COVID-19: Further reflections of impact on the Creative Sector in Tāmaki Makaurau

Follow-up survey report for Te Taumata Toi-a-Iwi

Adrian Field
Emily Garden
Adela Wypych

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PO Box 78 146, Grey Lynn, Auckland 1021 www.dovetailnz.com

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Acknowledgements

We would like to acknowledge the many people in Auckland's creative sector who participated in this survey, at a time of considerable personal, organisational and business stress.

This research was funded by Te Taumata-Toi-a-Iwi. The strengthening of the ecosystem that makes Tāmaki Makaurau a city alive with creativity will be the primary focus of Te Taumata Toi-A-Iwi over the coming years. Te Taumata Toi-a-Iwi seeks to create a stronger sector voice, build a clearer understanding of the sector's needs, and encourage a strategic and collaborative response to those needs.

Executive Summary

Introduction

Te Taumata Toi-a-Iwi commissioned Dovetail, an Auckland-based research and evaluation company, to undertake a follow-up survey of Auckland's creative sector on the impact of COVID-19. This survey was conducted in September-October 2020, and followed a similar survey conducted during the first lockdown in April 2020. The survey was distributed via email and social media networks. A snowball sampling approach was undertaken, in which recipients were encouraged to distribute the survey to others in the sector. In total, 146 responses were received from people based in or working in the Auckland region.

The sampling approach means that the results may not be representative of the creative sector in the region; the results do however point to a range of issues for consideration.

Respondent profile

More than half of those participating in the survey were creative freelancers, contractors or entrepreneurs (52%). Some 16% were leaders of a creative not-for-profit organisation, and 12% were leaders of commercial creative enterprises. A further 10% were creatives working for an organisation. The remainder were unpaid creatives or indicated other roles. Over two-thirds (57%) were working full-time in their roles, and (32%) were part-time. A wide variety of art forms or creative practice were identified by survey participants. One-third of respondents (29%) were male and two-thirds (64%) were female. Some 72% were European/Pākehā, 12% were Māori, 9% were Moana Oceania (Pacific), with the remainder spread across a range of ethnic groups.

Event cancellations

COVID-19 continues to have widespread impacts on respondents' creative sector activity. 58% of respondents indicated they had to cancel an event, hui or gathering, or project or service because of COVID-19, and a further 36% had had to postpone.

Half of these cancelled or postponed events (46%) were within the next month following lockdown, and some events were scheduled for up to six months from when the August lockdown was initiated; 11% were scheduled in 2 to 3 months from when the lockdown began, and a further 3% in 4-6 months' time. In addition, 41% had had to cancel multiple or ongoing events.

Financial impacts

There remains some financial uncertainty among participants as a result of cancelled activity. Some 66% said that they personally would be able to financially get by without the cancelled activity, compared 7% who could not get by, and a further 26% who were unsure. This compares to 40% who said that their organisation would be able to get by, 24% were unsure and 7% said no (note that a further 29% indicated that the organisational response was not applicable).

Answers to open-ended questions about financial costs indicated a range of personal financial impacts for individual respondents, from some saying no impact, to as high as $60,000. Some also reported significant losses for their creative organisations, ranging from less than $1000 to $2.5 million. Many respondents have had to reduce contractors (25% of applicable respondents) or staff (14%).

Key priorities and concerns

Key priorities and concerns of survey participants included the following: dealing with uncertainty and precariousness of funding; personal wellbeing; adapting to a new environment; viability of work, organisation and business; immediate financial survival; and future of the creative sector.

Areas of support that were identified as needed included innovation and strategic advice (52%); fundraising support (45%); digital technology (44%); grant-writing and marketing/communications (42% each).

Accessing support and adapting practice

Most respondents had accessed some form of support, particularly the wage subsidy (66%) and the Creative New Zealand emergency relief grant (29%).

A common theme in this survey is adapting to a new environment, recognising that COVID will not be dispelled in the near future, and embedding these new ways of working into development and delivery of work going forward. Survey participants had adapted their practice to meet the challenge of the current environment. This included shifts to online activities (58%); cutting some services or events (56%); new ways of delivering services (48%); new funding sources (47%); and contingency plans to meet health and safety requirements (43%).

Reflections from COVID-19

Key areas of learning from COVID-19 included the importance of responsiveness and flexibility (24%); capacity for resilience (14%); and the importance of relationships and community (9%).

In the face of the COVID crisis, suggested priorities for the creative sector going forward were financial support; recognition of the value of the arts; advocacy and leadership; collaboration and mutual support; capacity building; and disruption to current systems and structures.

Participants in the September survey appear to be focusing on dealing with the uncertainty that is part of 'the new normal' of COVID-19. This includes finding ways to resume business as usual, and operate within COVID level restrictions, implementing health and safety practices and ensuring readiness for the 'next wave'. Pivoting programmes and adapting to the new environment were also now key priorities, with innovation seen key to maintaining audiences, funding deliverables and providing certainty in uncertain times.

Māori and Moana Oceania respondents

From the 116 respondents indicating ethnicity, 14 respondents identified as Māori (12%), and 11 identified as Moana Oceania (Pacific, 9%). The sample size does not make statistical testing feasible, but some differences are apparent. In particular, the loss of events, and the impacts or uncertainty of the COVID-19 environment, appears to be more strongly evident among Māori and Moana Oceania respondents.

Key priorities or concerns that were particularly high among Māori respondents were future of the sector; fighting despondency and finding work; and viability of work, organisation or business. Key priorities or concerns that were particularly high among Moana Oceania respondents were wellbeing; and strengthening governance and operations. Both Māori and Moana Oceania respondent groups had shown a marked shift towards delivering online events and new ways of delivering services.

Shifts in experiences/feedback from the April 2020 survey

Some limited comparisons can be made between the findings from this survey, conducted in September-October, and those of the earlier April survey. Even with the shorter and less intensive lockdown from August, many were still impacted by COVID, and many are still struggling with the impacts of the earlier lockdown. Income sources and opportunities remain disrupted and cancellations/postponements are an ever-present factor. There does not seem to be the same level of long-term cancellations in this survey compared to the April survey, but this may indicate that fewer are planning long-term in the current environment.

A common theme in September 2020 was the inability to plan far ahead, and alongside this, adapting to a new environment, recognising that COVID will not be dispelled in the near future, and embedding these new ways of working into development and delivery of work going forward.

Responses suggest that people are more confident of getting by financially than in April. However, many are reporting financial losses, and in this survey, one in four respondents are unsure about being able to get by and face an uncertain future.

Conclusions

Six months on from the first COVID-19 lockdown, this survey reveals that the creative sector in Tāmaki Makaurau is cautiously rebuilding, with some optimism and resilience emerging, yet is still being buffeted by the challenges that COVID brings. Those participating in the survey appear to some extent to be in a stronger position to get by than the previous April survey, yet for many, uncertainty about the viability of their personal earning capacity, or that of the organisations they're part of, remains an ongoing issue.

Many in the creative sector are building in contingency planning, shifting to online delivery where feasible, and working day to day to maintain viability and momentum. The inability to plan for the long term appears to be keenly felt across the sector.

The survey findings suggest a disproportion impact among Māori and Moana Oceania respondents, particularly in terms of cancellations, uncertainty and ensuring viability. At the same time, these groups have also shown a willingness to adapt and build new forms of delivery.

For the creative sector, the findings reinforce those of the earlier April survey, particularly recognition of the value of the arts, the importance of advocacy and leadership, and the need for continued financial support.

1. Introduction

Background

2020 has in many ways been defined by COVID-19, a pandemic that has wrought disruption worldwide with the loss of lives, personal health and wellbeing, and in many respects continues to undermine the social fabric and economic foundations of countries around the globe.

A consistent theme from many countries is the impact this is having on the creative sector. People who work in the creative sector are often working on limited term contracts, and can be reliant on commissions and revenue from public access or performances to sustain a living.

Te Taumata Toi-a-Iwi (Arts Regional Trust) commissioned Dovetail, an Auckland-based research and evaluation company, to undertake a follow-up survey of the creative sector on the impact of COVID-19 is having in Tāmaki Makaurau. The survey was undertaken over September and early October 2020, around the time when Level 3 and Level 2 lockdowns/restrictions were required for the region. The survey follows a similar survey conducted in April 2020 during the nationwide Level 4 lockdown.

This report is structured around the following sections:

- Survey participants
- Impacts of COVID-19
- Key priorities and concerns
- Adaptation and response to COVID-19
- Reflections in the light of the COVID-19 experience.

Mind mapping diagrams at the start of each section summarise key findings.

Approach

The survey was distributed via email and social media networks over September and early October 2020, shortly after the Tāmaki Makaurau region was placed in a Level 3 lockdown for three weeks and during subsequent level 2.5 and level 2 restrictions.

The survey was distributed to people on the email database of Te Taumata Toi-a-Iwi. A snowball sampling approach was undertaken, in which recipients were encouraged to distribute the survey to others in the sector. In total, 146 responses were received from people based in or working in the Auckland region.

The sampling approach means that the results may not be representative of the creative sector in the region; nor can a response rate be accurately calculated. The results do however point to a range of issues for consideration that are explored in this report.

The survey was limited to those based or working in the Auckland region; 12 respondents were excluded from the survey who were from outside the region, and a further 52 respondents did not complete the survey after the first question (i.e. a total of 210 people accessed the survey, of which 146 then completed the survey).

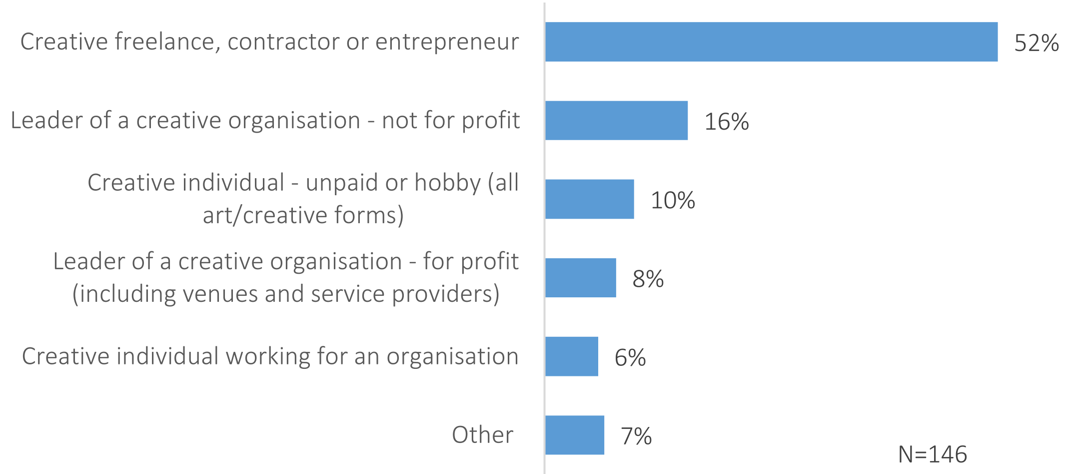
The survey included a mix of closed-response and open-ended questions.

From the 116 respondents indicating ethnicity, 14 respondents identified as Māori (12%), and 11 identified as Moana Oceania (Pacific, 9%). Where there are apparent notable differences between these groups and the total sample, these are reported, but the sample sizes do not make statistical testing of differences feasible.

2. Survey participants

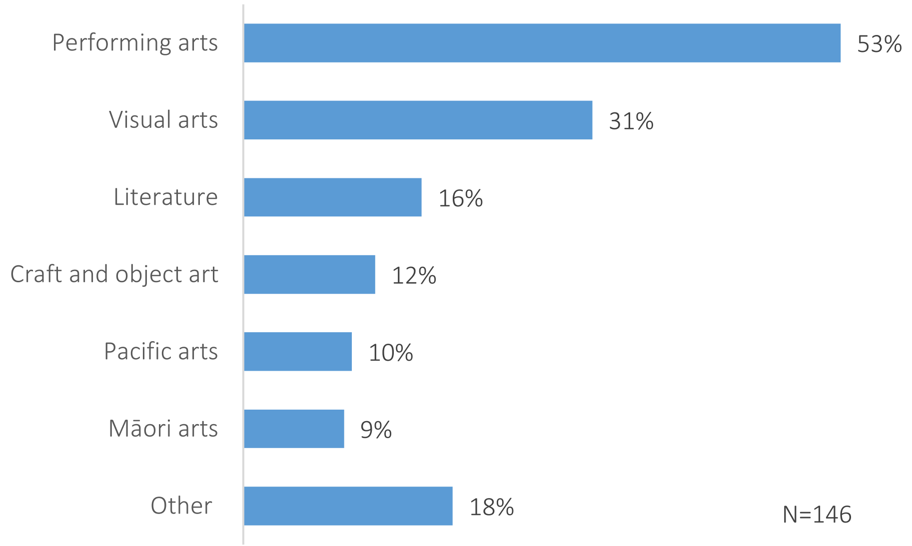
Just over half of those participating in the survey were creative freelancers, contractors or entrepreneurs (52%). Some 16% were leaders of a creative not-for-profit organisation and 10% were unpaid creatives. A further 8% were leaders of creative organisations for profit. The remainder were creative individuals working for an organisation (6%) or indicated other roles (7%) (Figure 1).

Figure 1: Role in the creative sector



Most creatives who responded were involved in performing arts (53%). Some 31% were involved in visual arts and 16% involved in literature. A further 12% of respondents were involved in craft and object art. Pacific arts were identified by 10% of respondents, and Māori arts by 9% of respondents. The remaining 18% described other art forms which included film, television, music, event management and multiple art forms (Figure 2).

Figure 2: Art form or creative practice

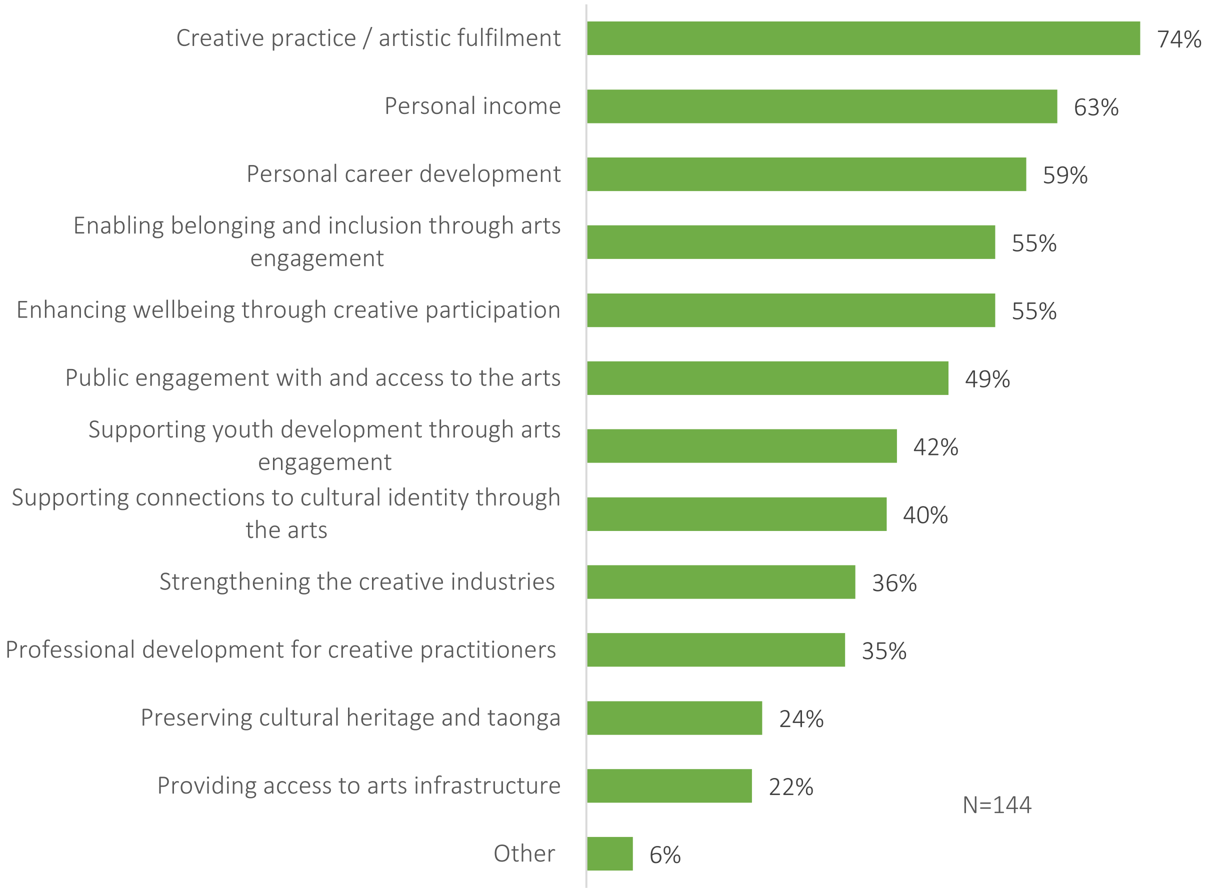


Participants want to achieve a range of goals from their creative work. Almost three-quarters of interviewees (74%) want to achieve artistic fulfilment. Personal income was important to achieve from 63% of participants. Over half wanted to achieve career development (59%), 55% want to enable belonging and inclusion and another 55% were looking to achieve enhanced wellbeing. Some 49% were looking achieve public engagement and access, and 42% were looking to support youth development and engagement. A further 40% were looking to support connections to cultural identity and 36% wanted to strengthen the creative industries. Further responses can be found in Figure 3 below.

More Māori respondents selected enhancing wellbeing (71%); supporting youth development (64%); supporting connections through cultural identity (57%); and preserving cultural heritage and taonga (57%).

More Moana Oceania (Pacific) respondents selected enhancing wellbeing (100%); creative practice (90%); supporting connections to cultural identity (81%); enabling belonging and inclusion (81%); preserving cultural heritage and taonga (72%) and supporting youth development (64%).

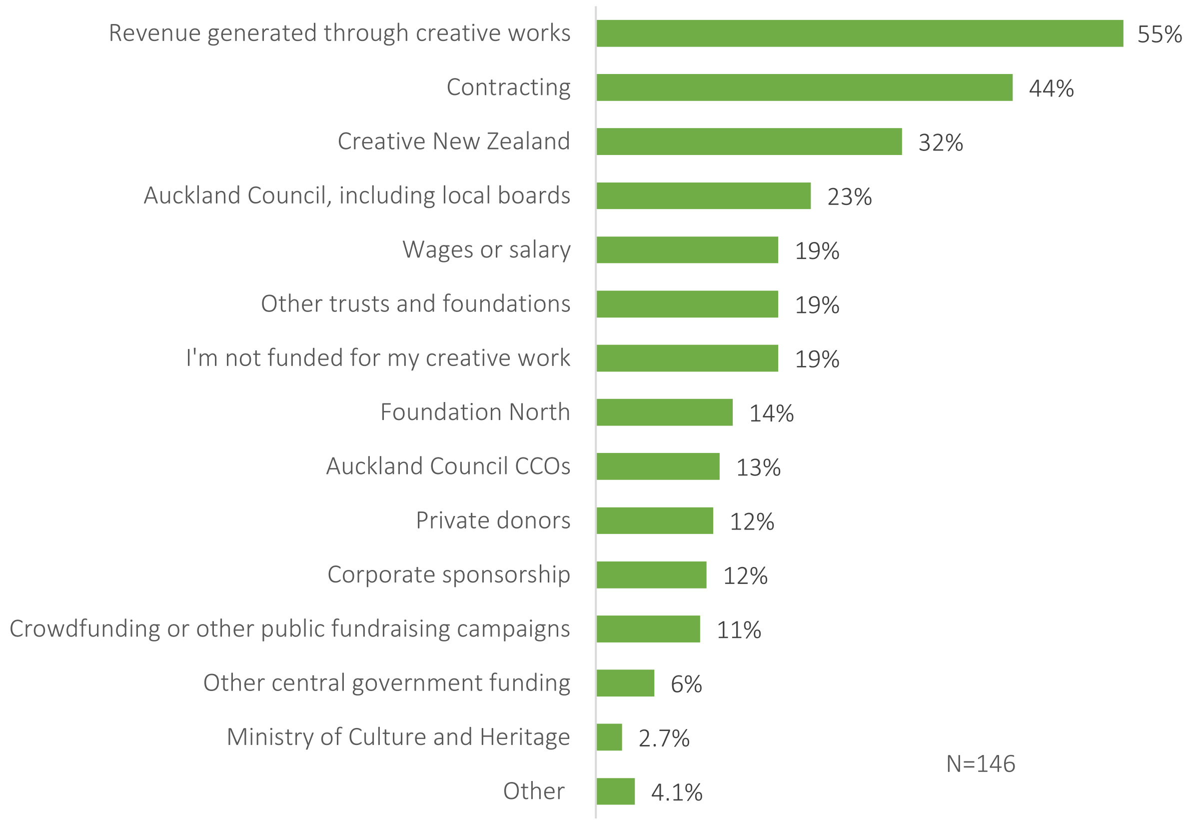
Figure 3: Looking to achieve from creative work



Participants were asked how their creative work is funded, with multiple answers allowed. Over half (55%) of participants have revenue generated through creative work e.g. sales, tickets and subscriptions. There were 44% of respondents who were funded by contracting, and 32% who were funded by Creative New Zealand. Auckland Council and local boards contributed to 23% of funding. Wages or salary were indicated by 19% of respondents. Foundation North was indicated by 14% of respondents, and other trusts and foundations by 19%. Those who indicated no funding for their creative work was identified by 19% of respondents. A further 14% responded with Foundation North, 13% indicated Auckland Council CCOs, another 12% each identified private donors and corporate sponsorship. The responses and forms of funding can be found in Figure 4 below.

More Māori respondents selected Auckland Council CCOs (28%); crowdfunding (21%) and Foundation North (21%). More Moana Oceania respondents selected Creative New Zealand (55%).

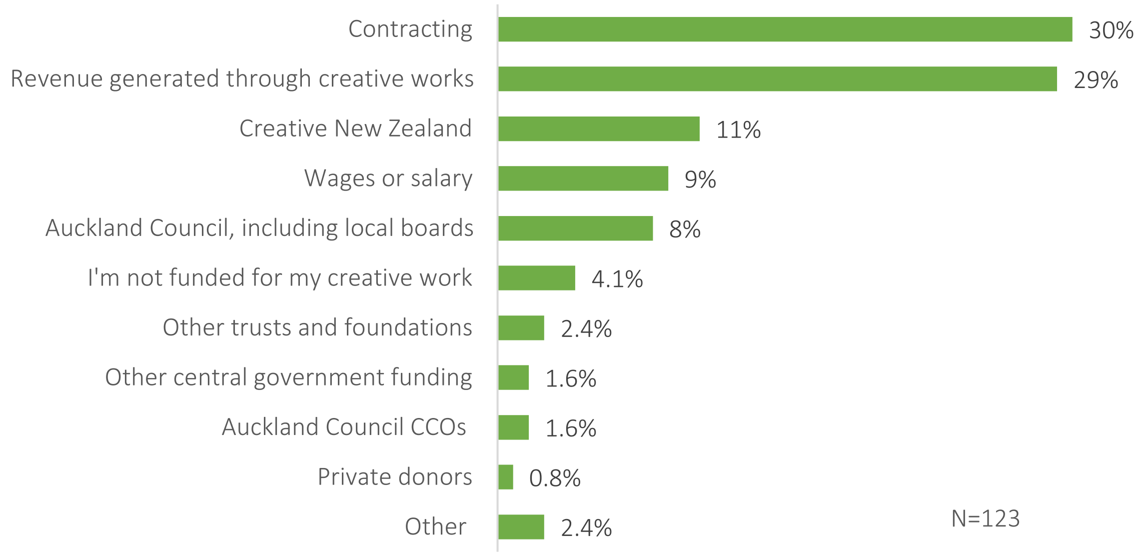
Figure 4: How respondents are funded for their creative work



Participants were asked which one of these funding sources were most critical to them. Figure 5 shows that contracting (30%) was the most critical funding source, followed closely by revenue generated through creative works (29%). A further 11% identified Creative New Zealand, 9% responded wages or salary, and 8% answered that Auckland Council was the most critical source of funding. The remaining funding sources were mentioned by 5% or fewer respondents.

Auckland Council appears to be of greater importance to Māori (15%) and Moana Oceania respondents (22%) than the total sample. Fewer Māori relied on revenue from creative works (15%). More Moana Oceania respondents (44%) were reliant on contracting.

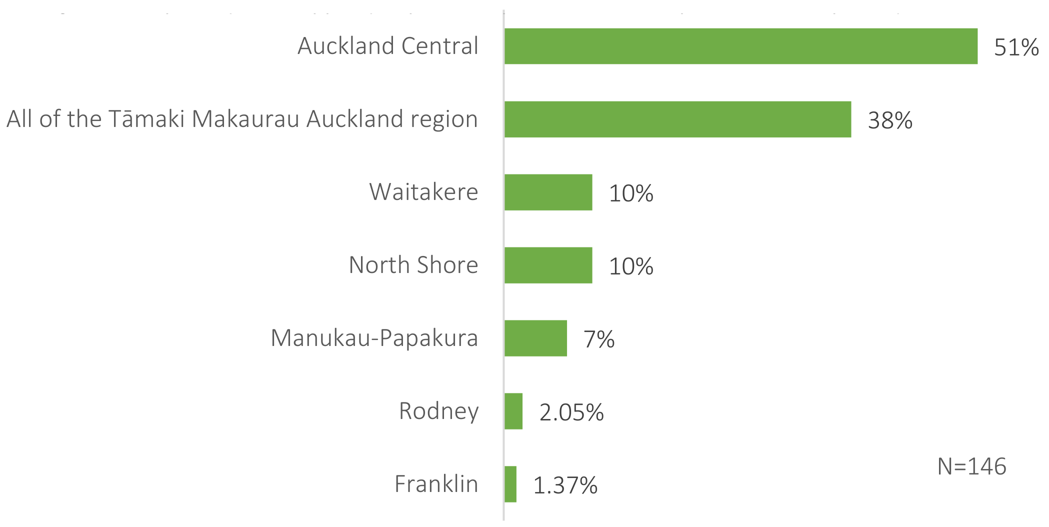
Figure 5: Most critical funding source



Over half of participants (57%) were working full-time in their roles, and 32% of respondents were working part-time. The remainder reported that this was not applicable to them or specified another working arrangement.

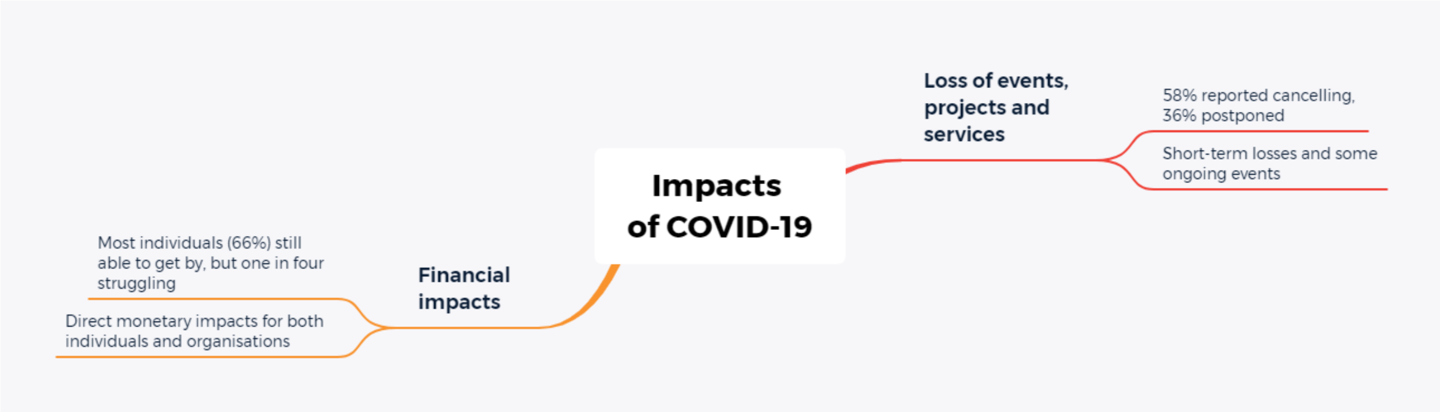
About half (51%) of eligible respondents were based around central Auckland, 38% said they were based around all of the Tāmaki Makaurau Auckland region, with the remainder spread across other parts of Auckland (Figure 6).

Figure 6: Areas in Auckland where survey respondents were based



One-third of respondents (29%) were male and two-thirds (64%) were female. 72% were European/Pākehā and 12% were Māori, with the remainder spread across a range of ethnic groups. More details on the demographic profile of survey participants can be found in Appendix 1.

3. Ongoing impacts of COVID-19

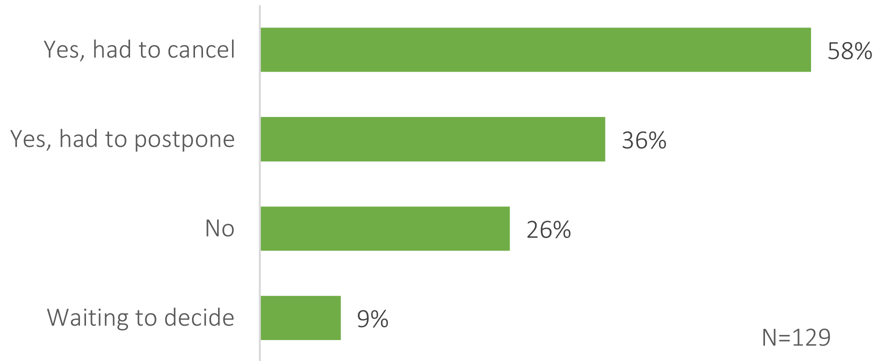


Loss of events, projects or services

Due to the re-emergence of COVID-19 in the Auckland community in August, creative sector activity was significantly disrupted. More than half of respondents (58%) indicated that they had to cancel at least one event, hui or gathering, or project or service because of COVID-19 since August. A further 36% said they had to postpone and 9% were waiting to decide (Figure 7).

The findings suggest that Māori and Moana Oceania respondents may have disproportionately been affected by cancellations. Some 71% of Māori respondents and 63% of Moana Oceania respondents had cancelled events. The differences were less pronounced with postponements.

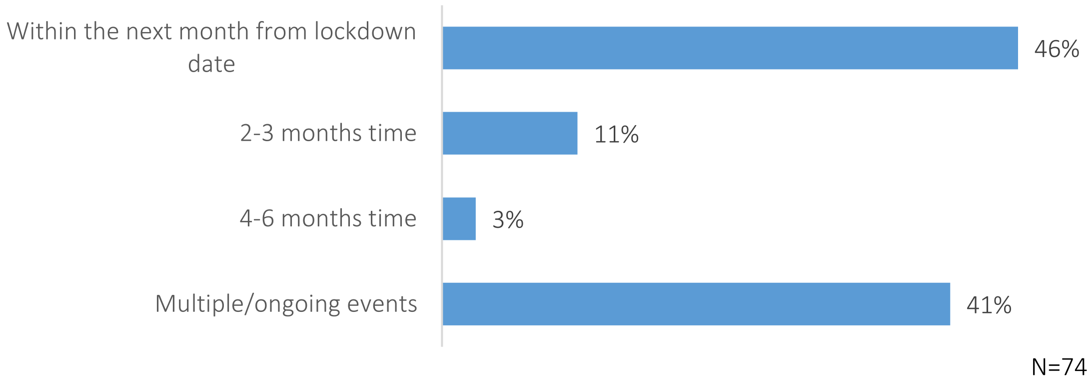
Figure 7: Reporting event or project cancellation due to COVID-19



Note: Multiple responses possible

The effects of COVID-19 have meant the cancellation of short-term, long-term and multiple events. Respondents were asked when their cancelled event was scheduled for, with answers categorised into dates from when the second lockdown in Auckland started (12th August). Figure 8 shows that most of the cancelled events were scheduled within the next month from the lockdown date (46%). A further 11% were between 2-3 months from lockdown, 3% were between 4-6 months from lockdown. A total of 41% responded that they had to cancel multiple or ongoing events due to COVID-19 and the August lockdown.

Figure 8: Intended scheduling of cancelled events, projects or services



Financial impacts

There seems to be reasonable levels of certainty of personally getting by as a result of a cancelled activity. Two thirds of participants (66%) said they would personally be able to get by without the event. A further 26% said they were not sure and 7% said no (Figure 9). This compares to 40% who said that their organisation would be able to get by, 24% were unsure and 7% said no. A further 29% indicated that it was not applicable (Figure 10).

There appears to be greater uncertainty for Māori and Moana Oceania respondents. Among Māori, 33% were personally able to get by, 58% were unsure and 8% were not able to get by. Among Moana Oceania, 55% were personally able to get by, 27% were unsure, and 18% were not able to get by. Patterns were less clear for organisations.

Figure 9: Respondents' perception of personal ability to get by with cancelled event or project

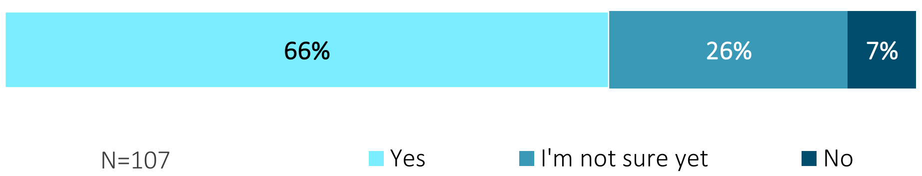
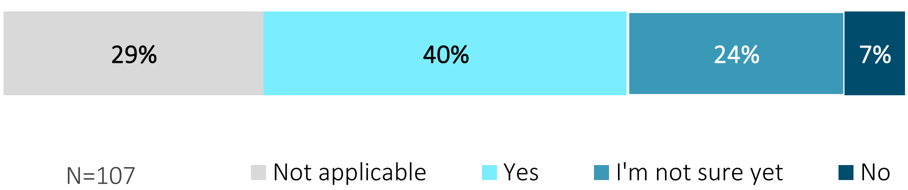


Figure 10: Respondents' perception of their organisation's ability to get by with cancelled event or project



Estimated value of impacts

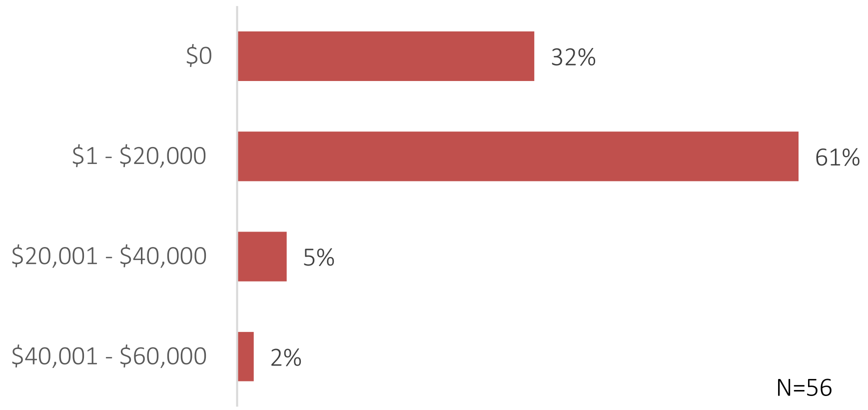
Personal impacts

Survey participants were asked "if you have had to cancel the event, project or service, in monetary terms what have been the financial impacts of this for you personally?" Because of the open-ended nature to this question there was a variety of responses, some of which could not be quantified.

For the purpose of this analysis, we have selected responses that indicated direct monetary impacts. For these respondents (N=56), there was a range of responses from no monetary impact to as high as $55,000[1]

The range of estimated impacts are displayed in Figure 11 below. Note that these figures should be treated with caution because of the difficulties accurately estimating impacts across the whole sample.

Figure 11: Estimated personal income losses (from those reporting direct monetary impact values)



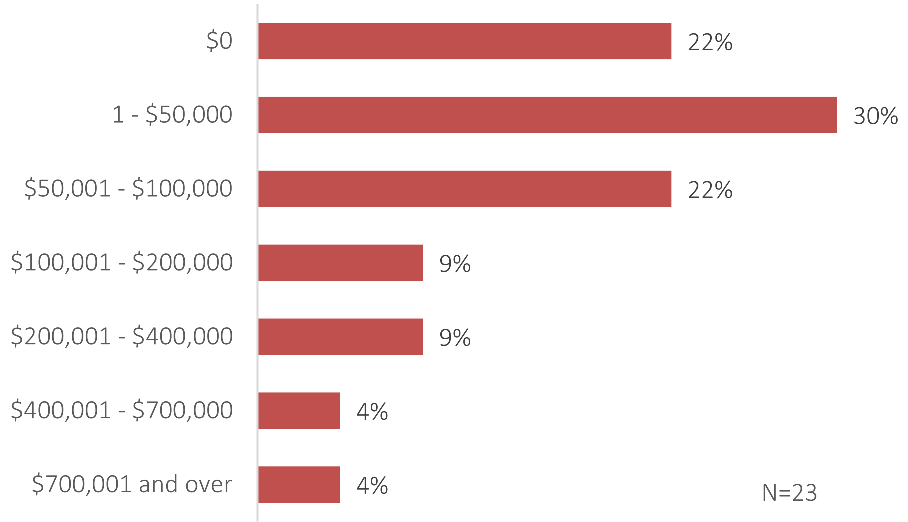
Organisational impacts

Survey participants were also asked "if you have had to cancel the event, project or service, in monetary terms what have been the financial impacts of this for your organisation?" As with the previous question, we have focused on respondents who indicated direct monetary impacts. There was more uncertainty with this question and only 23 respondents were able to provide an estimate.

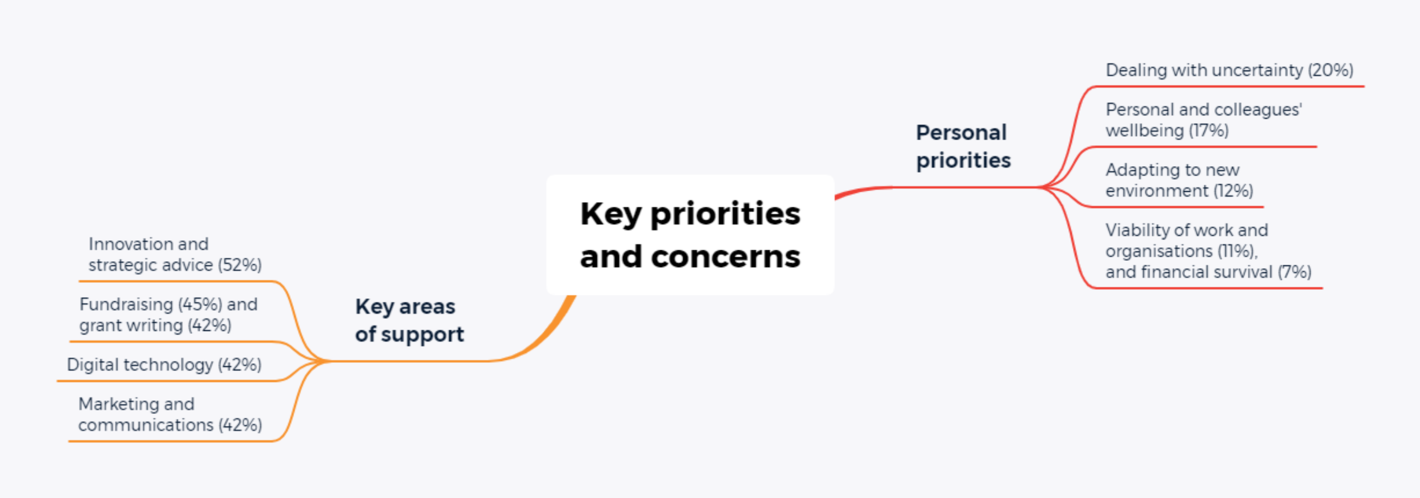
A range of responses were received, ranging from no monetary impact to $2,500,000. The range of estimated impacts are set out in Figure 12 below and similarly indicate substantial losses of income have been incurred. As with the previous figure, these should be interpreted with caution.

[1] Some of these responses suggested a range (e.g. $5000 to $7000), and a midpoint was taken as the value for the purposes of analysis

Figure 12: Estimated organisational monetary impacts (from those reporting direct monetary values)



4. Key priorities and concerns



Self-identified priorities and concerns

Participants were asked to describe in their own words their key priorities or concerns, and many respondents listed multiple priorities or concerns in response to this question (Figure 13).

Figure 13: Survey participants' key priorities and concerns

Dealing with uncertainty

The challenges of day-to-day operation, and planning for the future in a climate of continual change were raised by one fifth (20%) of respondents. For some, resuming business as usual and operating within 'the new normal' of COVID-19 restrictions, or ensuring readiness for the 'next wave' of infections were key priorities or concerns. Some spoke of difficulties navigating challenges associated with various alert levels such as event cancellations, meeting changing health and safety requirements, and the obligations of the Wage Subsidy scheme. The financial implications of, for example, cancellations or paying for spaces or services that are unable to be used was a further theme.

There was a sense from many of these respondents, particularly from those working in the events space, that dealing with long-term uncertainty was beginning to take a significant toll. The situation was described by some as frustrating, and 'a real challenge', as plans are repeatedly made and then cancelled, and events requiring any significant financial outlay, even those well in to the future, became unviable with no guarantees of them going ahead. A few respondents conveyed that the adaptations employed by some facets of the creative sector were less viable for their disciplines. One dancer, for example, shared that the need for movement together in a studio setting made longer-term remote-working unviable and that the restrictions of higher alert levels therefore severely limit the potential to develop, as well as perform, new works going forward.

> *My creative practice is affected by COVID related uncertainties and concerns. And it is difficult to plan events etc with a changing playing field. People would rather cancel than risk losing money spent on venues etc.*

> *[We need] some form of consistency about holding events, a plan for contact tracing and a plan for re-opening borders. These would give us a background of more than hugs and marshmallow to plan against.*

> *My key concerns are the ongoing impact of Auckland moving in and out of lockdown, and how live performance and event organisations are able to navigate these changes. Alongside the nervousness and risk in holding events, the need to have multiple contingency plans for the various levels is adding a huge load (both practical work and emotional) to already low-resourced organisations and practitioners.*

Wellbeing

Personal wellbeing and that of sector colleagues was front of mind for 17% of respondents. Many shared the impact of COVID-19 on their mental, spiritual and physical health, along with that of staff, fellow creatives and the wider community. Financial insecurity was causing stress and 'mental health pressure' for some, and others shared that the strain wrought by the pandemic has negatively impacted their creative process, which in turn further challenged wellbeing. Some respondents responsible for staff were prioritising maintaining their paid employment, or expressed concern for those they had needed to stand down. Keeping their teams positive and safe were also noted as important priorities.

> *[My priority is] wellbeing. Without the opportunity to perform live I feel a huge loss of self, and self-worth. I want to feel like I am contributing to the community again.*

> *The 2nd lockdown in Auckland has severely impacted many of my projects…I think this time has just revealed further the deeper issues of chronic instability that artists face. I think the mental health impacts are even more significant during this second outbreak.*

[My priority is] getting myself and my collective back into moving, writing and creating. We have been held back for far too long now and its getting dangerous for their wellbeing as well as for the future of urban pacific artists in Auckland.

[My priority is] Whanaungatanga.

Precarious funding

Concerns relating to the financial precariousness of the arts, particularly in relation to accessing funding, increased competition for resources and the loss of particular income streams, were raised by 12% of respondents. Some were concerned about the renewal of existing contracts, while shortfalls created by cuts in funding from Auckland Council and Gaming Trusts also featured in several responses. Inequity in funding distribution was a further concern for some, who felt that certain groups or individuals were continually prioritised, and one respondent felt that means testing grant applicants might go some way to addressing funding inequities. Another person expressed concern about what they saw as the short-term nature of Creative New Zealand's response to COVID-19 when they felt the impact of the crisis would be significant and long-lasting. Some respondents were worried about the financial cost of adaptation such as developing new programmes and moving models online, with one person noting that they have been unable to access additional investment to support this work.

[There are] more orgs competing for funding pool that have big infrastructure that we don't.

I'm concerned that potential financial support for the arts will be impacted because of the global financial crisis created by Covid-19. Many endowments rely on investment income.

My main concern is that Creative NZ for example seems to only fund to the same group of people, over and over again along the years.

Adapting to the new environment

Some 12% of respondents were focusing on 'providing certainty through innovation' by adapting programmes to maintain delivery to audiences and meet the obligations of their funding agreements. This group were adapting the delivery of current initiatives, as well as looking ahead and pivoting the work of their operations in 2021 and beyond. While many of these respondents were focusing largely on adapting delivery via moving offerings online, there was also a focus on agile working, on 'developing fluid strategies' to scale with demand and to seek and grow opportunities in an uncertain environment. Responses indicated that practitioners working in the events space were working particularly hard to innovate as the future of physical events was seen as highly uncertain.

Events aren't coming back so we need to find another way of generating revenue to survive.

We've had to shift our strategy entirely away from physical events, which was our biggest revenue stream before the first lockdown. Luckily we have adjust and only had one small physical event during the second lockdown, which had to be postponed but may be entirely cancelled.

The viability of my work, organisation or business going forward

Some 11% of respondents expressed concerns about the longer-term sustainability of their work, organisation or business. Surviving was an 'all-encompassing concern' for some in this group.

A number were struggling to keep staff employed and meet fixed overheads such as rent, with little or no income. Others felt able to survive in the short-term, yet were worried that further cancellations in 2021 would seriously threaten their viability. One maker was concerned about the impact of further lockdowns on the retail outlets they supply, and a representative of a production company worried they might fall through the cracks because despite there being very little demand for their services, 'we're in that weird place in the ecosystem where most of the funding isn't targeted towards us'.

> *Presently we are reasonably stable with an OK balance sheet but by the end of next year even if all goes well our balance sheet will be severely depleted and our ability to take risk in 2022 will be gone.*

> *I'm concerned that there will continue to be not enough revenue for an actor in Auckland, and that I'll have to take more and more hours in retail, rather than hours into acting, the thing I spent $35,000 on to get my BA.*

Immediate financial survival

Dealing with the impacts of personal financial insecurity was a key priority or concern for 7% of respondents, many of whom expressed anxiety about where their next pay check will be coming from, or how they might meet their basic expenses such as mortgages, rent, bills or providing for their families. One person noted the toll this sense of precarity was having on their mental wellbeing.

> *My mortgage holiday (deferral) ends in two weeks and I will not be able to pay it.*

Future of the creative sector

A further 7% of respondents expressed concern about the precarity of the creative sector as a whole. A number of this group expressed concern that their particular scene would not survive another lockdown, and many saw a reduction in financial support by way of funding and 'a falling away of support from collectors and patrons' or public engagement as the most significant threat.

> *I'm concerned that potential financial support for the arts will be impacted because of the global financial crisis created by Covid-19. Many endowments rely on investment income.*

Other themes

Further themes were strengthening internal governance and operations (5%); selling or marketing work (5%); seeking employment (3.7%); and remaining positive and fighting despondency (3.7%).

Key priorities or concerns among Māori and Moana Oceania respondents

Key priorities or concerns that were particularly high among Māori respondents were future of the sector (30% compared to 7% of the total sample); fighting despondency and finding work (25% each, compared to 4% each in the total sample); and viability of work, organisation or business (25%, compared to 10% of the total sample).

Key priorities or concerns that were particularly high among Moana Oceania respondents were wellbeing (29% compared to 17% of the total sample); and strengthening governance and operations (25%, compared to 5% of the total sample).

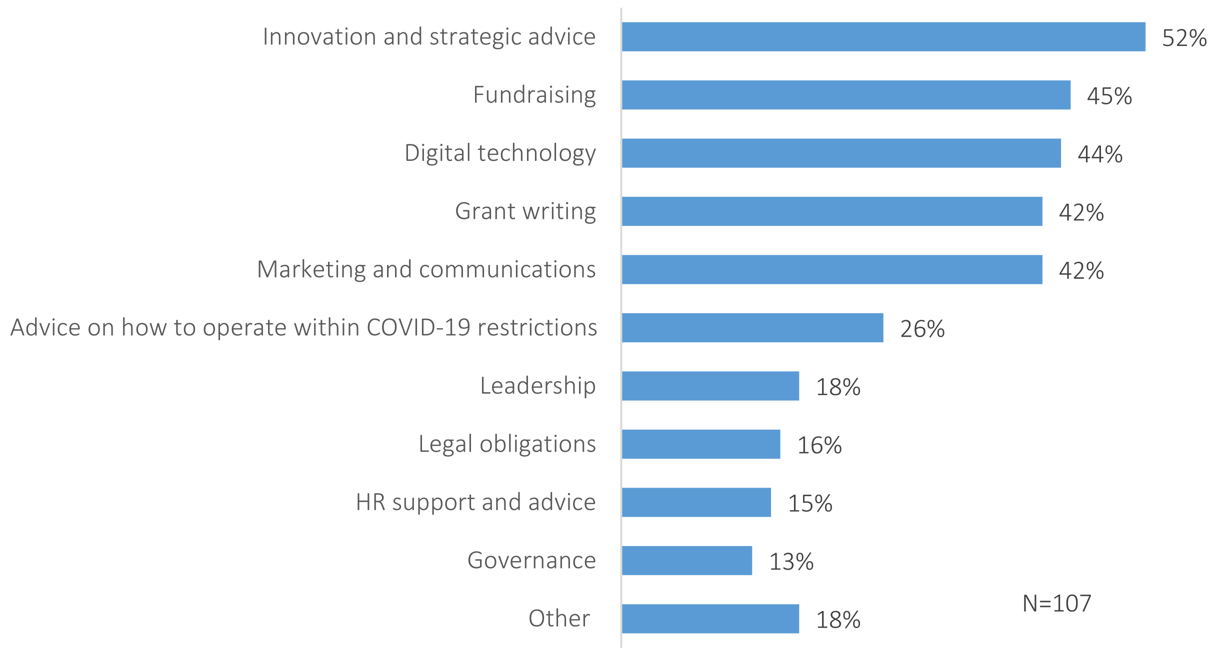
Areas of support needed

There were many areas that participants identified as areas where they most needed support. Over half (52%) currently needed innovation and strategic advice. Another 45% wanted support with fundraising and 44% wanted support with digital technology. Some 42% identified grant writing as an area for assistance along with the same proportion needing support with marketing and communications. A further 26% needed advice on how to operate within COVID-19 restrictions. Leadership was highlighted as an area for support by 18% of participants. Some participants needed support with legal obligations (16%), HR advice (15%) and governance (13%).

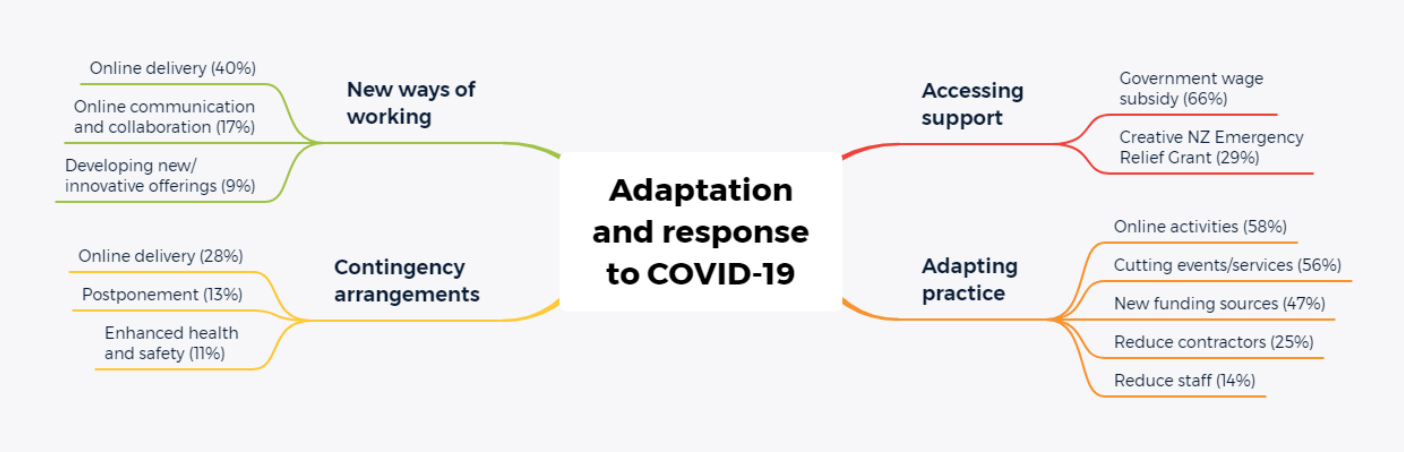
A further 18% of participants indicated they needed other forms of support. These included Government support through policies and clarity, funding, underwriting, and childcare; as well as not applicable for some respondents.

More Māori identified a need for digital technology and grant writing support (61% for each). No substantial differences were notable for Moana Oceania respondents.

Figure 14: Most needed areas of support currently needed due to COVID-19



5. Adaptation and response to COVID-19

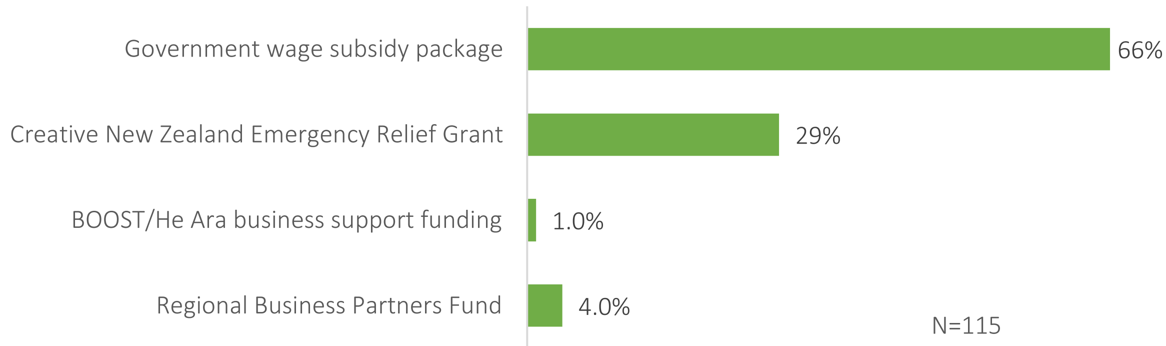


Accessing support

Participants were asked which COVID-related grants or support they had been able to access or are intending to access. This was a multiple-choice question, enabling participants to select more than one grant. Figure 15 below indicates that the Government Wage Subsidy (66%) followed by the Creative New Zealand Emergency Relief Grant (29%) were the most accessed.

Among Māori respondents, 85% had accessed the wage subsidy and only 14% had access the emergency relief grant. Among Moana Oceania respondents, 64% had accessed the wage subsidy and 20% had accessed the emergency relief grant.

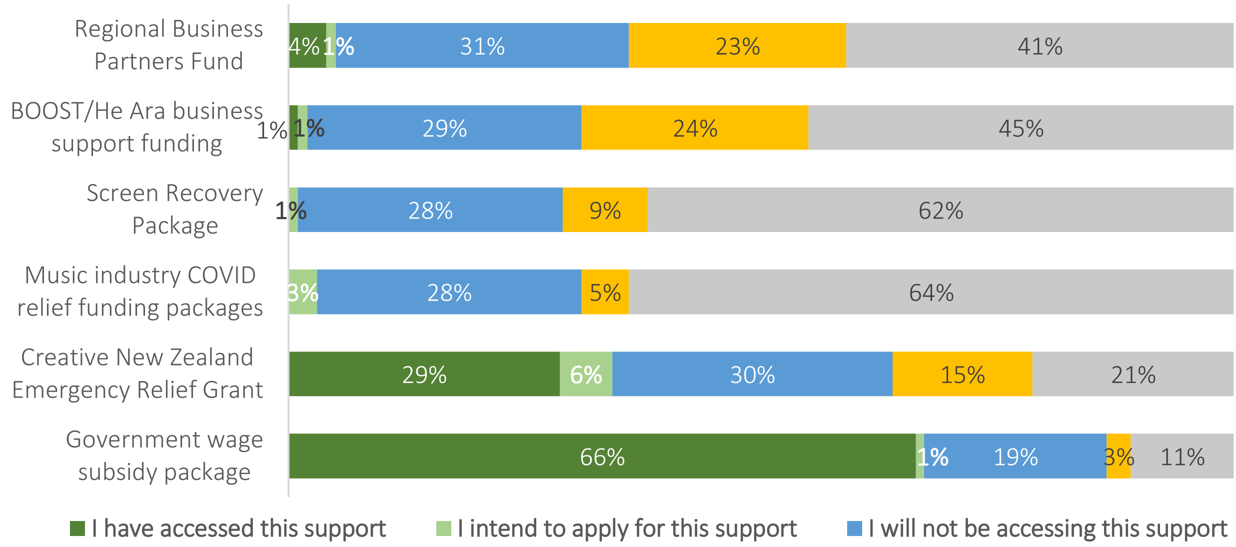
Figure 15: Type of grant or support accessed



Note: Multiple responses possible

From the remaining options for grants or support, over half did not find these grants applicable or did not intend to access them (Figure 16).

Figure 16: Access to COVID-related grants or support



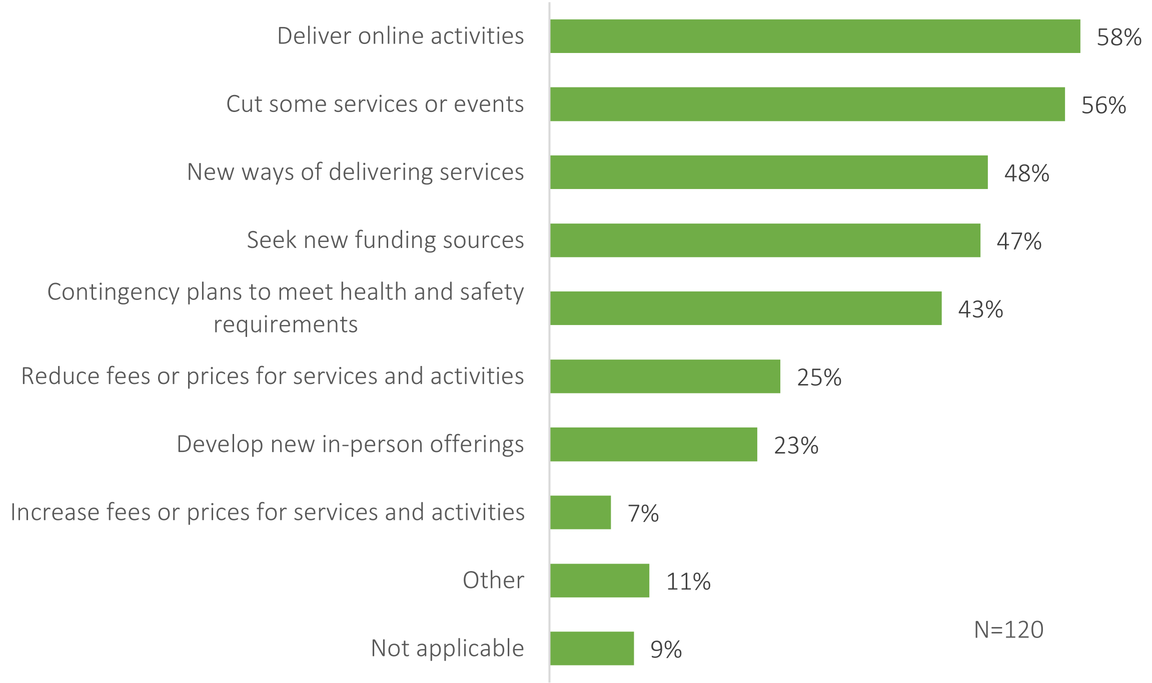
N=119 for Government wage subsidy, N=108 for all other funding/grants

Adapting practice

A range of steps were taken by participants to adapt creative practice due to COVID-19. Over half of respondents (58%) delivered some form of online activities, and 56% had to cut services or events. Nearly half (48%) found new ways of delivering services and 47% had to seek new funding sources. Some 43% of respondents had to make contingency plans to meet health and safety requirements. A further 25% had to reduce fees for services whereas 7% increased fees. Some participants (23%) developed new in-person offerings. The remainder of respondents selected either other (11%) or not applicable (9%) (Figure 17).

Among Māori respondents, 71% had cut some services or events; and 64% had shifted to delivering online events and new ways of delivering services. Among Moana Oceania respondents, only 45% had cut services or events, and 73% had delivered online activities and new ways of delivering services.

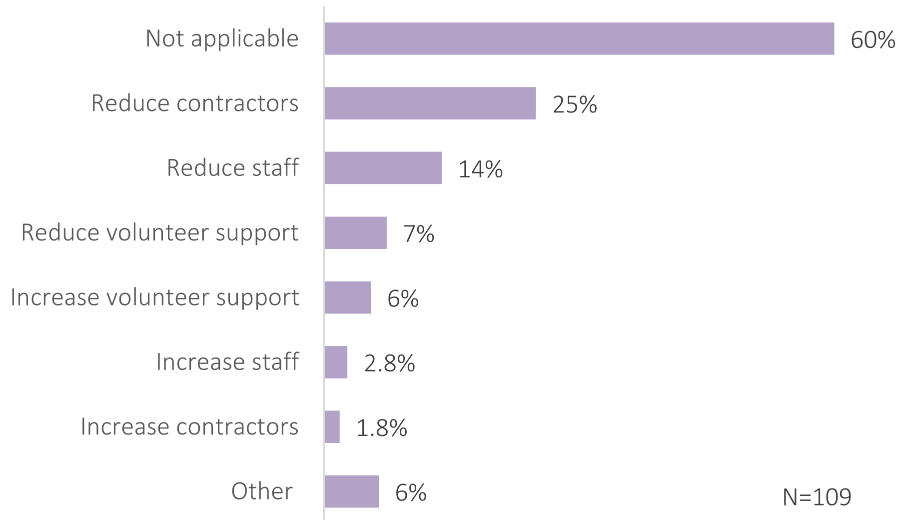
Figure 17: Steps taken to adapt to COVID-19 for creative practice



Staff and contractors

There were a range of steps taken by participants that had staff or contractors. Most responses that were applicable had to reduce contractors (25%) or staff (14%). A further 7% responded that they had to reduce volunteer support and 6% said they had increased volunteer support. A small percent had increased staff (2.8%) or contractors (1.8%) (Figure 18).

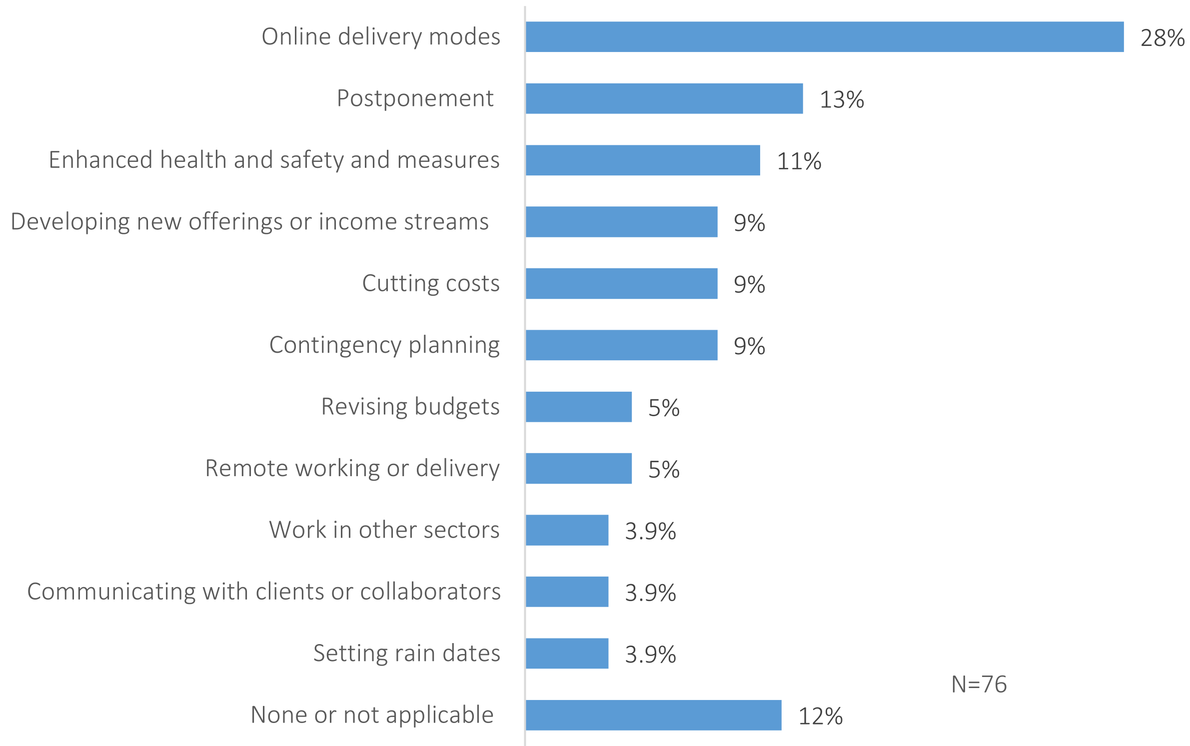
Figure 18: Steps taken to adapt to COVID-19 for staff and contractors



Contingency arrangements

Survey participants were asked to describe in their own words the contingency arrangements they had put in place in response to COVID-19. Summarised themes are detailed in Figure 19.

Figure 19: Contingency arrangements put in place by survey participants



Online delivery modes

Developing digital options for creating and presenting creative work was reported by 28% of respondents. While some of these people spoke in general terms about using Zoom, moving their work online or sharing work digitally, many were more specific.

Developing alternative digital offerings was seen as key to enabling continuity of service. Many of those using online delivery modes were engaged in teaching practice, with close to one-fifth of respondents sharing they had used digital tools to deliver workshops or classes. Others had developed an online presence to keep audiences in place or to increase revenue. One person had established an online shop, and another initiated a YouTube channel for members to showcase work.

While the majority of these practitioners had already implemented digital working or delivery at the time of responding, some were in the early stages of exploring online options. A few respondents shared that COVID-19 had increased their willingness to engage in digital spaces or had driven them to increase capacity via upskilling or upgrading technology. For some respondents, developing digital modes of delivery would enable them to switch between online and face-to-face engagement, depending on lockdown levels.

> *Online delivery of digital workshops and also released free content. Initiated you tube channel for members to showcase work.*

A major shift into the digital realm with more focused attention and prioritisation on content development as an outcome in addition to works for the stage.

We're ensured to shift our main offerings to online offerings that continue to have impact for the rangatahi we work with.

Digital options for creating and presenting work.

Postponement

Some 13% of respondents had, or were planning to postpone, pause or reschedule events or activities in response to COVID-19, with a few people sharing that postponement was the only contingency arrangement they had put in place. Most of these respondents had already postponed at least one activity at the time of responding, with one person having placed all events on hold as their organisation was losing money when the country is in alert level 2 or higher.

Moving dates to next year and seeing what happens.

I mainly have postponed. I am fortunate that my artistic practice has been successful enough that I have a level of financial stability. And the wage subsidy.

Enhanced health and safety and measures

A further 11% of respondents were implementing activities and precautions to improve safety in a COVID-19 environment. Examples of such measures included practising social distancing, contact tracing, mask-wearing and regular cleaning and sanitising, particularly when working in groups in contexts such as rehearsals. A few people noted that they had limited the size of gatherings or groups, including strict numbers in classes.

Following safety guidelines and keeping wellbeing front and centre.

Any arrangements we may have are governed by the Covid Levels. We can't operate under Level 3, but have reopened with limited seating and extra hygiene measures etc under Level 2.

Developing new offerings or income streams

Pivoting by shifting focus, diversifying income streams, offering a wider range of platforms for engagement with clients or broadening their portfolio was noted by 11% of respondents. One person was focusing on overseas markets, while others were re-aligning their businesses to ensure they can continue to operate under higher level lockdown restrictions, such as focusing on training and other activities that can be conducted remotely.

I am an artist and musician. It is easier to exhibit artworks at the moment than present concerts, so I am leaning on my art-making; recognising that choral music is really going to be difficult until there is a vaccine.

A major shift into the digital realm with more focused attention and prioritisation on content development as an outcome in addition to works for the stage.

Cutting costs

For some 9% of respondents, reducing costs was a key part of securing their activity. The majority of these people spoke in general terms of 'reducing outgoings' or that they had 'cut all unnecessary expenses'. However specific examples included 'contacting all suppliers to negotiate fees', moving business premises from commercial leased space to a home-based site, and reducing outsourcing or the use of contractors, such as doing one's own editing.

> *Online shop and self-created illustration and publishing to save money.*

Contingency planning

A further group, accounting for 9% of respondents, specified they had engaged in a formal contingency or business continuity planning process, with one person sharing that this had been an iterative process, with 'many plans written and rewritten'. Many of these respondents shared specific details of their plans, including 'planning for delivery under all alert levels', protecting themselves with clear contractual arrangements and 'reimagining budgets'. The importance of flexibility and innovation was highlighted by one person, whose organisation's contingency plan involved national broadcasting of their Festival.

> *Create a project plan that is agile and has flexibility to respond to different funding scenarios and creating event programme that caters for different alert levels enabling us to continue our event in different capacities regardless.*

> *Business Continuity Plan with risk assessed across all restriction levels. Clear contractual arrangements regarding government restrictions with all contractors. Rapid development of digital products to increase revenue.*

Other themes

Some 12% of respondents provided answers such as 'none' or 'not applicable' in response to this question. Further themes were revising budgets (5%); remote working or delivery (5%); work in other sectors (3.9%); communicating with clients or collaborators (3.9%); reducing client or participant numbers (3.9%); setting rain dates (i.e. second date for a scheduled event in case of postponement, 3.9%); releasing free content (2.6%); negotiating with suppliers (2.6%); and developing other (non-digital) delivery modes (2.6%).

Contingency arrangements among Māori and Moana Oceania respondents

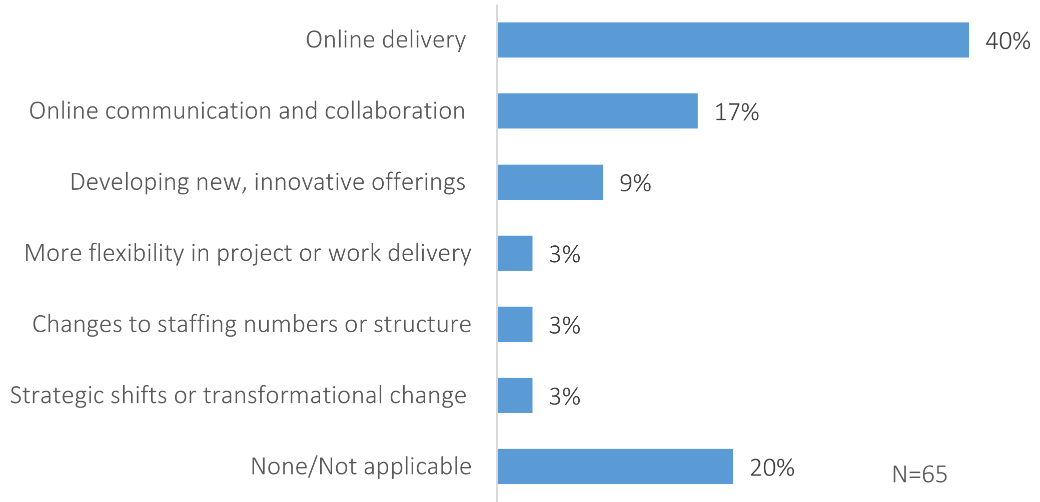
Contingency arrangements that were particularly high among Māori respondents were work in other sectors and setting rain dates (30% each compared to 4% each of the total sample); and remote working (24%, compared to 4% of the total sample).

Contingency that were particularly high among Moana Oceania respondents were contingency planning (29% compared to 9% of the total sample); and revising budgets (25%, compared to 5% of the total sample).

New ways of working

Participants were asked to describe in their own words any new ways of working that they had adopted because of COVID-19. Summarised themes are detailed in Figure 20.

Figure 20: New ways of working for participants because of COVID-19



Online delivery

Some 40% of respondents continued to engage with clients, audiences or customers via digital platforms, with a number noting the success of this approach which was seen to foster good engagement and broaden reach. Teaching, workshops and tutorials were the most frequent example of public-facing activities that were continuing to be delivered online, with digital transmission of workshops described a 'huge shift' for some organisations. Zoom was frequently noted as a preferred platform to deliver workshops and classes, with one person also using the software for rehearsals. Performing via livestream was another popular form of digital delivery and new area of skill development. One respondent had pivoted from offering performers purely live opportunities with filming for archival purposes, to full Livestream and video editing services. Another technical practitioner was now carrying out online Zoom recordings in addition to in-person services. A few respondents were continuing to deliver virtual events and creating content individually for the same project from different spaces, selling artwork via Instagram, creating films to present online, and conducting remote sessions with clients were further examples of online delivery.

> *We will continue digital workshops - hugely popular and kept our 1600 members around the country connected and supported over lockdowns.*

> *I'm currently organizing a "New Zealand stage" for an overseas festival based in Memphis that I usually work at and streaming in bands.*

> *Online has been a huge shift for us with good engagement, broadening our reach and increasing our audience.*

> *Making animations to be shared digitally, instead of making physical work for gallery space. This has really developed my art practice and animation is currently my new art medium.*

Online communication and collaboration

The ongoing use of online tools for communication, collaboration, project management and creative process such as rehearsals was raised by 17% of respondents. Many were continuing to hold meetings or hui via Zoom rather than in person, and one was hosting readings and meetings via a blended mix of digital and face-to-face delivery, with some people present physically and others attending via Zoom. Mural and Monday.com were other communication and project management tools employed. For a few respondents, this shift was in part driven by enhanced efficiencies such as reduced travel time and costs. A high level of access was seen as another positive outcome of working in this way. However, while many saw transitioning to digital communications as a positive step, a small number of respondents noted drawbacks, including that 'the lack of face to face engagement is impacting on the ability to build and develop relationships'.

> *We have staged our acting classes and rehearsals via Zoom. Committee meetings have also been held via Zoom. Our office manager was set up to run our office from home.*

> *I have already previously relied on phone calls and online meetings as I tend to travel a lot - now that more people are getting used to this way of working this has actually saved me some money on petrol by not having to go to face to face meetings*

Developing new, innovative offerings

A further 9% of respondents described how they had pivoted to develop new offerings, often tailored to conform to new COVID-19 level restrictions, or catering to specific groups or small numbers of participants. Examples of such activities included 'tailored, intimate viewings, with plenty of collaborative add-ons', 'personal presentations for artists with empathy at the core' and contracting services to other organisations.

> *Have transformed projects to match COVID-era recommendations, for example changing a pop-up restaurant into a deliver-at-home meal kit.*

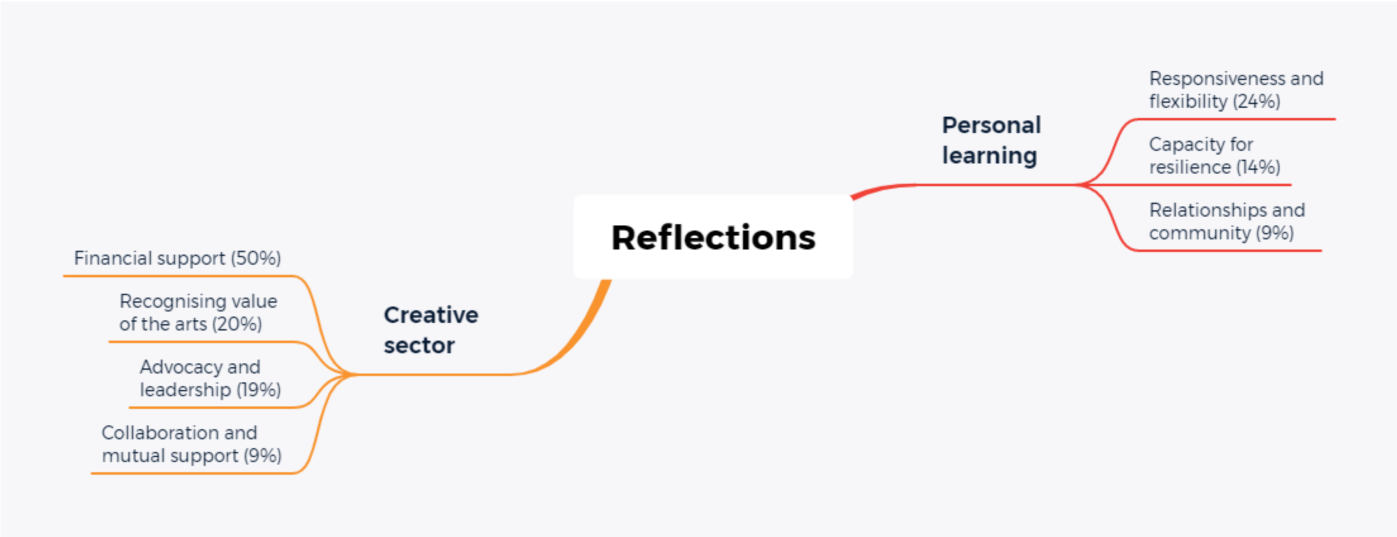
> *[I am] contracting services to other organisations.*

This response was notably high among Māori respondents, raised by 30%, compared to 9% of the total sample.

Other themes

20% of people provided answers such as 'none' or 'not applicable' in response to this question. Further themes present within multiple participant responses were more flexibility in project or work delivery (3%); changes to staffing numbers or structure (3%); strategic shifts or transformational change (3%).

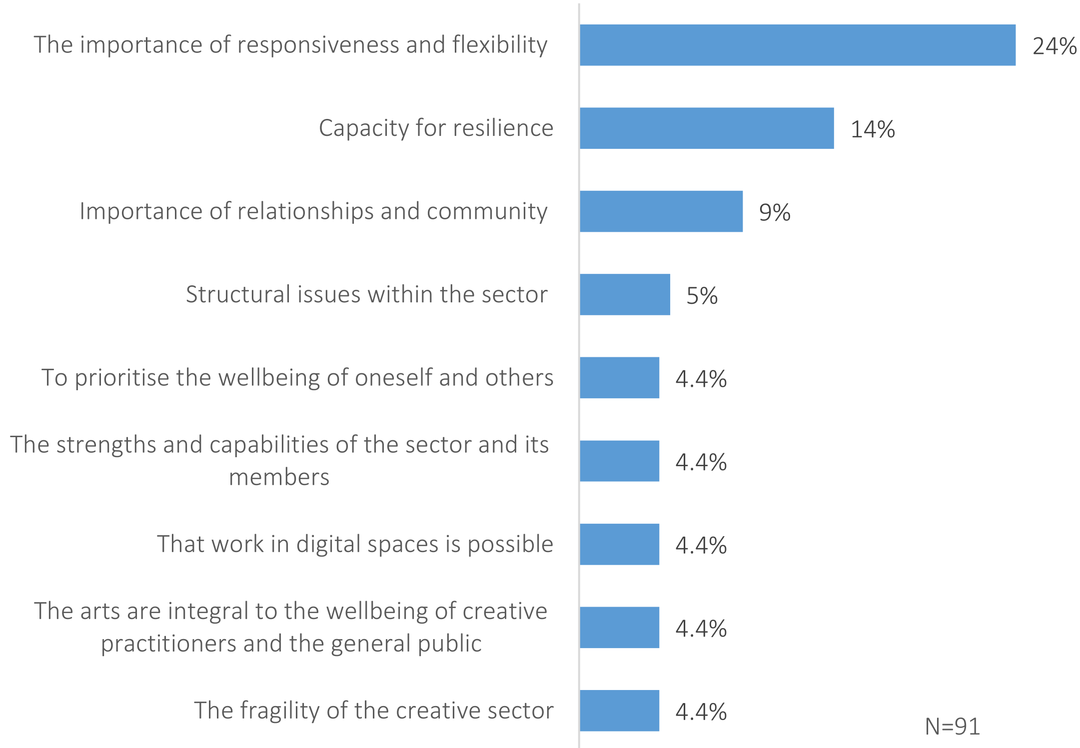
6. Reflections



Most important learning

Participants were asked to describe in their own words their most important learning during this time (N=91). Summarised themes are detailed in Figure 21 below.

Figure 21: Most important learning from COVID-19 experience



The importance of responsiveness and flexibility

Some 24% of respondents reported learning of the importance of agility, adaptability and versatility. Many felt that such skills were key for individuals and organisations to effectively respond to the rapidly changing environment of COVID-19. As one respondent put it – you must 'mutate to survive'.

Respondents working in the events space had learnt to accept that plans can and do change, ‘that we can't control what happens’ and must therefore be open to new ways of working and ‘thinking in a different way’, particularly if wishing to avoid cancellation or postponement. A few shared examples of these new ways of working, such as performing work outdoors, or broadcasting festivals. The value of being nimble enough to make decisions quickly was also highlighted, as was the importance of communicating any decisions or changes well to affected stakeholders.

> *There are no guarantees in theatre. Even the best-laid plans and revised plans can be thwarted by others’ actions, such as the Government’s COVID level changes. We have needed to be flexible, able and willing to plan ahead for every eventuality and quick to respond to changes in the country’s and the city’s circumstances.*

> *The need to remain flexible and adaptable with a plan A and B-Z in your back pocket. I already knew this but in a way, it’s been proved during this period - the creative sector leads the way in showing how innovation, flexibility and adaptability is crucial when facing 'the future of work'.*

> *This is a paradigm shift in society - we really need to be super innovative in our thinking to make sure we can survive.*

Capacity for resilience

A further 14% of respondents described either developing the skills and attitudes that foster resilience or discovering a previously unknown capacity for resilience in the face of uncertainty and adversity. The power of perseverance featured strongly, with respondents sharing they had learnt to ‘be brave’, ‘to dig deep’ and to not let uncertainty stifle their creative practice. As one respondent put it ‘[I learned] that you have to keep going, self-funding and surviving no matter the lack of funding available’. The relationship between self-care and resilience was also highlighted, as was the importance of supporting staff to maintain their wellbeing.

> *We can survive with some creative thinking. We have extended ourselves beyond our means and can do more with the less we have.*

> *That the many ‘knocks’ over the years has taught us resilience and that our company is much loved by our audience and didn’t want to see us fall over.*

> *That it is important to understand how to manoeuvre an everchanging landscape to deliver artistries to both digitally and physically.*

Importance of relationships and community

The value of whanau, community and looking out for one another was an important learning for 9% of respondents, with one person describing how the pandemic had fostered a ‘resetting of priorities’. Respondents described how COVID-19 had highlighted the importance of co-creation, collaboration and learning from each other. The pandemic was also seen to have fostered generosity, empathy and had taught some that support is available if you ask for help. A few people shared that good relationships and working together for mutual support had been key to surviving this challenging time, because ‘your community goes a long way when things are really awful’. Some respondents also shared the platforms or tools that had helped to foster this sense of community and shared experience, including accessing online hui, podcasts and articles.

People are the most important aspect - building good relationships is crucial.

The need to be versatile, empathetic and collaborative. Everyone is going through the same thing, and we need to band together as a sector to get through this.

Importance of whānau [and] reaching out.

Importance of planning for unexpected

Some 7% of respondents highlighted the need to be prepared for any eventuality, either by mitigation planning, savings or maintaining a varied practice or skill base. Some had learnt the value, both of planning ahead for a range of scenarios, and of being prepared to change those plans if required. One respondent highlighted the importance of having strong relationships with funders and finding ways to deliver value to them, even if deliverables need to change.

To always have a back-up plan and not rely on live work to get through. Perform through multiple avenues including online options.

Structural issues within the sector

A further 5% of respondents felt that COVID-19 had highlighted the presence of structural issues, and 'vast inconsistencies', the privileging of certain groups and practitioners, and wasted money within the creative sector. A few felt that such issues heightened the need for individual resilience because some arts sector bodies were not up to the task, with one person describing Creative New Zealand as 'inward-looking and out of step'. Another respondent reflected that during the pandemic 'those with the most did the least, those with less did more'. There was a feeling amongst this small group that there has been a lot of positive talk such from organisations in response to COVID-19, but most are ultimately shallow in delivery. One person commented on what they saw as the inequitable distribution of shovel ready funding and the Wage Subsidy, both within and beyond the creative sector. For a small number, the pandemic presents an opportunity to reflect on and address such structural issues, and potentially be an agent for positive change.

Working in theatre predominantly, I'm tired of seeing the same people working in the same groups, let alone the same spaces. Projects should be seeking out isolated practitioners and creating sustainable spaces for everyone. Instead, it feels like a lot of the same "We're in this together!" being said from behind closed doors.

To look out for individual artists and connect into the independent sector, because arts organisations have done a poor job of staying connected and some have shown their true colours (placing bottom-line and the needs of their organisation as a business above and beyond their people and community).

Other themes

Further important learnings were to prioritise the wellbeing of oneself and others (4.4%); the strengths and capabilities of the sector and its members (4.4%); that digital work is possible (4.4%); that the arts are integral to wellbeing for both the public and practitioners (4.4%); the fragility of the creative sector (4.4%); that audiences value creative work (3.3%); the value of face-to-face engagement (3.3%); that time to focus on practice is important (2.2%); insight into personal characteristics (2.2%); and the need to understand and honour your core purpose(s) (2.2%). There were also a significant number of individual responses to this question that could not be categorised into any overarching theme.

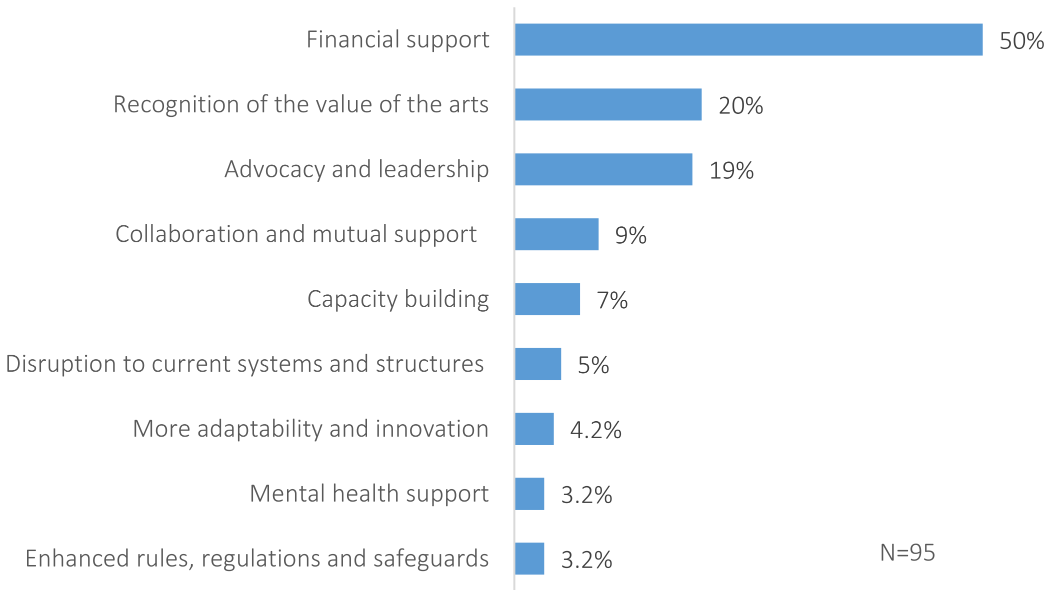
Many of these less common themes were more strongly evident among Māori and Moana Oceania respondents. Relationships and community were raised by 38% of Māori, compared to 8% of the total sample; prioritising the wellbeing of self and work in digital spaces were each raised by 25% of Māori, compared to 4% of the total sample.

Value of face to face engagement was raised by 30% of Moana Oceania respondents, compared to 3% of the total sample; highlighting strengths and capabilities was raised by 24% of this group compared to 4% of the total sample; and capacity for resilience was raised 23% of Moana Oceania respondents, compared to 14% of the total sample.

Reflections for the creative sector

Participants were asked to describe in their own words what is most needed for the creative sector as it faces the future. Summarised responses are detailed in Figure 22.

Figure 22: Participant reflections on needs of the creative sector as it faces the future



Financial support

A need for increased financial investment in the creative sector was raised by a substantial 50% of respondents. Many in this group spoke in general terms about the need for more or better funding, resourcing, financial support or assistance for creatives and arts organisations. A few respondents wished to see more buyers and sponsors supporting the sector. There was a general sense amongst this cohort that the arts are undervalued in terms of funding and that funding streams must be sustainable to enable sector members to programme with surety.

> *[We need] surety of investment by government and a cross government approach to supporting the creative economy.*

Increased grant funding and active support of the arts by the council, through promotion of the city's arts activities. A city is nothing without a healthy arts sector.

A few wished for prioritised support made available to creatives without access to private funding, for those who are economically or socially disadvantaged or for independent or 'sole trader practitioners who don't have legal, financial or emotional support networks'. Targeted support for the live performance sector was another desire highlighted by several respondents, who saw this industry (including venues, independent events, performing arts and musicians) as particularly vulnerable, both due to the impact of COVID-19, but also by 'the current prevailing idea' that all mediums should be moving to digital platforms. Some respondents wished to see creatives more involved in programming and decision making regarding resourcing – to bring about 'better funding decisions…made by real artists not by bureaucrats or politicians'. One person hoped that funding 'administered by experts who really understand the area of the arts that they are working with' could lead to better decision making and stronger working relationships between funder and those who deliver creative outputs.

The live performance sector needs government and funders to share the risk of staging live work in this environment - underwriting productions in case of cancellation, providing some level of insurance - to increase the confidence of operating and planning into the future.

[We need] opportunities for creative leaders, entrepreneurs and producers to co-design programmes of activities etc. to meet short and long-term needs; from this process (which could happen a couple of times a year), strong project ideas can move from design to pre-start to start-up with seeding investment from TTTIA.

A few respondents wished to see funding made available for marketing, such as promotion for events. As one respondent noted: 'we need money, and we…shouldn't be required to spend it all on creating a project that's great and nobody sees it'. Others wished to see subsidies for venues or funding for infrastructure costs.

Innovation and adaptation, including access to new ways of creating and delivering work in a COVID-19 world, was another area some felt required targeted financial support, either by way of grants or low interest loans.

There was also a desire for more flexibility, including in the classification and criteria of recipients and for untagged funding, 'similar to the Covid-19 self-employed payment' to 'help keep creatives afloat' during these uncertain times.

Clear and transparent decision-making structures or frameworks, and a concerted effort to promote funding opportunities more widely, were other shifts respondents wished to see from funding bodies. The need for a universal basic income, artists wage or artists benefit for those working in the sector was expressed by a handful of respondents, and one person wished to see more paid opportunities for artist residencies and online performances.

Addressing inequity in funding distribution was seen as another important area of focus. Some respondents expressed a desire to see funding spread equitably across all genres and levels, from established to emerging practitioners – because 'we see same artists working everywhere'. A few wished to see greater investment in upcoming makers and innovators in order to 'shake up what's being produced' and try to draw audiences in with 'material that feels different and exciting and challenges form'. On person suggested that funding process could be made more equitable by omitting the names of applicants on applications.

> *Better access to funding - currently the demand is higher for CNZ support and it seems people who have never been in the loop for gaining funding for projects before are still being missed out.*

> *Targeted funding for all areas of the supply chain, rather than hoping trickle down funding will work.*

Recognition of the value of the arts

One-fifth, or 20% of respondents talked about the need for greater awareness of and recognition for the legitimacy and value of the arts sector at all levels of society, including government and greater visibility and recognition in the media. Some voiced desire to see the arts prioritised to the same degree as sport is in this country and 'a shared national understanding' its contribution.

Many respondents spoke of the potential for the creative sector to foster dialogue, celebrate diversity, impact social change, promote wellbeing, provide vital commentary, express culture and heritage and further important conversations about climate change and human rights. Some of these respondents felt that the pandemic has made it 'abundantly clear that the arts are a vital part of our society' and a sector with potential 'be at the forefront of the new normal'. For this group, COVID-19 presented an opportunity to raise the profile of arts in Aotearoa and highlight the integral role of the sector in rebuilding the economy.

> *Leadership, security and knowing the creative sector is valued and plays a huge role in the overall wellbeing of people.*

> *[We need] acknowledgement that our contribution is important.*

> *Consistent support from the government and recognition in particular of the role that writers play in developing new ideas that can reflect our unique circumstances in the world…The support for arts educators is also underwhelming in terms of training opportunities and yet schools rely heavily on the arts to promote themselves, they clearly create a sense of community and belonging but arts access for young people depends on your post code.*

> *kia kaha, kia maia, kia manawanui! Arts Matter!*

Advocacy and leadership

A further 19% of respondents talked about the need for strong advocacy, leadership and guidance on behalf of the creative sector as a whole. There was a desire for strong and 'visionary leadership', 'clearer strategies' 'an active arts minister' and 'cheerleaders as opposed to gatekeepers'. Some expressed a desire for 'more diverse voices' representing the sector. One person wished to see a 'changing up' of leadership so that the sector might learn from grass roots and community-led leadership, and another felt the sector would benefit from having leadership roles taken up by those working in the sector. The need for sector leadership to play a greater role in advocating for the role and importance of arts was a further theme. Some respondents felt that sector leadership should work to coordinate and connect sector members to foster collaboration and make good use of resources. A range of views on Creative New Zealand were expressed, with one person describing their support as 'wonderful - quick and very responsive' and another calling for new, effective leadership at the agency.

> *Not just silo companies, and not some loosey goose collaborative approach. Someone just stand up and demonstrate a smart vision.*

> *We need a consolidated voice, better data (both qualitative and quantitative) to influence policy and strategies, and better communication channels from the sector to MCH/CNZ and vice versa.*

> *A properly led industry-wide advocacy group. Not a self-serving clique, as seems to be the case at the moment. Government needs to listen to our particular expertise, which is in bringing people together safely in a live situation, not dictate how we can/can't operate based on theoretical modelling from academics.*

Collaboration and mutual support

Some 9% of respondents felt the sector would benefit from a greater sense of collaboration, togetherness, inclusion and mutual support. There was a desire for less competition and more partnership working to solve issues, grow audiences and share resources, such as COVID-19 plans. A few felt that coordination, led by sector bodies would support this work, offering opportunities to connect regionally as well as to work across regions.

> *A collective support from one another to each other and from our funders/supporters. Continued kōrero and understanding is the only way forward.*

> *A greater ability to work with those whose mindsets and approach differs from yours. Aotearoa talks a big game about community, but practitioners tend to freeze up when faced with the idea of working alongside new people. We need to be given the skills to work with new creatives, new styles, and be resilient in the face of ambiguity. There's a lot of judgement and isolation right now, and it stings twice as much when the social media messaging is largely a false "be kind and stick together!"*

> *[We need]* mahi tahi.

This theme was notably evident among Moana Oceania respondents, raised by 22% compared to 9% of the total sample.

Capacity building

More capacity building within the sector was suggested by 7% of respondents. Digital skills including support to develop digital offerings was seen as an important area for development, with other suggestions including planning for 'resilience and recovery', soft skills, career support, mentorship, support for arts educators and 'educational support for emerging artists with nowhere to go'.

> *Mentorship in helping arts to go online. It would have been great to offer art classes via internet but I don't have the IT skills.*

Other themes

Further themes present within multiple participant responses were disruption to current systems and structures (5%); more adaptability and innovation (4.2%); mental health support (3.2%); and enhanced rules, regulations and safeguards (3.2%). This last theme was notably evident among Moana Oceania respondents, raised by 30% compared to 3% of the total sample.

Shifts in experiences/feedback from the April 2020 survey

Only limited comparisons can be made between the findings from this survey, conducted in September-October, and those of the earlier April survey. As opt-in surveys, rather than randomly sampled surveys, the survey populations may have some different characteristics that limit comparability, and there were changes in many questions (as well as new questions) introduced for this survey. However, some general observations can be made.

It's clear that even with the shorter and less intensive lockdown from August, many were still impacted by COVID, and many are still struggling with the impacts of the earlier lockdown. Income sources and opportunities remain disrupted and cancellations/postponements are an ever-present factor. There does not seem to be the same level of long-term cancellations in this survey compared to the April survey, but this may indicate that fewer are planning long-term in the current environment.

This inability to plan ahead (and in turn, to be able to rely on income from upcoming events) was appearing to have an impact, including on groups or individuals that had fared reasonably well thus far. Contractors also indicated they were affected by this move away from long-term planning, and felt that some promoters were more inclined to cancel than take the risk of investing heavily in something that may not go ahead.

A common theme in this survey is adapting to a new environment, recognising that COVID will not be dispelled in the near future, and embedding these new ways of working into development and delivery of work going forward.

Responses suggest that people are more confident of getting by financially than in April. However, many are reporting financial losses, and in this survey, one in four respondents are unsure about being able to get by and face an uncertain future. The wage subsidy remained heavily drawn on, and the Creative New Zealand emergency relief grant is a new source of support that was not available in April and is being used.

There are similar priorities and concerns being raised in both surveys, both personally and for the creative sector. This survey also highlights a significant degree of adaptiveness and reflection on individual capacity in the creative sector, in the midst of ever-present uncertainty.

Respondents in the September survey appear to be focusing on dealing with the uncertainty that is part of 'the new normal' of COVID-19. This includes finding ways to resume BAU and operate within COVID level restrictions, implementing health and safety practices and ensuring readiness for the 'next wave'. Pivoting programmes and adapting to the new environment were also now key priorities, with innovation seen key to maintaining audiences, funding deliverables and providing certainty in uncertain times.

7. Conclusions

Six months on from the first COVID-19 lockdown, this survey reveals that the creative sector in Tāmaki Makaurau is cautiously rebuilding, with some optimism and resilience emerging, yet still being buffeted by the challenges that COVID brings.

Those participating in the survey appear to some extent to be in a stronger position to get by than the previous April survey, yet for many, uncertainty about the viability of their personal earning capacity, or that of the organisations they're part of, remains an ongoing issue.

The survey findings highlight the challenges of long-term planning, in a context where cancellations or postponement are an ever-present reality. In response, many in the creative sector are building in contingency planning, shifting to online delivery where feasible, and working day to day to maintain viability and momentum. The inability to plan for the long term appears to be keenly felt across the sector, with an underlying focus on the short-term horizon and innovating to maintain audiences and deliver creative offerings.

Although the underlying numbers are small, the survey findings suggest a disproportion impact among Māori and Moana Oceania respondents, particularly in terms of cancellations, uncertainty and ensuring viability. At the same time, these groups have also shown a willingness to adapt and build new forms of delivery.

From the challenges of COVID-19, the survey offers important reflections for creative practice, including the need to be responsive and flexible in the light of challenges and opportunities; the importance of relationships, whānau and community; and the capacity that many were able to draw on to navigate the turbulent seas that have in many respects defined 2020.

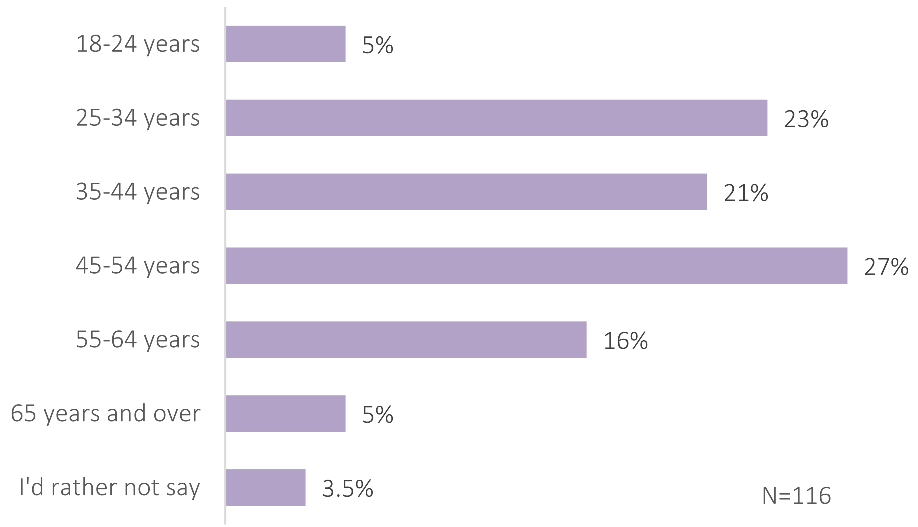
For the creative sector, the findings reinforce those of the earlier April survey, particularly recognition of the value of the arts, the importance of advocacy and leadership, and the need for continued financial support.

Appendix 1: Demographic profiles of survey participants

One-third of respondents (29%) were male and two-thirds (64%) were female. There were 6% of respondents that identified as gender diverse and one respondent indicated they would rather not say.

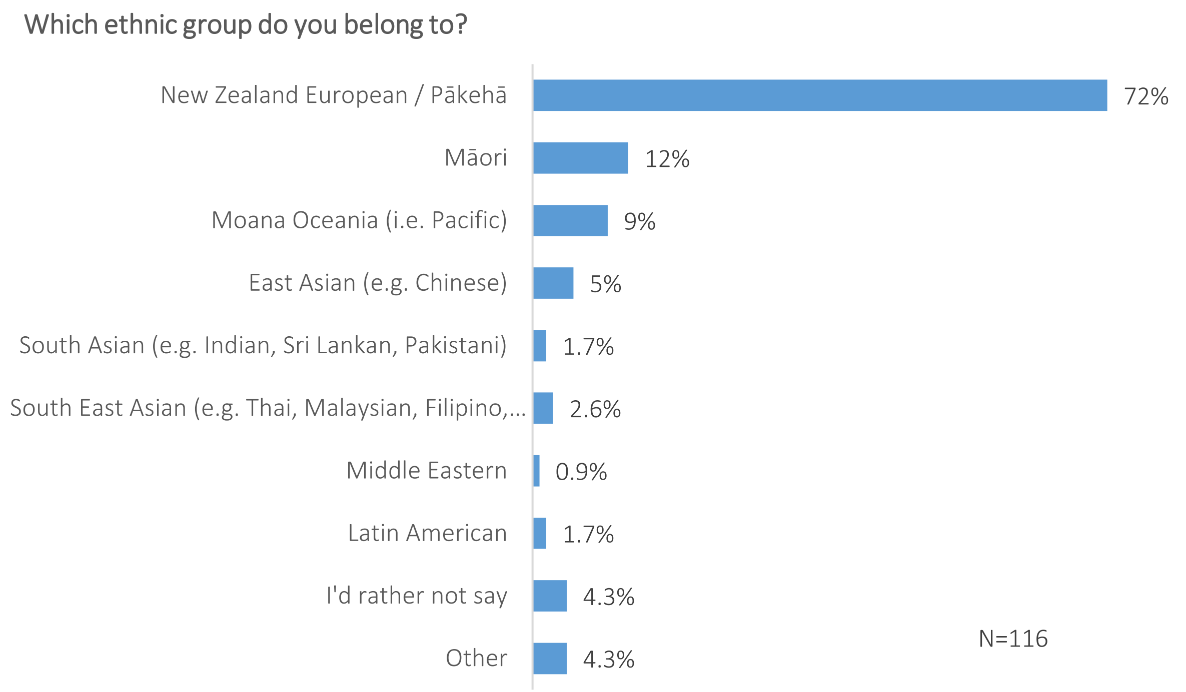
Nearly half of respondents were aged 35 to 54 years, those aged between 25-34 years represented 23% of respondents and 55 to 64-year olds represented 16%. Participants between 18 to 24 years and 65 years and over were each represented by 5% of respondents.

Figure 23: Age ranges of survey respondents



Some 72% were European/Pākehā, 12% were Māori, with the remainder spread across a range of ethnic groups.

Figure 24: Ethnicity of respondents (multiple responses possible)



From the 14 participants who identified as Māori, three identified with more than one iwi. There were 4 Māori who said it was not applicable or didn't answer.

The iwi identified with Māori participants are as follows: Tainui, Te Āti Awa ki Taranaki, Ngāti Kahungunu, Ngāi Tahu, Ngāpuhi, Ngāti Maniapoto, Ngāti Porou, Rongowhakaata, Te Whānau-ā-Apanui, Ngāpuhi-nui-tonu, Ngāti Awa and Te Aitanga-a-Māhaki.

There were 21 participants who identified as Moana Oceania (Pacific), 29% identified as Samoan, 19% identified as Cook Island Māori. A single person identified as Tongan and another identified as Fijian. In responses to the 'other' category, all but one specified Auckland, recognising it to have one of the largest Pacific populations in the world.

Figure 25: Ethnicity of respondents who identified as Moana Oceania (Pacific)