State of the Arts Survey

Aotearoa
September-October 2021

Report on survey findings

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Acknowledgements

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Executive Summary

This report presents the findings from an online survey of those in the creative sector in Aotearoa, between September-October 2021. In total there were 530 respondents nationwide, and results are discussed below.

Creative freelancers dominated the total sample: More respondents reported being a creative freelancer (50%) than any other role in the creative sector. This was followed by unpaid/voluntary creative individuals (24%), and leaders of a creative not-for-profit (23%).

Performing and visual arts were strongly represented in the total sample: Respondents were active in many creative areas. Performing arts was the most prominent area reported (47%), followed by visual arts (45%) and music (28%).

Respondents have shifted towards a more pessimistic view about their financial position: Respondents rated their outlook on whether their creative work would support their financial position in the next 12 months (from 1 meaning very pessimistic to 6 meaning very optimistic). Compared to the June-July survey, pessimism increased from 51% to 59%, and optimism fell from 48% to 38% indicating a shift towards a pessimistic view.

A majority of respondents expected to either increase or maintain their current staff or contractor numbers, which is consistent with the previous survey's findings: For respondents where this question was applicable, most respondents expected to take on new staff or contractors (37%) or expected to stay at the same level (38%). Findings were consistent with the previous June-July survey results.

Respondents' view on achieving their creative goals shifted to become more pessimistic: Respondents rated their outlook on whether they would achieve their own or their organisations' creative goals in the next 12 months (from 1 meaning very pessimistic to 6 meaning very optimistic). Compared to the June-July survey, pessimism increased from 24% to 44%, and optimism fell from 73% to 54%, indicating a shift towards a pessimistic view.

Respondents' perception of audience appetite for their creative work seems to have decreased: With 32% reporting audience appetite being more than usual, 31% reporting that it was the same as usual and 25% reporting that it was less. Overall, the average rating was 2.1 out of 3. This is lower than the average rating of the June-July survey (2.3), at a time when perceptions of audience appetite was captured at an Alert Level 1 setting.

The timeframe that respondents expected to be impacted by the latest COVID-19 lockdowns was largely between four months to two years: Nearly all (95%) respondents reported being affected by the latest COVID-19 outbreak and subsequent lockdowns. Nearly half of respondents indicated their creative work would be impacted by more than six months (47%), with 16% indicating seven months to one year, 20% indicating one to two years, and 11% indicating two years or more.

Recognition of the role arts, culture and creativity plays in a COVID environment and emergency funding were most important to respondents: Creatives were asked a series of statements about what is important for the arts, culture, and creative sector as it faces ongoing disruption from COVID-19 (from 1 meaning strongly disagree to 4 meaning strongly agree). Statements that were most important to respondents where more than 90% either strongly agreed or agreed were: Recognition of the role arts, culture, and creativity plays in a COVID environment; Emergency relief / resilience funding to support core operations during Alert Levels 4, 3, 2; Mental health and wellbeing support; and sector guidelines and resources for operating at different alert levels.

Qualitative themes that emerged from respondent feedback included the following:

- Suggestions for new strategies and approaches to support the creative sector
- Adapting to the COVID environment
- A call for changes to funding priorities and processes
- Greater recognition of the value of the arts
- Concerns about financial security
- The importance of the independent sector, such as organisations working outside of large arts organisations and businesses, and freelancers in the sector.

1. Introduction and approach

This report presents topline findings from an online survey of those in the creative sector in Aotearoa between the period of September-October 2021.

Arts Wellington, Te Taumata Toi-a-Iwi, and Creative Waikato partnered to commission Dovetail, an Auckland-based research and evaluation company, to deliver a quarterly online survey to the creative sector across Aotearoa. Additional funding for the survey was also provided by Wellington City Council and the Ministry for Culture and Heritage.

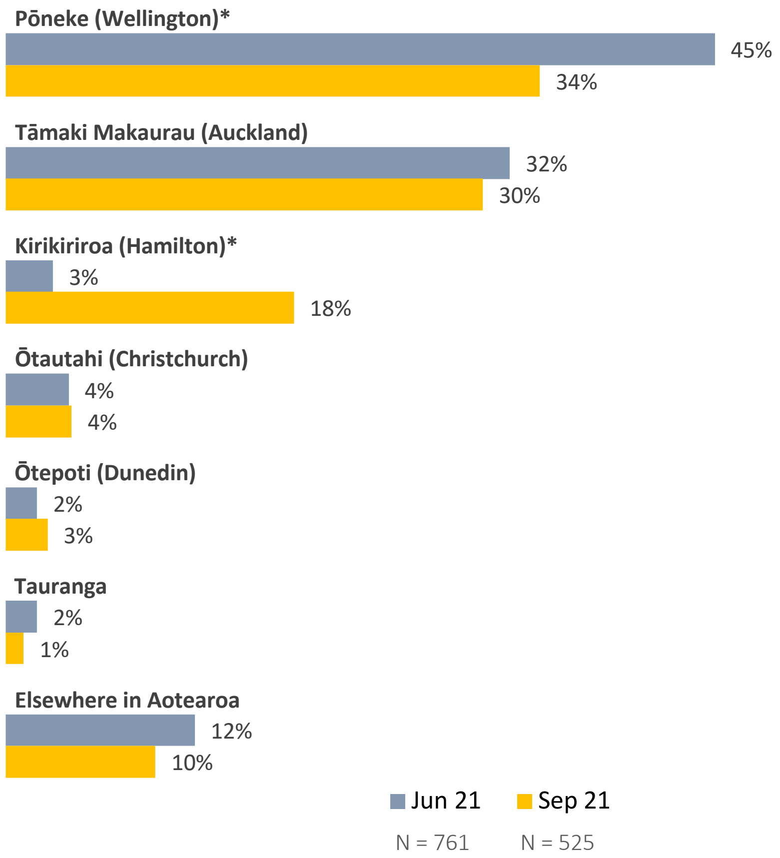
The survey's intent is to measure trends over time about the state of the arts sector in Aotearoa and tap into key issues emerging in the creative sector. The approach in this survey has been refined from the previous survey (State of the Arts June-July 2021). This survey includes additional questions about the impact of COVID-19 and the resulting lockdowns that began in August 2021.

The survey was distributed via the SurveyMonkey online platform and respondents were recruited through a combined method of own database distribution (via Te Taumata Toi-a-Iwi, Arts Wellington's, Creative Waikato, and the Ministry's network relationships), the database from the previous State of the Arts survey, and social media, targeting users that work in the Arts, Culture & Media sector. The sampling approach means that a response rate cannot be accurately calculated.

In total there were 530 responses. Pōneke (Wellington) had the highest number of responses with 34%, followed by Tāmaki Makaurau which had 30% of responses in the survey (Figure 1). There were fewer responses compared to the previous survey (761 responses). Comparisons should be interpreted cautiously between the total samples of each survey, due to the initial survey targeting those mainly in Pōneke and Tāmaki Makaurau. Between surveys, the proportion of Pōneke respondents significantly decreased (45% to 34%) whereas the proportion of Tāmaki Makaurau respondents remained at similar levels (32% to 30%). There was significant growth (3% to 18%) in responses from Kirikiriroa (Hamilton) which reflects the active outreach by Creative Waikato to the sector in the region.

This report focuses on results for all of Aotearoa using the total sample (N=530).

Figure 1: Areas in Aotearoa where respondents were mainly based



** Statement with a statistically significant difference*

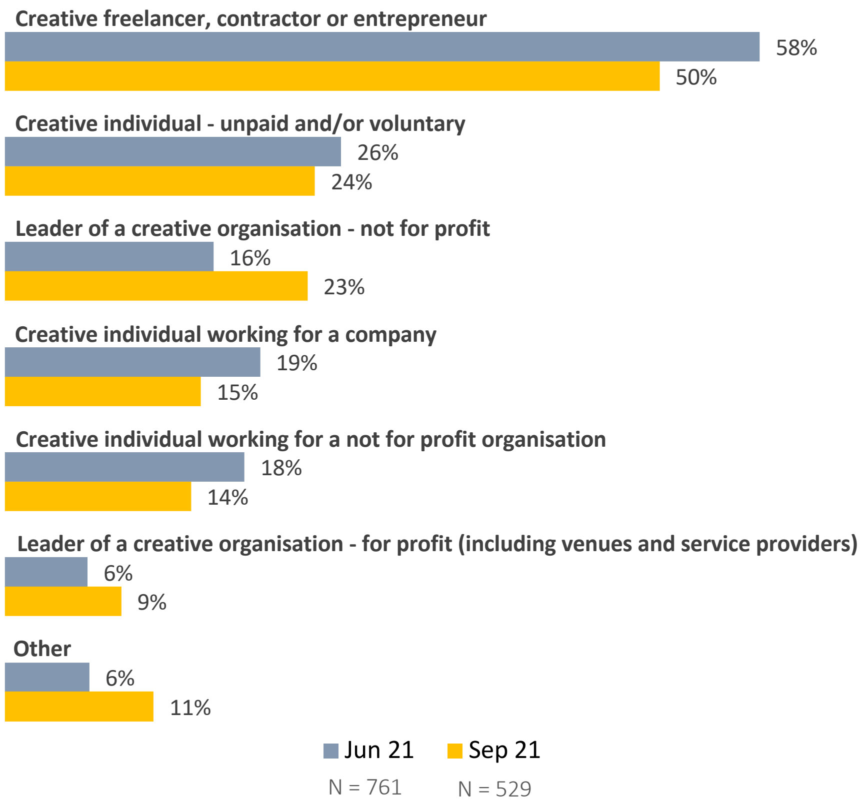
2. Roles of creatives

Creative freelances dominated the total sample

Most creatives were freelancers (50%), unpaid creative individuals (24%), and leaders of a creative not-for-profit (23%). A further percentage were creative individuals working for a company (15%), creative individuals working for a not for profit (14%) or leaders of creative for-profit organisation (9%). The remaining respondents who selected 'other' mentioned roles such as educator, board member, and student (11%).

Compared to the previous survey there were fewer creative freelancers in the most recent sample (58% to 50%) and a larger representation of leaders of a creative not for profit (increased from 16% to 23%). The proportions of the remaining roles were relatively similar between the two samples (Figure 2). The responses to this question and to other sector questions indicates some broad similarity between the two samples to enable comparison.

Figure 2: Respondents' roles in the creative sector

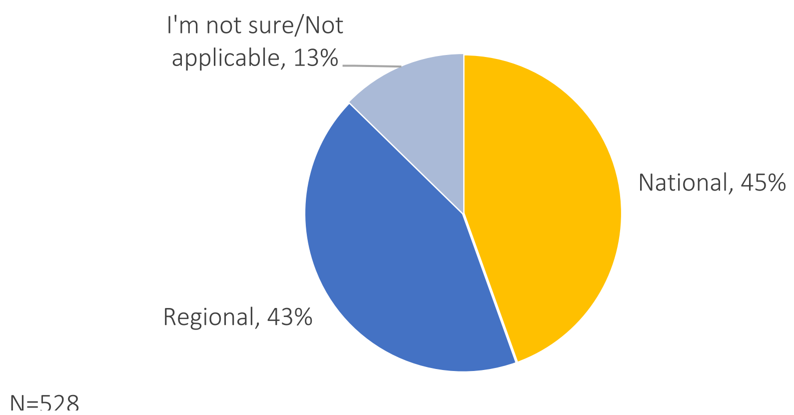


Note: Multiple responses were allowed

The work of creatives was split fairly evenly between national and regional focus

Of the respondents in the survey, 45% had work that was nationally focused. A further 43% had regionally focused work and 13% responded that they were unsure, or it was not applicable to them (Figure 3).

Figure 3: Whether respondents work was nationally or regionally focused



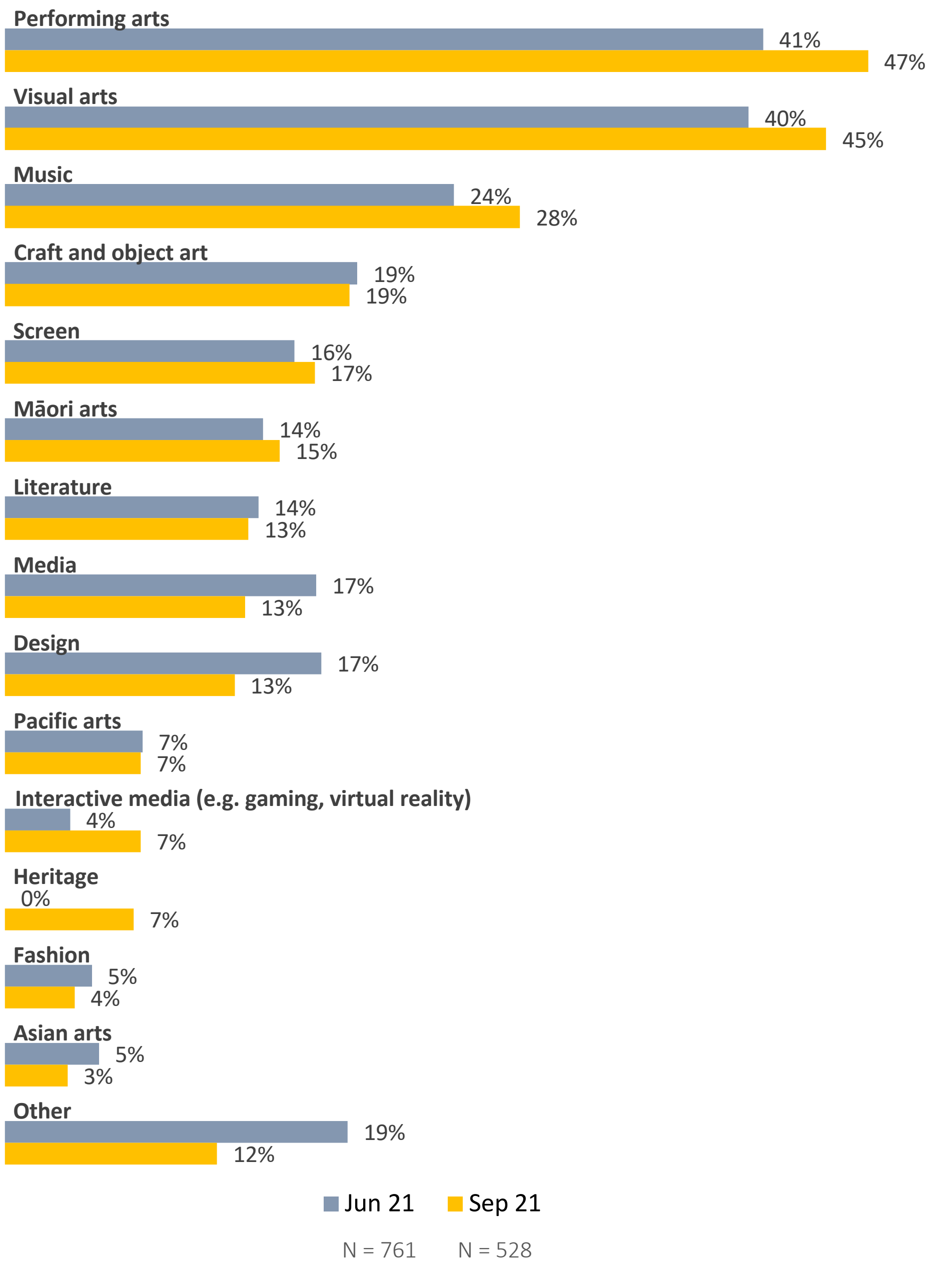
Performing and visual arts were strongly represented in the total sample

From the survey it is evident that respondents work in a variety of creative areas. When asked which of the following best described their area of work, the largest number of creatives were involved in performing arts (47%), followed by visual arts (45%) and music (28%). Some respondents were involved in craft and object art (19%), screen (17%), Māori arts (15%), and Pacific arts (7%).

Between surveys areas of creative work remained at similar proportions. Performing and visual arts further increased their representation (increasing from 41% to 47% and 40% to 45% respectively) and the proportion of those who selected 'other' decreased (from 19% to 12%). Please note that the Heritage category was added to the September survey for the first time.

A full breakdown of creatives roles in the total sample can be seen below in Figure 4.

Figure 4: Respondents' creative area of work



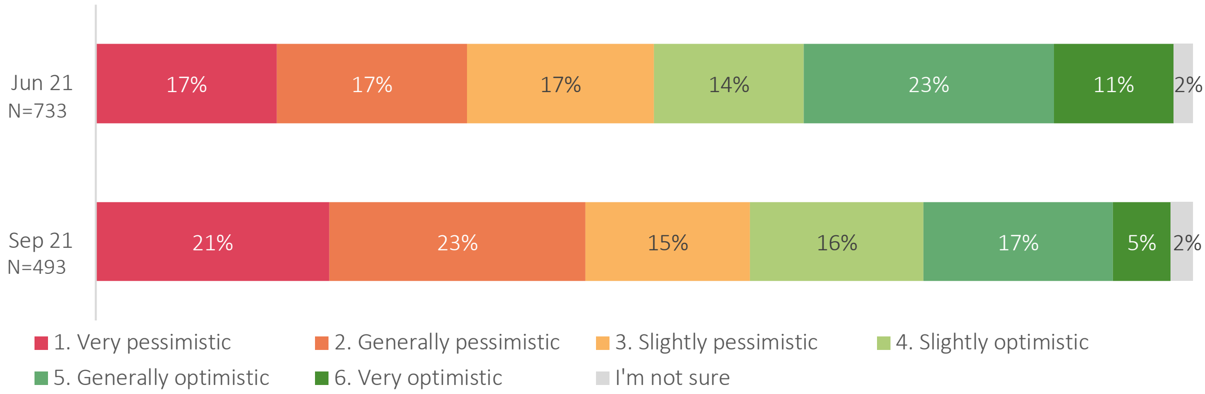
Note: Multiple responses were possible

3. Financial position

Respondents have shifted towards a more pessimistic view about their financial position

Creatives were asked how optimistic or pessimistic they were that 'their work in the creative sector will support their financial position in the next 12 months'. Respondents were asked to rate the statement on a scale of 1 to 6, where 1 was 'very pessimistic' and 6 was 'very optimistic.' Compared to the June-July survey pessimism increased from 51% to 59% and optimism dropped from 48% to 38% indicating a shift towards a pessimistic view (Figure 5). Overall, the average rating was 3.0 out of 6 in the latest survey, compared to 3.4 in June-July.

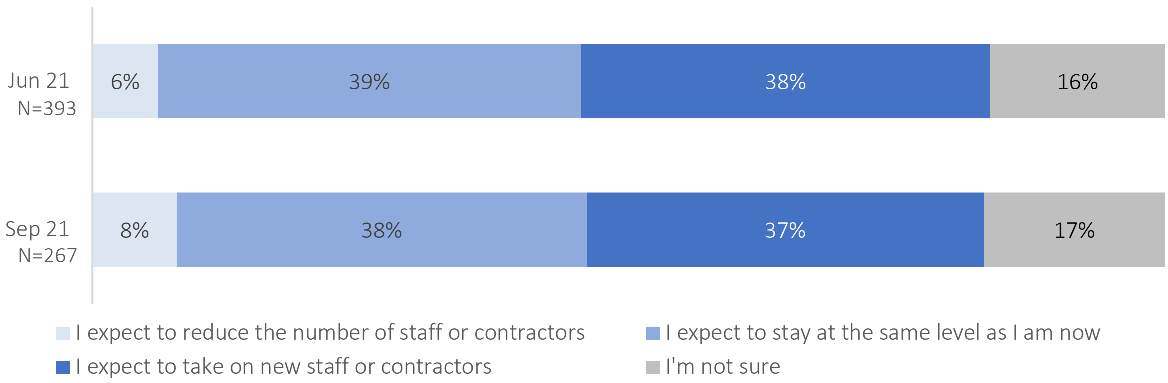
Figure 5: Respondents views on whether their creative work will support them financially in the next 12 months



Respondents expected to either increase or maintain their current staff or contractor numbers, which is consistent with the previous survey's findings

Creatives were also asked if they expected to take on new staff or contractors in the next 12 months, this question applied to 50% of respondents (N=267). A majority of respondents expected to take on new staff or contractors (37%) or expected to stay at the same level (38%). There were a few who expected to reduce the numbers of staff or contractors (8%), and some did not know (17%). Figure 6 shows that findings are consistent with the previous June-July survey's results.

Figure 6: If creatives expected to take on new staff or contactors in the next 12 months

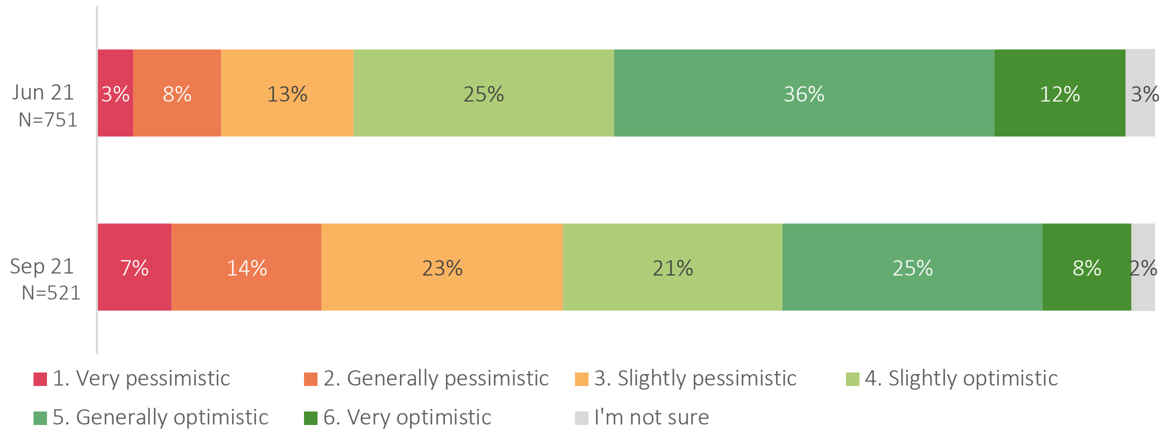


4. Creative position

Respondents' views on achieving their creative goals shifted to become more pessimistic

Creatives were asked how optimistic or pessimistic they were about achieving their own or their organisations' creative goals in the next 12 months. Respondents were asked to rate the statement on a scale of 1 to 6, where 1 was 'very pessimistic' and 6 was 'very optimistic'. Compared to the June-July survey, pessimism increased from 24% to 44%, and optimism dropped from 73% to 54%, indicating a shift towards a pessimistic view. Overall, the average rating was 3.7 out of 6, compared to 4.2 in June-July. (Figure 7).

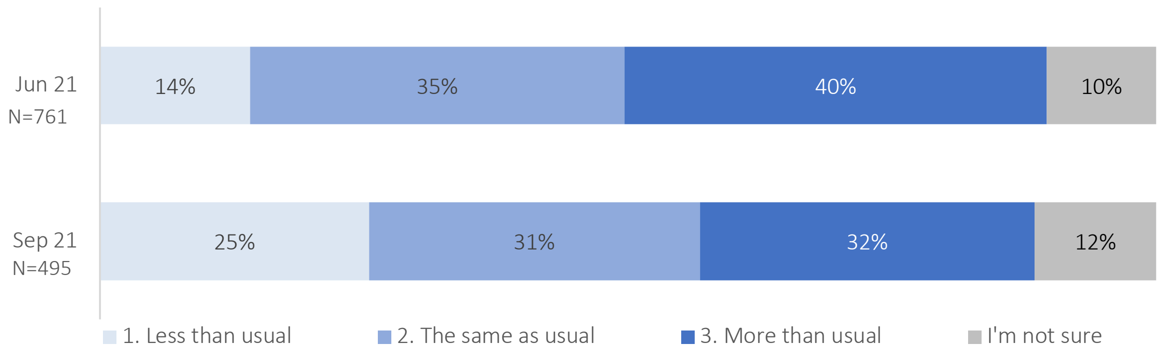
Figure 7: Respondents' views on achieving their own or organisations creative goals in the next 12 months



Respondents' perception of audience appetite for their creative work seems to have decreased

Respondents were also asked what their perception of audience appetite was for their creative works (either their own or their organisations) in the past three months. Most respondents indicated that the audience's appetite for their creative work was either more than usual (32%), or about the same (31%). Some reported that it was less than usual (25%), and others were not sure (13%). Overall, the average rating was 2.1 out of 3 which suggests that perceived audience appetite was at a moderate level. This is lower than the average rating of the June-July survey (2.3) where perceptions of audience appetite was captured at an Alert Level 1 setting (Figure 8).

Figure 8: Respondents' perceptions of audience appetite for their creative work (their own or their organisation) in the past three months



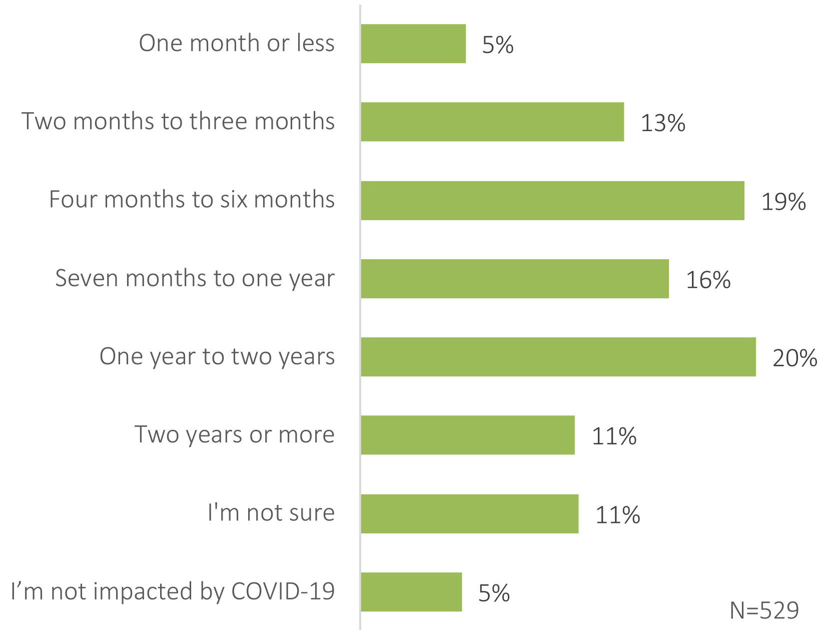
5. Impacts of COVID-19 and resulting lockdowns

Expected length of impact

The timeframe that respondents expected to be impacted by the latest COVID-19 lockdowns was largely between four months to two years

Nearly all (95%) respondents reported being affected by the latest COVID-19 outbreak and subsequent lockdowns. Nearly half respondents indicated their creative work would be impacted by more than six months (47%), with 16% indicating seven months to one year, 20% indicating one to two years, and 11% indicating two years or more (Figure 9).

Figure 9: Timeframe respondents reported being impacted by the latest COVID-19 outbreak and lockdowns



Looking to the future with COVID

Recognition of the role arts, culture and creativity plays in a COVID environment and emergency funding were most important to respondents

Respondents were asked a series of statements about what is important for the arts, culture, and creative sector as it faces ongoing disruption from COVID-19. Respondents were asked to rate the statements on a scale of 1 to 4, where 1 was ‘strongly disagree’ and 4 was ‘strongly agree’; don’t know/not applicable answers were also possible (Figure 10).

Statements that were most important to respondents, where more than 90% either strongly agreed or agreed were:

- Recognition of the role arts, culture, and creativity plays in a COVID environment (74% strongly agree, 20% agree)

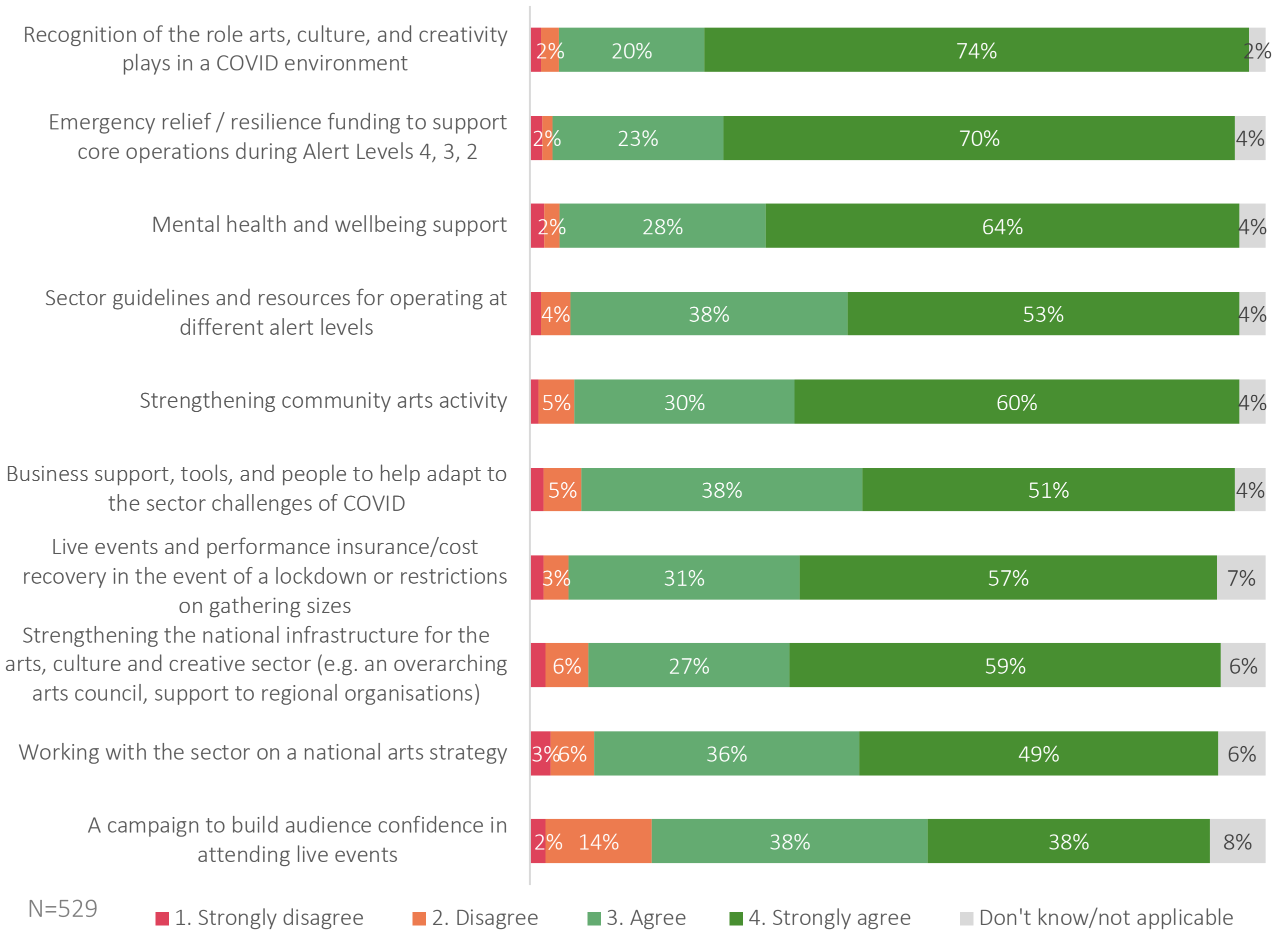
- Emergency relief / resilience funding to support core operations during Alert Levels 4, 3, 2 (70% strongly agree, 23% agree)
- Mental health and wellbeing support (64% strongly agree, 28% agree)
- Sector guidelines and resources for operating at different alert levels (53% strongly agree, 38% agree)
- Strengthening community arts activity (60% strongly agree, 30% agree)

Statements with 85% to 90% agreement included:

- Business support, tools, and people to help adapt to the sector challenges of COVID (51% strongly agree, 38% agree)
- Live events and performance insurance/cost recovery in the event of a lockdown or restrictions on gathering sizes (57% strongly agree, 31% agree)
- Strengthening the national infrastructure for the arts, culture, and creative sector (e.g., an overarching arts council, support to regional organisations) (59% strongly agree, 27% agree)
- Working with the sector on a national arts strategy (49% strongly agree, 36% agree)

There was less agreement (76%) for: 'A campaign to build audience confidence in attending live events' (38% strongly agree, 38% agree).

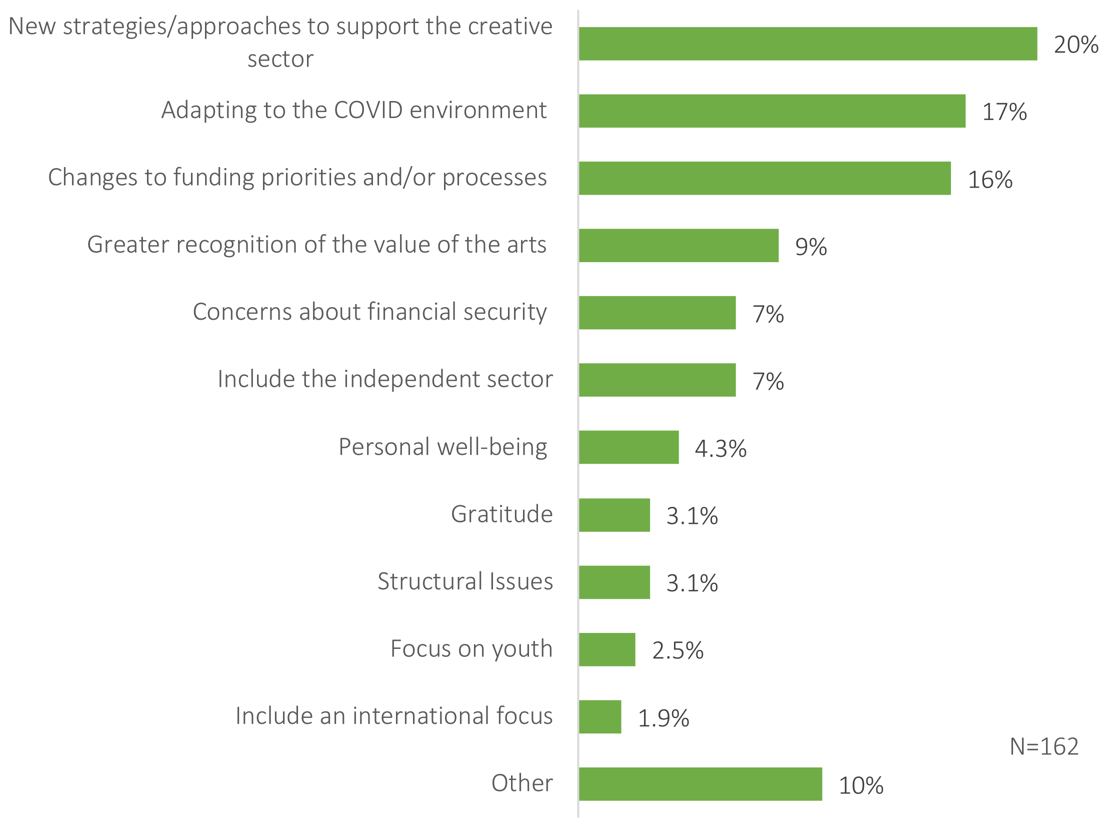
Figure 10: What is important for the arts, culture, and creative sector as it faces ongoing disruption from COVID-19



Further reflections

Respondents were also asked an open question: "Is there anything we've missed in the proposals above, or anything you would like to comment on?" Overall, 162 responses were received from the total sample of respondents. These were coded and Figure 11 below shows the percentage of responses within different themes.

Figure 11: Reflections on what is important for arts, culture and creative sector



New strategies/approaches to support the creative sector

20% of respondents to this question identified a range of ways to support the creative sector and/or commented on specific statements that were detailed in Figure 10.

Several people thought a media campaign to raise public awareness of the difficulties faced by creative industries would be useful.

> *More news coverage that makes people more aware of the consequences of lockdown impact on all involved with the arts sector instead of sports people.*
>
> *Like there has been a campaign to support local businesses, it would be great to have a similar one of supporting local artists. It's hard to get anything done when it feels like you're fighting against the public rather than working with them.*

Art sales events and markets were identified as great ways to support emerging and established artists.

New Zealand has very few art sales events, which is a missed opportunity. Art sales are a fantastic way for emerging and established artists alike to meet their audiences, in a friendly environment, as well as great ways to boost sales and establish market presence.

Greater engagement with local government was another strategy identified by survey respondents.

Engagement with local government across arts, culture and heritage - as they are primary funders of baseline operations for many organisations.

More support between councils, especially bordering ones. e.g. running a concert series through the Wellington council but being able to partner up with neighbouring councils like Hutt City and Porirua to present more widely throughout the region

Other ideas included the creation of interactive online platforms to raise awareness and promote the arts; moving live performances across to film and screen; bringing back community education to support mental health and creativity; providing greater access to venues plus providing free, subsidised workspaces for artists with children.

Several respondents commented on strengthening national arts infrastructure and support for regional organisations.

Strengthening the national infrastructure for the arts, culture and creative sector (e.g. an overarching arts council, support to regional organisations) THIS IS SOOOO IMPORTANT!!!

There was some support for a new broader national arts council[1] with some advocacy for a regional approach.

I completely agree that we need more support and a way forward that is clear and supportive of everyone in the creative sector. We need big changes in the creative sector of Aotearoa! An Arts Council or a specific body which looks at this could be helpful.

Strengthening a stronger regional infrastructure for regional arts, culture and creative sector in regions giving them a stronger voice in their regions.

Regional support for regional arts support. One size does not fit all.

Another approach proposed was to use existing associations and include more groups than just 'creatives'.

Use the existing associations to support, there are already steps in place, also many of our people fall between events, entertainment and arts, creatives is the wrong word to be using if you are encompassing all from production supply chain through to delivery. ETNZ, EVANZ, BEIA, NZEA, PROMOTERS ASSOCIATION - these groups have all been working together towards sector recovery group formed in 2020.

Increased collaboration across government was seen as potentially very useful for the literary sector.

[1] Creative New Zealand (CNZ) is the current governance model, but is not seen in itself as a national arts council.

Need a joined-up approach across government for the creative sector and creative industries. Small policy tweaks across government would change the dial for the literary sector.

Several people questioned the need for specific business support tools for the arts sector because there are numerous tools already available.

In terms of business support - I think this is necessary, but I ticked "disagree" because there is already a ton of small business resources online - I would hate for resources to be used duplicating existing information.

One person cautioned against a campaign to build audience confidence in attending live events *"as we wouldn't want to pressure people into attending events when they are rightly concerned about safety."* Another suggested that there needs to be a campaign to encourage people to get vaccinated in order to attend events.

Adapting to the COVID environment

Some 17% raised the need to adapt to the COVID environment; noting however that these responses were collected before the announcement of the COVID Protection Framework, including traffic lights and vaccine passports. One of the noted impacts of COVID was to push the arts sector into a *"greater number of online, collaborative, creative opportunities."* Several people argued that practitioners in the creative sector need support and mentoring to turn what they do into digital offerings.

More gathering and sharing of info about how to do that and how to make that digital experience as good as it can be is time consuming but very important. More show and tell opportunities around the details of how we're all doing this would be great.

Some see the shift to digital mediums as a huge opportunity for the sector to connect with audiences regardless of COVID.

There's a massive opportunity to 'go where the people are' that could be extended to the whole sector by using and promoting these mediums more.

Initiatives to curate, commission, fund and showcase opportunities for how to think about the future of the arts, especially in a time of COVID-19 where audiences are prepared to try new things (a massive shift in behaviour change has occurred globally) and learn about new ways to interact and access art. For example, this initiative in the UK is a great way to bring together arts, cultural and research to experiment: https://www.immerseuk.org/audience-of-the-future/

A few respondents commented that protecting public health is more important than the public performances.

As much as the arts are important to our well-being, the importance of attending performances is a distant second to that of maintaining a strong policy of Covid control.

Guidance regarding vaccination was seen by some as more useful than safe performance guidelines.

Something more specific about vaccinations, rather than safe performing guidelines. As that is a kaupapa that we will have to continue to tackle in a mana enhancing way with our audiences, cast and staff working in live performance events.

In contrast, another person noted that current guidelines for performances were not clear which was creating concern for staff in for their organisation.

Guidelines for working with the public under different Covid Alert Levels are not clear. Staff at our organisation were wanting people coming into facility at Level 2 to have mask wearing made mandatory as it was a public facility. Our Board disagreed and said we were more of an educational facility, so it was only mandatory for staff. Staff concern was for the welfare of numerous people coming to numerous activities.

One person noted that there is a need to boost the confidence of cultural producers, so they commit to developing performances, otherwise there will be nothing ready when New Zealand eventually opens up, for example, for 200-300 seat venues. Others wondered if local councils could do something to create safe outdoor environments for performances and whether the arts sector could do things to enliven spaces to make people feel good.

A respondent argued that arts organisations need to look at how they make better use of the funding they already have rather than advocate for more. They signalled a note of caution about a perception that the arts sector could be seen as competing "*with the needs of people who are experiencing real hardship".*

NZ will face many challenges in the next 12 months, I think we have to be conscious of the arts sector not competing and instead see how we can harness the existing public funds many arts organisations already receive to pivot our activities in support of social outcomes that we may not have engaged with in the past. Self-interested arts advocacy will not play well for our sector during this time.

Changes to funding priorities and/or processes

Respondents made a wide range of comments about funding in the creative sector, raised by 16% of respondents. There were a range of views about the criteria that is used for the allocation of funding. A few shared their concern that there is more support for new, developing and amateur works rather than accomplished performances, leading to lower quality events.

I am growingly concerned that there is way more support for those creating amateur performances as [o]pposed to creating self-supporting business. [T]his in turn creates very mediocre events destroying public confidence in paying what it is worth to go to a show.

Others believed that funding is going to those that already have privilege and that current funding criteria and processes do not support Māori practitioners.

This funding isn't going to effect the significant change that's needed, because of the way in which it was developed/founded is wrong (it's political driven, not needs based - bottom up) - still the same old top down approach (MCH / other funders / crown orgs have created the funding criteria, the limited timeframes, the funding level/structure/phases, who's being

> *invited to engage, how they engage etc* [...] *Matauranga Māori funds should not be benefiting / paying any Pakeha!*

In contrast, a few respondents believed that there should be "*Equal opportunities for all ethnicities. There appears to be a significantly higher amount of opportunities for Māori."* Another person thought the increased focus on Māori and Pasifika artists was fantastic but wondered if more could be done "*to encourage the growth of creative talents in our Asian communities*?"

Some wanted more community projects to be eligible for funding. Others argued that arts funding should be easier to access and enable people to commercialise and sustain their creative businesses rather than create barriers. Related to this, some wanted funding to go directly to artists and creators.

Others proposed more funding for existing infrastructure. One person advocated for the centralised funding of museums and art galleries "*and national and regional arts, culture and heritage strategies developed and aligned*."

Respondents commented that there were several groups within the arts sector that have been traditionally over-looked. These included interactive media such as the video gaming industry plus businesses that supply the arts. Subsidies and/or expanding funding criteria to include the videogames industry were seen as useful ways to retain talent and help the industry grow.

> *There are several successful Māori, youth arts, cultural and social issues interactive projects in Aotearoa NZ yet you lock the door on this entire artform. Please consult with the NZ Game Developers Association, WeCreate and our Universities to remedy this.*

A few people shared their frustration at the lack of support they had received.

> *Would like some support for bothering to create anything. I've spent a lifetime producing books and music and I've received no funding or support ever.*

Others thought there is a lack of support or funding for private companies who have lost money due to restrictions. Several people just wanted more funding overall, pointing out that the more funding that goes into the arts—the more art gets produced, no matter what the alert level.

Greater recognition of the value of the arts

Nine percent of respondents expanded on the theme of greater recognition of the value of the arts sector with comparisons made to the value placed on sport in the New Zealand context. The arts were identified as particularly important for improving mental health and well-being.

> *The arts are not recognised enough as a vital part of our culture, sense of community and its positive impact on mental health. More national promotional material around these points would help artists to be valued and paid properly.*

Community theatre, crafts, arts education in schools, were all mentioned as areas where greater recognition is required.

Concerns about financial security

Some respondents (7%) shared their concerns about the lack of financial security for artists, noting that there are many people who do not qualify for the wage subsidy during lockdowns and consequently *"fall through the net"*.

> *A lot of artists work casual jobs where they are employed and the wage subsidy doesn't apply to them. More needs to be done to fill the gap in financial support available to them during lockdowns.*

Others noted that childcare responsibilities during lockdown reduced their ability to work and earn income.

> *As a freelancer your income can be sporadic and not measured the same as other industries which have monthly averages. It can be impossible to work and produce things with kids at home from school. I got zero work done over lockdown because my husband had our home office and my kids needed support with distance learning.*

The introduction of a Universal Basic Income was mentioned multiple times as a potential way to better support people working in the arts.

> *Trial a universal basic income using the creative sector. Look to the system in Germany where if you can prove you have a sustainable income over a number of months/years you are entitled to a weekly stipend for a certain amount of time.*

Outreach to the independent sector

Some 7% of respondents commented that the needs of the independent sector[2] were not addressed by the options in the survey.

> *I'm not sure that the case of venues such as ours - independent non-local govt NFP - has been addressed entirely in any of the proposals so far.*

> *Increased support for individual artists, and artist-led decision-making as opposed to singularly focusing on structural, organisational and venue support feels crucially missing in this survey.*

> *A bit of a ho hum survey, which seems fixated on Covid without addressing other concerns - such as struggling independent sector held down by fat cat organisations and elite funding models.*

Other themes

Four percent of respondents shared their anxiety and nervousness about the future. One person noted the negative impacts of the COVID restrictions on their creative practice and well-being.

> *I think COVID has really impacted my creative practice, being in lockdown with two toddlers has meant I've had little to no time to work on my art. And that in turn has impacted my*

[2] The independent sector is comprised of individuals who operate independently of large arts organisations and businesses. Independents are generally not in long term funding arrangements with crown agencies or nationally. Instead, they have a portfolio career, working within a project-based framework supported by a flexible infrastructure. Income stems from a multitude of sources; contracts from organisations or businesses, from funding grants, or from box office proceeds.

> *mental health and continues to as I feel anxious about if or when we're [to] go into lockdown again.*

Respondents expressed their gratitude for the survey and/or the support they had received to date (3%). Additional themes included: structural barriers to participation in the arts (for example, poverty, noted by 3%); the need to focus investment on youth and education (2%); and the importance of international arts strategies as well as national and regional (2%).

6. Next steps

This survey is the second quarterly survey of the creative sector in Tāmaki Makaurau and Pōneke over 2021/22, and the first covering Waikato and nationwide respondents. Reporting on future surveys will continue to look at emerging trends over time and explore a different 'issue of the day' in each survey. The impacts of the most recent COVID-19 outbreak and resulting lockdowns will continue to be explored. Participants who provided their contact email will be included in an ongoing panel of participants, who it is hoped will participate on an ongoing basis to provide a regular 'pulse check' of the sector.

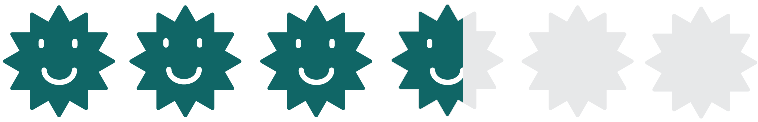
The next State of the Arts survey will be conducted in early 2022.

THE STATE OF THE ARTS

Findings from an online survey of the creative sector in Aotearoa

September-October 2021 survey - key figures at a glance

Respondents were slightly optimistic about whether they would achieve their own or their organisations' creative goals in the next 12 months.



Average weighting 3.7 out of 6

When asked to rate their outlook on a scale (from 1 meaning very pessimistic to 6 meaning very optimistic).

58% of respondents expect to be impacted by COVID-19 by more than six months.

One month or less	4%
Two months to three months	12%
Four months to six months	19%
Seven months to one year	16%
One year to two years	20%
Two years or more	12%
I'm not sure	12%
I'm not impacted	4%

Key issues facing the arts, culture, and creative sector through ongoing disruption from COVID-19 are...

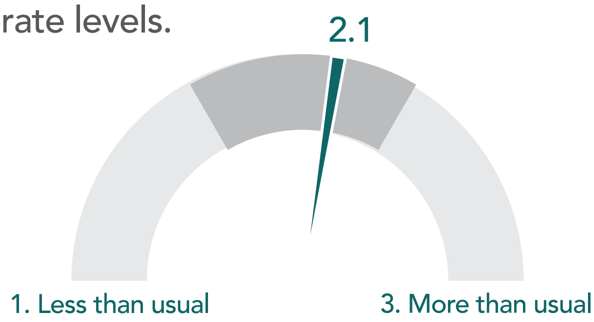
- 94% Recognition of the role arts, culture, and creativity plays
- 93% Emergency relief / resilience funding to support core operations during Alert Levels 4, 3, 2
- 92% Mental health and wellbeing support
- 91% Strengthening community arts activity
- 90% Sector guidelines and resources for operating at different alert levels
- 89% Business support, tools, and people to help adapt to the sector challenges of COVID
- 88% Live events and performance insurance/cost recovery in the event of a lockdown or restrictions
- 86% Strengthening the national infrastructure for the arts, culture and creative sector

Aotearoa creatives tended towards pessimism in their financial position.

Average weighting 3.0 out of 6

When asked to rate their outlook on a scale (from 1 meaning very pessimistic to 6 meaning very optimistic).

Respondents indicated that audience appetite for their creative work is at moderate levels.



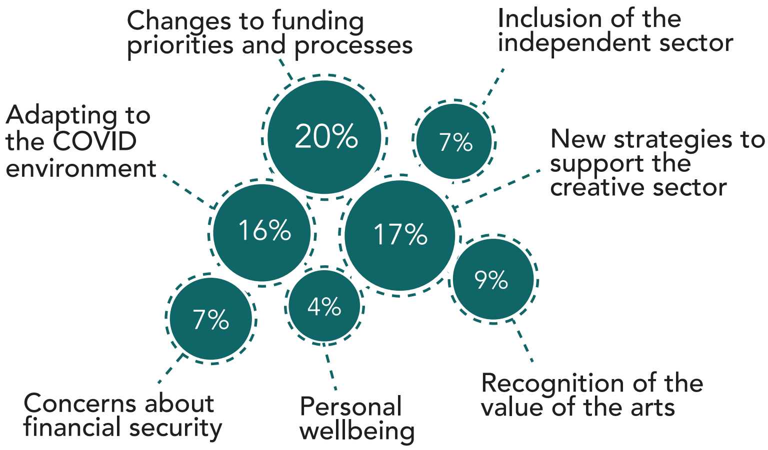
Creatives expect to increase or maintain current staff or contractor numbers.

Percentage is out of applicable respondents

Expected levels to stay the same

Expected to take on new staff or contractors

Other issues raised by respondents included...



State of the Arts Survey

Waikato,
September-October 2021

Report on survey findings

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8 December 2021

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insight for action and change

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Acknowledgements

We are very grateful to all who participated in this survey and gave their time and thoughts. This research was funded by Arts Wellington with the support of Wellington City Council (Pōneke), Te Taumata Toi-a-Iwi (Tāmaki Makaurau), Creative Waikato and the Ministry for Culture and Heritage.

Executive Summary

This report presents the findings from an online survey of those in the creative sector in Waikato, between September-October 2021. There were 96 respondents from Waikato and the results from those respondents are discussed below.

Creative freelancers dominated the Waikato sample:

More respondents reported being a creative freelancer (50%) than any other role in the creative sector. This was followed by unpaid creative individuals (26%) and individuals working for a not for profit (19%).

Visual arts were strongly represented by Waikato respondents:

Waikato respondents were active in many creative areas. Visual arts were the most prominent area reported (48%), followed by performing arts (39%) and music (35%).

Overall, Waikato respondents were slightly pessimistic about their financial position:

Respondents rated their outlook on whether their creative work would support their financial position in the next 12 months (from 1 meaning very pessimistic to 6 meaning very optimistic). Just under a half (45%) of respondents were optimistic about their financial position, most respondents were pessimistic (53%), and some did not know (3%).

A majority of Waikato respondents expected to either maintain or increase their current staff or contractor numbers, which is consistent with the previous survey's findings:

For respondents where this question was applicable, nearly half of respondents expected the number of staff or contractors to stay at the same level (45%), followed by some creatives who expected to increase (27%). There were a few who expected to reduce the numbers of staff or contractors (2%), and a quarter did not know (25%).

Waikato respondents view on achieving their creative goals was slightly optimistic:

Respondents rated their outlook on whether they would achieve their own or their organisations' creative goals in the next 12 months (from 1 meaning very pessimistic to 6 meaning very optimistic). Most (61%) creatives were optimistic about achieving their creative goals, and a third (33%) were pessimistic.

Waikato respondents' perception of audience appetite was at moderate levels:

With 42% reporting audience appetite being the same as usual, 25% reporting that it was more than usual and 25% reporting that it was less. Overall, the average rating was 2.0 out of 3 indicating that perceived audience appetite was at moderate levels.

The timeframe that Waikato respondents expected to be impacted by the latest COVID-19 lockdowns was largely between two months to one year:

Nearly all (94%) respondents reported being affected by the latest COVID-19 outbreak and subsequent lockdowns. A majority of respondents indicated their creative work would be impacted by two months to one year (51%), with 26% indicating two to three months, 15% indicating four to six months, and 10% indicating seven months to one year.

Recognition of the role arts, culture and creativity plays in a COVID environment and sector guidelines and resources for operating at different alert levels were most important to Waikato respondents:

Creatives were asked a series of statements about what is important for the arts, culture, and creative sector as it faces ongoing disruption from COVID-19 (from 1 meaning strongly disagree to 4 meaning strongly agree). Statements that were most important to respondents where more than 90% either strongly agreed or agreed were: Recognition of the role arts, culture, and creativity plays in a COVID environment; Sector guidelines and resources for operating at different alert levels; and Strengthening community arts activity.

Qualitative themes that emerged from respondent feedback included the following:

- Adapting to the COVID environment
- Suggestions for new strategies and approaches to support the creative sector
- Greater recognition of the value of the arts
- A call for changes to funding priorities and processes
- Personal wellbeing

1. Introduction and approach

This report presents topline findings from an online survey of those in the creative sector in Waikato between the period of September-October 2021.

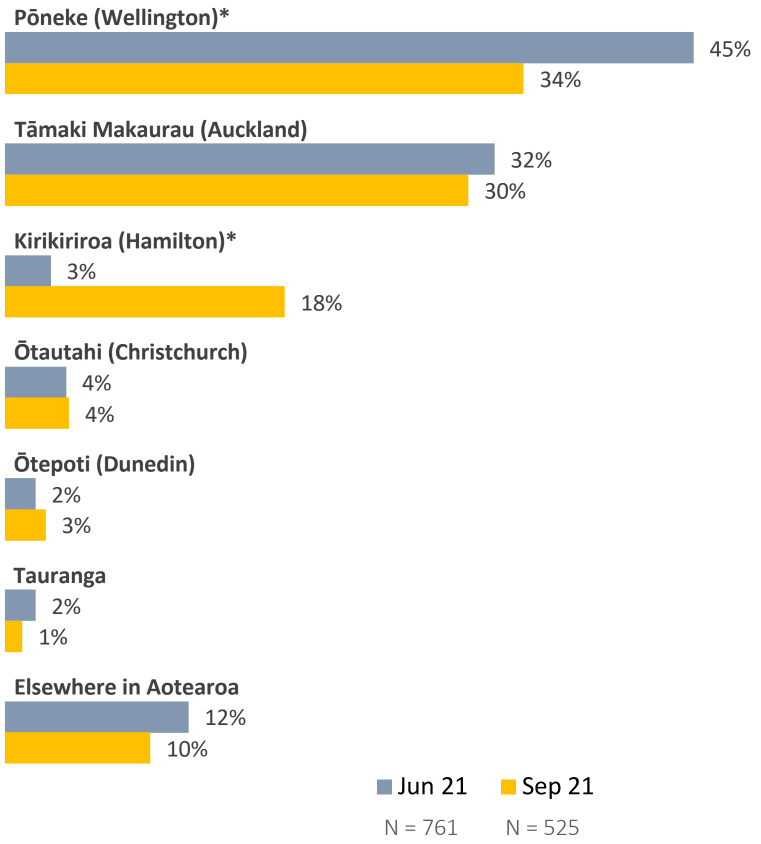
Arts Wellington, Te Taumata Toi-a-Iwi, and Creative Waikato partnered to commission Dovetail, an Auckland-based research and evaluation company, to deliver a quarterly online survey to the creative sector across Aotearoa. Additional funding for the survey was also provided by Wellington City Council and the Ministry for Culture and Heritage. The survey's intent is to measure trends over time about the state of the arts sector in Aotearoa and tap into key issues emerging in the creative sector. The approach in this survey has been refined from the previous survey (State of the Arts June-July 2021). This survey includes additional questions about the impact of COVID-19 and the resulting lockdowns that began in August 2021.

The survey was distributed via the SurveyMonkey online platform and respondents were recruited through a combined method of own database distribution (via Te Taumata Toi-a-Iwi, Arts Wellington's, Creative Waikato, and the Ministry's network relationships), the database from the previous State of the Arts survey, and social media, targeting users that work in the Arts, Culture & Media sector. The sampling approach means that a response rate cannot be accurately calculated.

In total there were 530 responses. Waikato had the third highest number of responses with 96, which accounted for 18% of responses in the survey (Figure 1). The significant growth (3% to 18%) in responses from Kirikiriroa (Hamilton)/Waikato reflects the active outreach by Creative Waikato to the sector in the region. Due to the small sample size of previous June-July 2021 survey in the region (21 responses) analysis was undertaken using the previous national sample to provide some indication of trends over time. With targeted outreach from future surveys continuing, comparisons within the region are expected in the following report in 2022.

This report focuses on results for the Waikato region.

Figure 1: Areas in Aotearoa where respondents were mainly based

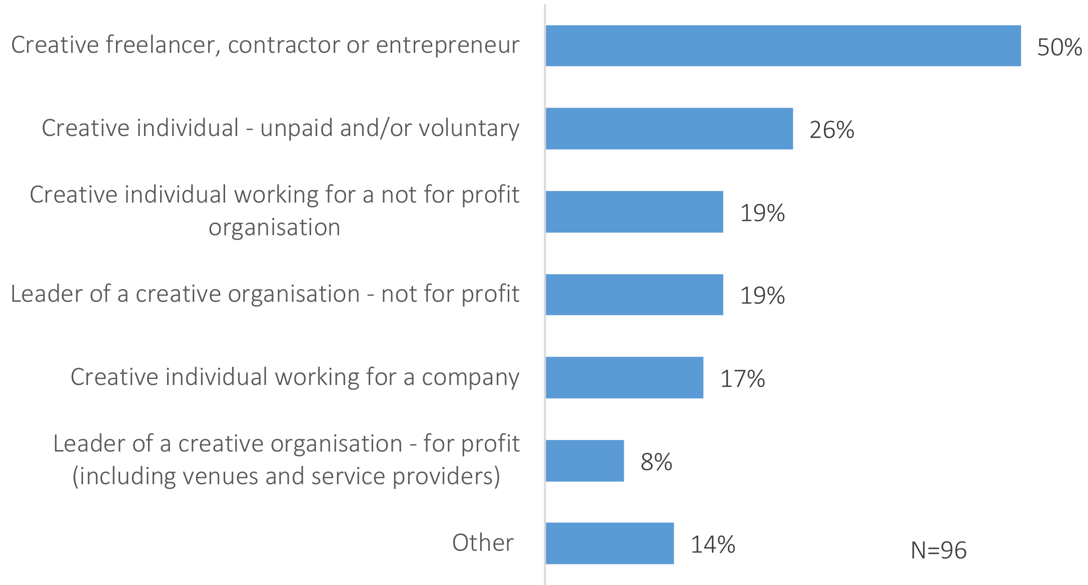


2. Roles of creatives

Creative freelancers dominated the Waikato sample

Most creatives in the Waikato region were creative freelancers (50%), unpaid creative individuals (26%) or individuals working for a not for profit (19%). A further percentage were leaders of creative not for profit (19%), creative individuals working for a company (17%) and leaders of creative for-profit organisation (8%). The remaining respondents who selected other mentioned roles such as educator, retired, and student (14%) (Figure 2).

Figure 2: Respondents' roles in the creative sector

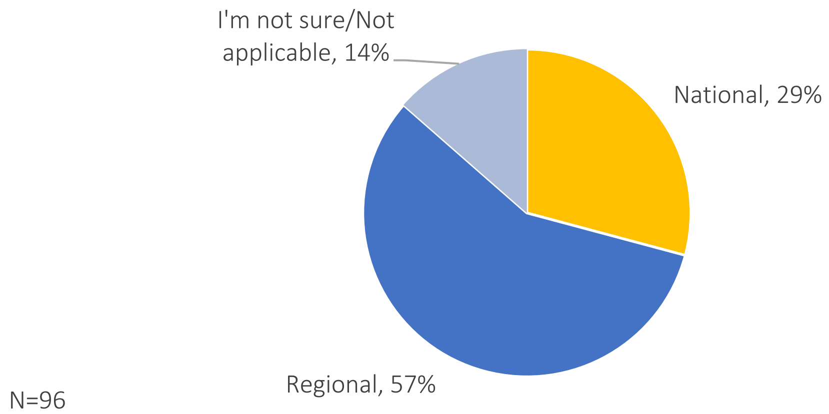


Note: Multiple responses were allowed

The work of creatives in Waikato was largely regionally focused

Of the respondents based in Waikato, 57% had work that was regionally focused. A further 29% had nationally focused work and 14% responded that they were unsure, or it was not applicable to them (Figure 3).

Figure 3: Whether respondents work was nationally or regionally focused

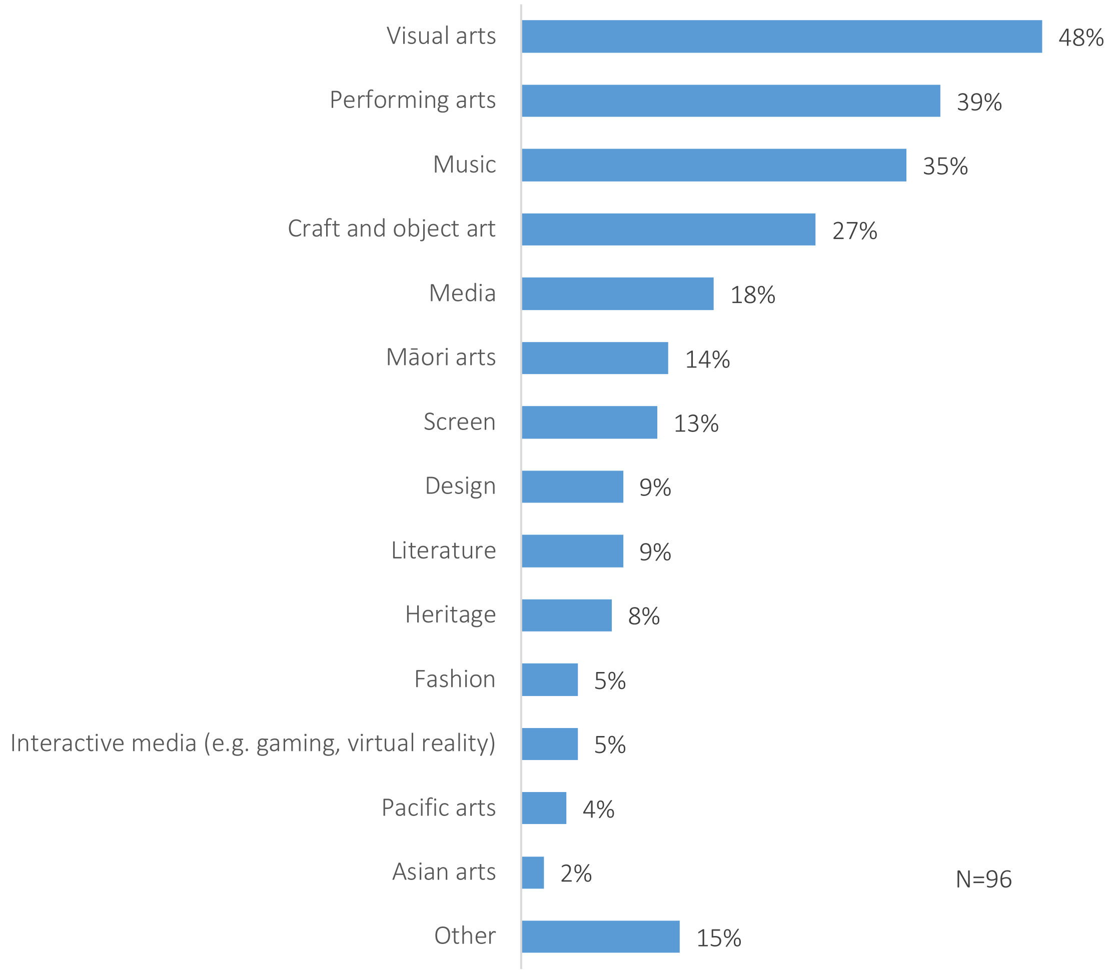


Visual arts were strongly represented by Waikato respondents

From the survey it is evident that respondents work in a variety of creative areas. When asked which of the following best described their area of work, the largest number of creatives were involved in visual arts (48%), followed by performing arts (39%) and music (35%). Some respondents were involved in craft and object art (27%), media (18%), Māori arts (14%), and Pacific arts (4%).

A full breakdown of creatives roles in Waikato can be seen below in Figure 4.

Figure 4: Respondents' creative area of work



Note: Multiple responses were possible

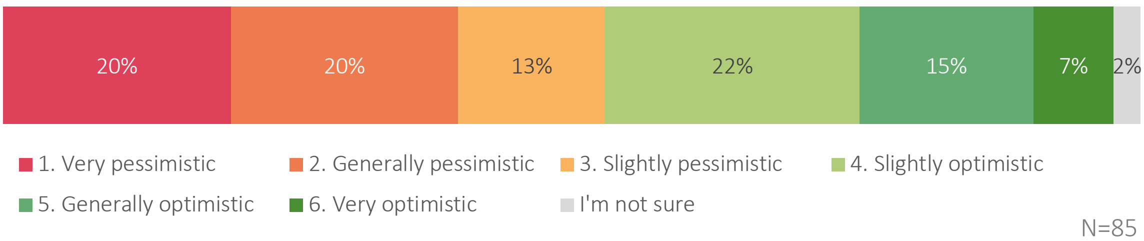
3. Financial position

Overall, Waikato respondents were slightly pessimistic about their financial position

Creatives were asked how optimistic or pessimistic they were that ‘their work in the creative sector will support their financial position in the next 12 months’. Respondents were asked to rate the statement on a scale of 1 to 6, where 1 was ‘very pessimistic’ and 6 was ‘very optimistic’. Just under a half (45%) of respondents were optimistic about their financial position, most respondents were pessimistic (53%), and some did not know (3%). Overall, the average rating was 3.1 out of 6 leaning towards a slightly pessimistic view (Figure 5).

There was no significant difference when analysing against the previous national sample.

Figure 5: Respondents views on whether their creative work will support them financially in the next 12 months

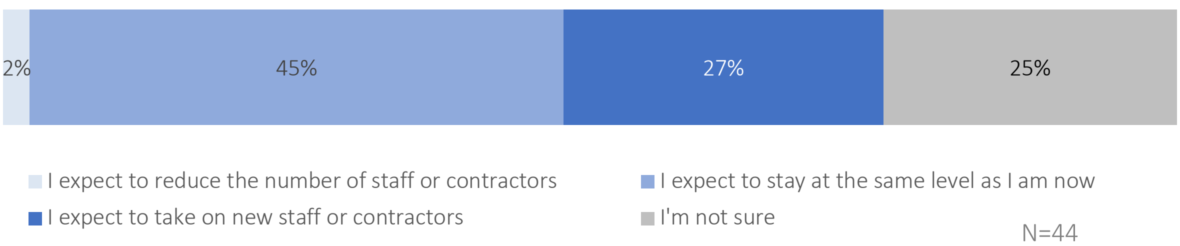


A majority of Waikato respondents expected to either maintain or increase their current staff or contractor numbers

Respondents were also asked if they expected to take on new staff or contractors in the next 12 months, this question applied to 46% of respondents (N=44). Nearly half of respondents expected the number of staff or contractors to stay at the same level (45%), followed by some creatives who expected to increase (27%). There were a few who expected to reduce the numbers of staff or contractors (2%), and a quarter did not know (25%) (Figure 6).

There was no significant difference when analysing against the previous national sample.

Figure 6: If creatives expected to take on new staff or contactors in the next 12 months



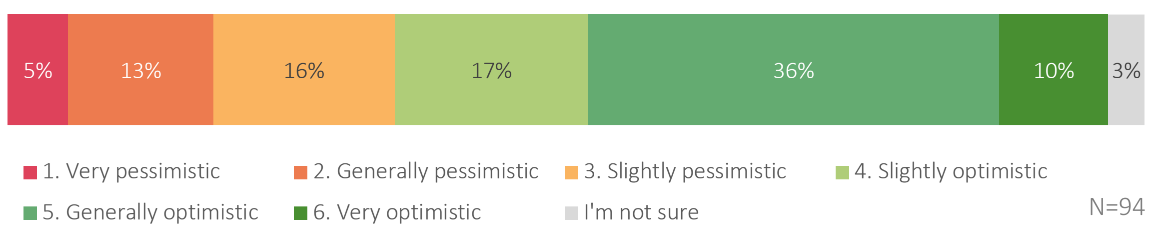
4. Creative position

Waikato respondents' views on achieving their creative goals was slightly optimistic

Creatives were asked how optimistic or pessimistic they were about achieving their own or their organisations' creative goals in the next 12 months. Respondents were asked to rate the statement on a scale of 1 to 6, where 1 was 'very pessimistic' and 6 was 'very optimistic'. Most (61%) creatives were optimistic about achieving their creative goals, and a third (33%) were pessimistic. A few were not sure (3%). Overall, the average rating was 4.0 out of 6 indicating a slightly optimistic view (Figure 7).

There was no significant difference when analysing against the previous national sample.

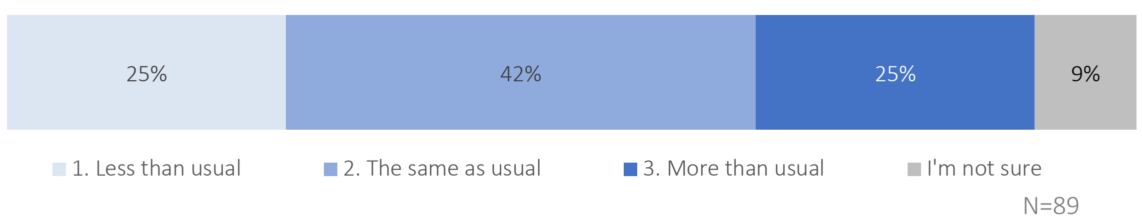
Figure 7: Respondents view on achieving their own or organisations creative goals in the next 12 months



Waikato respondents' perception of audience appetite was at moderate levels.

Respondents were also asked what their perception of audience appetite was for their creative works (either their own or their organisations) in the past three months. Most respondents indicated that the audience's appetite for their creative work was about the same as usual (42%), or more than usual (25%). Some reported that it was less than usual (25%), and some were not sure (9%). Overall, the average rating was 2.0 out of 3 indicating that perceived audience appetite was at a moderate level (Figure 8). This is lower than the national average rating of the June-July survey (2.3) where perceptions of audience appetite was captured at an Alert Level 1 setting.

Figure 8: Respondents' perceptions of audience appetite for their creative work (their own or their organisation) in the past three months



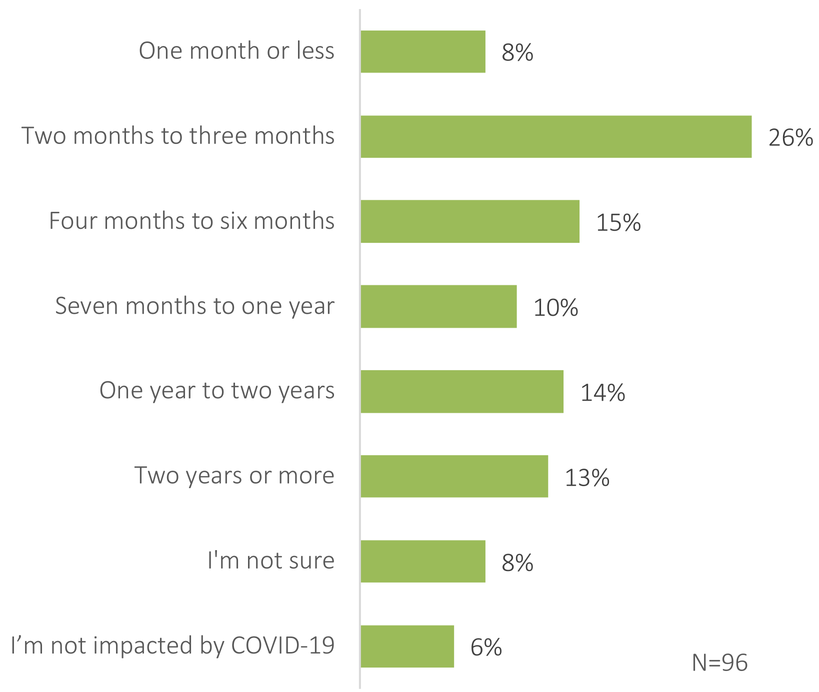
5. Impacts of COVID-19 and resulting lockdowns

Expected length of impact

The timeframe that Waikato respondents expected to be impacted by the latest COVID-19 lockdowns was largely between two months to one year

Nearly all (94%) respondents reported being affected by the latest COVID-19 outbreak and subsequent lockdowns. A majority of respondents indicated their creative work would be impacted by two months to one year (51%), with 26% indicating two to three months, 15% indicating four to six months, and 10% indicating seven months to one year (Figure 9).

Figure 9: Timeframe respondents reported being impacted by the latest COVID-19 outbreak and lockdowns



Looking to the future with COVID

Recognition of the role arts, culture and creativity plays in a COVID environment and sector guidelines and resources for operating at different alert levels were most important to Waikato respondents

Respondents were asked a series of statements about what is important for the arts, culture, and creative sector as it faces ongoing disruption from COVID-19. Respondents were asked to rate the statements on a scale of 1 to 4, where 1 was 'strongly disagree' and 4 was 'strongly agree'; don't know/not applicable answers were also possible (Figure 10).

Statements that were most important to Waikato respondents, where 90% or more either strongly agreed or agreed were:

- Recognition of the role arts, culture, and creativity plays in a COVID environment (72% strongly agree, 23% agree)

- Sector guidelines and resources for operating at different alert levels (49% strongly agree, 43% agree)
- Strengthening community arts activity (68% strongly agree, 23% agree)
- Mental health and wellbeing support (58% strongly agree, 31% agree)
- Emergency relief / resilience funding to support core operations during Alert Levels 4, 3, 2 (63% strongly agree, 27% agree)

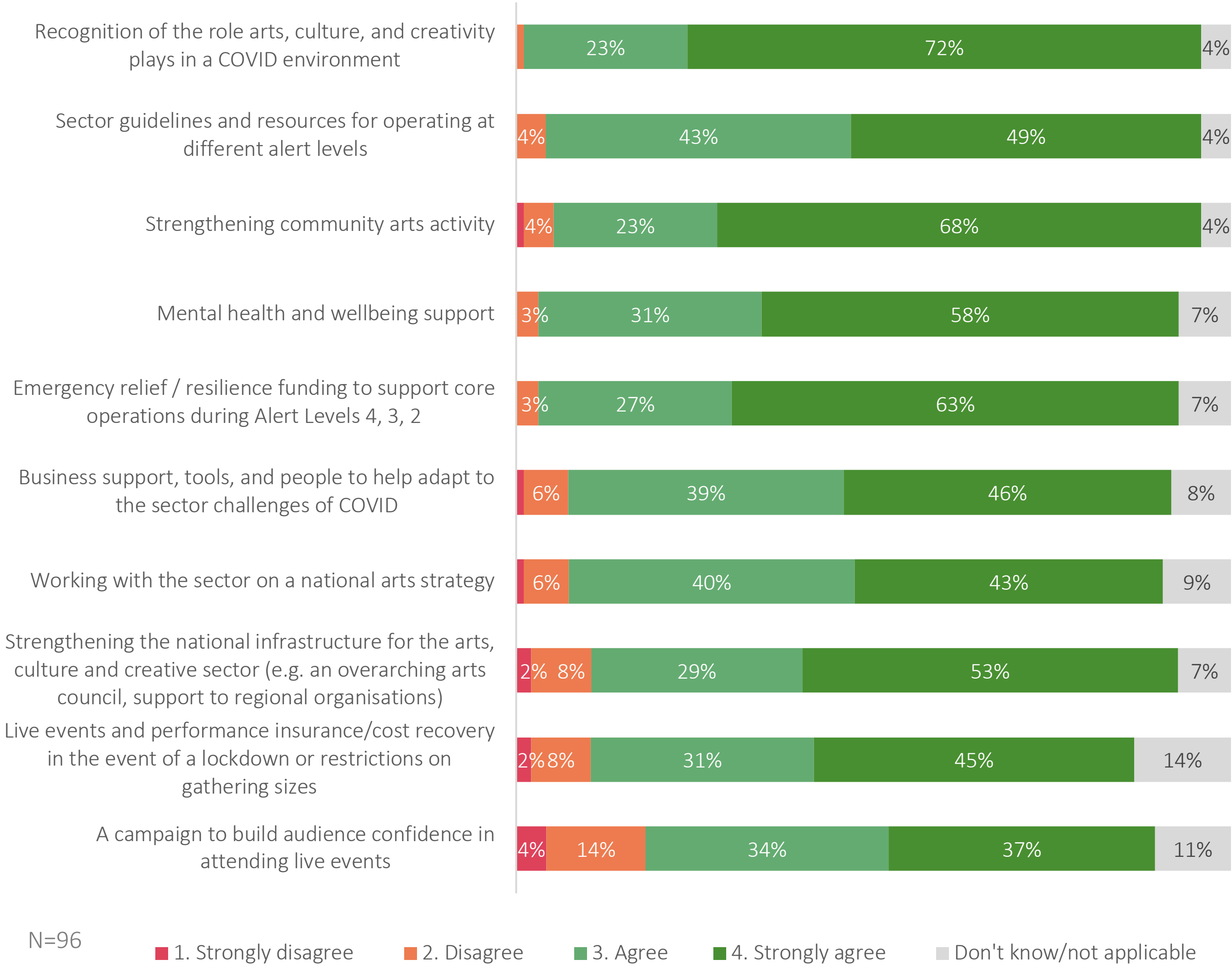
Statements with 85% to 89% agreement included:

- Business support, tools, and people to help adapt to the sector challenges of COVID (46% strongly agree, 39% agree)
- Working with the sector on a national arts strategy (43% strongly agree, 40% agree)
- Strengthening the national infrastructure for the arts, culture, and creative sector (e.g., an overarching arts council, support to regional organisations) (53% strongly agree, 29% agree)

The following statements were slightly less important to respondents, with 75% to 84% agreement:

- Live events and performance insurance/cost recovery in the event of a lockdown or restrictions on gathering sizes (45% strongly agree, 31% agree)
- A campaign to build audience confidence in attending live events (37% strongly agree, 34% agree)

Figure 10: What is important for the arts, culture, and creative sector as it faces ongoing disruption from COVID-19

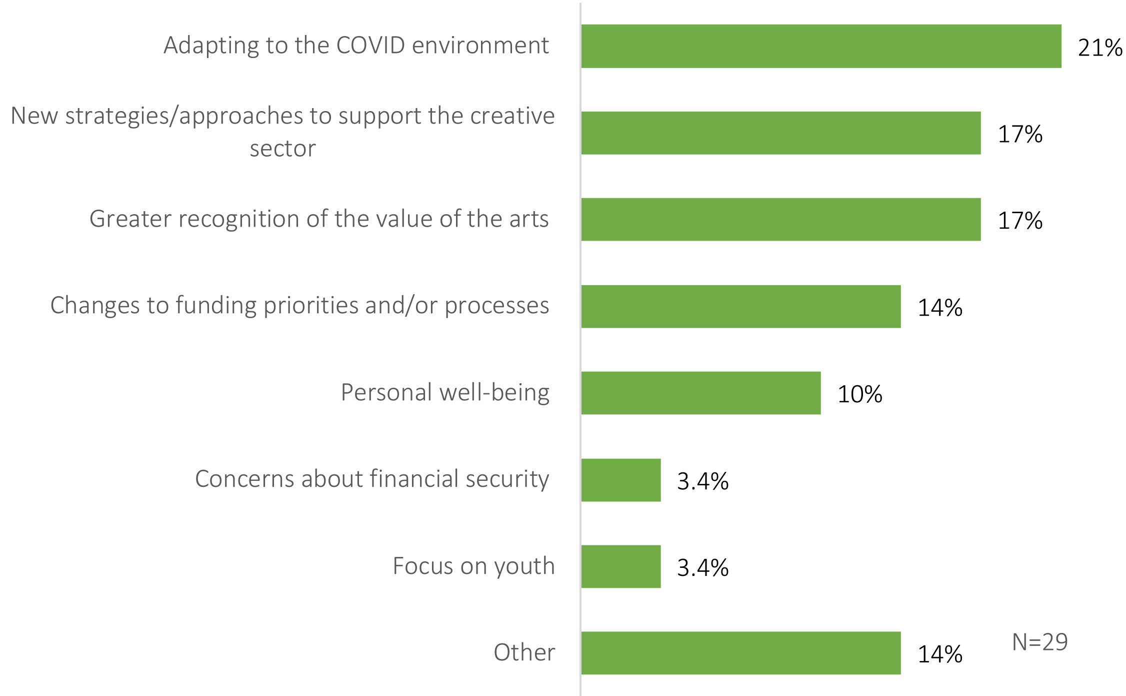


Further reflections

Respondents were also asked an open question: “Is there anything we’ve missed in the proposals above, or anything you would like to comment on?” Overall, 29 responses were received from the Waikato sample of respondents. These were coded and Figure 11 below shows the percentage of responses within different themes.

It is important to note that responses were collected before the introduction of the COVID-19 Protection Framework and My Vaccine Pass.

Figure 11: Reflections on what is important for arts, culture and creative sector



Adapting to the COVID environment

Some 21% of respondents to this question commented on the need to, and challenges, with adapting to the COVID environment. Several people argued that the creative sector needs more support to turn what they do into digital offerings

> *Professional development for artists like live performers who need to upskill to digital platforms to keep creating through lockdowns.*
>
> *For the next few years, until the bulk of our population is vaccinated, we need to have flexible and innovative options available to successfully take a live event online, and still not lose income. So as a sector, we need to engage closely with our techies worldwide to bring viable opportunities to the sector.*

Others wondered if local Councils could do something to create safe outdoor environments for performances.

> *Maybe what if anything local council can do to create safe outdoor environments for performance during restriction periods that supports the performance experience.*

One person mentioned that brass bands are finding practising and performing very difficult during COVID restrictions.

> *There are at least 35 [i]f not more brass bands around the country and we're finding it very difficult to practice when we don't quite fit any of the alert level guidelines, we also struggle to get an audience now as for most of us the retired generations are our main attendees and they're a bit more hesitant to come out during a world-wide pandemic.*

One respondent noted that current guidelines for performances were not clear which was creating concern for staff in for their organisation.

New strategies/approaches to support the creative sector

17% of respondents to this question identified a range of ways to support the creative sector and/or commented on specific statements that were detailed in Figure 10.

Art sales events and markets were identified as great ways to support emerging and established artists.

> *New Zealand has very few art sales events, which is a missed opportunity. Art sales are a fantastic way for emerging and established artists alike to meet their audiences, in a friendly environment, as well as great ways to boost sales and establish market presence.*

One person questioned the need for specific business support tools for the arts sector because there are numerous tools already available.

> *There are support systems in place for people and businesses affected by Covid so don't agree we need a range of support for the arts sector ONLY on top of what's available.*

There was support for regional arts practitioners and organisations to meet regularly and online training and networks over lockdown levels, that is, "*art, music, drama classes [led] from a national point*".

Greater recognition of the value of the arts

A similar proportion (17%) of respondents expanded on the theme of greater recognition of the value of the arts sector, with comparisons made to the value placed on sport in the New Zealand context. The arts were identified as particularly important for improving mental health and well-being.

> *The arts are not recognised enough as a vital part of our culture, sense of community and its positive impact on mental health. More national promotional material around these points would help artists to be valued and paid properly.*

> *Mandatory national arts strategies. Funding equal to that of sports. National campaigns on the importance of the arts. National airtime allocated for arts, culture and creativity equal to that of sports.*

An arts strategy that emphasised how individuals and organisations contribute to society in non-commercial ways was seen as useful by some.

Changes to funding priorities or processes

14% of respondents questioned current funding decisions and/or priorities. One person was concerned that these decisions are leading to festivals "*falling over*".

> *It is extremely disappointing the CNZ assessors decided to support new works in development opposed to supporting presenters that provide platforms for work to be experienced (and paid for). As a consequence, major presenters i.e festivals, are falling over.*

Some wanted funding to go directly to artists and creators rather than establishing more Councils.

> *Please prioritise giving artists and creators direct funding and help rather than just creating more councils etc*

Another felt that there is a lack of support or funding for private companies who have lost money due to restrictions.

> *Currently there seems to be lack of support/funding for privately owned companies, who have lost work or revenue as suppliers. It would be good to see a wider scope of how restrictions have impacted those who supply to the creative sector.*

Subsidies for the videogaming industry were recommended as a useful investment.

> *We should consider subsidies for the videogame industry. It's a huge untapped market and we cannot retain talent to help our industry grow.*

Personal Wellbeing

Several people shared their anxiety and nervousness about the future. One person noted the negative impacts of the COVID restrictions on their creative practice and well-being.

> *I think COVID has really impacted my creative practice, being in lockdown with two toddlers has meant I've had little to no time to work on my art. And that in turn has impacted my mental health and continues to as I feel anxious about if or when we're [to] go into lockdown again.*

Other themes

Other themes raised by individual respondents included concern about financial insecurity and the need to promote the benefit of the arts to youth.

> *The government should find more ways to bring awareness to the youth on the healing importance of the arts during these emotionally unstable times.*

6. Next steps

This survey is the second quarterly survey of the creative sector in Pōneke and Tāmaki Makaurau over 2021/22, and the first covering Waikato and nationwide respondents. Reporting on future surveys will continue to look at emerging trends over time and explore a different 'issue of the day' in each survey. The impacts of the most recent COVID-19 outbreak and resulting lockdowns will continue to be explored. Participants who provided their contact email will be included in an ongoing panel of participants, who it is hoped will participate on an ongoing basis to provide a regular 'pulse check' of the sector.

The next State of the Arts survey will be conducted in early 2022.

Creative Waikato
Toi Waikato

THE STATE OF THE ARTS

Findings from an online survey of the creative sector in the Waikato region

September-October 2021 survey - key figures at a glance

Respondents were **slightly optimistic** about whether they would achieve their own or their organisations' **creative goals** in the next 12 months.

Average weighting **4.0** out of 6

When asked to rate their outlook on a scale (from 1 meaning very pessimistic to 6 meaning very optimistic).

51% of respondents expect to be impacted by COVID-19 by **two** months to **one** year.

One month or less	8%
Two months to three months	26%
Four months to six months	16%
Seven months to one year	10%
One year to two years	14%
Two years or more	12%
I'm not sure	8%
I'm not impacted	6%

Key issues facing the arts, culture, and creative sector through ongoing disruption from COVID-19 are...

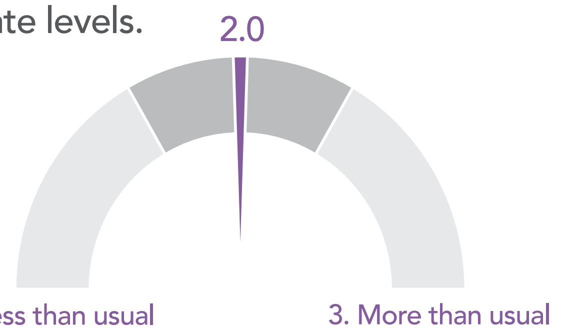
- 95% Recognition of the role arts, culture, and creativity plays
- 92% Sector guidelines and resources for operating at different alert levels
- 91% Strengthening community arts activity
- 90% Mental health and wellbeing support
- 90% Emergency relief / resilience funding to support core operations during Alert Levels 4, 3, 2
- 84% Business support, tools, and people to help adapt to the sector challenges of COVID
- 83% Working with the sector on a national arts strategy
- 82% Strengthening the national infrastructure for the arts, culture and creative sector

Waikato creatives tended towards **pessimism** in their **financial position**.

Average weighting **3.1** out of 6

When asked to rate their outlook on a scale (from 1 meaning very pessimistic to 6 meaning very optimistic).

Respondents indicated that **audience appetite** for their creative work is at moderate levels.



Most creatives expect to **maintain** current **staff** or **contractor numbers**.

Percentage is out of applicable respondents

Expected levels to stay the same

Expected to take on new staff or contractors

Other **issues raised** by respondents included...