The invisible architecture of creative and cultural work: The relationship between miscategorisation and sector wellbeing during COVID-19

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Abstract

Tasmania, Australia's southern island state, is known nationally and increasingly internationally for its arts and cultural sector. As is common elsewhere, the extent and nature of the sector has been poorly measured and documented, with its value remaining relatively opaque within a policy making framework. With the onset of COVID-19 in March 2020, serious consequences of this poor categorisation and articulation of the sector's value emerged, with many creative and cultural workers missing out on crucial financial and other support. This article presents the findings of a study of the impacts of COVID-19 on Tasmania's cultural and creative sector, including on financial sustainability, health and wellbeing, and future work. Using a combination of survey data and interviews, we problematise the reliance on workforce categories when describing the economic understanding and measurement of the sector, and instead provide an analysis of the sector through an approach based on self-describing work, work identities and perceived contributions. We find that those who were financially supported during the pandemic were able to shift or adapt their creative practice and had a higher sense of health and wellbeing, whereas those who did not receive government or philanthropic funding experienced significant negative impacts on their health and creative practice. These findings reinforce the urgency of embedding new methods for describing and valuing the sector for policy makers, and in turn, the sector's participants.

Keywords: COVID-19, pandemic, workforce, Tasmania, data, sector recovery, government funding

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Introduction

Within the context of COVID-19 impacts globally, Tasmania has been in a relatively privileged position. As a local newspaper, *The Mercury,* claimed on behalf of Australia's southern island state, population 540,000: 'We have a moat, and we're not afraid to use it'. Tasmania closed its borders to mainland Australia, and therefore the rest of the world, on 20 March 2020 (*The Mercury* 2020). From then, until borders reopened in December 2021, Tasmania was mostly free from the health impacts of COVID-19 with few cases of community transmission. Nevertheless, social distancing and venue capacity limits followed the end of the initial lockdown period, and remained in place into 2022. Anecdotally, the Tasmanian creative and cultural industries were one of the most impacted sectors during the initial COVID-19 lockdowns. On a national scale, Deloitte Access Economics places the economic impact on the sector as being second only to Accommodation and Food (Richardson 2020). Social isolation and distancing immediately shifted the nature of work in the sector, which relies on collaboration, audiences and – for many Tasmanian-based workers remote from major centres – travel. Meanwhile, national lockdowns of the major centres of Sydney and especially Melbourne were among the longest in the world (Walquist 2021).

In response to the pandemic, the Australian Federal Government launched two major initiatives as part of a 'stimulus package' (Pacella et al 2020, p.41). Over the course of 2020, employing businesses (including sole traders) that had to go into 'hibernation' (Australian Government 2020) and could demonstrate a significant (30%) loss in income in March 2020 relative to March 2019 were eligible for JobKeeper, a scheme to enable employers to keep eligible employees on payroll through a standardised wage subsidy paid by the government. Jobkeeper payments were paid to employees via their employers. Payment rates tapered from $1500 per fortnight between 30 March and 27 September 2020 for all eligible employees, to $1200 for those who ordinarily worked 20 or more hours and $750 for others until 31 December 2020, to $1000 and $650 until 31 March 2021, when the program ceased entirely (Klapdor 2021). People who were unemployed were transferred from existing income support schemes to JobSeeker. Between 27 April and 24 September 2020, JobSeeker recipients received the Coronavirus Supplement of $550 per fortnight, effectively doubling pre-pandemic income support rates (Klapdor and Guiliani 2020). In a similar fashion as JobKeeper, Coronavirus Supplement rates gradually reduced over 2020 and early 2021 before ceasing on 31 March 2021 (Klapdor 2021).

Businesses that permanently shut or stood down their workforce also contributed to the number of people signed up to JobSeeker, which doubled to 1.6 million Australians between December 2019 and May 2020 (Klapdor and Guiliani 2020). Critically, much of the creative and cultural sector nationally did not meet the requirements for JobKeeper. Among individual creatives and sole traders, the nature of contracted and seasonal employment in the sector meant that individual creative workers were unable to demonstrate that they had experienced a loss in income within the eligibility parameters. Among employing businesses, JobKeeper could only be applied for on behalf of employees who had continuous employment with the employer for 12 months or more – a criteria incongruous with the nature of casual work. In addition, many were ineligible for JobSeeker because of their work being across sectors, meaning they were technically still employed, even though many lost the employment income related to their creative work (Morrow and Long 2020). Accordingly, many creative and cultural workers either fell through the social security safety net or were subject to uncertain and regularly declining support during the first year of the pandemic.

For the creative and cultural sector, there was a discursive disjuncture between the rhetoric espousing the sector's economic importance and contribution and the negative impact on individuals who fell outside of economic safety nets. Despite claims to the contrary or intent from the Federal Government, many cultural and creative industry workers fell outside of these initiatives because casual work is so widespread in the sector. Crucially, the difference in perceived eligibility and actual eligibility rested on the well-documented poor understanding of the actual nature of creative and cultural work (see, for example, Cunningham and Higgs 2010). For example, larger organisations such as the Museum of Old and New Art (MONA) in Tasmania were eligible for JobKeeper, as they closed their doors during the pandemic and therefore had a clear decline in income. However, not all of their workers were eligible to receive the payment, as they may not have worked continuously in the organisation for 12 months. For individuals and small businesses, the situation was further complicated by the fact that contracted funds that they rely on over the cultural calendar weren't factored into the JobSeeker/JobKeeper conditions.

That creative and cultural workers 'fell through the net' of national income and sector support initiatives during COVID-19 is symptomatic of broader issues in measuring the size and nature of the creative and cultural workforce. In terms of industry categorisation, creative and cultural industries are grouped with sectors such as sports and gambling, leading to inflated estimates of the size of the creative and cultural industries and an imprecise notion of the policy and practice issues facing them. For example, high barriers to entry created by regulatory requirements mean that the gambling industry is dominated by large organisations, often diversified conglomerates with commensurate resources. Creative and cultural industries, on the other hand, are home to many small businesses and sole traders whose needs in the policy realm inherently differ, and whose positions in terms of self-advocacy are significantly less powerful than that of large businesses.

Administrative approaches to measuring the size and activity of the workforce, such as the Australian Bureau of Statistics (ABS) Census and ABS Labour Force study, generally ask for detail about a person's 'main' job when, in reality, employment in the creative and cultural sector is volatile, often characterised by 'portfolio careers' in which creative workers often subsidise their own practice through employment in other sectors such as hospitality and tourism (Banks and O'Connor 2020 p. 4), or other traditional salaried work (Bartleet et al 2019; National Association of Visual Artists 2021). Similarly, payroll and wage data only captures those who were paid in a given week or who have a regular payment schedule, when many creative individuals find that their income fluctuates not only seasonally but between years as they are not salaried workers, and further varies based on grant success, retail changes, or shifting between jobs and positions (Pennington and Eltham 2021).

The heterogeneous and ever-changing nature of employment in creative and cultural industries in itself creates a complex policy environment, which is further compounded by the abovementioned measurement issues. This is not a new problem (Cunningham et al 2010), but continues to create difficulties not only for those tasked with making policy and other decisions on behalf of the creative and cultural industries, but also for the sector when advocating for itself and in its component parts, including in times of crisis.

In response to these issues, the ‘creative trident’ (Cunningham 2011) considers three ‘occupational situations’ (p15) of creative and cultural professions: those in cultural/creative occupations working in a cultural/creative sector; those in cultural/creative occupations working outside the sector; and those in non-cultural/creative occupations working in the sector. The trident helps account for creative and cultural activities in businesses and organisations outside of the sector (for example, art therapists in hospitals), as well as work in the sector that may not be counted as creative and cultural activity (for example, a construction worker embedded in a theatre company). Triangulation of industry and occupation (rather than examining each separately) is useful for understanding the embeddedness of creative workers in other sectors and the role of various occupations in delivering creative and cultural work, in turn allowing for a more nuanced view of the sector. However, even using the creative trident approach, people with portfolio careers and people who are seasonally or episodically employed will often not be captured or will be miscategorised in the administrative data collections upon which many funding and policy decisions are based. Further, on-island in Tasmania, where there is a lack of medium-to-large enterprises, the critical mass of sole traders, collectives and small business may not fall into reporting data for these occupations, even if the classification of the occupations includes them in the sector.

The full extent of this problem and its potential impacts became evident during the COVID-19 pandemic. The cultural and creative sector in Tasmania has been referred to as an ecosystem (O’Connor 2017), in which most aspects of a larger sector are evident but on a smaller scale and primarily comprised of often informal groups and sole operators. Hence, it was unlikely that the impacts of COVID-19 would be fully captured by national studies, or that what was needed for recovery would be covered by national plans. As such, this research set out to map the impact of the pandemic on the creative, financial and emotional sense of wellbeing of those working in the sector, with the aim of supporting the Tasmanian State Government to develop a targeted policy response. In doing so, we confronted the key challenge of how to reflect the complexity inherent in creative careers and income streams within the Tasmanian context, and to contribute a more nuanced picture of the individuals and practices impacted than that which has often framed national discourse.

The study, comprising surveys and interviews designed according to the principle we devised of 'self describing', explored critical questions about the sustainability of the sector and the wide-ranging impacts of COVID-19 on creativity and finances. Knowing that creative workers often fall into multiple industry and occupation categories – some of which are often not included in the extensive categories available through the Australian Bureau of Statistics (Author Citation; Pennington and Eltham 2021) – this study sought to more accurately capture the broad practices, income streams and modes of employment that define the sector. As such, the study was designed to allow practitioners to characterise their own work. This approach allowed us to capture conditions and experiences that may not have been revealed in other datasets, particularly when it came to income loss during COVID-19.

The real impact on the sector is not yet known (Coates et al. 2020). It is also unclear how to lead the sector out of the pandemic, particularly when social distancing and hesitancy is likely to impact access to arts and recreation for some time. Nevertheless, this paper contributes by describing how creative and cultural workers in Tasmania characterised their experiences during COVID-19 and their future ambitions, and how their responses to the pandemic can be leveraged to problematise categorisations of their work to help with future recovery and other policy responses. The pandemic has made clearer the nature of work in the sector, and this offers a critical juncture to accurately represent the nature of creative work to aid recovery and beyond.

Background and methods

For the purposes of this study, we adopted the definition of creative and cultural industries from a 2017 study of the Tasmanian sector by O'Connor, which draws upon a previous definition by Creative Victoria:

> Creative industries are an evolving mix of sectors spanning arts, culture, screen, design, publishing and advertising. They cover disciplines as diverse as game development and graphic design, fashion and filmmaking, performing arts and publishing, architecture and advertising, media and music, comedy and craft. They include activities that are commercially-driven and community-based, experimental and export-intense. (O'Connor 2017, p. 7)

While the definition of the sector is deeply contested, we found that most of our participants did not object to being included in the category of cultural and creative industries. We consciously included examples in our survey that reflected the broad range of disciplines and activities in the above definition, to demonstrate that the sector included those not necessarily living from their practice or receiving salaried work. The Creative Island report described the sector as made up of a combination of 'small organisations, microbusinesses and sole practitioners, comprising the vast majority of the sector' (2017, p. 7), in contrast to broader national discourse during COVID-19 that tended to focus on the larger institutions and their workforce, with advocacy from high profile individuals.

National and international perception of Tasmania's creative and cultural industries is often dominated by the Museum of Old and New Art (MONA), which is credited with changing the nature of Tasmania's cultural tourism and reinvigorating Hobart's northern suburbs – colloquially known as the 'MONA Effect' (Franklin 2014). MONA is a privately owned museum which deliberately frames itself as antithetical to publicly funded organisations (O'Connor 2014), although its two festivals in summer and winter receive public funding. MONA's distinctive branding has helped shape the state as a festival destination. In tandem with a shift in state brand identity that embraces the natural beauty alongside a positive framing of the quirkiness of a former penal colony state and geographically isolated populations, the state's festival economy has emerged to house both international and local acts in unique models of participation (including Dark Mofo and MONA Foma, the Unconformity, Panama Festival and Falls Festival). Festivals not only provide income opportunities for performing and visual artists, but their employment swells with arts administrators, producers, curators and other workers in the lead-up to the festivals' delivery. Those working in technical roles also rely on events and festivals, and changes to tourism are closely entwined with the economic success of cultural institutions through cultural institutions (see, for example, Flew and Kirkwood 2020).

Beyond festivals, Tasmania has several state government-run art galleries and museums, a state-wide contemporary art organisation and gallery, regional arts centres, museums and galleries, a symphony orchestra and large performing arts venues. It also has a screen industry, which includes some mid-size app, gaming and animation businesses in addition to the film and television industry, which has seen recent expansion in Tasmania as a site for productions, including *The Kettering Incident, The Gloaming, The Nightingale* and multiple seasons of the national broadcaster's sitcom, *Rosehaven.* Tasmania's screen sector workers typically work both on and off island depending on the productions and workforce composition, and often act as sole operators contracted to productions.

As noted, understanding the economic composition, contribution and effect of the sector is difficult. In this study, we have drawn upon multiple reports and datasets to understand the different ways the sector is represented, and to highlight the limitations of those approaches. Differing definitions of 'cultural' or 'creative' lead to inflation of employment figures, particularly when it comes to manufacturing, tourism, sport and Information Communications Technology (ICT). Even those receiving regular income from a salaried position hold very different positions in the sector: ranging from being embedded within a non-sector company or organisation, through to those who have a support role ensuring delivery of creative work such as gallery attendants (Higgs et al 2008). Given that many creatives such as artists and musicians are self-employed, the number of people employed in the cultural and creative industries is unclear. The number and proportion of employees (relative to total employment) in creative positions varies across the state, with higher concentrations in major economic centres in the lower east and central north (Figure 2). An exception is the Tasman Peninsula, a regional area to the south east of Hobart, which has a small population and a disproportionally high number of workers in the museum operations industry because of the presence of the World Heritage-listed Port Arthur convict historic site.

Understanding this complex workforce is difficult enough without a pandemic, let alone during one – where economic impact can amplify existing inequalities or representative gaps in data, and those who are not normally included in the sector continue to remain outside of recovery initiatives. However, combined, this produced a critical moment to examine not only the impact of COVID-19, but the impact of poor measurement tools. Thus, rather than contributing to existing debates over what the GDP contribution of the sector is, we use this moment to build a picture of the workforce on their terms, allowing for further speculation and comparative study with current statistics.

Methods

In seeking to more accurately capture the broad practices, income streams and modes of employment, we investigated the sector in four ways: extant administrative data; a survey specifically designed for those who identified as working in or with the cultural and creative industries in Tasmania; a series of long semi-structured interviews with a subsample of survey respondents in order to better understand their experiences during the pandemic and their views on the future of the Tasmanian sector; and broader population surveys seeking to understand participation in and value of cultural and creative industries, as well as overall wellbeing.

General population surveys (June 2020)

The Tasmania Project was launched in April 2020 in the initial phase of the COVID-19 pandemic as an initiative from the Institute for Social Change at the University of Tasmania. One objective was to track the wellbeing, experiences and opinions of residents of the state. A second was to provide as many Tasmanian residents as possible with the opportunity to share their experiences and opinions, and as such respondents were not limited to a selected demographically representative panel. However, data have been weighted against Tasmanian population data (age, gender and education) available from the Australian Bureau of Statistics, with minimal impact on findings (see, for example, Institute for Social Change 2020). All surveys were online and self-administered, and responses were collected using Survey Monkey and data was cleaned and analysed in SPSS V26.

This study draws on the project's second general survey which was undertaken in June 2020. Of relevance to the cultural and creative industries, the general survey asked Tasmanians questions about creative and cultural value, and general questions about health and wellbeing. The data about health and wellbeing was used to compare to similar questions in the targeted sector study, and the questions about creative and cultural value and cultural participation informed questions in the targeted survey.

Targeted Creative and Cultural Industries survey (6-31 August 2020)
Respondents to the Creative and Cultural Industries survey comprised a non-random sample attained through convenience and snowball sampling methods. The survey was advertised widely through various channels such as across social media and through broadcast media, on the University of Tasmania's website, through the Department of State Growth's networks, and through a mailing list of Tasmanian arts and cultural organisations. A total of 291 responses were collected. Participants were required to be working (or have worked), either paid or unpaid, in the cultural and creative industries in Tasmania. Participants also needed to be over 18 years of age and be currently residing in Tasmania. The survey consisted of six sections: involvement in the sector, work in the sector, income, COVID-19 recovery for the sector in Tasmania, concerns and wellbeing, and demographic information, and included opportunities throughout for respondents to provide qualitative responses in text boxes. The majority of participants were women and aged over 45 and resided in the South, although there were higher proportions of participants in the North, North-West and West than in previous commissioned surveys. Table 1 outlines the sample demographics for each survey.

	General survey 2 (n=1258)	**Creative and cultural**

	June 2020		industries survey (n=291) August 2020	
	n[1]	%	n[1]	%
Gender				
Male	338	29.8	65	26.7
Female	784	69.2	171	70.4
Prefer not to say/self-describe	11	1.0	7	2.9
Age				
18-24	24	2.2	2	0.8
25-44	270	24.7	68	28.7
45-64	539	49.2	123	51.9
65+	261	23.8	44	18.6
Highest education level				
High school	99	8.8	15	5.2
Advanced Diploma, Certificate	333	29.6	41	14.1
Bachelor's degree or above	693	61.6	234	80.7
Region of residence				
Greater Hobart	545	48.3	129	52.9
Regional South	147	13.0	30	12.3
Launceston	108	9.6	48	19.7
Regional North	131	11.6	2	0.8
North West and West	197	17.5	32	13.1

[1] Ns vary by question as no questions were compulsory

Table 1: Comparative demographic information between General Survey and Creative and Cultural Industries Survey.

Interviews (11 – 21 August 2020)

The interview sample was drawn from email addresses left by survey participants. At the time of recruitment, 81 email addresses had been provided. From this list, 19 participants were able to complete one-on-one interviews in the timeframe. The research team developed a semi-structured interview guide, covering topics such as the type of employment and creative practices participants engage in, how their creative practices were funded, the impact of the pandemic upon their own work and the sector more broadly, public perceptions of the sector, and what participants hoped for the sector moving forward. A group of five researchers from the University of Tasmania conducted the interviews, which lasted between 30-60 minutes. The recorded interviews were coded using NVivo. Of the 19 interviewees, 14 identified as female and 5 as male. Nine were primarily affiliated with an organisation, 7 were independent and 3 government. The most common sector areas in which interviewees worked were music, visual arts and education, followed by theatre and dance, events management, gallery management and administration, and organisation management.

Results

Mapping employment and income pre-COVID

Drawing upon data to understand the economic impact of COVID-19 on the sector is not only complex but, as noted earlier, leaves many out of the picture. Administrative data, such as that collected by the Australian Bureau of Statistics and Australian Tax Office, can provide certain insights into the size and nature of the creative and cultural workforce. As its intention is to provide a high-level overview of the economy overall, administrative data categorises groups of industries together. Creative and cultural industries are grouped into the broad category of Arts and Recreation Services, comprised of Sports and Recreation Activities, Gambling Activities, Heritage Activities, and Creative and Performing Arts Activities. Comparing these categories with the definition of creative industries adopted for this study, it is evident that reliance on the Arts and Recreation Services industry category to estimate the size and nature of the Tasmanian creative and cultural workforce will provide an inflated and skewed picture. This indeed plays out in the data: 57% of those employed in the Arts and Recreation Services in Tasmania at the 2016 Census were employed in Sports and Recreation Activities or Gambling Activities (ABS 2018a).

Irrespective of industry, occupations are grouped into the high-level categories of Managers, Professionals, Technicians and Trade Workers, Community and Personal Service Workers, Clerical and Administrative Workers, Sales Workers, Machinery Operators and Drivers, and Labourers. Once again, these categories intend to provide a high-level picture of the overall economy and do not necessarily provide an accurate or nuanced picture of each sector or industry – for instance, 26% of those employed in Arts and Recreation Services in Tasmania at the 2016 Census were Community and Personal Services Workers (ABS 2018a). We are not suggesting that this occupation is *not* part of creative and cultural employment, but rather use the example to illustrate that administrative data does not always produce a workforce profile that is reflective of the reality 'on the ground'. Community and Personal Service Workers are much more likely to be securely employed than, say, a visual artist, and it is unlikely that Community and Personal Service Workers do comprise (in reality or perception) one quarter of the creative and cultural workforce. It is important to note that the high-level occupation categories are further broken down: within the Professionals category, there is the subcategory Arts and Media Professionals (which are then further disaggregated, for example, Photographer is an occupation under Arts Professionals and Author, and Book and Script editor is an occupation under Media Professionals). However, examining these lower-level subcategories of occupations and industries at the state or sub-state level is only readily possible at 5-yearly intervals (with the Census) and, even then, is subject to issues of data reliability.

Another core limitation of administrative data for the cultural and creative sector is that most data is gathered in relation to a person's 'main' job, which creates further representative gaps of those who are sole traders, who have portfolio careers, or who cross-subsidise their own work. Payroll jobs and wage data can partially mitigate this issue, though these sources are not without their own issues. Primarily, jobs do not provide great insight into the workforce because a person can hold multiple jobs, and a job can be held by multiple people. Payroll jobs and wage data include only those where a person is paid in the reference week or has a regular payment schedule, meaning that casual workers or people who were away from work are not always captured, and the data is not seasonally adjusted. Given the high prevalence of casual and seasonal work in creative and cultural industries, payroll jobs and wages thus do not provide a clear window into employment in the sector. In addition, payroll and wage data have significant limitations when understanding the sector – small employers (those with 1-4 employees) and micro employers have only recently (August 2021) had exemptions and reporting concessions removed so, taking into account time lags and ironing out of data quality issues in reporting, it will be some time before longitudinal data for these employers, who comprise a substantial proportion of creative and cultural industries, are available and reliable.

What administrative data does tell us about employment in creative and cultural industries is that as at the end of August 2021, employees working in Arts and Recreation comprised 2.4% of all employees in Tasmania (ABS 2021a) and 1.6% of all Tasmanian payroll jobs (ABS 2021b). In terms of income and the nature of work, two-thirds of those employed in Arts and Recreation as their main job in Tasmania earned less than $1,000 per week before tax (<$51,999 per year pre-tax) at the 2016 Census; one third earned less than $500 per week pre-tax (ABS 2018a). Though the relatively low wages are partly accounted for by 27% of Tasmanian Arts and Recreation workers working 15 hours or less in the week prior to the Census, concerningly 41% were working more than 35 hours per week.

In order to better understand the nature of employment in the sector, we first sought to map the various positions that individuals held. We expected it to be common for creative workers to have multiple employment across more than one industry (for instance, a musician and a teacher), or for their creative work to sit within multiple categories (a visual artist who also works part time in the public service, or a musician and a woodworker). Holding an Australian Business Number (ABN), which is issued by the Federal Government to enable sole-trading and invoicing, is a widespread practice across the sector. The majority of participants in our targeted survey had an ABN for their work (62%), with a further 6% holding an ABN for non-sector related work. Sector-related work that would fall under this category includes invoicing for DJing events, receiving artist commission and fees, or selling bespoke furniture. A total of 32% of our participants did not have an ABN; 14% of participants did not have an ABN because their work in the sector was salaried.

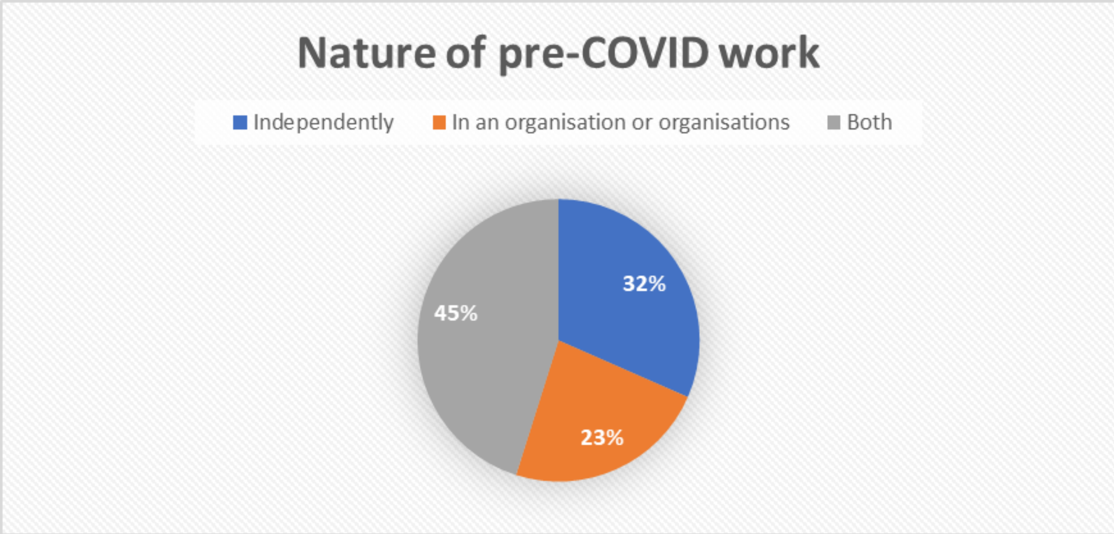

Figure 1: Nature of pre-COVID work, Targeted survey respondents.

This finding is reinforced by 45% of respondents working in a mix of both independent practice and with an organisation prior to COVID-19. Overall, 32% worked independently, and 23% with organisations. The majority of work was full time (44%) or more than half of their time (21%), meaning that their contribution to the sector occupied the majority of their working life.

However, just under one third of participants worked in other sectors (32%), including health, education, community work, local government, media and some tourism. Beyond the COVID-19 impact, we asked respondents to identify barriers to gaining more work in the sector in Tasmania. Responses focused mostly on opportunity, compensation, diversity and financial support, suggesting that it was a relatively common experience to use work in one sector to financially support creative work. As one interview participant noted:

> And then there are a range of things that you just do that aren't paid according to the way they really should be paid. And so that's not working for free, but it still has a significant in-kind component [and] that would apply to just about everything I do. (Interview 6, 21 August 2020)

The ability to map hours of contribution to developing and delivering creative work allows for a more nuanced picture of how work outside of the sector contributes to the financial viability of individuals' work within the sector, by funding the use of their time.

Targeted survey respondents identified the amount of unpaid work that they did in the sector, helping to capture what counts as employment and what does not. There was a spread across the board of unpaid work, with only 23% of participants reporting that they were fully compensated for their work. As evident in Figure 2, a higher proportion of those in the more rural and remote North West and West region were undertaking unpaid work. In interviews, the majority of participants identified as engaging in volunteer positions as board members or judges of awards. Others engaged in unexpected paid work, particularly in the intersection between community services and arts organisations.

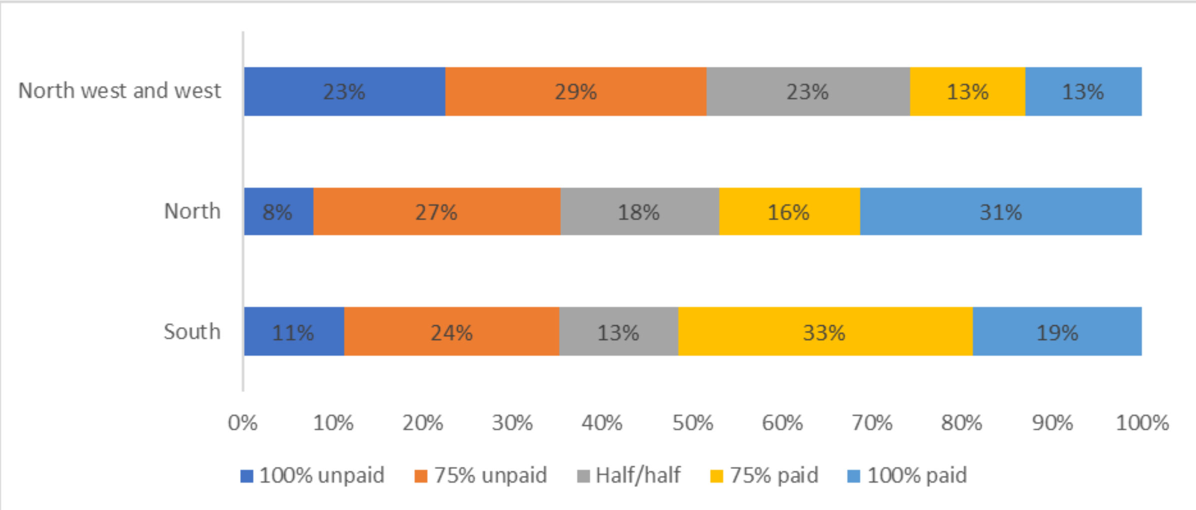

Figure 2: Proportion of paid versus unpaid work among creative and cultural industries professionals, by region

COVID-19 Funding

Some creative businesses were able to secure JobKeeper payments, and for those businesses, JobKeeper contributed to the security of staff and the future of that business. However, the majority of respondents (54%) did not receive any pandemic-related government support.

Government Support Type	**Percentage**

JobKeeper	27%
JobSeeker	11%
Small business emergency support grants	20%
Small business hardship grants	4%
Australia Council Resilience Funding	2%
Sector Stimulus	4%
Local Government support programs	3%
None	54%

Table 3: Proportion of respondents who received government support, by type of support

For those working outside of creative businesses with multiple employees, such as the 32% of targeted survey respondents that worked independently, COVID-related national schemes did not cover the episodic work that is endemic to the sector. Interviewees used words such as 'eroded' or 'depleted' to express their concerns about the lack of support for the sector. One of the major issues for the sector during the pandemic was the amount of unpaid work that ensures the support of other activities and work. This unpaid labour became more difficult for those who were not receiving other income sources, with some interviewees describing having to turn down the unpaid work that they normally contribute to focus on preserving or generating as much income as possible. This practice of subsidising participation in the sector through paid work in other industries or through other parts of the sector is widespread and falls outside of the boundaries of support provided during COVID.

An unexpected finding of the interviews was that many in the sector were not applying for government support because they did not feel as though they had a right to.

> Participant One: [My Organisation] didn't apply for the collective small business hardship grant because there are people that need it more. (Interview 13, 14 August 2020)

> Participant Two: I haven't applied for it anyway because I'm not in dire financial straits. There would be some people who would be much worse off than I would…I figure you leave, particularly in these times, you leave those spaces for the people who really, really need it. (Interview 10, 21 August 2020)

This raises a critical question for future sector recovery: if individuals and smaller organisations think that they need to 'save' funding for people in more financial distress than them, what does this tell us about how endemic not only self-subsidy is, but intra-sector philanthropy? How can we account for this in strategies that are implemented and in advocacy?

The other funding decision that was positively discussed was the decision from Arts Tasmania to roll over funding for the delivery of projects. For many who were creating performance or attendance-based work, this meant that they spent 2020 developing new ways of engaging with audiences in the absence of the delivery of their planned projects, with the safety of known funding sources. For those who did not secure funding for 2020, this decision was seen to restrict their potential income at the organisational level, as a new grants round was not announced.

Income during COVID-19

The pandemic impact on income for those working in the sector and the people they financially support has been significant. As one participant starkly put it: 'I have earnt no money since the pandemic begun with no prospects in sight' (Survey response to Part 3 Question 6, August 2020). Overall, 46% of targeted survey respondents reported earning less in 2019-2020 than in the previous year, with only 10% earning more. When asked about their income before the pandemic, in 2018-2019, Tasmanian creatives reported stability with their income, with 23% reporting an increase in income. This suggests that income streams were becoming more sustainable, and for those 'cobbling together' there were more opportunities. The decline in sector-specific income from those surveyed was higher than overall income loss, with 51% reporting either much less (29%) or less (22%). For those who were able to increase their income during the pandemic, sector-specific income was also higher at 12%, compared to 10% overall.

The reasons for significant negative changes in income were widespread, with 52% reporting a direct change in their income *because of* COVID-19. This included work being cancelled, venue closure and restrictions, performances unable to go ahead, stockists and markets closed, no direct sales from studios, book trade slowing, and even a decrease in graphic design work as there were less events needing promotion. This captures a critical element to income in the sector, which is the interconnectedness of creative work – that cancellation of live theatre and performance had impacts on other parts of the sector from box office sales to graphic design.

Diversity in the sector is perhaps best represented by the impact COVID-19 had on feelings of creativity. Our participants split almost cleanly into thirds: 32% felt more creative, 33% felt less creative, and 36% reported no change to their creativity. Some of those who were invigorated by lockdown and changes to work reported also changing their subject matter, with one musician describing how their work was becoming 'more community focused' (Survey response to Part 2 Question 7, August 2020). For those who were feeling more creative during this time, financial security was often identified as contributing to their ability to think laterally about their work. One participant who was able to qualify for JobKeeper described being able to not only rethink her individual creative arts practice, which is a large generation of her income, but also her community networks and the space she is able to facilitate for others' creative outputs. One participant remarked that the experience has given her the 'push I needed to explore online methods of connecting with the arts community' (Survey response to Part 2 Question 7, August 2020).

Wellbeing during COVID-19

The impacts on health and wellbeing on creativity and the sector were evident throughout the responses we received in this study. The sector was identified as being central to the wellbeing of the consumers and audiences of products and content delivered by the sector, and the long-term viability of the Tasmanian sector was identified as being reliant on the wellbeing of its workforce. One participant argued that they would like to 'reclaim artistic, creative and cultural values for their intrinsic worth and as essential to our social and psychological wellbeing' (Survey response to Part 4 Question 4, August 2020). Many of our participants saw the sector as being critical to improving wellbeing of themselves and of the community more broadly.

Sector workers in Tasmania reported markedly higher dissatisfaction with all elements of their lives compared to a survey of the general Tasmanian public conducted within the same three-month period. In some cases, the levels of extreme dissatisfaction were up to 4-5% higher (life opportunities, finances, feeling safe, amount of free time). Dissatisfaction rates were at times 10+% higher than the general sample average (life opportunities, finances and health).

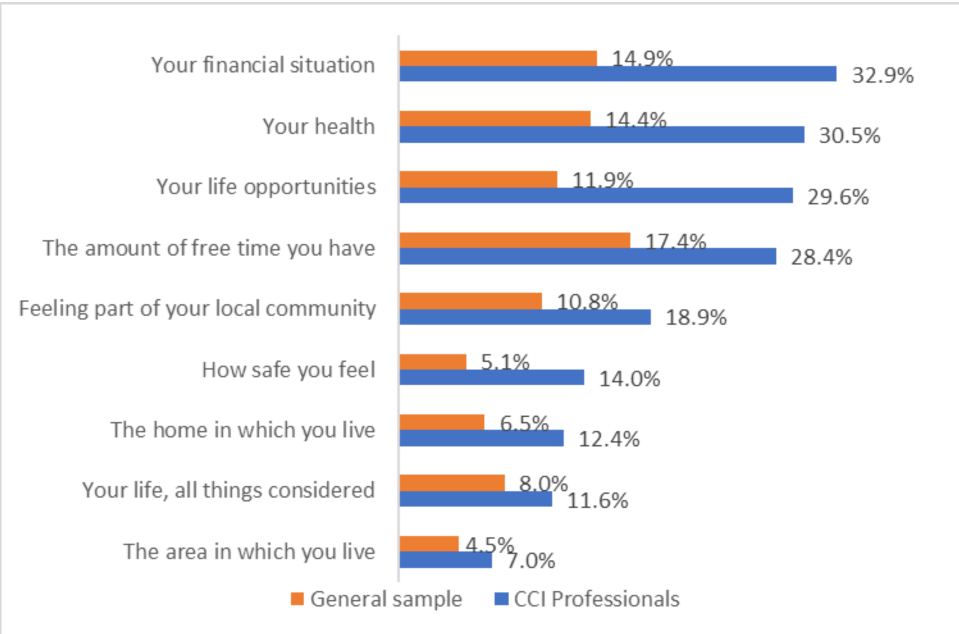

Figure 3: Proportion of sector professionals who were dissatisfied or very dissatisfied with different aspects of life

For some creative Tasmanians, losing the ability to creatively express themselves led to poorer mental health, and loss of income and audiences impacted upon their identity. One musician described not having sung or played an instrument for the period of lockdown, and despite having returned to playing in venues, was not motivated to practice their craft. A writer remarked that 'living through a pandemic has understandably impacted on my mental state by reducing my motivation and energy to write creatively.' (Survey response to

Part 2 Question 7, August 2020). Others found that the lockdown period gave them opportunity to focus more on what they enjoyed doing, which, if in tandem with financial security or grants, allowed them to make small changes to their creative work that would prepare them for COVID related changes.

Planned and existing opportunities and income were heavily diminished. Some were simply not able to adapt the work that they had been creating and their work remained cancelled or indefinitely postponed - including those who relied on the festival economy in Tasmania. For many, the pandemic uncovered, or amplified, existing bigger concerns about the long-term sustainability of work in the sector, and the wellbeing of those who participated in it. One participant described the sector as in urgent need of shifting business models to protect the wellbeing of its workers:

> The cultural landscape was in a period of unsustainable urgency that needed to end for the mental wellbeing of its participants. Moving forward, we need to develop a culture of valuing the contributions of its producers and ending the cycle of production for the sake of production. We have forgotten that the content providers labour over their content and audiences and organisations are stuck in an unsustainable mode of consumption without value. (Survey response to Part 2, Question 7, August 2020)

For this participant, addressing the wellbeing of those working in the sector was crucial to its success as a future industry. This was reinforced by our comparison of our sector sample with the general population survey. Mental health was a significant concern (41%) to those in the sector, compared with the general Tasmanian public (22%). Interestingly, there was also a significant difference in whether life priorities had changed since COVID-19, with 51% of the sector reporting that their priorities had changed, compared with 34% of the Tasmanian public. This could be accounted in part through changes in individual creative practices, which in some cases participants reported abandoning in order to seek out other income.

Many within the sector identified the role that creative work plays in building resilience in crisis. For one participant, this was due to those in the arts being used to changing landscapes and environments: existing under uncertainty for long periods of time. For another, this resilience that is built by involvement in the sector could be applied to generating responses to COVID, beyond artistic responses, but thought that creative people should be drawn upon to help devise government responses to the pandemic.

Discussion

Our study makes clear that attempts to measure the sector as a whole drastically flatten the experiences of sole operators. Even when individuals rely in part on larger organisations, many of these organisations are ad hoc in their structures, or have flexible approaches to hiring based on demand, such as festivals, events and productions. As one technician put it, 'I need events to happen. No festivals and no theatre means no work. It really hurts' (Survey response to Part 2 Question 7, August 2020). Sectioning off parts of the sector to aid in recovery misses the complexity of creative work that the technician describes. In a sector like Tasmania's, festivals and theatre are often inseparable in terms of work. If either suffers or closes, then employment cannot remain the same. This is crucial in identifying who is in need.

For some in the sector, this is time critical. For the organisations and individuals that received government funding or support, our research suggested that funding gave them the space and time to figure out new ways to engage with their audiences online, through sharing content unique to their platform of choice, and sometimes by conducting classes or workshops. This kept audiences interested, helped to retain connections between sector workers and their audiences, and added events to indoor cultural calendars. These endeavours were effectively a result of the overarching funding. How does this translate to a long-term model for those in the sector most impacted by social distancing in an uncertain future? Some of our participants in the performing arts described how the Tasmanian sector was not able to survive on ticket sales alone. Given that for many venues, it is not commercially viable to open to a smaller audience without inflating ticket prices, and once overheads are considered, this puts some performing arts venues in increasingly precarious positions (Vincent 2020) and the impact on employment and wellbeing of sector workers even more critical to understand.

In this paper we have argued that in order to understand the impacts of COVID-19 on creative workers, we need to move beyond the inflated data categories that typically include many elements of the sector that do not necessarily include creative *work*. A detailed and nuanced understandings of how people work within the sector is important in order to make decisions about short-term responses, mid-term recovery and the longer-term future of that work. Moreover, it is clear that many creative workers self-subsidise their participation in the sector through employment in another area, suggesting even more nuance is required in how we map impact and support beyond COVID-19. The pandemic has brought to fore existing concerns and frustrations with how creative work is financially funded and developed, and that many in the sector want to design new ways of funding and distributing creative and cultural work.

Despite being relatively free of the health impacts of COVID-19 to date, the Tasmanian community experienced the financial precarity felt by many as national and global influences changed our social and economic lives. The impact on individuals' wellbeing was stark, with Tasmanian sector workers expressing lower satisfaction with their lives than their general population counterparts. The entanglement between financial security, creative expression and wellbeing was expressed by our participants; those who were able to take risks in adapting their creative practice because of financial security were more optimistic about their future.

Taken together, these results have implications for policy and advocacy in the cultural and creative industries generally, as well as particular insights for Tasmania. The differences in the story about cultural and creative work told by administrative data versus workers themselves indicates that developing policy and strategy that meets the needs (and leverages the strengths) of a given region's cultural and creative industries requires an understanding that is more nuanced than can be provided by administrative data. To this end, policy makers can ensure they undertake broad, transparent and meaningful consultation in both the design and implementation phases. Perhaps more ambitiously, governments and other major funders could commission research focused on developing more robust methods of measuring the cultural and creative industries' workforce and activities and applying them to build localised knowledge of the industries. With regard to

Tasmania, our results suggest that future research should seek to better understand the interdependence of Tasmania's cultural and creative industries and the intersection, via workers, of creative and cultural industries with other sectors. This would enhance planning and strategic development across sectors, facilitating sustainable growth and greater resilience in the face of shocks such as the pandemic and their considerable aftermaths.

In terms of advocacy, the findings of this (and other) research that the pandemic has made the value of the cultural and creative industries more apparent to the public and, in some cases, governments make the pandemic recovery period an ideal time to advocate to address the issues raised in this research and by the pandemic more broadly, such as the benefit of financial security and the mental health impacts of precarity. These arguments by advocates could have particular resonance given the role that cultural and creative industries have had in driving local social and economic recovery after natural disasters and economic recessions (Noonan, 2021; National Assembly of State Arts Agencies, 2021).

In sum, Tasmania's cultural and creative workers represent a workforce and community that self-funds, participates in philanthropy of their own sector, and cobbles together income from multiple sources. If we are to strive to protect the health and wellbeing of those who create the cultural outputs valued by our community, a greater understanding of the make-up of this sector and its embeddedness in the financial success of others is vital. Even if vaccination means the easing of restrictions and returning to life pre-COVID, when will the next crisis uncover the same invisible architecture?

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