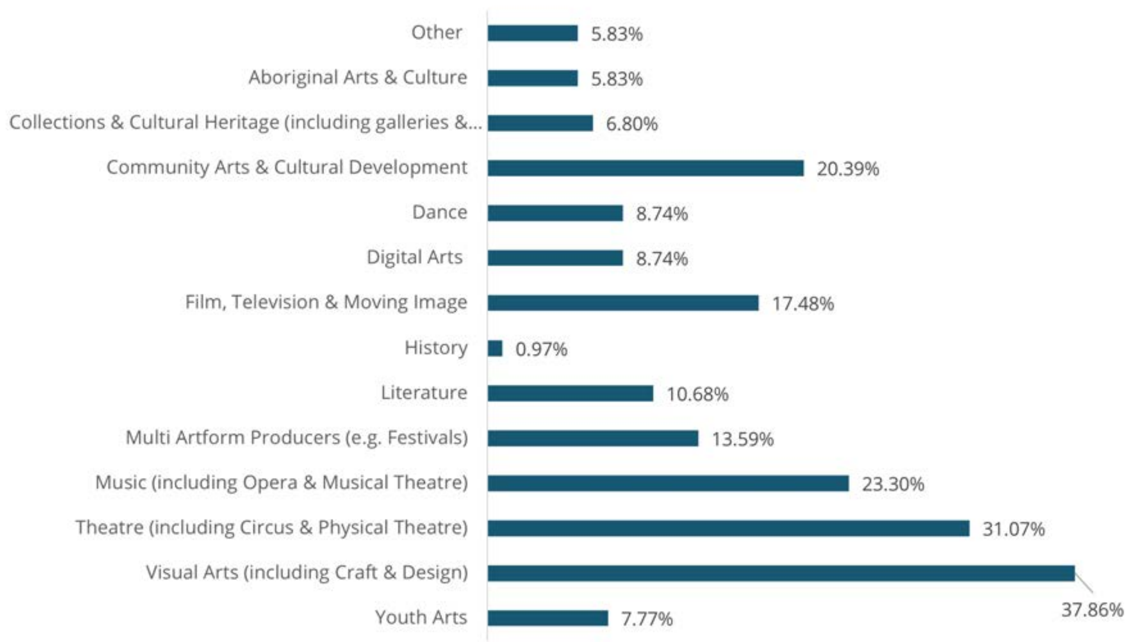
Extremely confident	2.47%
Very confident	3.70%
Somewhat confident	35.80%
Not so confident	30.86%
Not confident at all	27.16%

Survey Results
Artists and Creative Producers

103 PEOPLE RESPONDED IN THEIR CAPACITY AS AN ARTIST OR CREATIVE PRODUCER

Respondents represented the broad spectrum of artistic practice and were based across the state. 88.34% of respondents earn income from their artistic practice and 3.92% of respondents identified as Aboriginal or Torres Strait Islander.

Graph 6: Survey Question What artform/s do you work in? (Tick all that apply)?



Other artforms included teaching artists, podcasters, sculptors and a professional audio describer for the blind and visually impaired for theatre and visual arts.

Table 14: Survey Question - Where is your practice based?

Perth Metro	72.59%	74
Outer Metro	16.50%	17
Regional WA	27.18%	28
Total Respondents: 103		

Table 15: Survey Question - Please select which of the following best describes your work and income (please tick the answer that best describes you).

Self-employed artist / creative producer, totally dependent on creative income (e.g., sole trader, micro business owner, contract worker)	42.72%	44
Practising artist who supplements income with other work	31.07%	32
Not earning an income from my creative practice but this is a goal I am pursuing	9.71%	10
Not earning an income from my creative practice but this is not a significant goal	1.94%	2
I work for an arts or cultural organisation in an artistic role	7.77%	8
I work in a non arts/cultural organisation in an artistic role	0.97%	1
Other (please specify)	5.83%	6
Total Respondents: 103		

All the "Other" responses were earning income from their creative practice, so 91 of the 103 respondents earn some income through their artistic practice.

Table 16: Survey Question - Please select which of the following best describes your work and income (please tick the answer that best describes you).

Responses by region

	Self-employed artist / creative producer, totally dependent on creative income	Practising artist who supplements income with other work	Not earning an income from my creative practice but this is a goal I am pursuing	Not earning an income from my creative practice but this is not a significant goal	I work for an arts or cultural organisation in an artistic role	I work in a non arts/ cultural organisation in an artistic role	Other (please specify)
Perth Metro	41.89%	29.73%	8.11%	1.35%	10.81%	1.35%	6.76%
Outer Metro Perth	35.29%	47.06%	5.88%	5.88%	5.88%	0.00%	0.00%
Regional WA	41.38%	31.03%	17.24%	0.00%	3.45%	0.00%	6.90%

Financial Impact on Creative and Artistic Income

The financial impact of the past 2 years on the income of artists and creative producers has been devastating.

When we asked if respondents had lost income over the past 2 years as a result of Covid (e.g., projects cancelled or delayed, contracts cancelled, work hours reduced, etc.) 81 indicated they had, meaning that ***89.01% of those who earn income as an artist / creative producer had lost income in the past 2 year.***

Table 17: Survey Question - In the past 2 years, have you experienced a loss of income from your artistic/creative practice as a result of COVID (e.g., projects cancelled or delayed, contracts cancelled, work hours reduced, etc.).

Responses by region

	YES	NO	NA
All respondents	80.20% (81 responses)	14.85% (15 responses)	4.95% (5 responses)
Perth Metro	81.94%	13.89%	4.17%
Outer Metro Perth	88.24%	11.76%	0.00%
Regional WA	75.86%	13.79%	10.34%

The financial outlook for the next 6 months is equally pessimistic. We asked respondents, thinking about March – August 2022, if WA were to experience a COVID wave with exponential case numbers, accompanying venue closures, audience hesitancy, periods of enforced quarantine, etc.) how their income from their artistic/creative practice could be impacted?

Most reported an expected loss of income, with some indicating another 6 months of delays and cancellations would end their ability to continue to work as an artist. Work destined for exhibitions and/or sale opportunities would be impacted by a reduction in visitors or cancellation of exhibitions, tours would be postponed or cancelled by venues, within the literature sectors respondents reported that publishers are already taking less risks on new writers and opportunities to deliver talks and workshops and teaching opportunities to supplement artistic income would be reduced.

Respondents overall were not optimistic about the financial impact of covid over the next 6 months with 57.89% of respondents predicting it to be severe to extremely severe and confidence was not high in regards to their own financial position, especially in the regions.

Respondents were uncertain about the future. Many had drawn on savings for the past 2 years, had been relying on their partner/spouse to support them and many practitioners who had lost income have sought work outside the arts and culture sector.

Confidence is also low in their ability to access support over the next 6 months, with 58.06% of respondents not so confident to not confident at all in being able to access financial support resources

"It would completely erase my income as an independent artist as it essentially has for the better part of the last two years."

"I have no other income so I currently live by accessing surplus on my home loan."

"I feel that there is no current way for independent artists who have seen reduced income due to 'buying hesitancy' over Fringe etc. to claim income support. Compensation for losses needs to have broader criteria to support this. The caps on income also make it harder for people to claim their full potential loss. I have also worked in the major orgs, and caps like $50,000 do not adequately reflect full estimated loss."

"I think financial support for the arts in WA needs to take a long-term approach. The arts in WA is in desperate need of financial support regardless of COVID."

"Anything could happen. We are supposed to be at the peak in March but who knows. New variants can appear. Clients and venues are afraid to plan to far into the future to make bookings, also budgets to pay artists are continually shrinking."

Table 18: Survey Question - Thinking about all the ways you earn income (not just through your artistic/creative practice) how severe do you expect the overall financial impact of COVID over the next 6 months will be to you?

Extremely confident	20.00%
Very confident	37.89%
Somewhat confident	32.63%
Not so confident	6.32%
Not confident at all	3.16%

Table 19: Survey Question - How confident are you about your financial position over the next 6 months?

	All respondents	Perth Metro	Outer Metro Perth	Regional WA
Extremely confident	3.16%	4.48%	5.88%	0.00%
Very confident	3.16%	8.96%	5.88%	8.00%
Somewhat confident	47.37%	25.37%	29.41%	36.00%
Not so confident	29.47%	40.30%	29.41%	36.00%
Not confident at all	16.84%	20.90%	29.41%	20.00%

Table 20: Survey Question - How confident are you that you will be able to access financial resources to support you through the next 6 month?

	All respondents	Perth Metro	Outer Metro Perth	Regional WA
Extremely confident	4.30%	4.48%	0.00%	0.00%
Very confident	9.68%	4.41%	0.00%	0.00%
Somewhat confident	27.96%	44.12%	47.06%	42.31%
Not so confident	38.71%	29.41%	29.41%	38.46%
Not confident at all	19.35%	17.65%	25.53%	19.23%

"Grants and funding opportunities ALWAYS make for the person/persons applying to fit into boxes designed to suit those funding bodies instead of funding bodies working to fit their funds to people/persons. Creative Industry suffers as creatives are left trying to find any bits of paid work to meet living costs and are taken away from their regular practices just to meet basic needs."

Financial mitigation strategies

43.59% of respondents had sought work outside the arts and culture sector to supplement lost income and 22.22% of respondents had accessed their superannuation. Others have drawn on their own savings, re-mortgaged property, relied on their spouse/partner to support them and/or had lived off a reduced income.

Regionally based artist respondents accessed federal support packages at a much lower rate than Perth Metro and Outer Metro creatives.

Respondents ranked a federal support package for creative workers as the most useful financial support for the sustainability of their artistic practice, followed by State and Local Government grants and subsidies for individual artists. When asked what other support would be useful, a basic living wage for artists was identified by the many of the respondents as well as their artistic practice being recognised as work, reimbursement for superannuation that had been accessed over the past 2 years, a State funded recovery package for the sector to stimulate production activity, and risk sharing for touring.

Respondents also suggested programs to activate empty spaces and encourage audiences back such as joint exhibitions at all empty venues and stores for general public to see and purchase artwork, and support for the mental health and various form of wellness related costs.

The interconnected arts ecology and the impact of covid on arts and cultural organisations is evidenced with respondents stating the need for a support package for individual sole traders/contractors working in the creative industries who have lost income and opportunities because of government decisions that have trickled down to affect organisational and corporate decision making.

Other strategies suggested reflect long-term issues within the sector including provision of business development grants for artists to build their business with capital purchases to improve their equipment, esources and digital capabilities, financial coaching, rental assistance and access to grant writers.

"The single most useful thing would be universal basic income. Then people would be free to choose whether to earn extra income and artists would be free to support themselves and their COVID Financial and Well-being Impact Survey practice. Trying to squeeze a bit more money out of the current system is a distraction. Artists end up competing with each other for a shrinking amount of money, and, even worse, with the organisations that provide professional support."

Table 21: Survey Question - You indicated that you have experienced a decline in your artistic/creative income. How have you supplemented that lost income (if at all)? (please select all that apply)

	I do not have a plan to find supplemental income	I do not yet have a plan but will be making one	Income from non-artistic/ creative work	Sought a personal loan from friends or family	Sought a loan from a financial institution	Applied for government unemployment support	Applied for relief in the form of COVID support grants	Other (please describe)
All Respondents	15.38%	15.38%	43.59%	8.97%	2.56%	16.67%	20.51%	21.79%
Perth Metro	14.04%	12.28%	43.86%	10.53%	1.75%	12.28%	19.30%	26.32%
Outer Metro Perth	21.43%	14.29%	57.14%	7.14%	0.00%	14.29%	28.57%	21.43%
Regional WA	14.29%	23.81%	38.10%	9.52%	4.76%	23.81%	19.05%	19.05%

Table 22: Survey Question - Have you accessed any of the following in the past 2 years to help support you financially and help sustain your creative work? (Please tick all that apply)

	Federal Government Support Packages (e.g., Jobkeeper / jobseeker)	Accessed superannuation	State Government Grants	Loans from family or friends	Loan through a financial institution	NA
All Respondents	46.67%	22.22%	22.22%	14.44%	5.56%	25.56%
Perth Metro	50.77%	21.54%	20.00%	16.92%	4.62%	24.64%
Outer Metro Perth	60.00%	26.67%	20.000%	20.00%	0.00%	13.33%
Regional WA	32.00%	28.00%	32.00%	20.00%	8.00%	24.00%

Impact on Creative Productivity

73.91%

OF RESPONDENTS PREDICTED THEIR CREATIVE PRODUCTIVITY WOULD DECREASE OVER THE NEXT 6 MONTHS IF THERE WAS A COVID WAVE IN WA

The next 6 months could see WA experience a reduction in creative and artistic output. 73.91% of artists and creative producers respondents indicated that creative productivity would likely decline as WA experiences its first significant covid wave. This decrease in productivity would be the result of stress, anxiety and depression, cancelled events, lack of funding and an inability to access the supplies, resources, spaces and/or people necessary for their artistic practice.

Childcare, especially if children are forced home from childcare or school would also impact a number of respondents.

The responses show covid is another stress on an already stressed workforce. The stress around other world issues is compounded and the impact on creative expression could be devastating for at risk communities and for WA well into the future.

Respondents expressed concerns about the future of their own practice and the future of the industry as a whole.

Recurring concerns included :

- Lack of support and recognition for the arts by all levels of government
- Financial security
- Money to invest in artistic practice
- Audience hesitancy
- Isolation
- Stress related burnout
- Feelings of insignificance when looking at world events.
- Further cutbacks within the industry impacting artists – publishers reducing the number of books they publish, venues impacted by restrictions
- Diversion of time to other employment is impacting on creative work.
- Lack of opportunities to create / maintain a career in WA
- Uncertainty – inability to plan
- Climate change

Table 23: Survey Question - Thinking about the next 6 months (March - August 2022), if WA were to experience a COVID wave similar to that experienced by the Eastern States over the last 6 months (i.e., exponential case numbers with accompanying venue closures, audience hesitancy, periods of enforced quarantine), how do you think your creative productivity will be impacted?

	Productivity drastically decreased	Productivity somewhat decreased	No change	Productivity somewhat increased	Productivity drastically increased	Other (please specify)
All Respondents	35.87%	38.04%	9.78%	6.52%	2.17%	7.61%
Perth Metro	38.46%	36.92%	9.23%	3.08%	3.08%	9.23%
Outer Metro Perth	17.65%	41.18%	11.76%	17.65%	0.00%	11.76%
Regional WA	50.00%	26.92%	11.54%	3.85%	0.00%	7.69%

Table 24: Survey Question - You indicated a likely decline in your creative productivity. What do you think the contributing factors would be (tick all that apply)?

	My health/ my family's health has been directly impacted by COVID	Stress, anxiety, and/or depression about the state of the world.	Having to devote more time to non-creative money-generating activities.	General lack of motivation.	Inability to access the supplies, resources, spaces, and/or people necessary for my artistic/creative practice.	Cancelled events	Lack of funding
All Respondents	41.79%	65.67%	52.24%	34.33%	67.16%	74.63%	61.19%
Perth Metro	46.94%	71.43%	51.02%	34.69%	63.27%	73.47%	57.14%
Outer Metro Perth	40.00%	40.00%	60.00%	20.00%	60.00%	70.00%	60.00%
Regional WA	36.84%	68.42%	42.11%	31.58%	68.42%	73.68%	84.21%

"I have also felt much much less confident and able to dream artistically. I feel less able to get passionate about presenting my ideas - when the world is so fraught, I feel like all of my output needs to be in service of community, or disadvantaged folks. If a project doesn't have direct ties to some sort of positive wellbeing / social contribution, I feel less able to get on board and support it. This is especially true of my own creative ideas. And it feels like there are less resources than ever in an already massively competitive industry so it's pretty discouraging in terms of dreaming big or dreaming new."

Impact on Mental Health and Well-being

58.49%

OF RESPONDENTS SHARED THAT THEY HAD EXPERIENCED MENTAL HEALTH ISSUES OVER THE PAST 2 YEARS AS A RESULT OF COVID

Many of the issues raised by the respondents reflect those identified in the Chamber's research into independent artists from 2020. These include

- Stress around childcare and looking after other family members
- Financial security (an issue even without covid)
- Isolation – unable to travel for work and to visit family and friends
- Cancellation of shows, events
- Uncertainty about future
- Higher risk in producing events – unsure if plans will eventuate – are we doing work for nothing? Risk taking is more difficult

"After two years of doing pivot projects and facing cancellations I am exhausted and close to burn out. I've expressed anxiety and a sense of hopelessness"

"Uncertainty is a massive contributing factor to ongoing issues with anxiety, compounded by economic repercussions of loss of productivity."

"I feel disillusioned with the sector, and resentful of the administrative staff in arts organisations who have been protected by employee programs... Whilst many of the freelance, contract artists I know have suffered beyond the usual difficulties of short term, insecure employment (to which we are already accustomed)."

Impact on the cultural ecology

68.13%

OF RESPONDENTS ARE NOT CONFIDENT IN THE STATE GOVERNMENT TO MANAGE AND MITIGATE THE POTENTIAL IMPACTS OF COVID ON THE ARTS AND CULTURE SECTOR?

Table 25: Survey Question - We asked confident are you in the state government to manage and mitigate the potential impacts of COVID on the arts and culture sector?

Extremely confident	2.20%
Very confident	2.20%
Somewhat confident	27.47%
Not so confident	39.56%
Not confident at all	28.57%

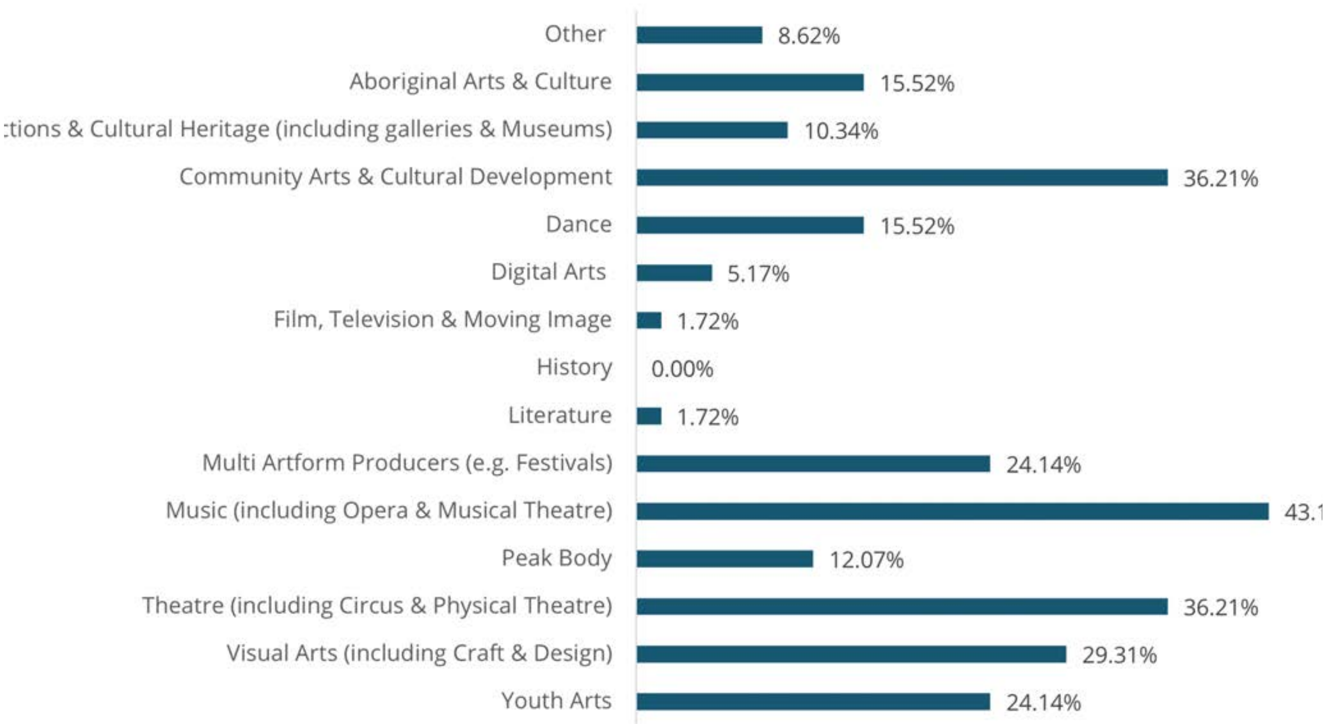
Survey Results
Arts Administrators

58

PEOPLE RESPONDED IN THEIR CAPACITY AS AN ARTS ADMINISTRATOR

Respondents represent the broad spectrum of artistic practice and working across Perth Metro, Outer Metro Perth and Regional WA. Most respondents work for a not-for-profit arts or cultural organisation.

Graph 7: Survey Question - What artform/s do you work in? (tick all that apply)?



Other artforms included venue management, arts education and creative learning.

Table 26: Survey Question - Where is your work based?

Perth Metro	84.48%	49
Outer Metro	22.41%	13
Regional WA	32.76%	19
Total Respondents: 58		

Table 27: Survey Question - Who pays you? Please select any of the following parts of the creative sector that you earn revenue from.

	Responses	
Not for profit arts and cultural organisation	81.03%	47
For profit creative business (e.g. a film studio, commercial gallery, arts consultancy)	10.34%	6
Local government cultural agency	6.90%	4
Educational institution	6.90%	4
Non creative for profit business (e.g., marketing company, newspaper)	1.72%	1
Non creative not for profit organisation	0.00%	0
Self Employed	15.52%	9
My role is a volunteer position	5.17%	3
Other (please specify)	1.72%	1
Total Respondents: 58		

Financial Impact on Arts Workers

38.60%

OF RESPONDENTS LOST INCOME AS AN ARTS ADMINISTRATOR AS A RESULT OF COVID OVER THE PAST 2 YEARS

Over the past 2 years 38.60% of respondents had lost some of their income from arts administrative work due to covid. The main reasons given for the lost income were the postponement and/or cancellation of projects, and a reduction in hours. Some respondents had a reduction in salary for a period of time and non-salaried consultancy work reduced.

We asked respondents, thinking about March – August 2022, how their income earned from employment as an arts administrator could be impacted. Redundancy and reduced hours were the main concerns – as respondents expressed concerns about the sustainability of the organisations they work for.

34.37% of respondents expected the financial impact of covid over the next 6 months to be severe to extremely severe. When you compare this to the 57.89% of artists and creative producers who indicated the same level of severity of impact, the results reflect the relative security of administrative workers in the arts compared to artists.

"I am a permanent part time employee at a NFP entertainment venue. What happens to me will depend on the financial viability of the venue. There is the possibility that I will be made redundant if there is no box office income to enable the venue to continue operations."

As a marketing manager the pressure on me is enormous. Spending more $ to promote while not buying able to guarantee ROI is risky. The covid buyer hesitancy is already apparent and I'm worried about losing my job."

The distraction from core business was also a concern:

" Income will be fine. But workload and focus will change and I will need to support the staff through COVID rather than through our core business."

Many expressed concerns about audience confidence – even if government restrictions are not as harsh as predicted, people will be hesitant to see live performances, gather together, etc.

'i think audiences will self-quarantine and not be prepared to risk exposure, so our venues will be empty."

Financial Mitigation

Many respondents who had lost income have sought work outside the arts and culture sector. Respondents had also relied on partner/spouse income when their own income was impacted.

50% had received support through the Jobseeker and Jobkeeper and 9.26% had accessed their superannuation over the past 2 years to support themselves.

50%

RECEIVED JOBKEEPER OR JOBSEEKER

9.26%

ACCESSED SUPERANNUATION

Table 28: Survey Question - Have you accessed any of the following in the past 2 years to help support you financially? (Please tick all that apply)

	Responses
Federal government support packages (e.g. Jobkeeper / Jobseeker)	50.00%
Access to superannuation	9.26%
Benefited from a state government grant	9.26%
Loans from family or friends	3.70%
Loan through a financial institution	1.85%
NA	44.44%

Table 29: Survey Question - You indicated that you experienced a decline in your income as an arts administrator in the past 2 years. How have you supplemented that lost income (if at all)? (please select all that apply)

	Responses
I do not have a plan to find supplemental income	31.82%
I do not yet have a plan but will be making one	18.18%
Income from non arts related work	31.82%
Sought a personal loan from friends or family	9.09%
Sought a loan from a financial institution	4.55%
Applied for government unemployment support	22.73%
Other (please describe)	13.64%

Overall, respondents are not confident about their financial position over the next six months, however, are significantly more confident than the artists and creative producers who responded to the survey

Table 30: Survey Question - Thinking about the income you earn from employment as an arts administrator how severe do you expect the overall financial impact of Covid over the next 6 months will be to you?

	Responses
Extremely severe	4.35%
Severe	30.43%
A little severe	43.48%
Not severe at all	21.74%

Table 31: Survey Question - How confident are you about your financial position over the next 6 months? *(Arts Administrators vs. Artist Responses)*

	Responses (Arts Administrators)	Responses (Artists)
Extremely confident	4.26%	3.16%
Very confident	21.28%	3.16%
Somewhat confident	44.68%	47.37%
Not so confident	23.40%	29.47%
Not confident at all	6.38%	16.84%

Impact on Well-being and Mental Health

"Stress levels of most administrators are through the roof. I would liken it to "building a house on top of your full time job". Many are having to re-learn their work, and adapt processes to accommodate the last minute COVID worries. Spending your working life working on performances and events that could be cancelled with a single announcement is really frustrating, and soul-destroying for some. There was much public empathy for this at the start, but I feel now there is less understanding for the ongoing uncertainty and the huge challenge it provides for the arts."

51.66% of respondents shared that they had experienced mental health issues over the past 2 years as a result of covid citing the following reasons:

- Cancellations, postponements, and the emotional impact of cancelling artists and productions.
- Pivoting to work from home and losing the team aspect of working.
- Looking after other staff.
- Stress around employment and the well-being of artists engaged by their organisation
- Looking after family members and stress around vaccinations.

The top work-related concerns expressed by this group highlights the immense stress those working in the arts and culture sector are under. Job uncertainty, the demise and devaluation of the arts sector, staff turnover, stress, burnout and the cancellation and postponement of shows, programs and events were top of the list of concerns, as well as concern about the expectation to continue working as public health restrictions are put in place.

51.66%

OF ARTS ADMINISTRATOR RESPONDENTS REPORTED EXPERIENCING MENTAL HEALTH CHALLENGES AS A RESULT OF COVID.

COVID EXHAUSTION

"The cancelling of shows. It's traumatic."

"Keeping up confidence and not disappearing into negativity. We cannot plan with any confidence that our numbers and predictions will hold. Any change in govt directives affects how we work and the audience's ability/appetite to attend. So all the work we have done building audiences is down the toilet. And whether we can do it all again... and again... is a moot point. Also some of our suppliers in terms of infrastructure support have also suffered greatly and some have closed. We are left struggling for the staff to do things - the ones who are left in the industry are in demand. Its just a bit of a nightmare really."

"The uncertainty going forward. The organisation I work for survived 2020 because we had JobKeeper. We don't have it this time around. We need box office income to keep our doors open. Most of our commercial hires this side of 30 June have now cancelled or rescheduled to22-23. Promoters are not taking the risk, especially with capacity restrictions in place. I don't know if members of our staff will be made redundant. I don't know if our organisation will make it out the other side of COVID."

"The constantly changing situation around COVID is very stressful which has had impact on my own mental health and that of my colleagues. As the Mental Health First Aider, this has become a great concern."

Impact on the Cultural Ecology

61.70%

OF RESPONDENTS ARE NOT CONFIDENT IN THE STATE GOVERNMENT TO MANAGE AND MITIGATE THE POTENTIAL IMPACTS OF COVID ON THE ARTS AND CULTURE SECTOR?

Table 32: Survey Question - We asked confident are you in the state government to manage and mitigate the potential impacts of COVID on the arts and culture sector?

Extremely confident	2.13%
Very confident	8.51%
Somewhat confident	27.66%
Not so confident	36.17%
Not confident at all	25.53%

Further Resources and Information

Mental Health and Well-Being Resources

- SANE AUSTRALIAN Factsheets & guides - https://www.sane.org/information-stories/facts-and-guides
- SportWest Mental Health and Wellbeing Community Sport Framework - https://sportwest.com.au/wp-content/uploads/2021/10/SW-Mental-Health-and-Wellbeing-Community-Sport-Framework.pdf
- World Health Organisation Mental well-being: resources for the public - https://www.who.int/news-room/feature-stories/mental-well-being-resources-for-the-public

Research

Social Ventures Australia and the Centre for Social Impact - Paying what it takes: Funding indirect costs to create long-term impact - https://www.philanthropy.org.au/tools-resources/paying-what-it-takes

About the Chamber of Arts and Culture WA

The Chamber of Arts and Culture WA is the peak policy and advocacy organisation for arts and culture in Western Australia.

The Chamber believes that a vibrant and diverse arts and culture environment is essential for economic, social, and personal well-being.

The Chamber is a Not-For-Profit organisation that aims to bring the WA arts and culture sector together to debate, discuss and to act as a collective on the major issues that impact the sector. We have a membership base of over 260 arts organisations, individuals and businesses across the broad spectrum of the arts, individual members and associate members.

The Chamber informs, advocates and engages with government, policy makers and other opinion formers on behalf of the industry it represents.

The Chamber's ambitions include:

Global to Local - Cultural infrastructure that signals our global sophistication and community spirit.

Collaborate - Arts and culture inspires, connects and attracts people to our capital city and regional centres.

Whole ecology approach - Taking a holistic approach to grow a healthy sector that is part of Western Australia's diversified economy and a key contributor to the State's aspirations and societal well-being.

Celebrate - WA artists showcased and celebrated here and throughout the world as key to Western Australia's sense of place, image and identity.

THE CHAMBER OF ARTS AND CULTURE
WESTERN AUSTRALIA

The Chamber of Arts and Culture WA Incorporated

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