

Research Paper

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Abstract

This research paper provides a snapshot of the state of Victoria's arts and entertainment sector between October 2021 and mid-January 2022, as restrictions eased in line with vaccination rates rising. It also explores how state and local governments in Victoria implemented policy and allocated finances in order to provide relief to the sector, and the new challenges presented by the Omicron variant.

COVID-19 Vaccination Rates and Victoria's Arts Sector

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Why are Vaccination Rates Important?

Vaccination rates in Victoria were the key to COVID-19 public health restrictions easing across the state's arts and entertainment sector, according to the roadmap released by the Victorian Government last November (Andrews 2021). Once 90 per cent of the state's eligible population of roughly 5.7 million people aged 12+ received two doses of a COVID-19 vaccination, the last restrictions on entertainment venues and music festivals were lifted on 19 November 2021, paving the way for the sector's recovery.

In the months leading up to reaching the 70 per cent, 80 per cent and 90 per cent vaccination milestones, arts and entertainment industry leaders reiterated calls for targeted government support and clarity around what thresholds need to be met for events to return in full (Triscari 2021). These requests from the sector had been regularly publicised through the press and other channels since venues first shut their doors in March 2020 due to COVID-19.

However, the sector's roadmap to recovery was planned before the emergence of the Omicron variant, which has presented a new set of challenges and prompted governments to reconsider their approach to balancing economic viability and public health.

Arts Audiences Eager to Return

Over the past two years, arts audiences have been surveyed nationwide as part of an ongoing research project known as the Audience Outlook Monitor (Patternmakers 2020). The project, run by research firm Patternmakers in collaboration with Creative Victoria and a vast array of arts venues, records the opinions of arts audiences in relation to attending events and under what conditions during the pandemic.

The most recent findings from the Audience Outlook Monitor showed that, overall, Victorian audiences were keen to return to in-person events considering the state's high vaccination rates. In its data capture in November 2021, researchers surveyed Victorians on their feelings towards returning to cultural events in person. Sixty-three per cent of the approximately 2,300 respondents said they had made plans to attend a cultural event or venue in the past fortnight.

Additionally, the majority of respondents said they would be comfortable attending most indoor and outdoor venues in a hypothetical scenario where all borders are open, 90 per cent of the population aged 12+ had received two doses of a COVID-19 vaccine, and proof of vaccination or negative COVID-19 test result was required as a condition of entry.

A limitation of these findings is that respondents were surveyed prior to the emergence of the Omicron variant and the increased push from governments for Australians to receive a third dose of a COVID-19 vaccine. It is plausible to suggest confidence in attending in-person events may have declined since.

Returning to Creative Spaces and Events

Location data provided by Google (2020) shows trends in Victorians' mobility around retail and recreation establishments including museums, libraries, restaurants and movie theatres. The ongoing COVID-19 Community Mobility dataset records the daily increase or decrease in mobility within most Victorian local government areas (LGAs) compared to a baseline set back in January–February 2020.

To evaluate trends from this extensive dataset, a mean average was calculated for each LGA each week. Google did not publish mobility figures for many of the LGAs as they did not meet its quality and privacy threshold.

As December 2021 arrived, both regional and metropolitan LGAs recorded large increases in mobility around retail and recreational areas, indicating a return to these spaces as restrictions eased (see Figure 1). Presumably, this increase was also due in large part to the Christmas and New Year's holidays.

Figure 1. Mobility in retail & recreational spaces per local government area

Daily scores are grouped by week and a mean score is calculated.

■ 1 October 2021 ■ 5 November 2021 ■ 17 December 2021

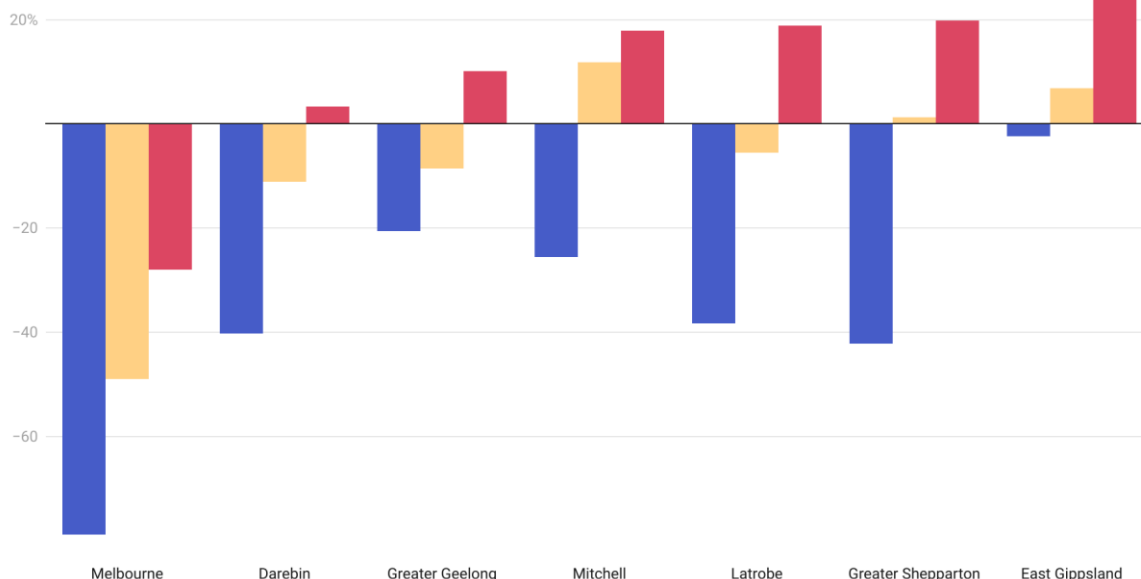


Chart: Caleb Triscari • Source: Google COVID-19 Community Mobility Reports • Created with Datawrapper

Mobility across the seven listed local government areas increased in line with COVID-19 vaccination rates rising and restrictions easing. Percentages are calculated from a baseline established by Google in January/February 2020.

Some changes in mobility between the weeks beginning 1 October and 17 December include:

- City of Melbourne: -79 per cent to -28 per cent (51 per cent increase in mobility)
- City of Darebin: -40 per cent to 3 per cent (43 per cent increase in mobility)
- City of Greater Geelong: -21 per cent to 10 per cent (31 per cent increase in mobility)
- City of Latrobe: -38 per cent to 19 per cent (57 per cent increase in mobility)
- Shire of East Gippsland: -2 per cent to 28 per cent (30 per cent increase in mobility)
- City of Greater Shepparton: -42 per cent to 20 per cent (62 per cent increase in mobility)
- Shire of Mitchell: -26 per cent to 18 per cent (44 per cent increase in mobility).

The 2021–2022 summer featured hundreds of ticketed events each month in rural and urban areas throughout the state. In the final weeks of January 2022, 760 music, film, visual and performing arts events in Victoria were listed across major ticketing companies Eventbrite, Ticketmaster, Oztix and Moshtix. The following month, 853 events were listed, an increase of 12 per cent. Major festivals including Sun Cycle, Beyond the City and NYE on the Hill were able to proceed over the New Year's period without any capacity restrictions.

Decline and Recovery of Arts Sector Jobs

The arts and recreation sector was one of the hardest hit in Victoria, with data from the Australian Bureau of Statistics (ABS) (2020) showing a 34 per cent decline in payroll jobs between the weeks ending 14 March and 11 April 2020. Notably, this dataset does not include sole traders and other creative workers that do not rely on a payroll for income, leaving room for this figure to be even greater.

The skills vacuum left behind by industry workers seeking employment in other, less volatile sectors remains an area of concern (LCEIC 2021). This problem is only heightened by the time needed to train newly employed workers and insecurity around what the future holds.

More recent months have seen a sharp increase in payroll jobs among the sector, coinciding with the state's restrictions lifting. Between the end of Victoria's sixth lockdown on 22 October 2021 and the 90 per cent fully vaccinated threshold on 19 November 2021, payroll jobs in the arts and recreation sector increased by approximately 30 per cent. Payroll jobs in the accommodation and food services sector, a closely related industry, grew by approximately 16 per cent in the same period (ABS 2020) (see Figure 2).

Figure 2. Weekly payroll jobs per sector in Victoria

Between October and December 2021.

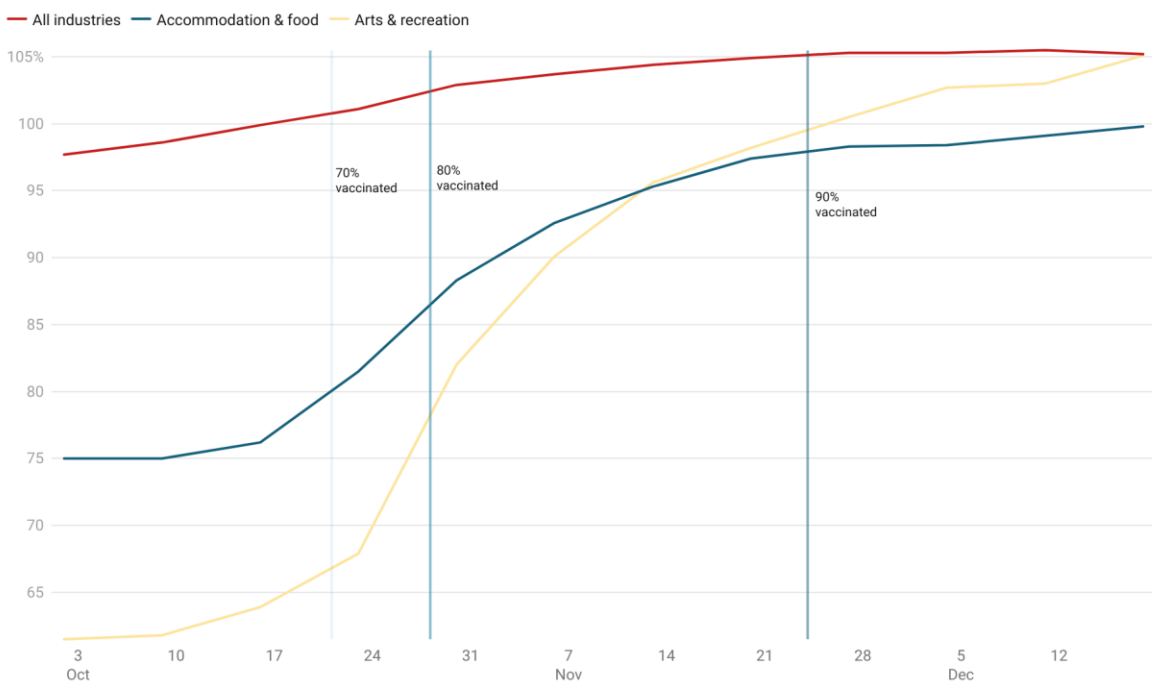


Chart: Caleb Triscari • Source: Australian Bureau of Statistics • Created with Datawrapper

The Victorian arts, recreation, food and accommodation sectors experienced significant growth in payroll jobs in the final quarter of 2021 as COVID-19 vaccination rates increased and restrictions eased. Percentage is calculated from a baseline set in March 2020 by the Australian Bureau of Statistics.

By December 2021, following the 90 per cent vaccination mark, payroll jobs in the arts and recreation sector eventually returned to, and even surpassed, levels the ABS initially used as a baseline back in mid-March 2020.

These increases are significant relative to all industries across the board in Victoria—which only grew by an average of approximately 4 per cent between 22 October 2021 and 19 November 2021—and demonstrate how the health of the arts and hospitality sectors are tied to pandemic-related restrictions.

The arts and recreation Australian and New Zealand Standard Industrial Classification (ANZSIC) does include non-creative sub-industries such as gambling and sports (ABS 2006). While the ABS does break down the arts and recreation data into sub-industries, this is only done at a nationwide level. However, the sub-industry figures show signs of recovery, with payroll jobs in the creative and performing arts increasing by 11 per cent, only slightly less than sports and recreation, and gambling (both at 15 per cent) (see Figure 3).

While it is likely the recovery of gambling and sports has skewed the overall arts and recreation sector figures for Victoria, the individual success of the creative and performing arts, and heritage activities, does not render this data completely useless. When presented alongside the Google mobility data, which is also limited by how it combines creative and non-creative categories, the figures illustrate a broad look at the arts sector's return.

Figure 3. Weekly payroll jobs in national arts and recreation sector sub-industries

Between October and December 2021.

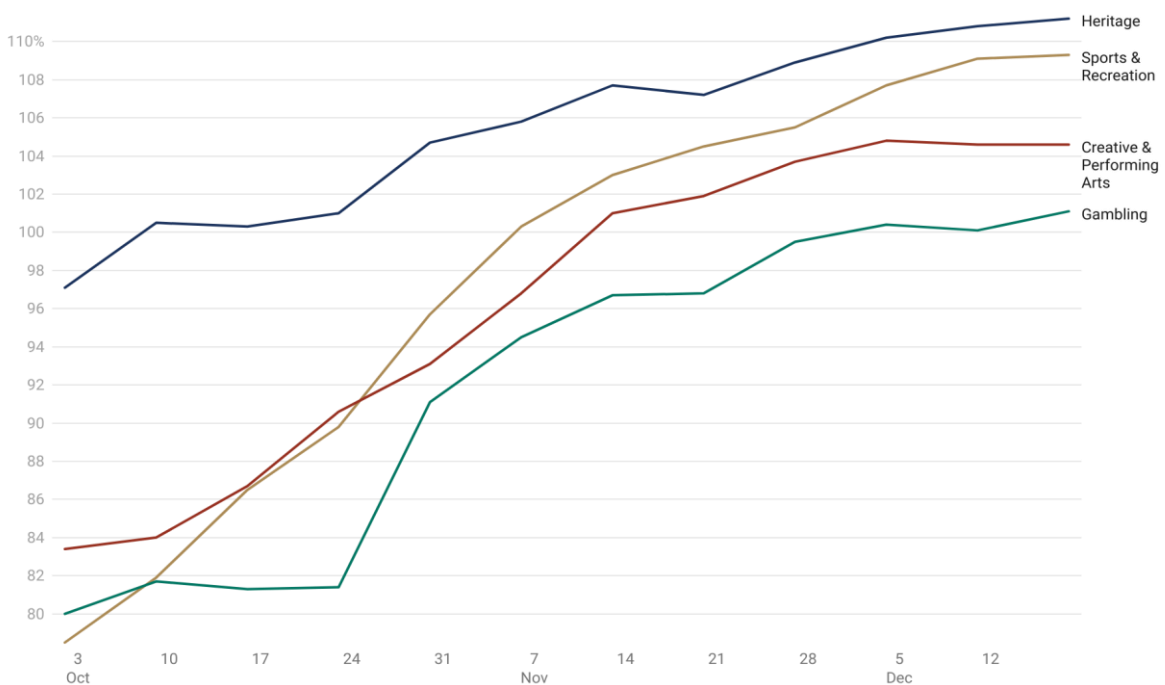


Chart: Caleb Triscari • Source: Australian Bureau of Statistics • Created with Datawrapper

All four sub-industries experienced growth in payroll jobs in the final quarter of 2021 as COVID-19 vaccination rates increased and restrictions eased. Percentage is calculated from a baseline set in March 2020 by the Australian Bureau of Statistics.

COVID-19 Insurance and Returning Event Confidence

In its inquiry into the pandemic's effect on the tourism and events industry, the Victorian Legislative Council Economy and Infrastructure Committee (2021) heard operators were hesitant to plan events in case a sudden lockdown or other government-imposed restrictions disrupted plans and caused financial losses. Exacerbating this anxiety was the fact insurance providers were refusing to offer operators an appropriate event cancellation or business interruption policy.

For touring companies, festival organisers and their contractors, arranging for major acts to tour Australia involves significant logistical coordination, and one interstate border closure can lead to disarray. As CrewCare's Howard Freeman explained in one inquiry hearing:

I can leave Adelaide on a Friday night and be doing a show in Perth on Sunday, but I have got two drivers in every truck. I have got 14 trucks. I have got 28 drivers. I have got 90 crew. I have got 130 hotel rooms. I have got 100 seats on a plane. The spend is huge. So to be stuck somewhere and then reschedule your other shows on the off chance that you can find a venue that can take the rescheduling—the nightmare is continuous. The confidence in the industry—we are smashed at the moment.

In December, following the release of the committee's report in August 2021, the Victorian Government launched the pilot of a \$230 million COVID-19 event insurance scheme (Pearson 2021) through the Victorian Managed Insurance Authority (VMIA), with the aim of giving producers the confidence to plan events. Approved policyholders are entitled to a payout if there is a 'state or federal government imposed restriction directly relating to COVID-19 which means the event has to be cancelled or can only go ahead at reduced capacity' (VMIA 2021).

As of January 2022, the VMIA reported more than 200 COVID-19 event insurance policies are in force, amounting to more than \$100 million in combined declared value. Eighty per cent of insured events are creative, ranging from small regional music festivals to long-running theatre productions in Melbourne.

Grants for the Creative Industries

In response to the pandemic, state and local governments established grant pools specifically for financial relief for creative workers and businesses. The Legislative Council inquiry received submissions from affected Victorians mostly expressing their appreciation for the financial relief streams available, especially when many were ineligible for the national JobKeeper scheme (LCEIC 2021).

Funding streams established in response to support creatives during the pandemic include:

- Creative Victoria's Victorian Live Music Venues Program (\$15 million)
- Business Victoria's Events Support Package (\$20 million)
- The City of Melbourne's COVID-19 Arts Grants (approx. \$2.5 million)
- The City of Port Phillip's Arts Response Grants (\$132,000)
- The City of Moreland's Flourish Arts Recovery Program (\$200,000)
- The City of Greater Geelong's COVID-19 Arts, Culture and Heritage Recovery Grant (\$302,000).

Concerns Surrounding the Omicron Variant

On 6 January 2022 the Victorian Government reintroduced density quotients for hospitality and some entertainment venues, limiting capacity to one person every two square metres (Andrews 2022a). These density quotients were removed on 18 February 2022 as more than half of all Victorians aged 16+ received a third COVID-19 vaccine dose (Andrews 2022b).

Nevertheless, the six-week period of reintroduced density restrictions, as well as concerns for future restrictive measures, saw some producers cancel or postpone their events. This includes the music festivals UNIFY Forever (UNIFY Gathering 2022), As the Cocky Flies (2022) and Summer Camp (2022). Summer Camp, in particular, featured international acts on the line-up.

The VMIA has identified approximately 200 insured events up until mid-April 2022 that may be impacted by the density restrictions.

Despite Victoria and various other jurisdictions launching state-specific COVID-19 event insurance schemes, industry bodies Australian Recording Industry Association (ARIA), Australasian Performing Right Association and Australasian Mechanical Copyright Owners Society (APRA AMCOS), Live Performance Australia and the Australian Festival Association, among others, have reiterated calls for a federal scheme (APRA AMCOS 2021). During an interview with the ABC's *News Breakfast* on 13 January 2022, Australian Festival Association general manager Julia Robinson argued a national insurance scheme would help the sector 'live with the virus' as many governments are now expecting their constituents to do (Razak & Millar 2022):

It's great that Victoria have put in an insurance scheme through the Victoria Managed Insurance Authority. We're seeing that tested at the moment... But as I said, this is a national sector. We work across state lines, we work with crew that work across from Queensland through New South Wales down to Victoria each summer.

Due to high COVID-19 case numbers, workers have been forced to cancel shifts after testing positive or isolating as a close contact, leaving venues understaffed and possibly unable to open. This reportedly happened to the Brunswick Ballroom, with co-director Will Ewing telling *The Age*, 'We are again in a period where we don't have any income... we're going into uncharted territory' (Miller 2022).

Theatres are not subject to the reintroduced density quotient. However, in the same article, executive producer of musical *Jagged Little Pill*, Torben Brookman, said ticket sales have slowed and the Victorian Government's COVID-19 event insurance scheme will not compensate for the lost income: "The only way to claim on that policy to cover some of [our] operating losses is if the government does restrict access to venues – it's a fairly ironic position...".

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