

State of the Arts Survey

Waikato,
June-July 2022

DRAFT Report on survey findings

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Contents

| | |
|--|----|
| Acknowledgements | 2 |
| Executive Summary | 3 |
| 1. Introduction and approach | 5 |
| 2. Roles of creatives..... | 6 |
| 3. Financial position..... | 9 |
| 4. Creative position..... | 10 |
| 5. Reflections for the Minister for Arts, Culture and Heritage | 11 |
| 6. Final report | 15 |
| Appendix | 16 |

Acknowledgements

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Our thanks are also extended to Dr Aaron Schiff for additional statistical analysis in this report.

Executive Summary

This report presents the findings from an online survey of people in the creative sector in Waikato, conducted over June-July 2022. This is the third in the current series of surveys intended to track the state of the creative sector in Aotearoa. There were 67 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 (42%) than any other role in the creative sector. This was followed unpaid creative individuals (31%), and leaders of a creative not-for-profit (19%).

Visual arts were strongly represented in Waikato respondents: Waikato respondents were active in many creative areas. Visual arts was the most prominent area reported (54%), followed by craft and object art (34%) and performing arts (27%).

Waikato respondents remain slightly pessimistic about their financial outlook: 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 February-March 2022 survey, optimism increased from 38% to 43% and pessimism fell from 61% to 55%; this still indicates a shift towards an optimistic view, but with most remaining generally pessimistic. However, there was no statistical significance for this trend between the quarterly surveys.

More respondents expected to increase their current staff or contractor numbers compared to the previous survey: The number of respondents who expect to take on new staff or contractors had increased (from 19% to 31%) and those who expect staff or contractor numbers to stay the same decreased (from 69% to 55%). Those expecting to reduce their current staff numbers had increased (from 0% to 3%). However, there was no statistical significance for this trend between the quarterly surveys.

Waikato respondents view on achieving their creative goals remained even more 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). Compared to the February-March 2022 survey, optimism increased (from 61% to 76%), and pessimism decreased (from 35% to 23%). Between the February and June survey, this increase in optimism was statistically significant ($p < 0.05$).

Waikato respondents' perception of audience appetite for their creative work seems to have slightly increased: Most respondents indicated that audience appetite for their creative work was more than usual (42%), followed by those who thought it was about the same (37%). Some thought it was less than usual (14%) and some were not sure (11%). When comparing the February and June quarterly surveys, the reduction in those reporting audience appetite to be less than usual was statistically significant ($p < 0.05$).

Survey respondents were asked *'if you were having coffee with the Minister for Arts, Culture and Heritage today, what changes would you advocate for?'* Key themes emerging from this question for Waikato respondents were:

- The largest group of responses focused on **changes to arts funding** (41%). Most wanted an increase in the amount of funding that was available for the arts, particularly for the regions and in the Waikato. Respondents advocated for more funding across a range of roles, activities, and organisations as well as for application processes to be more transparent and user-friendly. Others wanted arts funding to be allocated differently.
- Just over a quarter of survey respondents advocated for initiatives to improve **the financial sustainability of artists** (26%). The most common call was for some form of basic income for artists and creatives.
- Another group of responses (12%) centred on the need for a **variety of supports in the arts and creative sectors** such as support for collaborations and more venues.
- Another group of responses focused on **arts education** (7%). Respondents raised a range of issues from the need for further investment in arts education for children and teachers and more support for people to study the arts.
- Enhancing the accessibility of the arts to **youth and new creatives** stepping into the industry was a further theme (7%). Several people advocated for more support for emerging artists and businesses.
- Smaller groups of respondents advocated for **more diversity in the arts** (5%) and **a more strategic approach to the arts** sector. These people wished to see greater cultural diversity and acknowledgement of women.
- Other themes raised by respondents included the need for government and the wider community to place **greater value on the arts** and its contribution to society and the importance of supporting the **wellbeing of artists**.

1. Introduction and approach

This report presents findings from an online survey of people in the creative sectors in Waikato conducted over June-July 2022. The survey occurred at a time when Aotearoa was operating at a 'orange light' setting in response to the COVID-19 Omicron variant outbreak, following a gradual easing of restrictions on both indoor and outdoor gatherings. At this time, the government had put in place a support package for the creative sectors that included financial support to creative freelancers, and support and underwriting for events.

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 sectors across Aotearoa. Additional funding for the survey was also provided by Wellington City Council and the Ministry for Culture and Heritage (MCH).

The survey's intent is to measure trends over time about the state of the creative and cultural sectors in Aotearoa and tap into key issues emerging. The approach in this survey was refined from the previous surveys (State of the Arts June-July, September-October 2021 and February-March 2022). Each survey contains different open-ended questions based on current issues facing the sector. This survey's open-ended questions focused on what changes they would advocate for if they were meeting with the Minister for Arts, Culture and Heritage.

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 MCH's network relationships), a list of previous respondents from State of the Arts surveys who agreed to participate in future surveys, and social media targeting users that work in the Arts, Culture & Media sectors. The sampling approach means that a response rate cannot be accurately calculated.

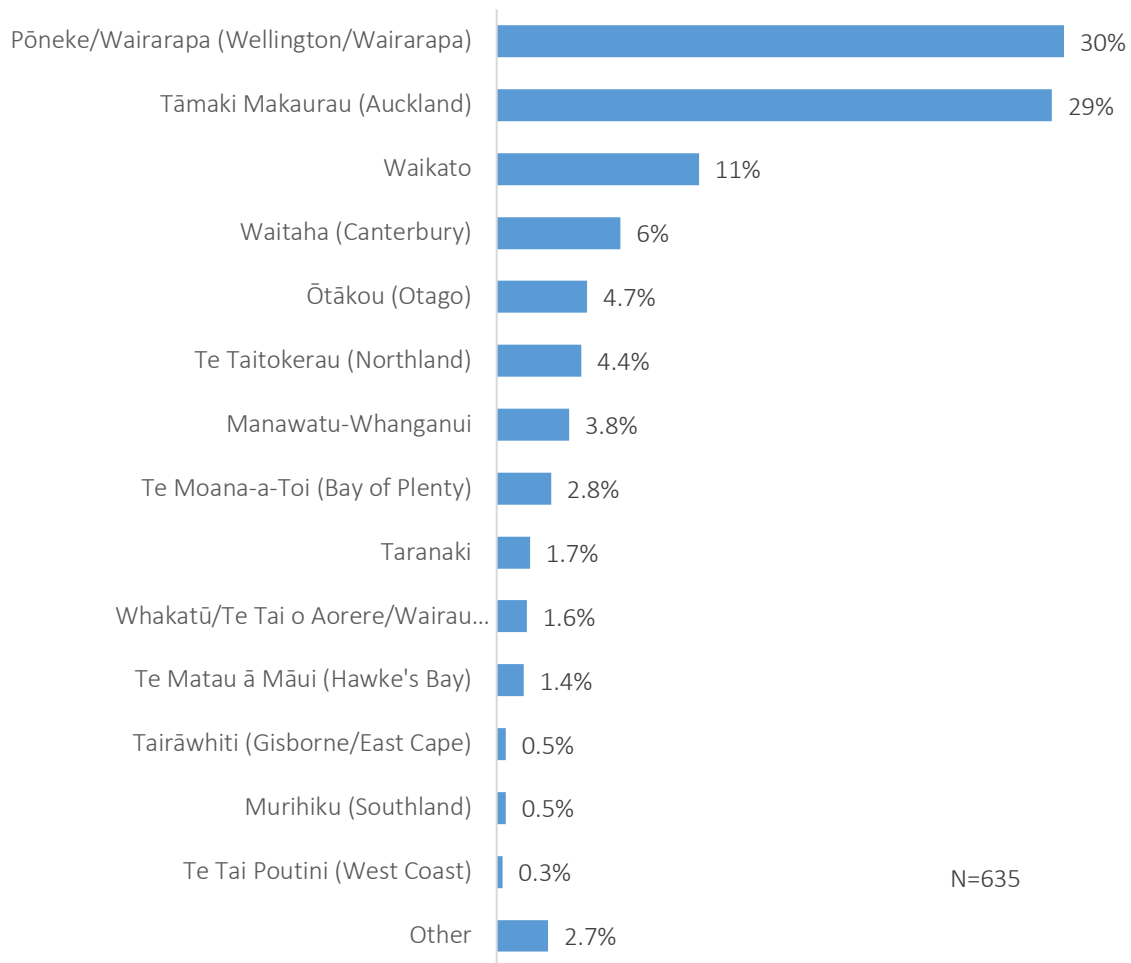
In total there were 635 responses. Waikato had 67 responses, which accounted for 11% of responses in the survey (Figure 1). There was a smaller response number compared to the previous survey, where 12% (N=85) were from the Waikato region. A further regional breakdown between the most recent surveys can be found in the Appendix (Figure 10).

This is the second and final survey to capture perceptions under the COVID-19 Protection Framework (traffic lights). While the survey was open, Aotearoa was at the 'orange light' setting due to the outbreak of Omicron in the community. The previous February-March 2022 survey captured perceptions when Waikato was at the 'red light' setting. The September-October 2021 survey captured perceptions when Tāmaki Makaurau was at Alert Level 3 and 4 under the previous Alert System, and the June-July 2021 survey captured the Alert Level 1 setting.

Due to active outreach by Creative Waikato in the region beginning in the second edition of the survey (September-October 2021) comparisons will only be made between the September-October 2021 survey, the February-March 2022 survey and the most recent June-July 2022 survey. The overall similarity of number of responses by region, sector, and role from the surveys, allow some broad comparisons to be made.

This report focuses on results for the Waikato region.

Figure 1: Where respondents were mainly based in Aotearoa



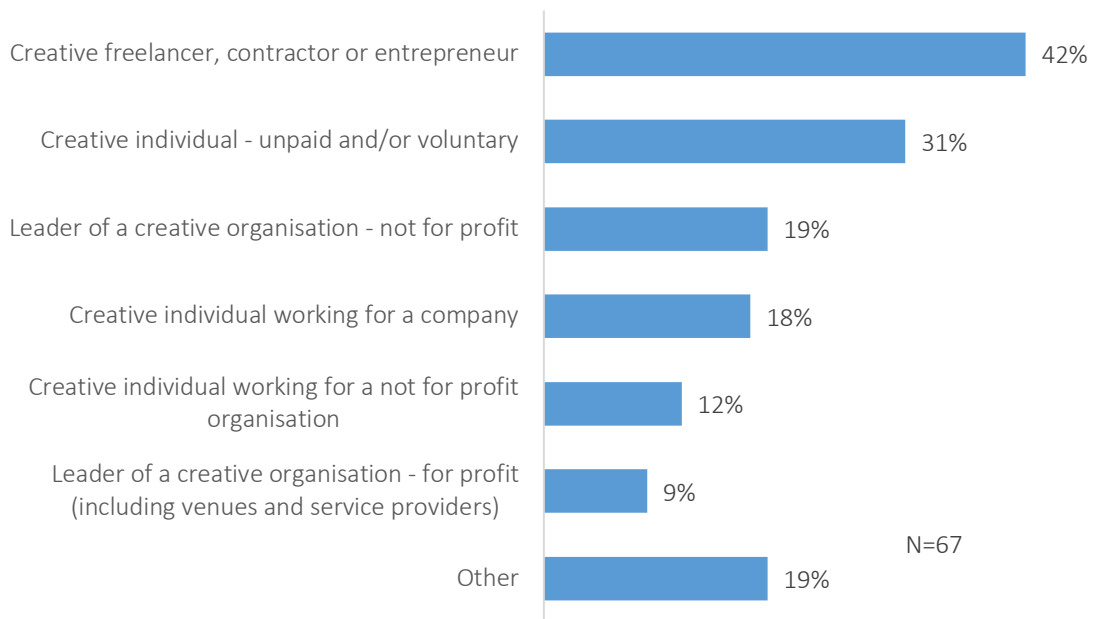
2. Roles of creatives

Creative freelances dominated the Waikato sample

Most respondents in the Waikato region were creative freelancers (42%), unpaid creative individuals (31%), and leaders of a creative not-for-profit (19%). Other respondents were creative individuals working for a company (18%), creatives working for a not-for-profit organisation (12%), or leaders of a for-profit creative organisation (9%). The remaining respondents who selected 'other' mentioned roles such as the post-graduate supervisor, fundraiser, or student (19%) (Figure 2).

Compared to the February survey there were a greater number of unpaid creative individuals (increased from 26% to 31%) and a smaller representation of leaders of a creative not-for-profit (decreased from 25% to 19%). The proportions of the remaining roles were relatively similar between the two samples. A further breakdown of roles between surveys can be found in the Appendix (Figure 11).

Figure 2: What best describes respondents' roles in the creative sector

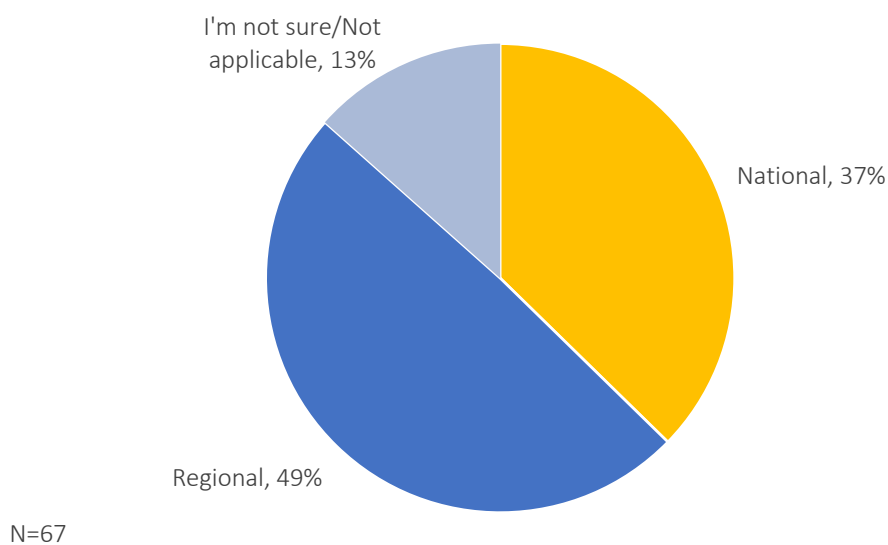


Note: Multiple responses were allowed

The work of creatives in Waikato was largely regionally focused

Of the respondents based in Waikato, 49% had work that was regionally focused. A further 37% had nationally 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

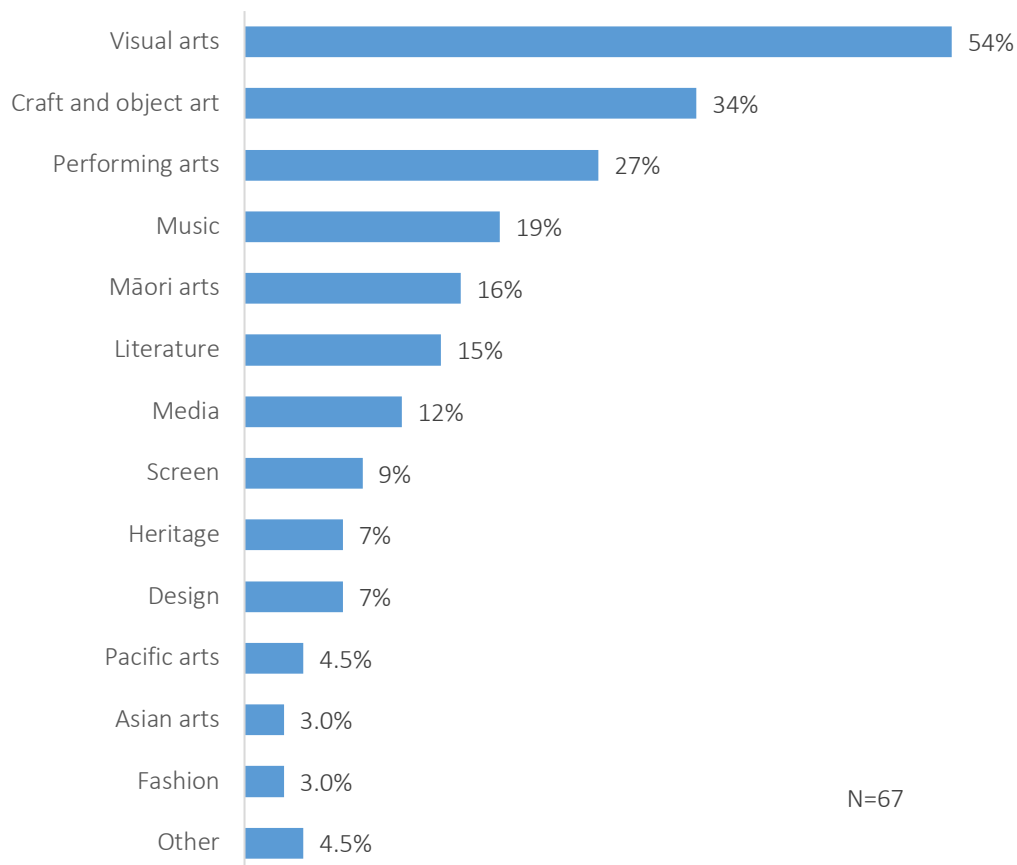


Visual arts were strongly represented in Waikato respondents

From the survey it is evident that respondents work in a variety of creative areas. When asked which of the following best describes your area of work, most creatives were involved in visual arts (54%), followed by craft and object art (34%) and performing arts (27%). Some respondents were involved music (19%), Māori arts (16%), literature (15%), and media (12%). A full breakdown of creatives roles in Waikato can be seen below in Figure 4.

A comparison of creatives' areas of work between surveys can be found in the Appendix (Figure 12).

Figure 4: What best describes respondents' creative area of work



Note: Multiple responses were possible

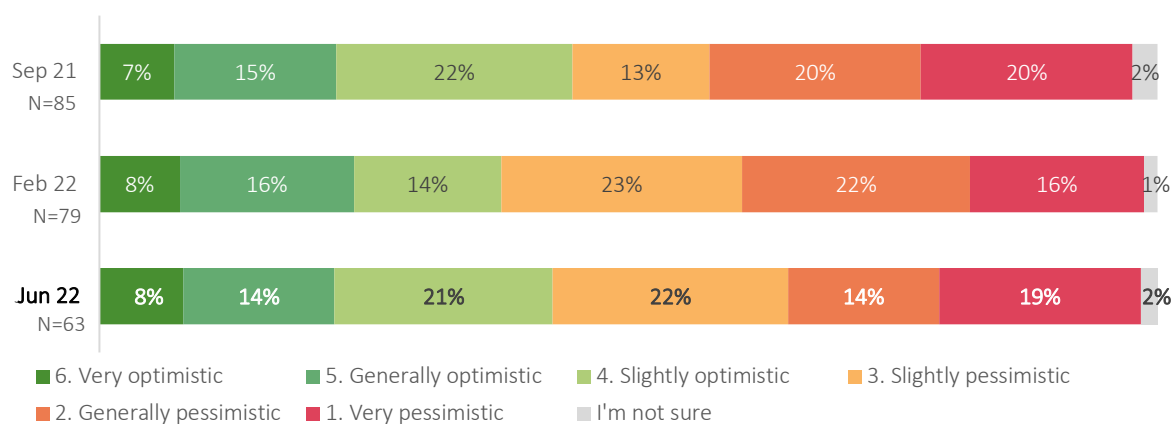
3. Financial position

Waikato respondents remain slightly pessimistic about their financial outlook

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 February-March survey, optimism increased from 38% to 43% and pessimism dropped from 61% to 55% (Figure 5).

Overall, the average rating at 3.2 out of 6 in the latest survey, compared to the February-March 2022 and September-October 2021 survey at 3.1, indicating that Waikato respondents remain slightly pessimistic. Despite these slight changes over time, there was no statistical significance between the quarterly surveys.

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

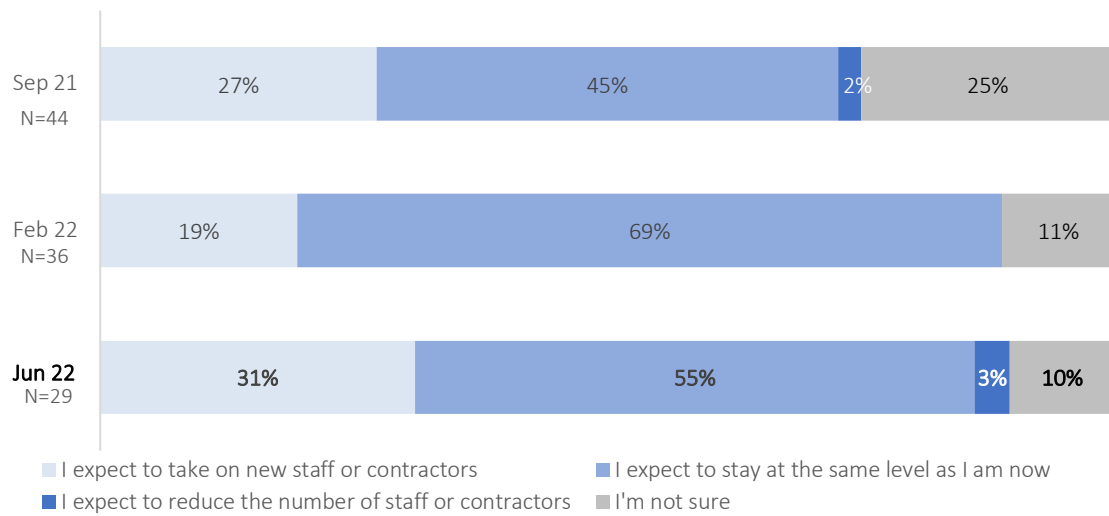


More respondents expected to increase their current staff or contractor numbers compared to the previous survey

Respondents were also asked if they expected to take on new staff or contractors in the next 12 months; this question applied to 43% of respondents (N=29). Around half (55%) of eligible respondents expected staff or contractor numbers to stay the same, followed by some creatives who expected it to increase (31%). There were a some who did not know (10%) and others who expected to reduce the number of staff or contractors (3%).

It also shows the number of respondents who expect staff or contractor numbers to stay the same decreased (from 69% to 55%) and those who expect staff or contractor numbers to reduce had increased to 3%. It also shows the number of respondents who expect staff or contractor numbers to stay the same decreased (from 69% to 55%) and those who expect staff or contractor numbers to reduce had increased to 3%. However, these trends were not statistically significant.

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



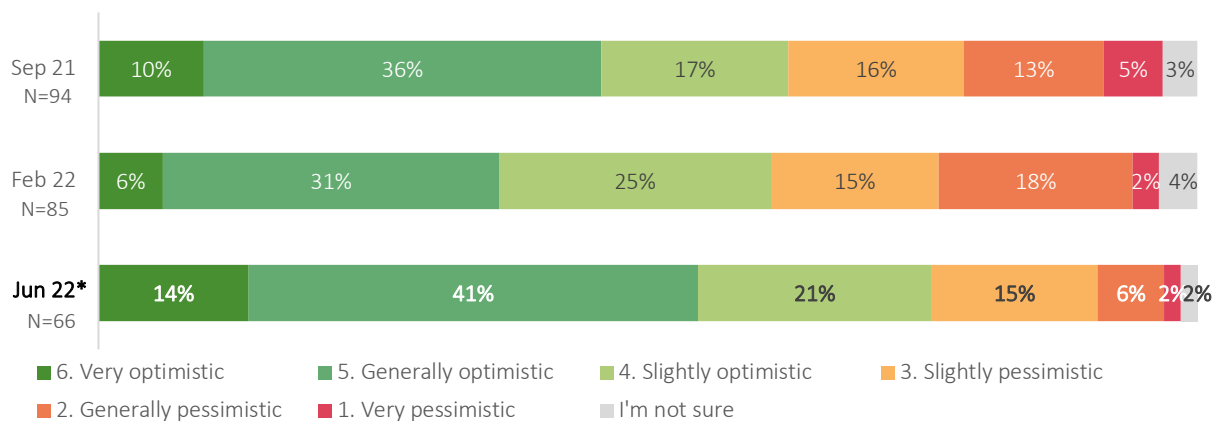
4. Creative position

Waikato respondents view on achieving their creative goals remained optimistic

Respondents 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 February-March 2022 survey, optimism increased from 61% to 76%, and pessimism dropped from 35% to 23%. This indicates a trend of increased optimism (Figure 7).

Overall, the average rating increased to 4.4 out of 6, compared to 3.8 in February-March 2022 and 4.0 in September-October 2021. This trend toward heightened optimism between the February and June surveys was statistically significant ($p < 0.05$).

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



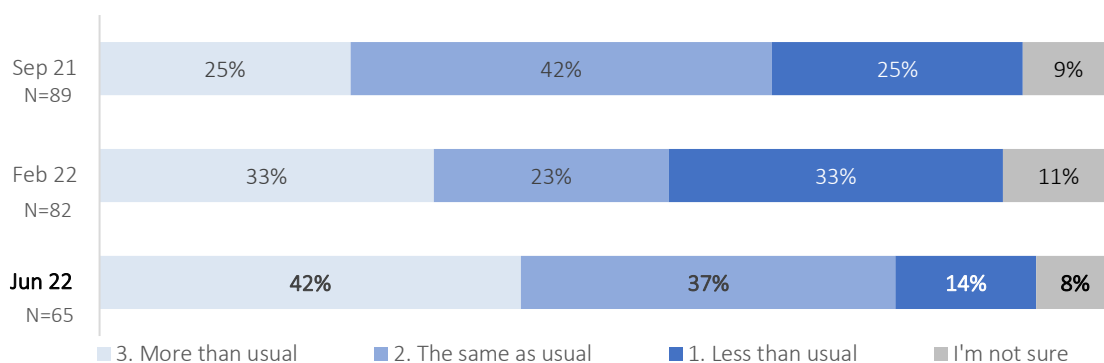
* Indicates a statistically significant change from the February 2022 survey

Waikato respondents' perception of audience appetite for their creative work appear to have slightly increased

Respondents were also asked to rate 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 audience appetite for their creative work was more than usual (42%), followed by those who thought it was about the same (37%). Some reported that audience appetite was less than usual (14%), and some were not sure (8%).

Overall, the average rating was 2.3 out of 3 which suggests that perceived audience appetite was at a moderate level. This is an increase from the average rating of the February-March 2022 survey and the September-October 2021 survey (2.0), indicating an increase in audience appetite (Figure 8). When comparing the February and June surveys, the reduction in those reporting audience appetite to be less than usual was statistically significant ($p < 0.05$).

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



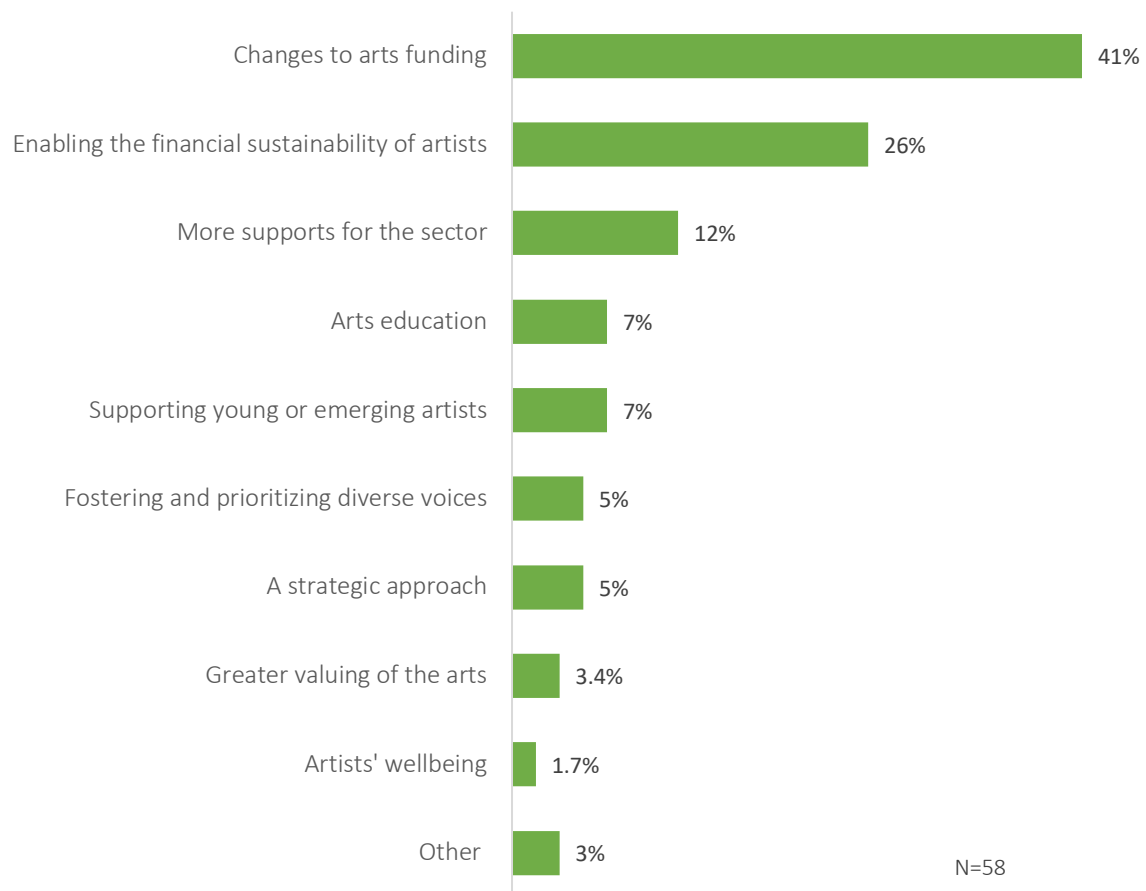
5. Reflections for the Minister for Arts, Culture and Heritage

Survey respondents were asked 'if you were having coffee with the Minister for Arts, Culture and Heritage today, what changes would you advocate for?'

There were 58 responses received from respondents in the Waikato across a wide range of themes. Responses were grouped thematically and are discussed below¹. Figure 9 below shows the most common themes:

¹ A single response could be coded into more than one theme if multiple issues were raised.

Figure 9: If you were having coffee with the Minister for Arts, Culture and Heritage today, what changes would you advocate for?



Changes to arts funding

The largest group of responses (41%) were in relation to changes to arts funding. Most wanted an increase in the amount of funding that was available for the arts and creative sector, particularly for the regions and in the Waikato.

Increased funding support for artists.

More funding for regional development...Currently the arts funding is more skewed towards large city centres i.e. Auckland and Wellington. In terms of Creative NZ national funding, it is rare to see someone from my home city in Hamilton or art event/projects successful in their applications.

Respondents advocated for more funding across a range of roles, activities and organisations in the arts and creative sectors. These included:

- Greater funding for smaller and not-for-profit organisations in this sector
- More funding for fringe operations and performances
- Support for long-term /senior practitioners alongside the emergent group
- More funding into projects, advertising for events to be easily accessible.

Several respondents shared that funding application processes needed to be more transparent and user-friendly.

A transparent funding process that includes feedback.

Some people argued for fundamental changes in the way that arts funding is structured and administered.

To have the NZFC, NZ on Air, Creative NZ and other such funding bodies, Board members and Commissioners of funding, screened for a higher level of expertise and experience in Film and TV.

Others wanted to arts funding to be allocated differently, for example, less funding to 'traditional' art forms such as ballet and orchestras.

Also, reduce funding to ballet and NZSO. Those are funded in a very disproportionate way to their active audiences.

One respondent argued for supporting 'organisations to pay Fundraising/ Development staff/contractors so that greater sustainability can be achieved by diversifying income streams.'

Enabling the financial sustainability of artists

Just over a quarter of respondents (26%) advocated for initiatives to improve the financial sustainability of artists. The most common call was for a Universal Basic Income (UBI) for artists and creatives.

A universal basic income or artists wage.

More Government support for artists including a basic income to ensure that we are able to produce our work sustainably.

Respondents also pushed for a fairer pay for artists and creatives.

Advocating for fair pay for works created by creatives within the commercial sector.

More supports for the sector

Another group of respondents (12%) pointed out the need for a variety of supports in the arts and creative sectors. Ideas included support for artists to set up a community gallery; encouraging collaborations across the sciences and arts and promoting 'Buy NZ Made.'

Others called for 'support for art venues', 'more public spaces for exhibition' and better support from regional arts organisations.

Arts education

Several responses (7%) were focused on arts education. Respondents raised issues such as increasing the grant money available for people to study, and the importance of investing in art education in schools.

More opportunities for free education in the arts. Re-establish more Bachelor of Arts degrees in universities.

Supporting young or emerging artists

Enhancing the accessibility of the arts to youth and new creatives stepping into the industry was a further theme, raised by 7% of respondents. Several people advocated for more support for emerging artists and businesses.

Funding pool for emerging artists.

Funding for local workshops particularly for newbies.

I think more funding needs to be available for start-up businesses in the creative sector, but also make it easier to get hold of. A lot of funding is project based rather than sustainable business/organisation based.

Fostering and prioritising diverse voices

The need to create space and opportunities for more diversity in the arts, culture and heritage sectors was a further theme raised by 5% of respondents. These people wished to see greater cultural diversity and more opportunities for women. Some advocated for 'more Māori in leadership roles' and for 'Te Tiriti to be applied to CNZ funding applications.'

Acknowledging and encouraging the role that women play in the arts sector was also seen as important.

Bringing more women into the political/editorial cartooning world. Also bringing more indigenous women into the field and indigenous men. The field is over-saturated with older white males. We need more voices - more visual voices - and that means making the field accessible or even a thing for people.

A strategic approach

A small group of respondents focused on the need for a more strategic approach to arts sector.

The role of the Minister, I believe, is to set long term strategic direction for NZ, and do what they can to ensure short term goals are resourced effectively, so that we can, as a country, achieve those long-term outcomes.

A holistic, strategic approach to the support and development of our artists.

One person suggested a specific strategy:

It [the government] needs to work in tandem with the private sector who need to put more money into arts support...The government should make it mandatory that each public works project getting taxpayers funding should have to have a percentage that goes to artwork alongside the project.

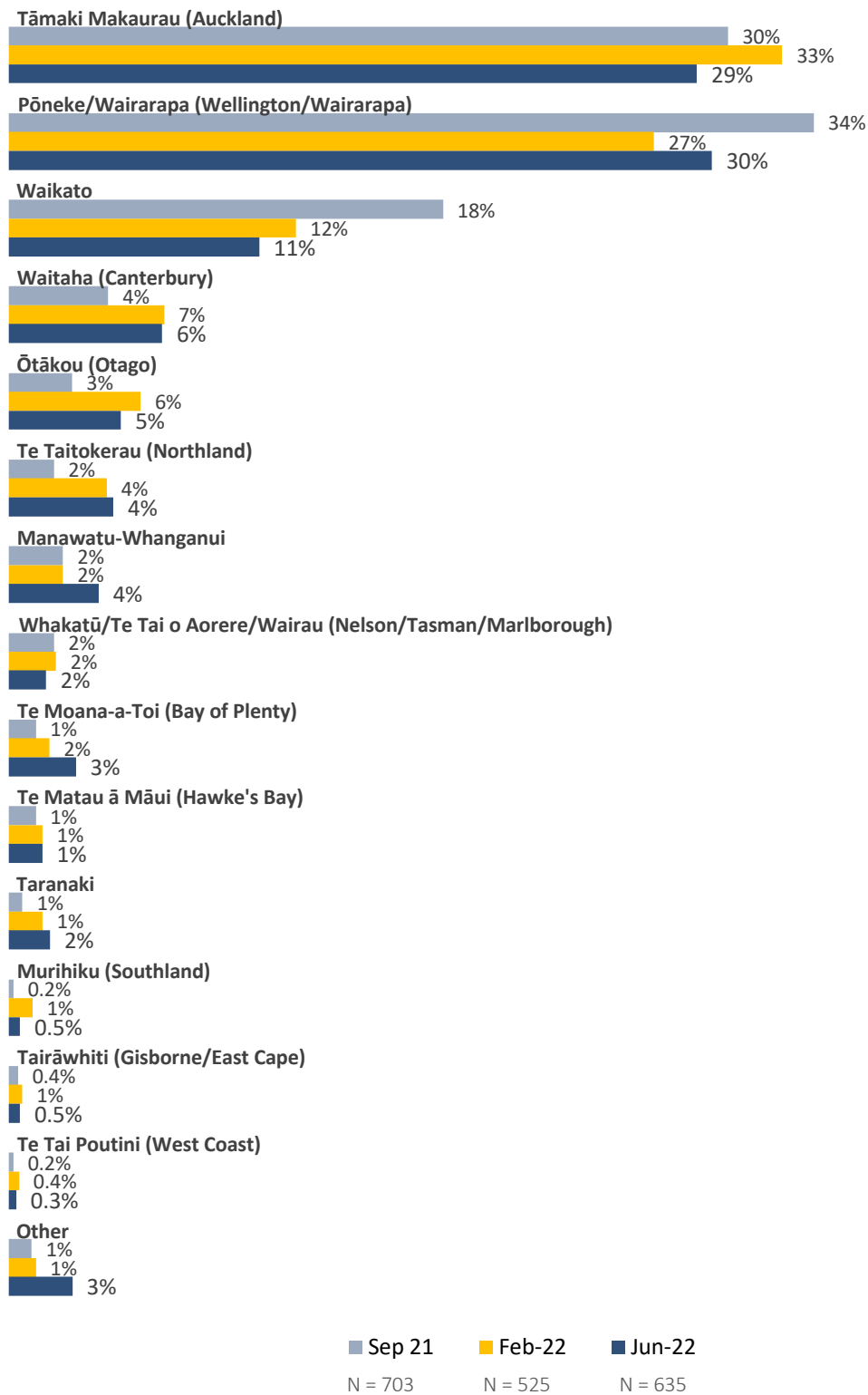
Other themes raised by respondents included the need for government and the wider community to place greater value on the arts and their contribution to society (3.4%) and the importance of supporting the wellbeing of artists (1.7%).

6. Final report

This survey is the fourth and final quarterly survey of the cultural and creative sectors in Pōneke and Tāmaki Makaurau, (initiated in July 2021), over 2021/22, and the third covering Waikato and nationwide respondents (initiated in September 2021). The impacts of the most recent COVID-19 Omicron outbreak and resulting restrictions are ongoing and will continue to be felt by the creative sectors. Ideally, these trends should, therefore, continue to be explored as a ‘pulse check’ of the creative sectors as they navigate their way through what’s to come. In the event that the survey continues for a further period, participants who provided their contact email will be included in an ongoing panel of participants, and it is hoped they will participate on an ongoing basis.

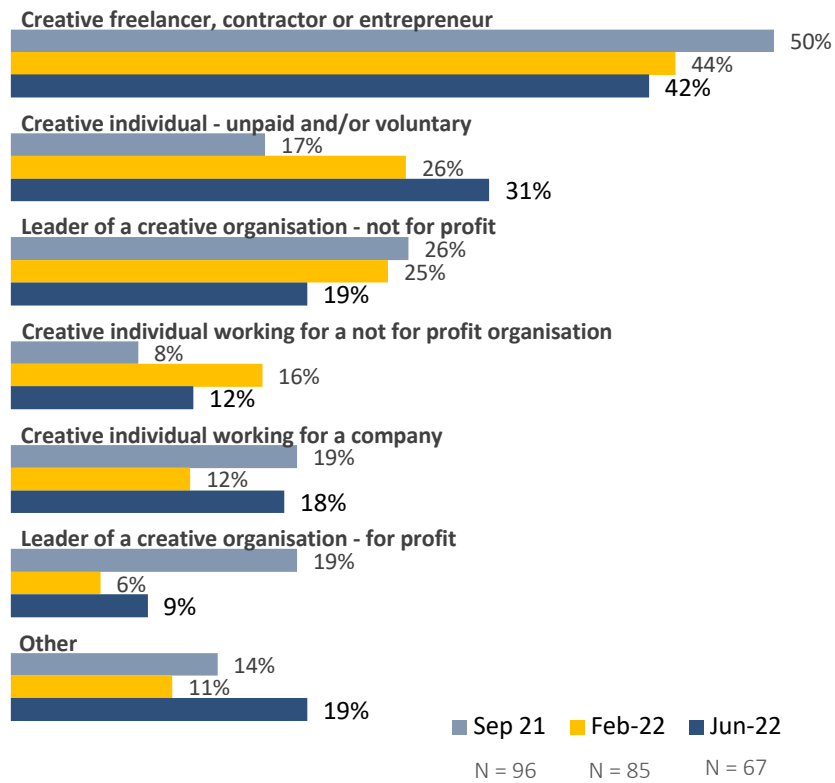
Appendix

Figure 10: Areas in Aotearoa where respondents were mainly based, compared to the previous surveys



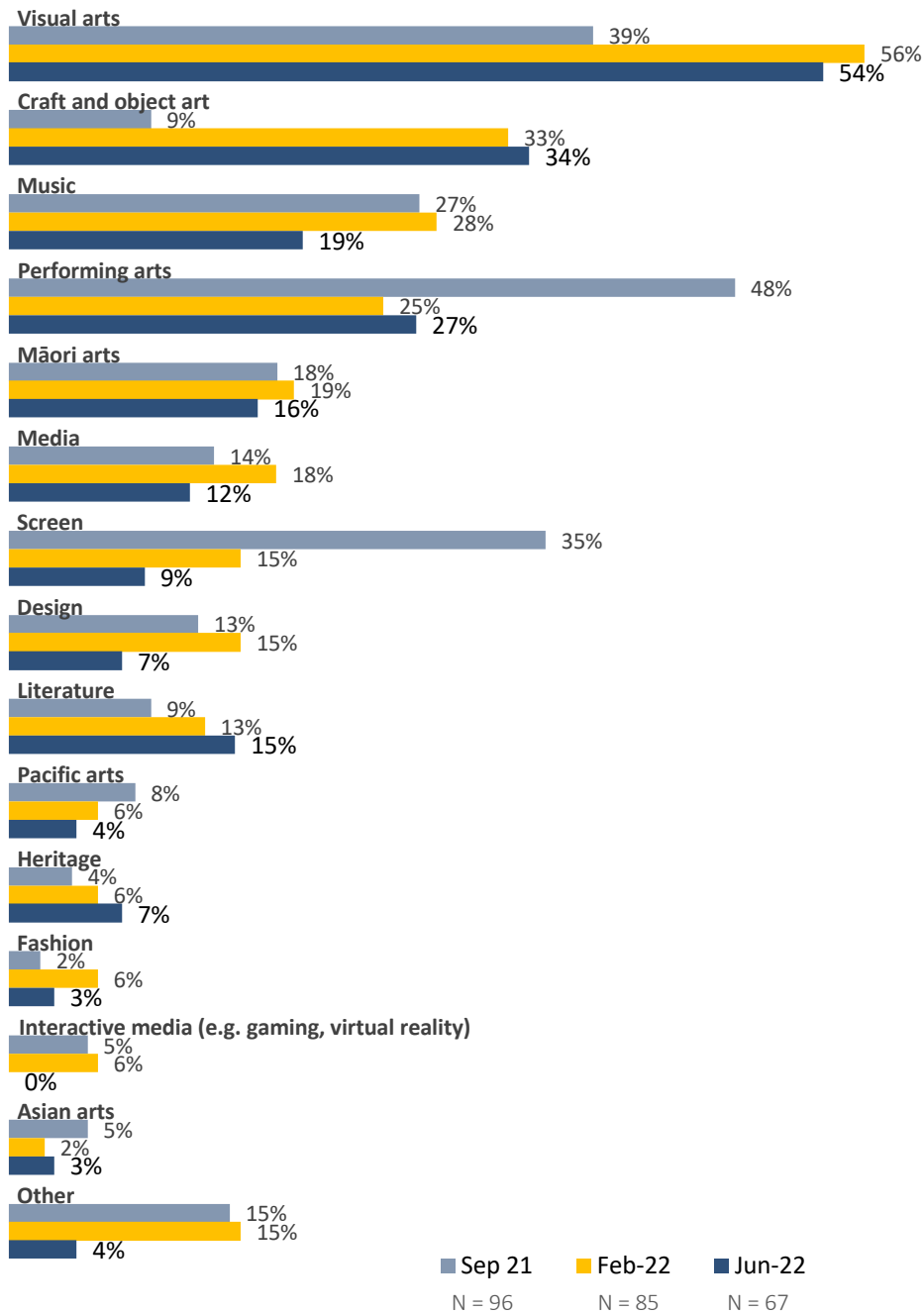
Note: June 2021 survey included different region options and therefore is excluded in this figure

Figure 11: Waikato respondents' roles in the creative sector between surveys



Note: Multiple responses were possible

Figure 12: Waikato respondents' creative area of work between surveys



Note: Multiple responses were possible

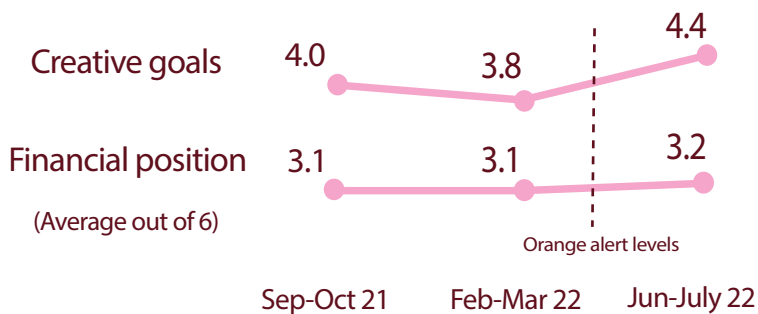
Creative Waikato Toi Waikato

THE STATE OF THE ARTS

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

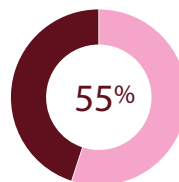
June - July 2022 survey - key figures at a glance

Views on **financial position** remain **stable**, whereas views on achieving **creative goals** in the next 12 months have become more optimistic.

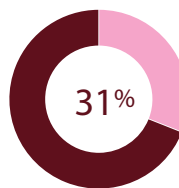


When asked to rate their outlook on a scale (from 1 meaning very pessimistic to 6 meaning very optimistic).

Respondents expect to **maintain** current **staff** or **contractor numbers**.



Expected levels to stay the same an **increase** of **45% to 55%** since September 2021



Expected to take on new staff or contractors an **increase** of **27% to 31%** since September 2021

Percentage is out of applicable respondents

42% of creatives making up the Waikato survey sample were **creative freelancers** (sample = 85).



54%



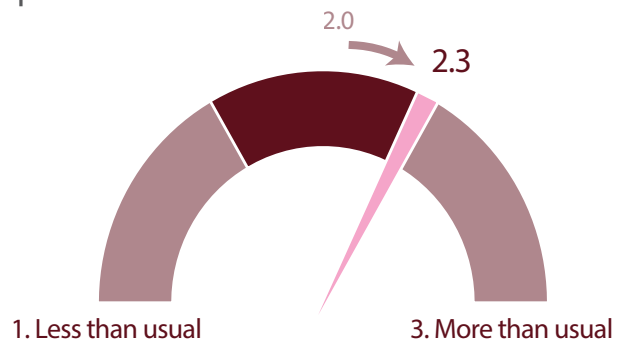
34%



27%

Visual arts were strongly represented followed by **craft and object art** and **performing arts**.

Respondents indicated that **audience appetite** for their creative work **increased** since September 2021.



Survey participants were asked to respond to the question 'If you were having coffee with the Minister for Arts, Culture and Heritage today, what changes would you advocate for?'

The most common themes were:

