COVID IMPACT

SCREEN SURVEY RESULTS

NSW GOVERNMENT

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STATE THEATRE, SYDNEY FILM FESTIVAL 2019 OPENING NIGHT. IMAGE: COURTESY THE FESTIVAL

contents

STATE THEATRE, 66TH SYDNEY FILM FESTIVAL 2019 OPENING NIGHT. IMAGE: COURTESY THE FESTIVAL

key findings

In April 2020, Create NSW launched a Screen Impact Survey to the Screen sector. Respondents were asked about the impact of the COVID-19 pandemic on their work situation. At the close of the survey, 636 complete responses were received. This analysis includes only completed responses.

- **Confirmed loss of income from businesses: $25,711,005**[1]
- **Estimated loss to 30 September 2020 from businesses: $50,138,733**[2]
- **Confirmed loss of income for employees and Freelancers/Contractors: $6,704,131**[3]
- **Overall reduction in full time equivalent staff is 50%**[4]
- 91% of Freelance/Contractors have had projects cancelled or postponed
- 1 in 3 employees (fulltime, part time or casual) have lost their job
- 40% of employees (full time, part time and casual) have had reduced pay or hours and of these, 40% were unsure how long it would last for
- 86% of businesses have had projects cancelled or postponed
- Only 2.8% of business have had no change
- Of the businesses that had to reduce staff, the majority have reduced by over 50% of their previous full time equivalent (FTE)
- Income losses were significantly higher for Freelancers/Contractors than they are for employees (full time, part time and casual employees)
- Employees (FT, PT, Casual) were more likely to report projected income loss under $30,000
- Freelancers/Contractors were more likely to report projected income loss above $40,000.

1 Losses are for all business repsondents to the survey and so not represent the total impact of sector which is likely to be significantly higher
2 As above
3 There may be overlap in the losses reported by employees and Freelancers/Contractors and business losses
4 Of business that reported employees

91%

of Freelance/Contractors have had projects cancelled or postponed

one in three

employees (fulltime, part time or casual) have lost their job

40%

of employees (full time, part time and casual) have had reduced pay or hours

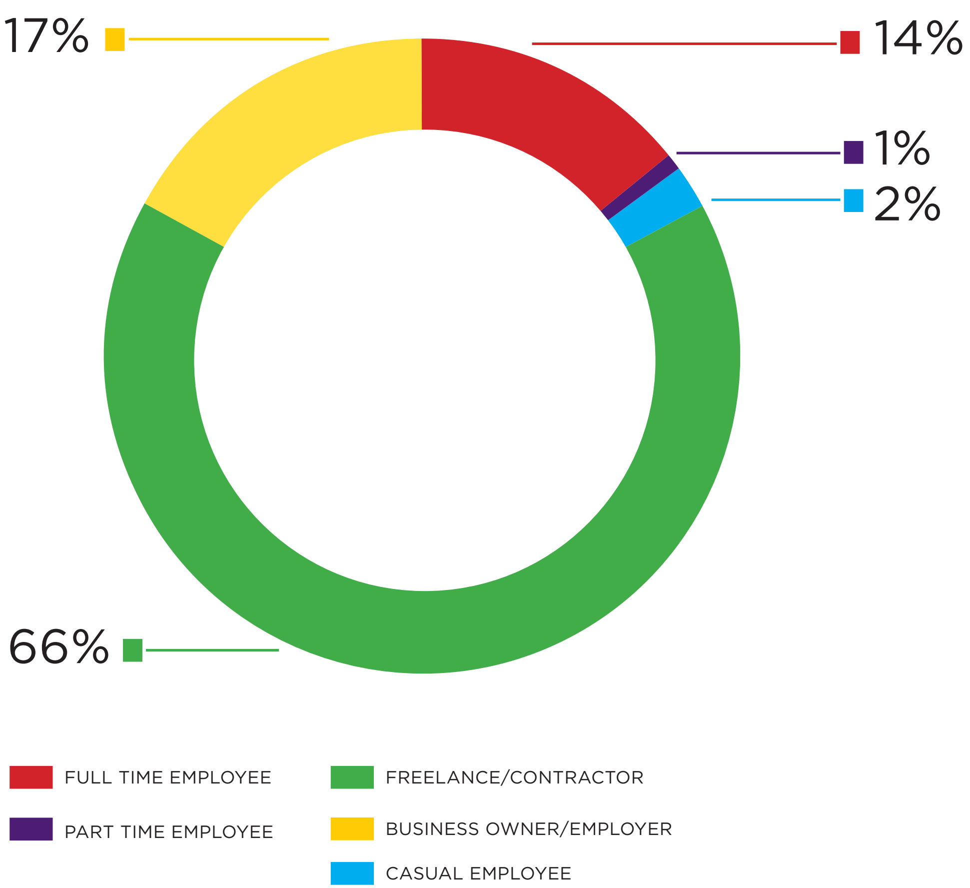
86%

of businesses have had projects cancelled or postponed

respondents

Most respondents are Freelancer/Contractor. The main role in the industry for respondents was On Set Crew, followed by Producer.

FIGURE 1: Respondents employment type



MAIN **ROLE** IN SCREEN INDUSTRY

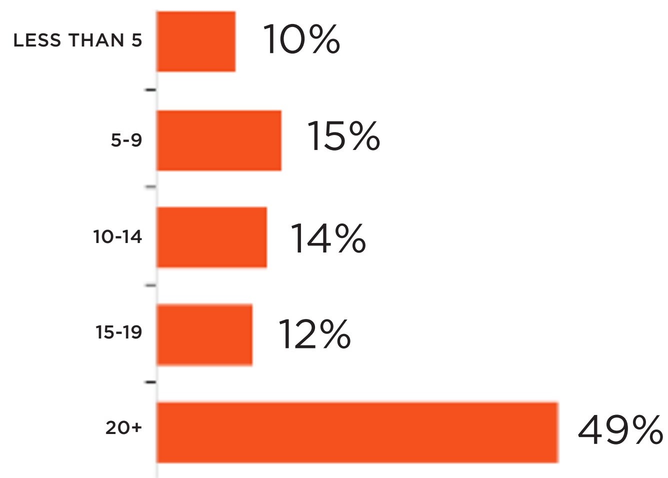
FIGURE 2: Respondents' main role in Screen industry

ANSWER	%	COUNT
On Set Crew	36%	231
Producer	22%	140
Other	21%	133
Post-Production	10%	64
Director	5%	33
Writer	2%	14
Professional Development/Industry events	1%	8
Facilities provision	1%	6
Film Festival	1%	4
On Screen	0%	3
Publicity	0%	0

TIME IN INDUSTRY

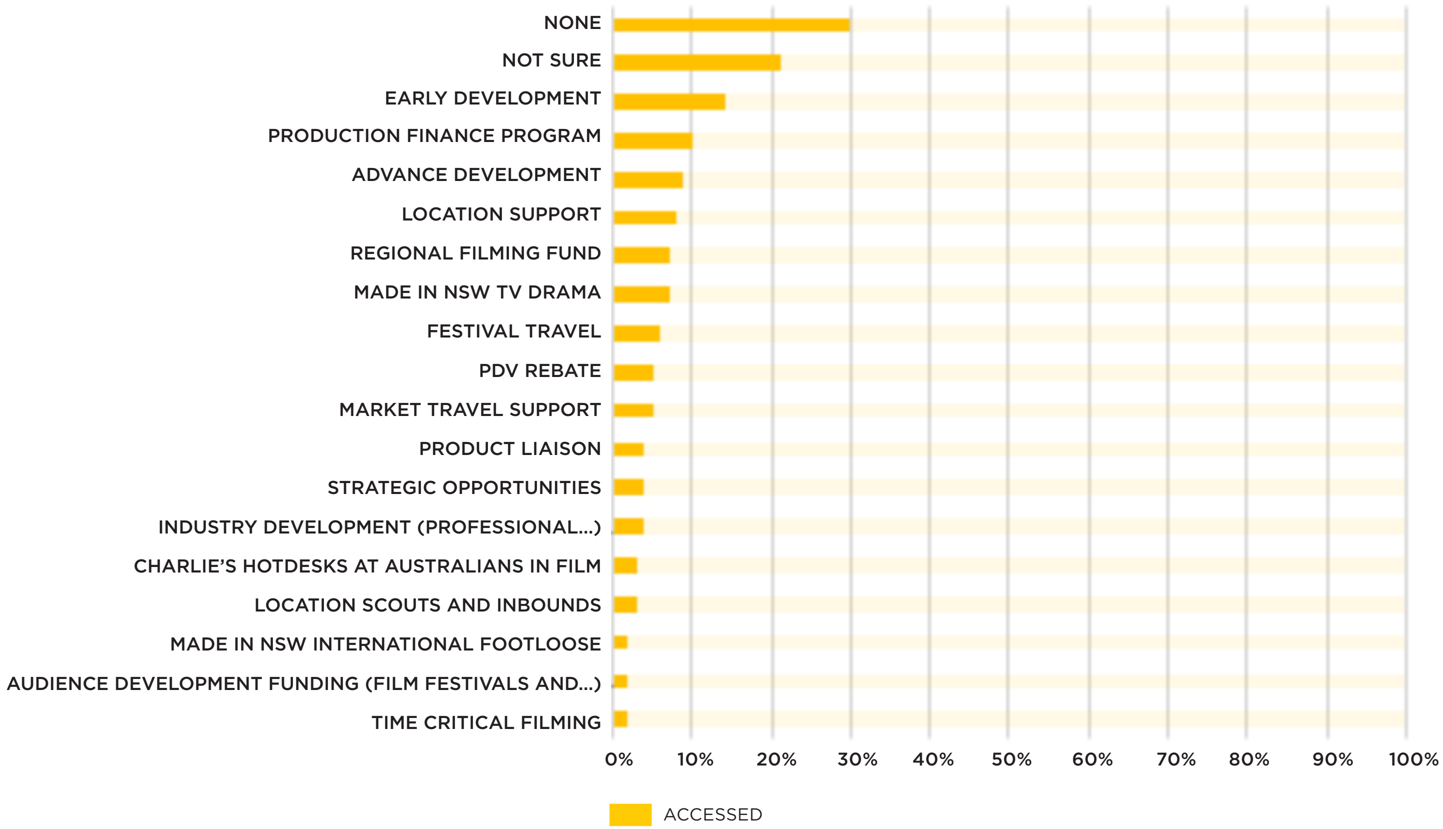
Half of all respondents had been in the screen sector for over 20+ years.

FIGURE 3: Respondents length of time in Screen industry



respondents

FIGURE 4: Access to Screen NSW services



When asked about what screen services the respondent accessed, the majority accessed no services or were unsure.

Two out of three Freelance/Contractors were unsure or accessed no services from Screen NSW. For businesses and all other employee types this was one in three.

- The most common service type accessed by Freelancers/Contractors was Early Development (1 in 10)
- The most common service type accessed by all other employee types was Production Finance (1 in 5)
- The most common service type accessed by businesses was Production Finance (1 in 4) and Early Development (1 in 5).

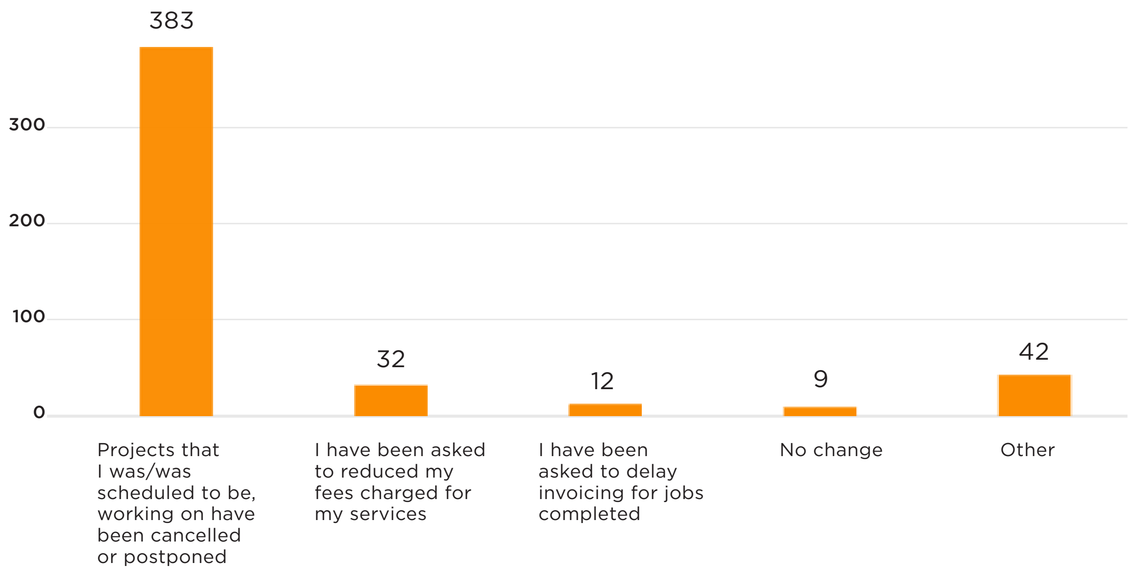
More detailed data tables are available at **Appendix A**.

freelancer experience

Freelancer and contractors had 419 complete responses.

Of these, 383 (91%) stated that projects have been cancelled or postponed.

FIGURE 5: Impact on Freelancer/Contractor



Of those asked to reduce their fees, the most common responses were between 20-60%. Freelancers/Contractors that had been asked to delay invoicing were most commonly asked to delay for 0-3 months.

NOTE: Small response rates (only 44 responses from 419) where received for these questions and results should be used with caution.

FIGURE 6: Percentage reduction in fees requested

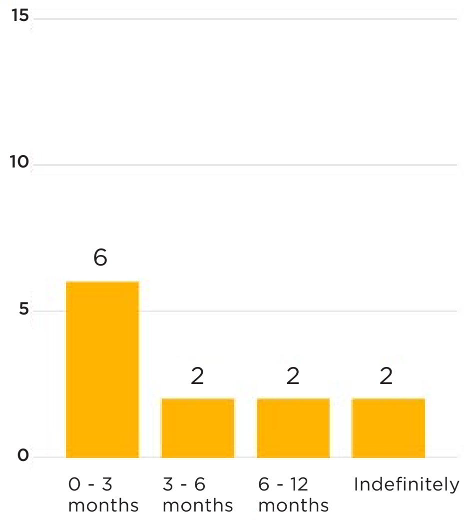
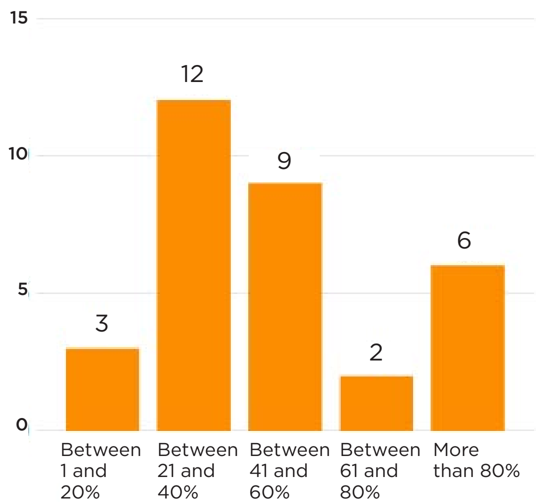


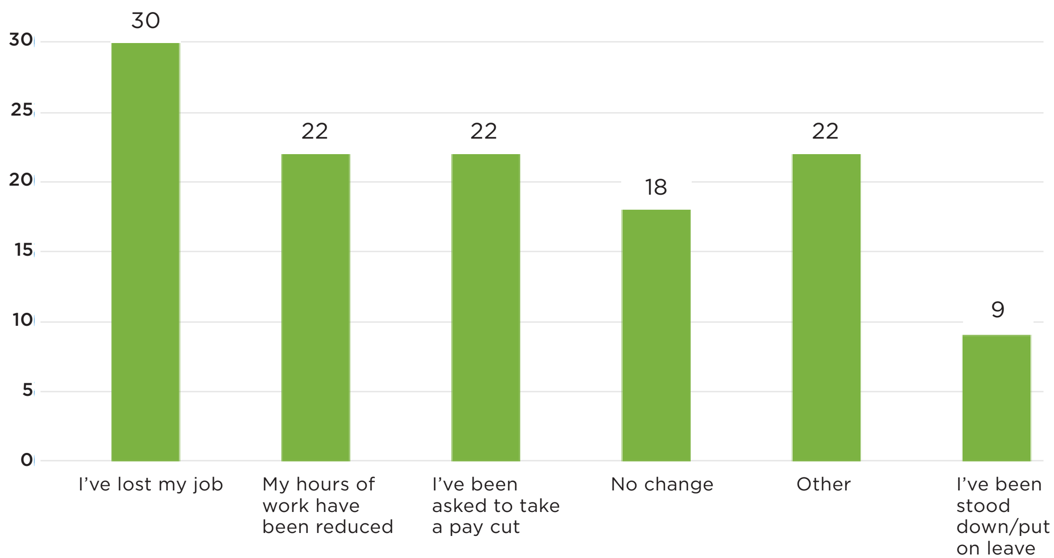
FIGURE 7: Length of requested delay in invoicing



full time, part time & casual experience

Full time, Part time and Casual responses had 111 complete responses. One in three respondents have lost their job.

FIGURE 8: Impact on full time, part time and casual employees



Of the respondents that stated they had been asked to take a pay cut, most had been asked to reduce their pay by 1 -40%, however of respondents who were asked to reduce their hours, this was between 1 and 60%.

FIGURE 9: Respondents that have been asked to take a reduction in pay or hours

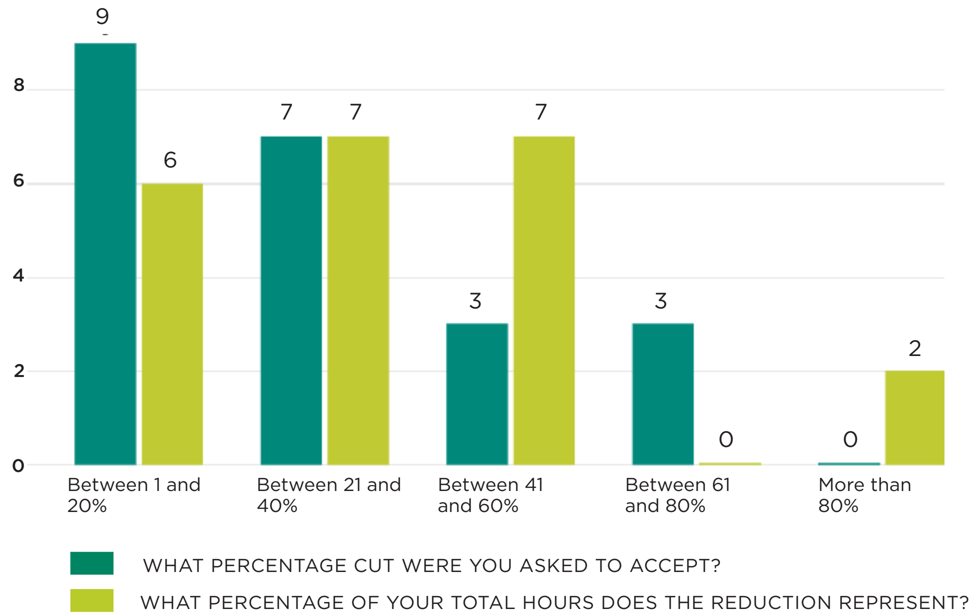
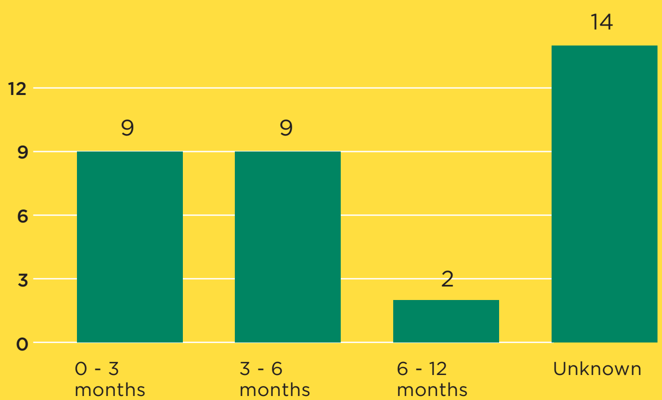


FIGURE 10: Length of reduction in pay or hours

Only 2 respondents (6%) expected the reductions to be in place for over 6 months however, 14 of the 34 (41%) responses did not know how long their reduction would be in place for.

There was no strong correlation between the percentage reduction in hours or pay and the length of time the reduction was expected to last.



business owner/employer experience

Business Owner/Employer had 106 complete responses. Similar to Freelancers, 86% of business owners have had projects cancelled or postponed. Only 3 respondents (2.8%) had no change to their business.

FIGURE 11: Impact on business owners

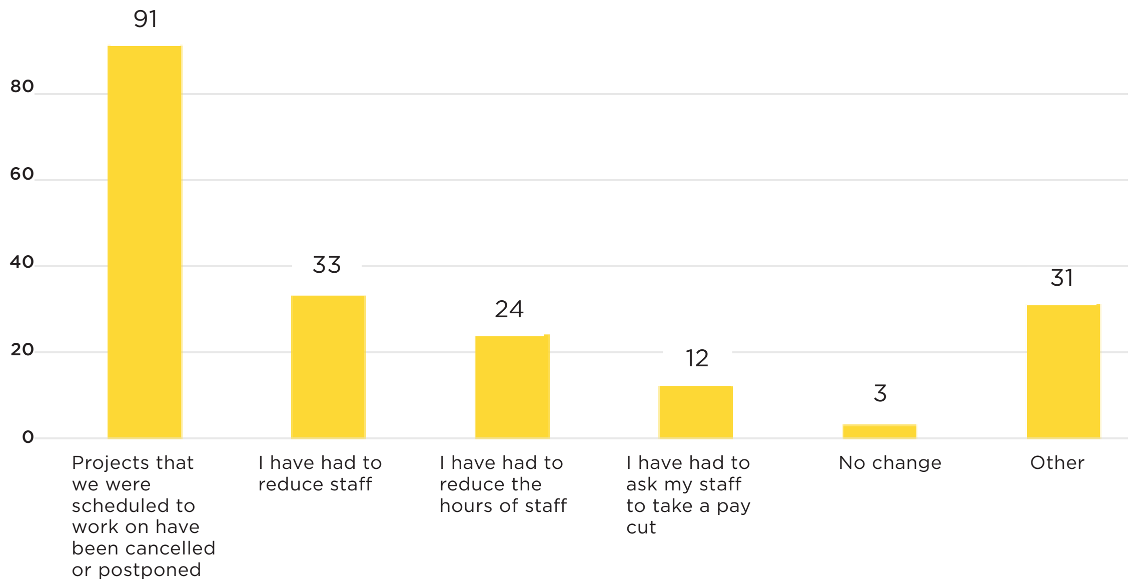
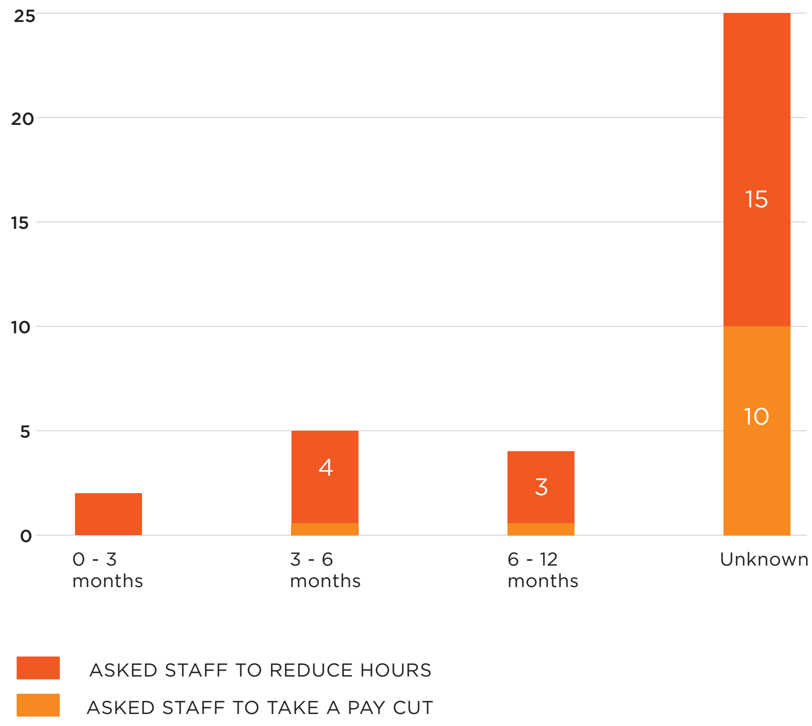


FIGURE 12: Length of reduce hours or pay



Of the respondents that had **reduced staff**, 82% have reduced their staff by 50% or more. Most respondents were from organisations with small full time equivalent (FTE) staff numbers and as such the average reduction in staff was 2.2 FTE.

Of respondents that had to reduce the **hours of staff**, 54% had reduced by 1 – 40%. A quarter of respondents had to reduce staff hours by more than 80%.

Of respondents that had to reduce **wages of staff**, 75% had reduced by 1 -40%.

Of businesses having to reduce either staff or pay, the majority are unsure for how long the reductions will be in place for.

NOTE: Small response rates for these questions and should be used with caution.

income

EMPLOYEES

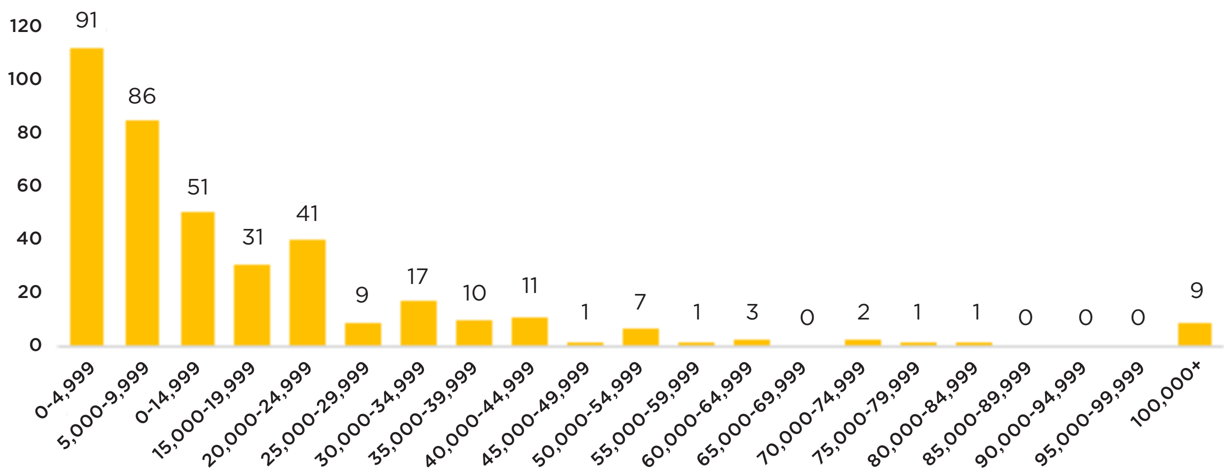
When comparing income levels in 2018-19 for Freelancers/Contractor to all other employees, the income levels reported in 2018-19 follow a similar pattern i.e. the respondents to the survey had similar income distributions prior to COVID-19. See **Appendix A** for more detailed tables on income breakdown.

However, the income impact immediately as well as projected to September 2020 was significantly higher for Freelancers/Contractors.

Confirmed income lost to date from all employment types ranged from under $5,000 to over $500,000.

Total confirmed loss of income for employees and Freelancers/Contractors: $6,704,131

FIGURE 13: Confirmed income loss to date - all employment types



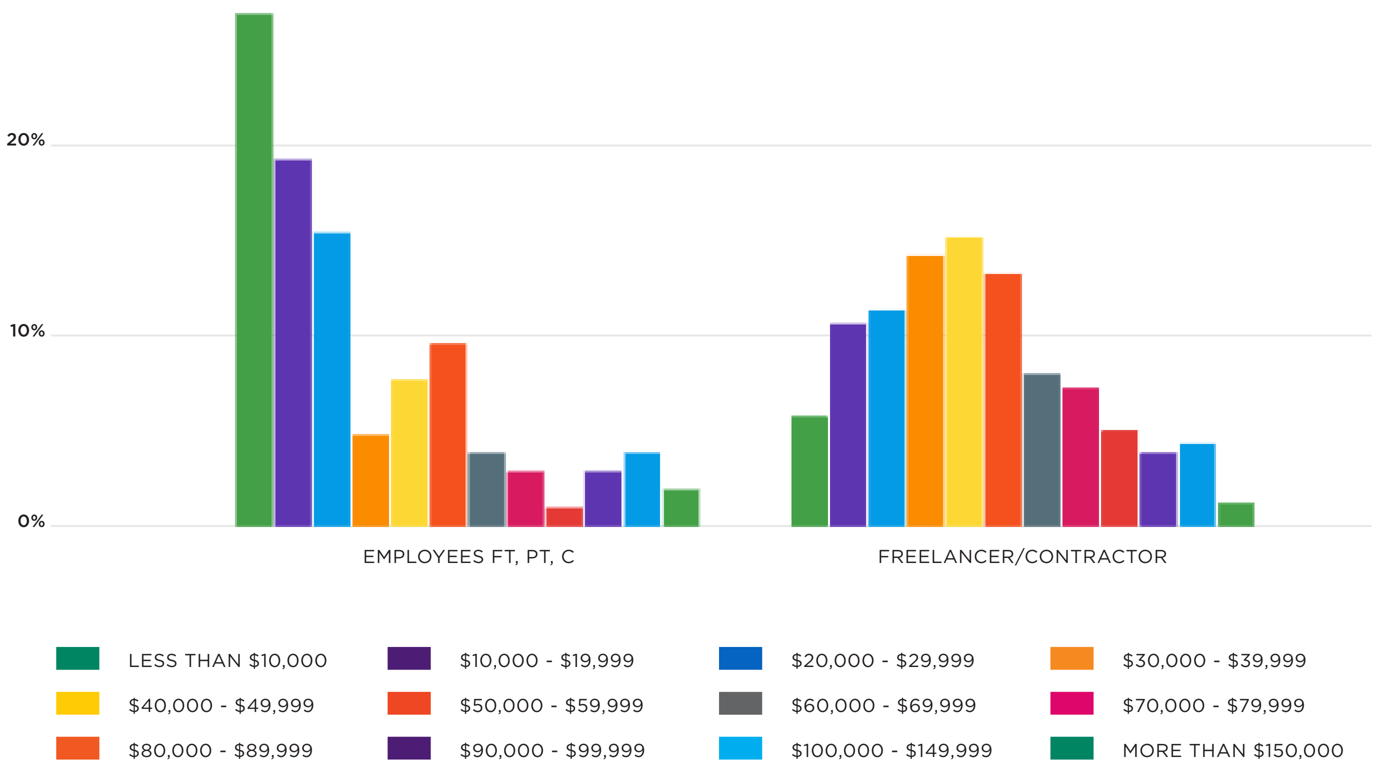
The average amount of confirmed income lost for freelancers was significantly higher than the average for employees (FT, PT, Casual) with Freelancers/ Contactors losing on average $19,405. The average income loss for employees over the same time period is $7,393.

When looking at projected income loss to September 2020, a similar trend emerges. Employees (FT, PT, Casual) were more likely to report projected losses under $30,000. Freelancers/ Contractors were more likely to report projected income loss above $40,000.

There was not statistically significant relationship between the role in the industry i.e. On Set crew, producer etc and the projected loss of income up to September 2020.

income

FIGURE 14: Percentage of responses for projected income loss by employment type



Response rates for projected income loss to September 2020 are displayed in **Appendix A.**

income

BUSINESS INCOME

The majority of business have experienced losses to date of under $50,000. Losses to date varied based on the size of businesses before the COVID-19 impact. Longer term impacts up to September are larger but generally proportionate to business size.

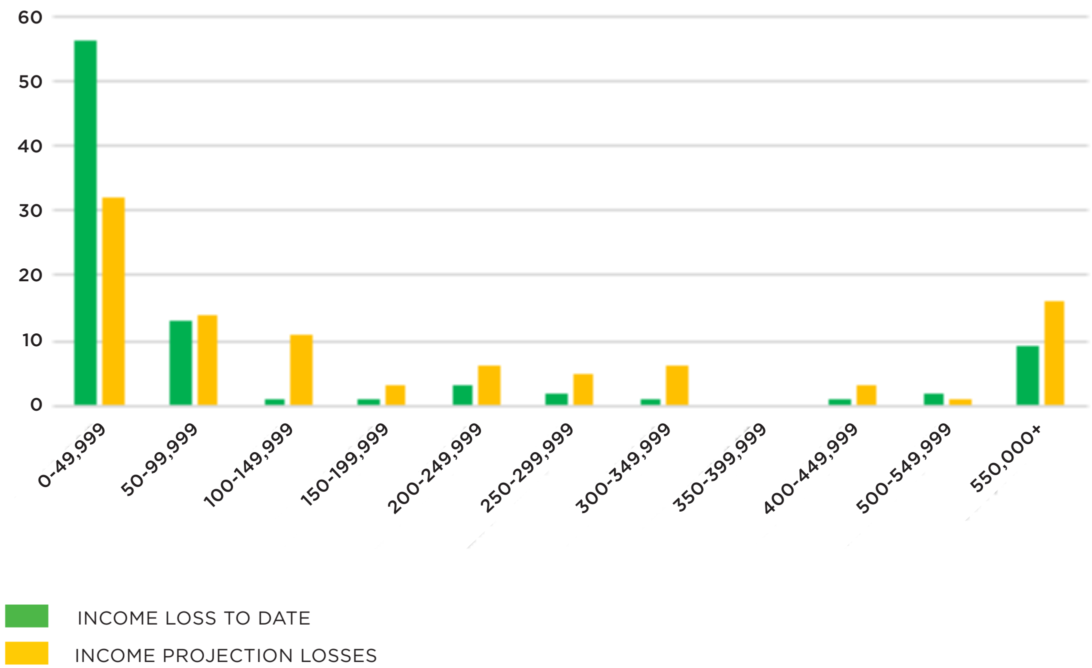
Confirmed loss of income from businesses: $25,711,005

Estimated loss to 30 September 2020 from businesses: $50,138,733

Of the six businesses that reported more than $1million in losses four were for Production companies.

Of the 15 businesses that reported over $1million in projected losses up to September 2020, 10 were for Production companies, 2 for onset crew, 1 for postproduction, 1 for facilities management and 1 for other.

FIGURE 15: Business income loss to date and projected losses



NOTE: the sample for this survey does not necessarily represent the industry composition, rather represents the group who have completed the survey. Some groups may be under or overrepresented in this sample.

- There is no statistically significant relationship between business turnover and the confirmed loss of income.
- There is no statistically significant relationship between the type of business and the confirmed loss of income.

government support

The JobKeeper package was the most common government support that respondents thought they would access. Responses to support type where influenced by the employment type of the respondent. A detailed breakdown by employment type is at **Appendix A.**

FIGURE 16: Levels of access to Government support

	TOTAL
NSW Government support for businesses	16.1%
Australian Government support for individuals and households	29.3%
Australian Government support for business	17.3%
JobKeeper payment Program	39.1%
Loan repayment relief	15.7%
Not sure	21.5%
Other (please specify)	5.4%

MARDIS GRAS FILM FESTIVAL 2018. IMAGE: COURTESY THE FESTIVAL

appendix a

EXTRA DATA TABLES

FIGURE 17: Access to Services from Screen NSW

	TOTAL	FULL TIME EMPLOYEE	PART TIME EMPLOYEE	CASUAL EMPLOYEE	FREELANCER/ CONTRACTOR	BUSINESS OWNER/ EMPLOYER
Early Development	**14%**	13%	18%	13%	11%	23%
Advanced Development	**9%**	10%	36%	0%	6%	19%
Time Critical Filming	**2%**	2%	0%	4%	2%	1%
Market Travel support	**5%**	6%	18%	0%	3%	10%
Festival Travel	**6%**	3%	18%	8%	5%	9%
Production Finance Program	**10%**	18%	9%	4%	5%	23%
Made in NSW TV Drama	**7%**	8%	9%	0%	7%	5%
Regional Filming Fund	**7%**	7%	0%	0%	6%	9%
Audience Development funding (film festivals and screen events)	**2%**	2%	0%	8%	2%	4%
Industry Development funding (professional development events)	**4%**	3%	0%	4%	4%	5%
Strategic Opportunities	**4%**	9%	9%	4%	3%	6%
Made in NSW international footloose	**2%**	5%	0%	0%	2%	3%
Location Scouts and Inbounds	**3%**	2%	0%	0%	3%	3%
Location support	**8%**	6%	0%	8%	8%	9%
Production Liaison	**4%**	4%	0%	4%	4%	3%
PDV Rebate	**5%**	14%	0%	4%	1%	13%
Charlie's hotdesks at Australians in Film	**3%**	1%	0%	8%	3%	3%
Not sure	**21%**	17%	0%	8%	27%	9%
None	**30%**	22%	36%	25%	35%	22%

FIGURE 18: Respondents income percentage breakdown for 2018-19

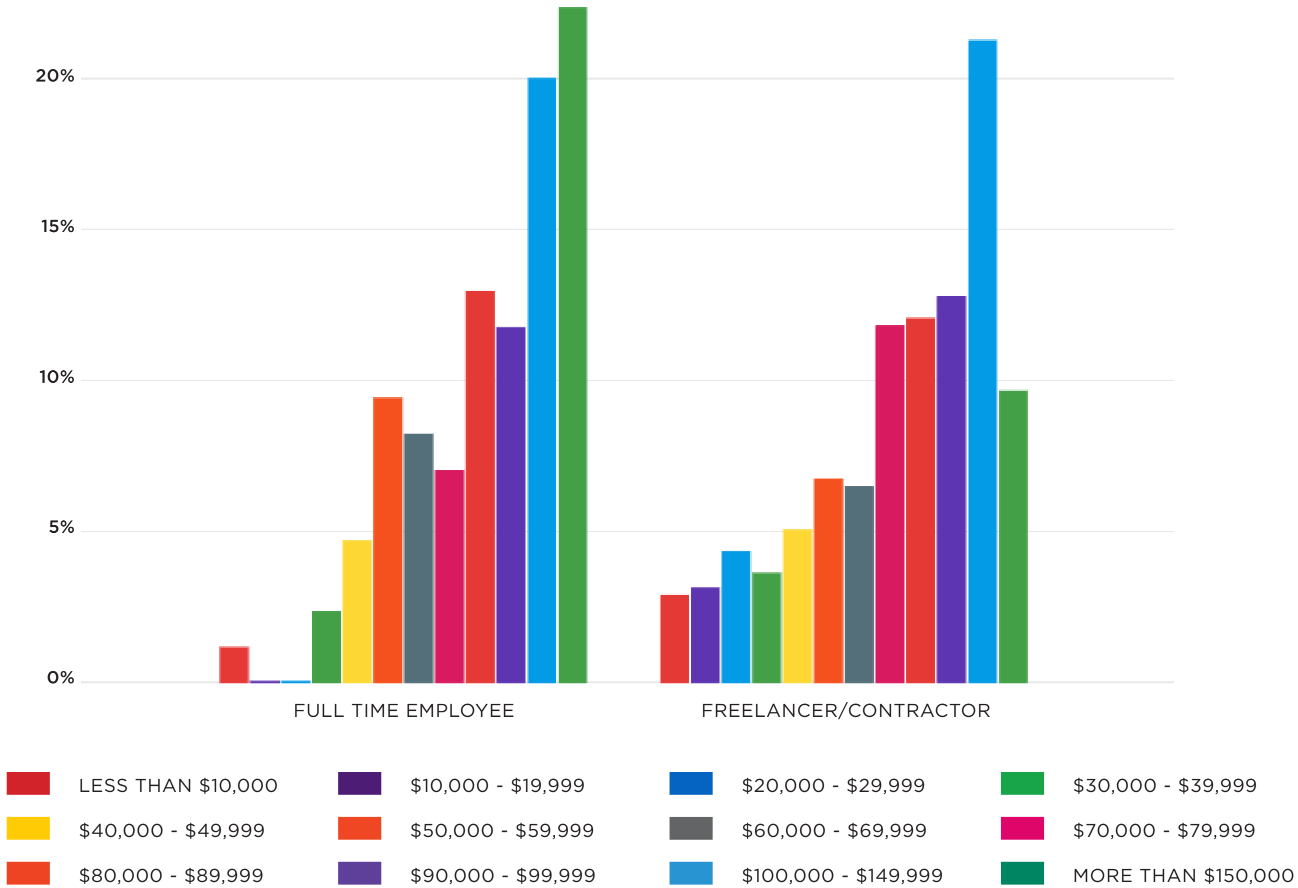


FIGURE 19: Projected loss of income up to 30 Sept 2020

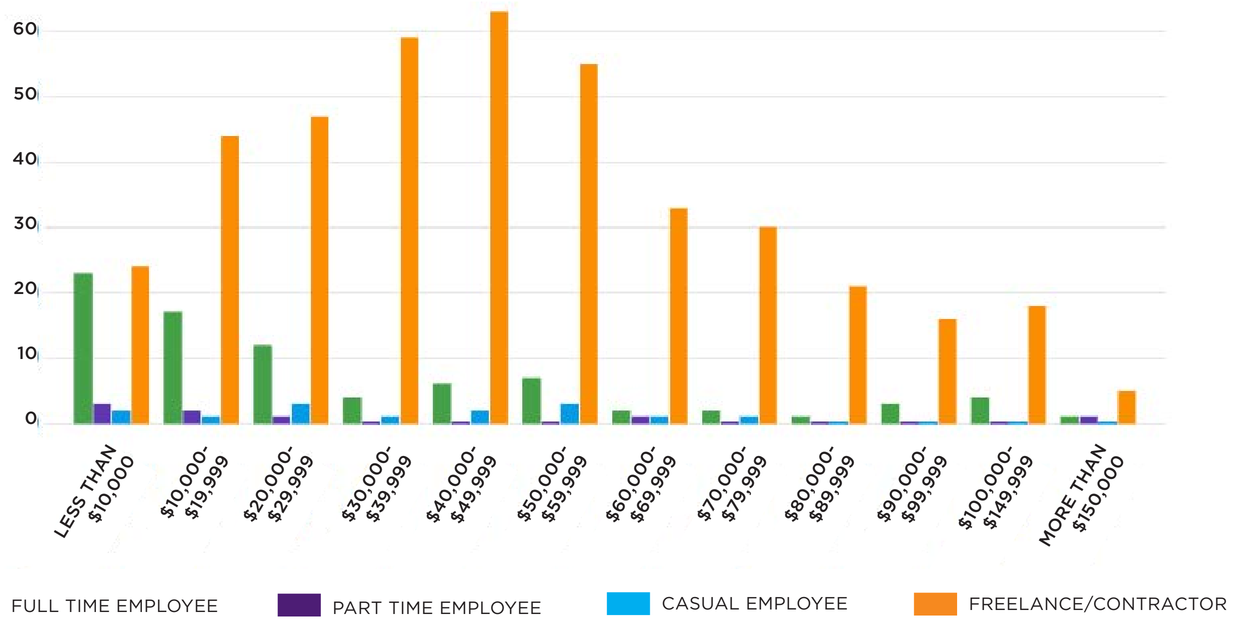


FIGURE 20: Percentage of respondents who may access government support

	TOTAL	FULL TIME EMPLOYEE	PART TIME EMPLOYEE	CASUAL EMPLOYEE	FREELANCER/ CONTRACTOR	BUSINESS OWNER/ EMPLOYER
NSW Government support for businesses	**16.1%**	16.7%	0.0%	4.2%	9.5%	41.6%
Australian Government support for individuals and households	**29.3%**	21.4%	9.1%	29.2%	33.5%	22.8%
Australian Government support for business	**17.3%**	15.9%	9.1%	4.2%	9.9%	47.0%
JobKeeper payment Program	**39.1%**	31.7%	27.3%	33.3%	37.7%	51.7%
Loan repayment relief	**15.7%**	11.9%	9.1%	12.5%	16.4%	17.4%
Not sure	**21.5%**	24.6%	36.4%	16.7%	24.8%	7.4%
Other (please specify)	**5.4%**	3.2%	18.2%	12.5%	6.2%	2.7%