

Genero

THE IMPACT OF COVID-19 ON THE GLOBAL CREATIVE INDUSTRY.

A creative talent survey
on production trends.



Image courtesy of MALK Creative.

INTRODUCTION.

Although the creative industry has seen a great deal of disruption over the last decade, no-one could have predicted the seismic shifts that have been caused by COVID-19. When the pandemic took hold, live production halted altogether and marketing spend was paused while the industry grappled to adjust to a new reality.

Whilst there's no doubt the circumstances are extraordinary, the pandemic has heightened some of the fundamental challenges within the creative and production industry and accelerated a shift towards new ways of working. Beyond the short term effects, there will undoubtedly be lasting changes across our industry.

To better understand the immediate and long term challenges for the creative industry, we surveyed 430 creatives - including creative directors, producers, directors, production companies, agencies, animators and more - across 61 different countries.

The survey found that the immediate impact on creative and production talent around the world was huge in terms of loss of work and income, and that there have also been significant changes in creatives' preferred ways of working, with a major shift towards freelancing and independent work.

These insights are critical for brands and agencies to understand, as the resulting fragmentation will change the way that they engage with creative talent in future. A flexible, global talent pool offers opportunities for greater efficiency, scale and creativity; but to take advantage, new structures and approaches will be required.

For creative talent it's undoubtedly been an incredibly difficult time, but we see exciting opportunities for a permanent shift to more flexible, independent work. At Genero we hope we can play a role in supporting those changes and empowering more creative talent to take control over their careers and access exciting opportunities for growth.



Mick Entwisle

CEO & Co-founder, Genero

A FEW FACTS ABOUT OUR RESPONDENTS:

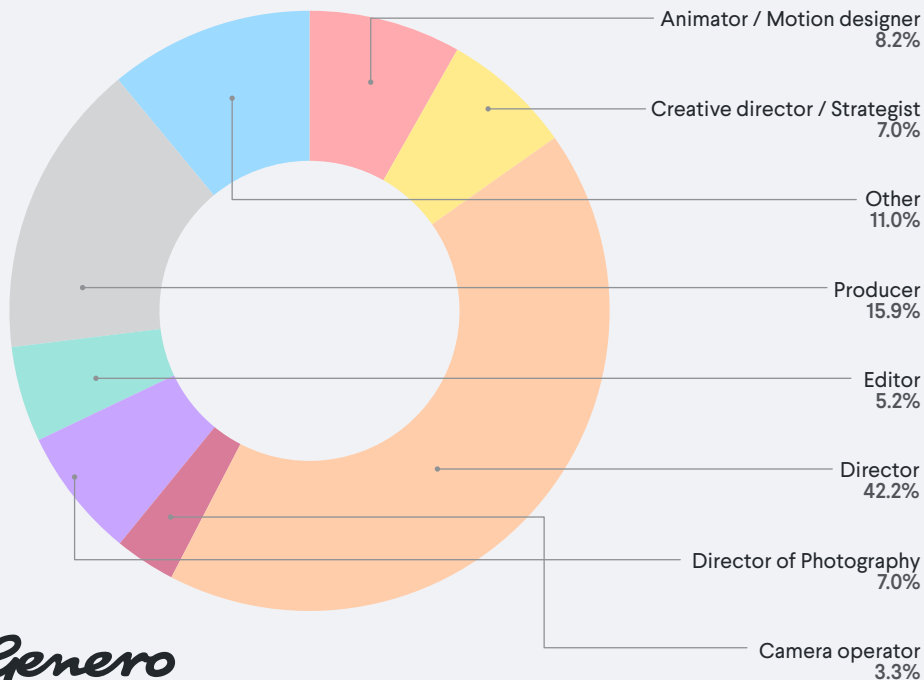
430

Respondents

61

Countries

What is your main creative/production role?



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CURRENT EMPLOYMENT.

52%

Freelance

17%

Full-time

TYPE OF BUSINESS.

52%

Production companies

10%

Agency

5%

In-house agency

8.5%

Studio

FUNCTION.

15%

Management

99%

In creative roles

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Image courtesy of Jian Chen and Electric Lime Films.

THE IMPACT OF COVID-19 ON CREATIVE TALENT.



In the midst of pandemic panic and facing the uncertainty of a global crisis, the creative industry took a tumble. With such significant changes to projects and employment, we wanted to dig deeper to better understand the short term impact on creatives and the longer term implications for the broader industry.

Adapting was certainly fundamental for creatives who strove to continue production projects despite the myriad of ever changing restrictions and regulations. A majority faced huge challenges when it came to income and employment, leading many to make significant changes to their ways of working.

In the survey, we investigated the loss of income, changes to employment, preferred ways of working going forward, and how creatives pivoted their skills to find new ways to create.

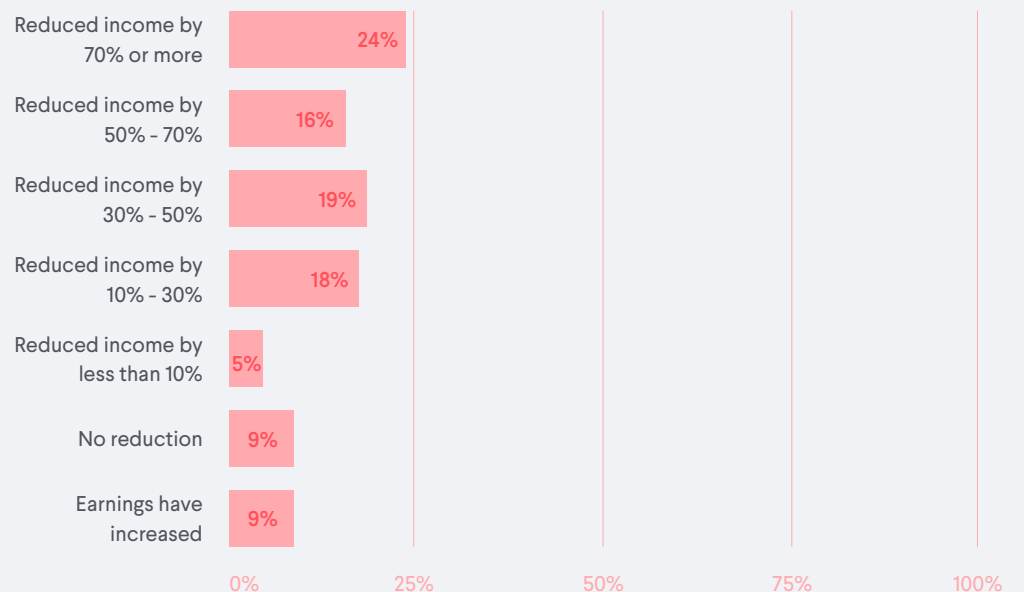
LOSS OF INCOME.

81% of our respondents highlighted that their income had been reduced in the period March 2020 to September 2020.

Given the impact that lockdowns and restrictions had on production globally, this isn't a huge shock, although it's a devastating statistic to see.

The extent of the impact may surprise some though, with **the most common response (24%) being more than a 70% reduction to income, and 40% of respondents seeing their income reduced by 50% or more.**

How was your income affected in 2020, compared to what you would have otherwise likely earned?



The factors that have had the greatest impact on income and earnings include postponed and cancelled shoots, as well as limitations on travel.

“90% of my work came from international projects, due to travel restrictions and a general halt on productions, these projects have come to a near full stop.”

Producer (Belgium)

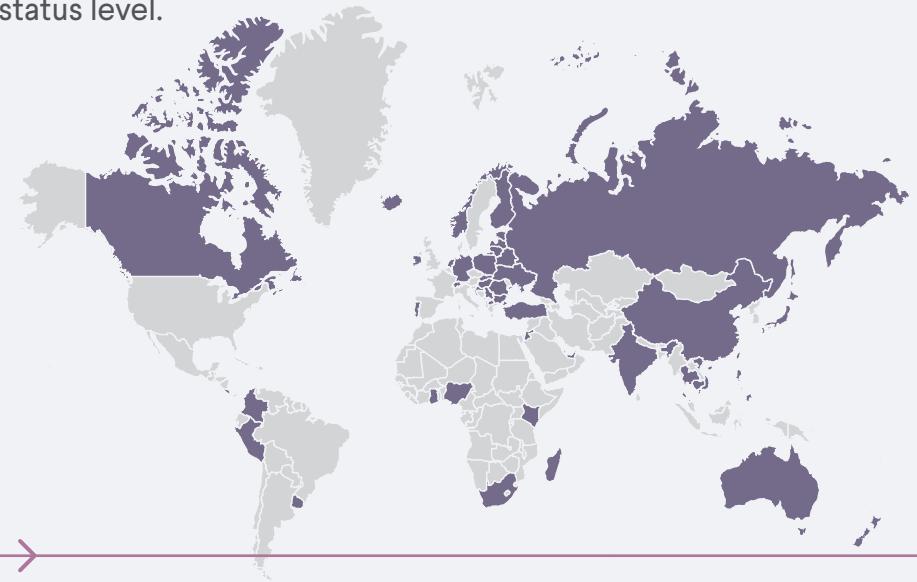


→
May 2020

1 of 89 countries open for full production in May 2020 (Taiwan only)

However the good news is that 1 in 3 respondents were expecting their income to rise over the following 12 months. Although international travel remains a challenge, most markets have been able to recommence production (even during lockdowns) with strict safety protocols in place.

In 2020 Genero launched the [Global Production Status Map](#) which tracks the status of production in 89 countries. At the time of publication of this report, 51 of 89 of countries were open for full production including full scale shoots. When we first launched the map in early May 2020, only one country was at this status level.



→
March 2021

51 of 89 countries open for full production in March 2021

Publication date March 2021. Countries not listed above as 'open for full production' may still have restrictions in place. Please visit genero.com/covid-19-map for up to date information and see the status level of each country.

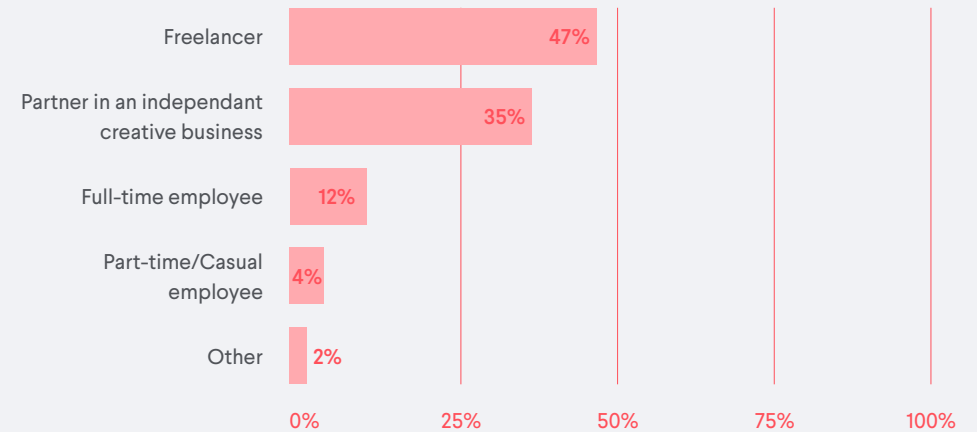
CHANGES TO WAYS OF WORKING.

A PREFERENCE FOR FREELANCING.

72% of respondents have had to change their ways of working as a result of the pandemic, either temporarily or permanently, with the primary catalyst being a forced change due to a loss in earnings.

Many creatives have moved into freelance work from full time employment, and that shift is looking likely to stay. **Only 12% of respondents would choose full time as their preferred way of working moving forward. The overwhelming majority would like to freelance (47%) or work as a partner in an independent creative business (35%)**, highlighting a major shift to independent, flexible work that will require brands and agencies to re-think the way they've traditionally engaged creative and production resources.

Thinking about your career moving forward, what is your preferred way of working?



Apart from the clear preference from creative talent, the job losses in the creative industry will further accelerate this shift to freelancing and independent work, with [Forrester](#) predicting over 100,000 agency job losses across 2020/21.

With a growing pool of talent working outside of agencies, the challenge and opportunity for brands is to find an efficient and optimal model for engaging them. For marketers looking for more efficient ways to create content, platforms that connect brands directly with talent whilst streamlining the creative process, will become increasingly important. And similarly, for the increasing number of freelance creatives, these platforms will be an important tool to help them find work and independently manage their careers.

NEW WAYS TO CREATE.

With restrictions on production, creatives have had to adapt and find new ways to create content. More creatives focused on local projects or work that can be done at home, or with less reliance on travel, including animation, motion design and stock footage.

“We’re adapting. Looking into animation more than we were. Using our curated teams interstate more than we were. Relying on our network to complete and deliver our content to our clients.”

Creative Director (Australia)



TECHNOLOGY AND TOOLS.

As stay at home measures rolled out globally, creatives were quick to utilise new technology and facilitate remote working.

There was a big uptake of productivity, collaboration and remote working applications and programs, with creatives increasingly using Zoom, Triller, Adobe Creative Cloud, Dropbox, Google Suite, Jira, Slack, Asana, Notion and various social media platforms as part of their toolkit. The overall adoption of these platforms has allowed creative teams to organise, communicate, produce content safely and even cut costs during the pandemic.

“We remotely directed and controlled a shoot with a robot arm and high speed camera from 10km away.”

Creative Director (Thailand)

“We use a lot of virtual services now and have been working to implement a “virtual” workforce since before the pandemic started. Utilizing cloud-based services helps streamline the process, such as review systems, file delivery, collaborative post-production software, etc.”

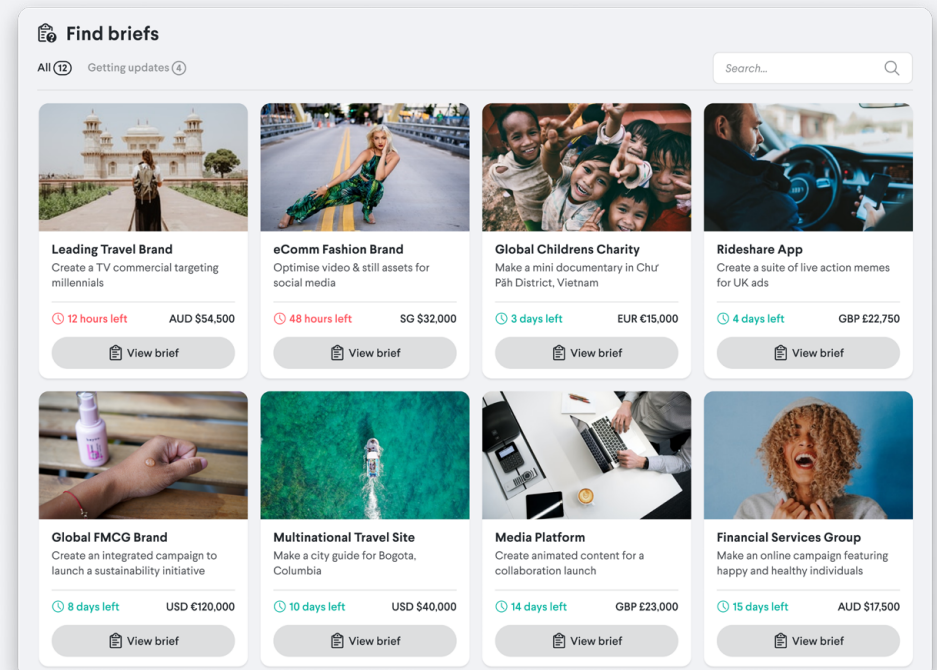
Founder & Creative Director, Production Company (United States)

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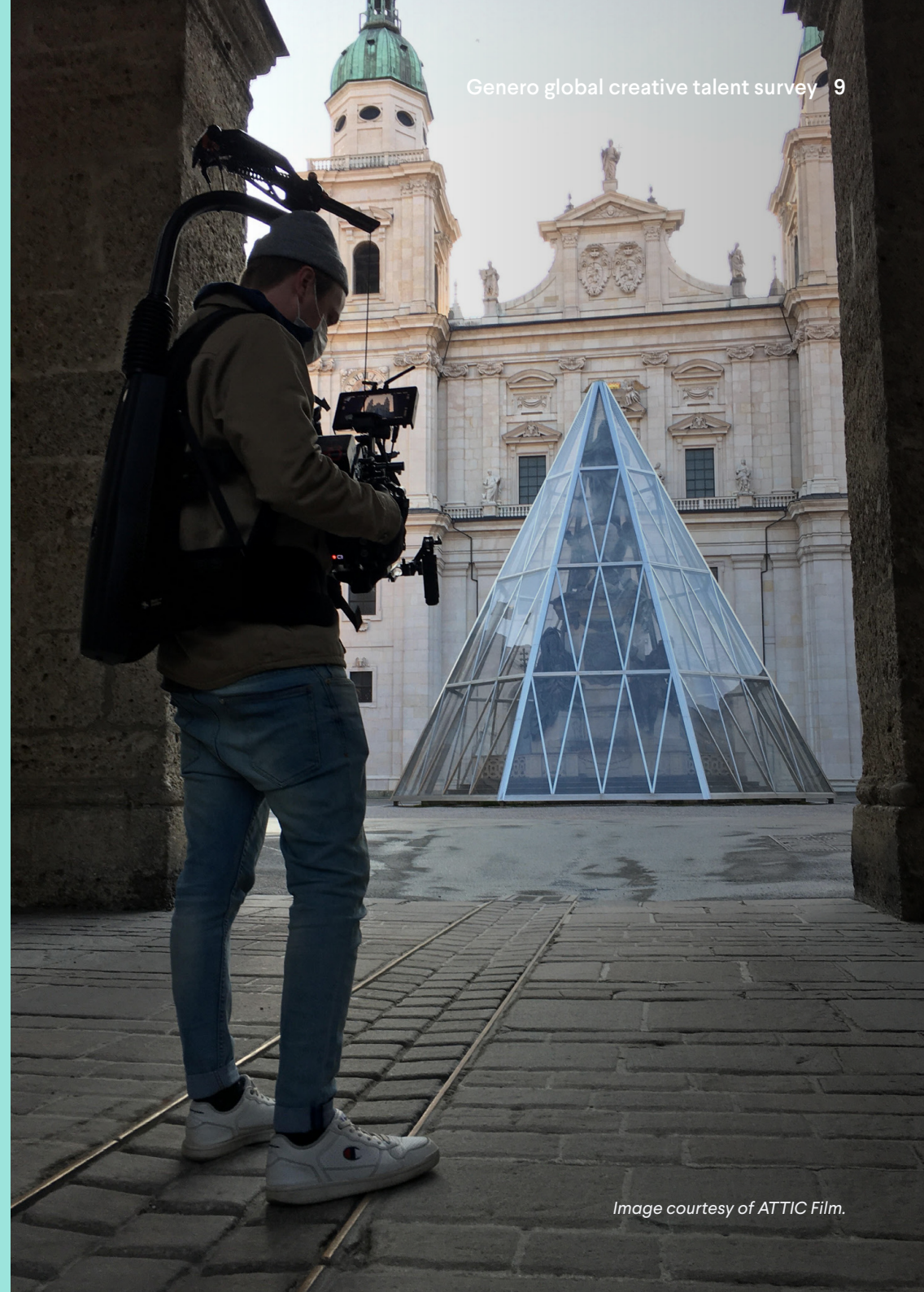
Creative tech platforms such as Genero, Vimeo and Frame.io have served many creatives well throughout the pandemic, allowing them to find, create, share, approve and discuss content online.

“As much as it seemed as if opportunities were lost during the pandemic, I’ve had many new experiences that I wouldn’t have sought after if not for being forced to reach out to clients. Genero has been particularly helpful in that way!”

Director (Australia)



THE IMPACT OF COVID-19 ON PRODUCTION.



As individuals struggled with the economic impact of COVID-19, production was also heavily affected. We know from our own experience that the cost and time required for production have both increased, primarily to account for new safety measures, so we wanted to find out how the industry is adapting to these challenges.

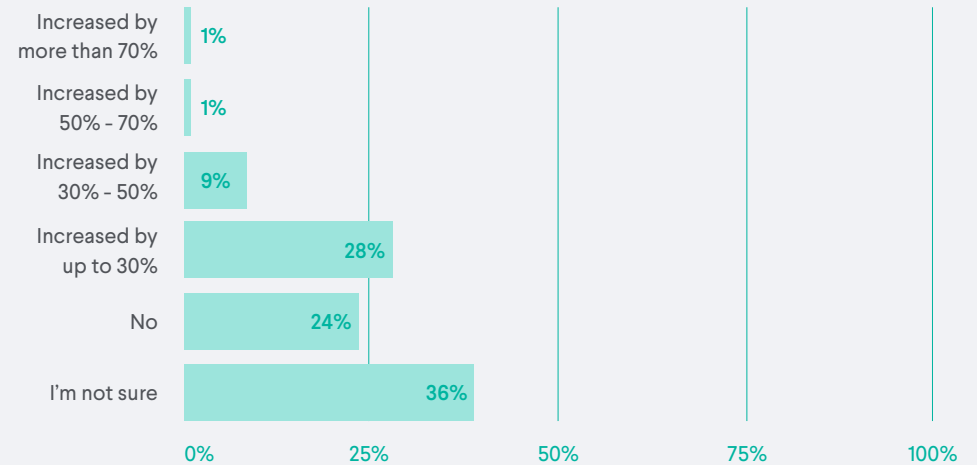
THE COST OF PRODUCTION.

40% of respondents said that the cost of production has increased, with 28% seeing an increase (in costs) of up to 30%. When isolating answers from respondents at Production Companies, Agencies and Studios, 46% said that costs have increased.

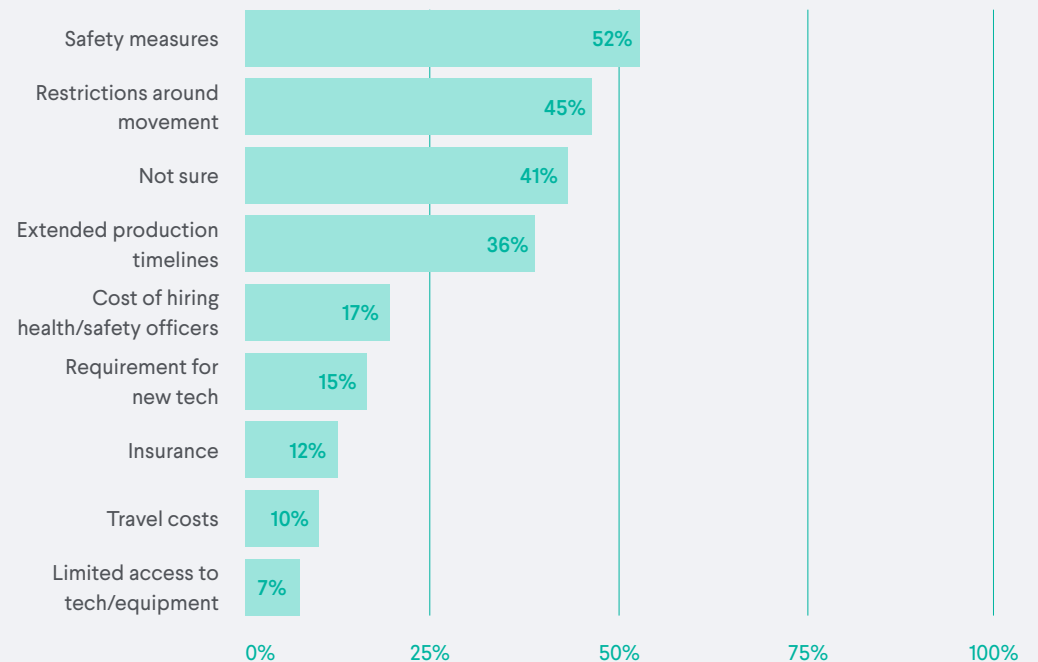
New safety measures, restrictions on movement and extended production timelines are the three factors having the greatest impact on production costs, while increased insurance fees, additional tech requirements and the need for hiring health & safety officers are also impacting budgets around the world.

Respondents highlighted the need for these challenges, and the impact they have on production and budgets, to always be taken seriously when planning new productions.

Has COVID-19 impacted the cost of creative production?



What factors have had the largest impact on production costs during the pandemic?

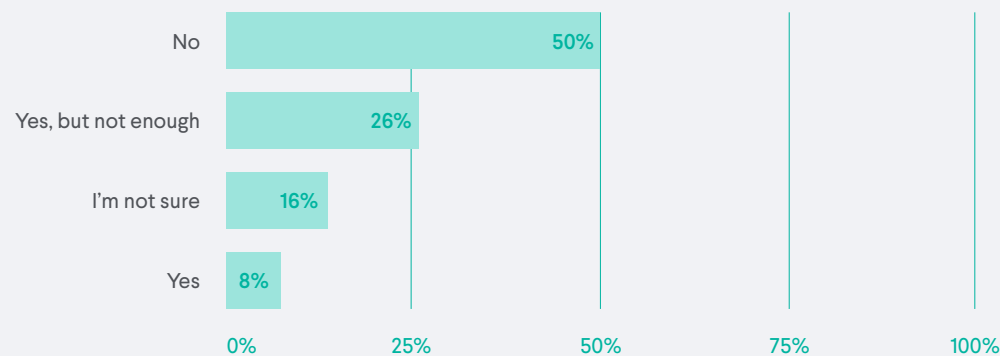


Greater pressure on advertising budgets is also being passed down through the creative process. **76% of respondents said that client budgets haven't been adjusted enough to take increased costs into account.** Creatives are urging clients to understand that by dropping budgets, production quality and support becomes far more limited.

“The most important factor is to understand the need for increased budgets in order to cover additional costs connected with COVID. Providing good masks for the entire crew, testing and sanitizing stations add a lot of cost very quickly (not to mention the increase in insurance fees). Many budgets do not take this into consideration, hence, there’s a substantial reduction in filmmakers’ take-home rates.”

Freelance Filmmaker (Poland)

Have client budgets been adjusted to take additional costs into account?

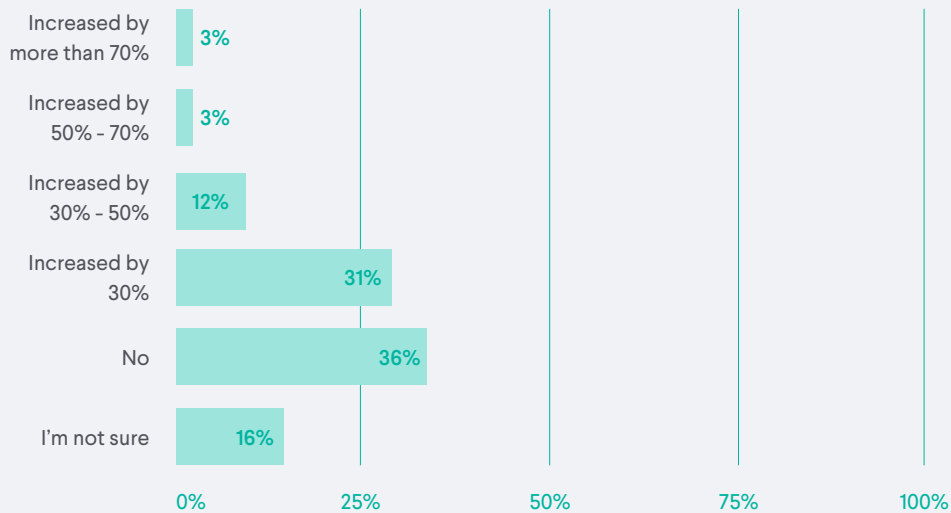


PRODUCTION TIMELINES.

Just under half of creatives surveyed said that timelines have also increased due to the pandemic. The key factors impacting timelines are shoots having to be postponed or rescheduled, restrictions on movement and also teams having to work with tighter crews.

Building flexibility into production schedules is key during this time, to allow creative teams to respond and adapt to possible impacts, and factor in the need to meet government guidelines and maintain safe practices on set.

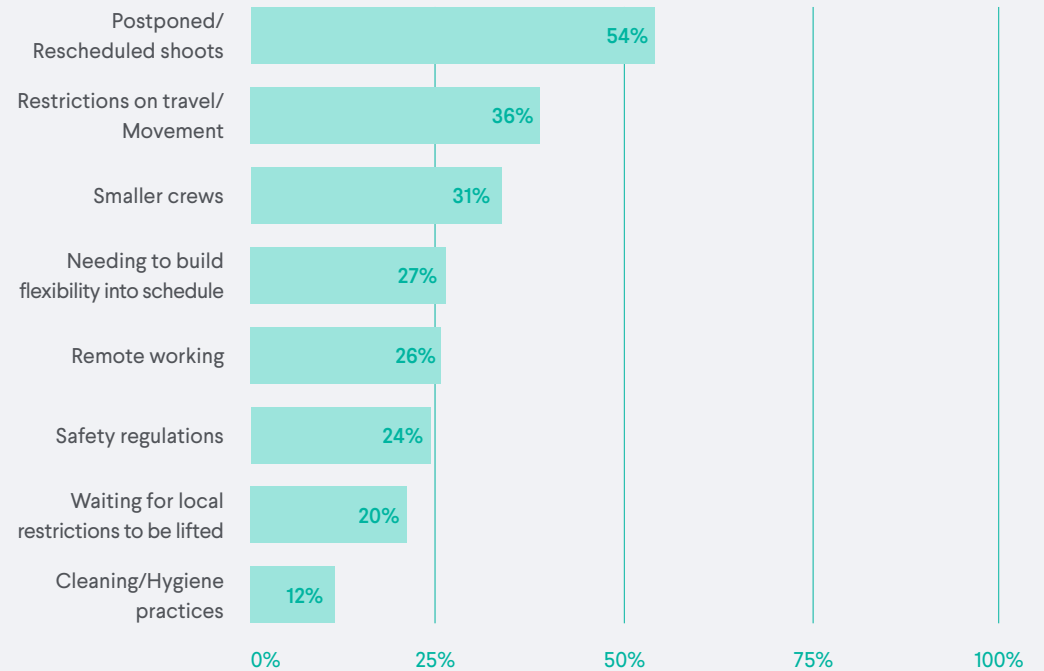
Has COVID-19 impacted your timelines for production?



“There’s an increase in the number of hours needed to make a production happen. While we still get the job done, the client may not realise the additional number of hours taken to co-ordinate talent, make sure measures are put in place to keep talent safe, find talent that already interact or are related to make them more comfortable with working in close proximity to someone etc.”

Producer (Jamaica)

What factors have had the largest impact on production timelines?



WHAT IT MEANS FOR BRANDS.

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Image courtesy of Luminoustudios.

After a year of drastic shifts and constant uncertainty, we hope this report provides some helpful insights into the state of creative production in 2021 and beyond.

Where local regulations permit it, production is moving forward at encouraging speeds, but there will be changes to the way we create for a long time to come - including significant safety measures, an ongoing need for flexibility and adaptability, and a shared understanding of the day-to-day considerations this new normal brings.

The biggest opportunity for marketers is to understand that the shift towards freelancing and independent creative work is accelerating and permanent, and to embrace new ways of working with a more flexible, independent, global creative talent pool.

The traditional model isn't designed to be able to work efficiently with a more fragmented creative workforce, but, by using creative technology and platforms, marketers can better harness the power of a larger, more diverse talent pool. This will ensure they can experience the benefits, with direct access to creatives anywhere in the world, the ability to scale their resources and access specialist capability, without adding headcount to their teams.

ABOUT GENERO.

Genero is a global creative platform that provides always-on access to a global, professional network of 120,000 creatives, to generate fresh creative thinking and visual content.

Our creative technology solution provides a scalable, efficient content production model for global brands including Diageo, Unilever, L'Oreal, the BBC and Fitbit.

We're also official partners of major platforms including Facebook, Instagram, Google, TikTok and Hulu, providing their advertising clients with a creative solution delivering best practice advertising content for each channel.

Genero provides a platform for professional creative talent to access briefs, pitch ideas and grow their careers.

YOUR GO-TO SAFETY GUIDELINES.

We've gathered safety guidelines from our creative network as well as government and industry bodies around the world. Click [here](#) to view a list of local guidelines for 49 different markets around the world, and [here](#) to visit our collection of go-to safety guidelines designed to help creatives work on production safely.

For questions about the report, please email: info@genero.com

METHODOLOGY.

We surveyed creators from Genero's creative network in October and November 2020. The survey sample size was 430, with respondents from 61 countries. We asked respondents to give both quantitative and qualitative answers to questions about their experience with creative production during COVID-19. The survey was designed to provide insight into the immediate and long term challenges for the creative industry as a result of the pandemic.

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