Culture Counts

COVID-19 Impact on the Cultural Industries Survey

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On 8 April 2020, Culture Counts launched its research initiative regarding the impact of COVID-19 on the cultural industries, this snapshot provides a summary of the responses received so far. Analysis is split into three sections; what has happened, how organisations have transformed to adapt to the situation and what types of support resources will be most useful to them at this time.
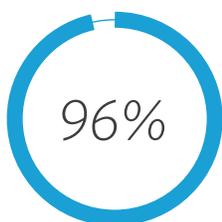
321
Respondents

97%
Respondents from Australia

8 - 22 April 2020
Survey Time Period

IMPACT

96%

Have cancelled programs or events

88%

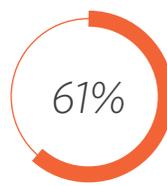Have lost revenue, including
• Sponsorship
• Private Giving
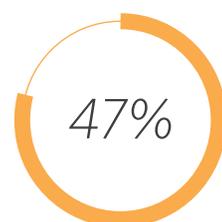• Government Funding

ADAPT

66%

Have never delivered digital programs before

61%

Will not be charging a fee for their online programs

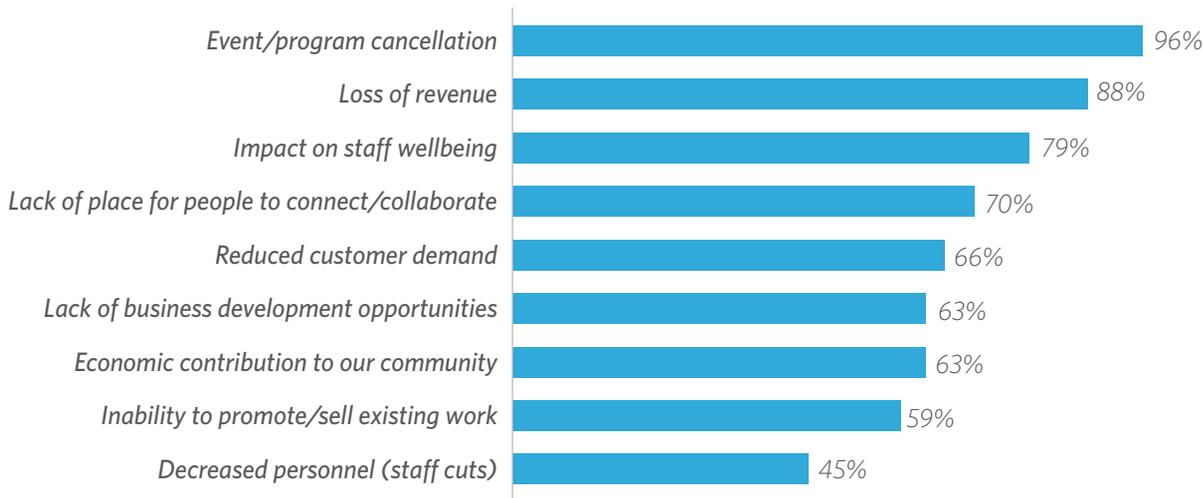## SUPPORT

47%

Want to know how to engage audiences

68%

Want to know what the future of the sector will look like

The COVID-19 Impact on Cultural Industries survey was designed in collaboration with Performing Arts Connections Australia.

CultureCounts

IMPACT

The stories and comments we hear from our colleagues and peers have been devastating, and these survey results were no different. The following section looks at what impacts have been felt by organisations due to the introduction COVID-19 related restrictions.

At this stage, what adverse impact(s) of COVID-19 have been felt by your organisation? *n=243*

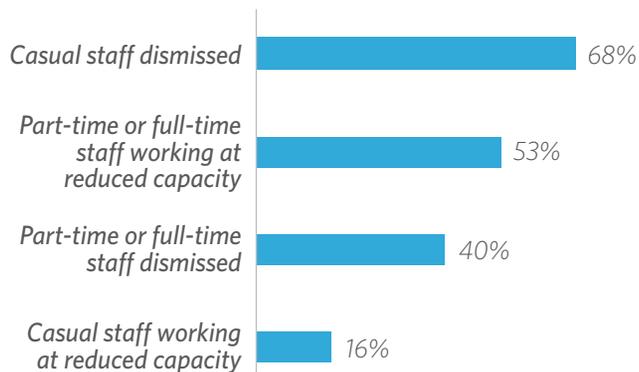| Impact	%
Event/program cancellation	96%
Loss of revenue	88%
Impact on staff wellbeing	79%
Lack of place for people to connect/collaborate	70%
Reduced customer demand	66%
Lack of business development opportunities	63%
Economic contribution to our community	63%
Inability to promote/sell existing work	59%
Decreased personnel (staff cuts)	45%

Of the 45% of respondents that have decreased or cut staff, 68% have dismissed casual staff, while 53% reported part-time or full-time working reduced hours.
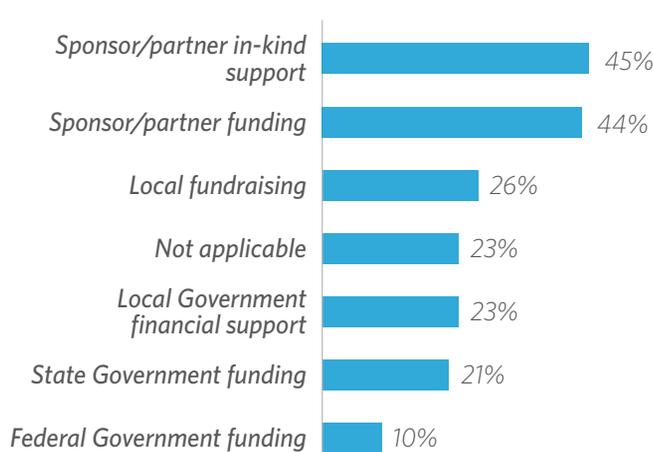
The nature of employment in the sector compounds this impact, with 58% of respondents reporting their ineligibility for the Australian Government's JobKeeper package. At the time of the survey, full details of the program had not been released, resulting in 16% of respondents being unsure.

The cancellation of events is a significant drain on revenue for organisations, but commercial revenue is only one funding source. Organisations reported flow-on funding declines from all sources of sponsorship, government and philanthropy funding. Sponsorship was the most commonly noted drop, with 44% of respondents reporting lost revenue from partnerships.
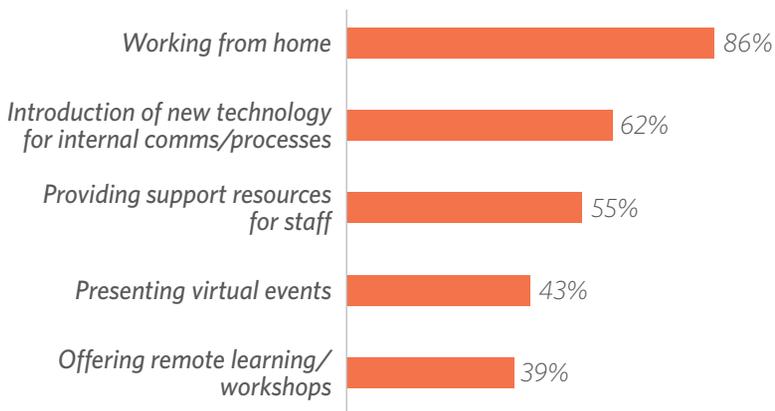
How have you had to decrease your personnel? *n=104*

Method	%
Casual staff dismissed	68%
Part-time or full-time staff working at reduced capacity	53%
Part-time or full-time staff dismissed	40%
Casual staff working at reduced capacity	16%

What sources/methods of revenue raising have you lost that would have contributed to your programming budget? *n=155*

Source	%
Sponsor/partner in-kind support	45%
Sponsor/partner funding	44%
Local fundraising	26%
Not applicable	23%
Local Government financial support	23%
State Government funding	21%
Federal Government funding	10%

ADAPT

Cultural organisations have quickly proved their capacity for creativity and innovation, by putting a number of processes in place that will allow them to continue working, creating and connecting to their community, throughout this challenging period.

66% Of those who are producing virtual events, two thirds have never delivered digital programs before

At this stage, how is your business transforming to adapt to the current situation? n=170

Working from home	86%
Introduction of new technology for internal comms/processes	62%
Providing support resources for staff	55%
Presenting virtual events	43%
Offering remote learning/ workshops	39%

When looking at digital platforms for engagement, there were four dominant choices: n=90

70% Facebook **67%** Zoom **50%** YouTube **44%** Instagram

Of those delivering virtual events: n=84

61% Will not be charging fees

13% Are undecided if they will charge a fee

12% Will be asking for donations

SUPPORT

In this unprecedented time, it is challenging to navigate day-to-day work life and plan ahead. As communities band together online to share ideas, discuss scenarios and learn from one another, these are the topics that are of most interest to those working for cultural organisations.

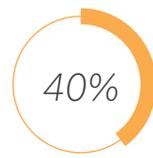*What support resources or topics would you find most beneficial throughout this period?* n=151

68% Want to know what the future of the sector looks like

47% Of respondents want to know how to engage audiences

44% Want to know how to manage and lead while working from home

40% Want to know how to present online and what their audience wants regarding online programs

40% Want to know what audiences are looking for from online content