State of the Arts Survey

Pōneke - Wellington, February-March 2022

Report on survey findings

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Acknowledgements

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

Executive Summary

This report presents the findings from an online survey of those in the creative sector in Pōneke, between the period of February-March 2022. This is the third in a series of surveys intended to track the state of the arts sector in Tāmaki Makaurau; other surveys are being undertaken concurrently in other regions as well as a national survey. There were 191 respondents from Pōneke and the results from those respondents are discussed below.

Creative freelancers dominated the Pōneke sample: More respondents reported being a creative freelancer (59%) than any other role in the creative sector. This was followed unpaid creative individuals (24%), and leaders of a creative not-for-profit (18%).

Performing and visual arts were strongly represented in Pōneke respondents: Pōneke respondents were active in many creative areas. Performing arts was the most prominent area reported (53%), followed by visual arts (40%) and music (28%).

Pōneke respondents have shifted to become even more pessimistic about their financial position: Respondents rated their outlook on whether their creative work would support their financial position in the next 12 months (from 1 meaning very pessimistic to 6 meaning very optimistic). Compared to the September-October survey, pessimism increased from 64% to 71% and optimism fell from 33% to 26%, indicating a declining trend in optimism since the initial June-July survey.

Fewer respondents expected to either 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 decreased (from 33% to 26%) and those who expect staff or contractor numbers to stay the same or reduce had increased (from 42% to 45% and 10% to 15% respectively).

Pōneke respondents view on achieving their creative goals shifted to become more pessimistic: Respondents rated their outlook on whether they would achieve their own or their organisations' creative goals in the next 12 months (from 1 meaning very pessimistic to 6 meaning very optimistic). Compared to the September-October survey, pessimism increased from 49% to 64%, and optimism fell from 47% to 34%. This indicates a declining trend in optimism since the initial June-July survey.

More Pōneke respondents reported that audience appetite for their creative work had decreased: With 42% reporting audience appetite being less than usual, 25% reporting that it was the same and 20% reporting that it was more than usual. Overall, the average rating was 1.8 out of 3 (from 1 meaning less than usual to 3 meaning more than usual). This is slightly lower than the average rating for September-October (2.1).

In this survey respondents shared the things they were most worried about in 2022 in relation to their creative work or the work of their organisations. The most commonly raised concerns were:

- The impacts of the pandemic on their creative work and/or the creative sector more broadly.
- Whether they would have enough money to live on and/or whether their organisations or businesses would survive.
- The extent to which there was enough financial support for the creative sector and about how funding was allocated.

- The impacts of COVID-19 restrictions such as limits on audience numbers, border restrictions, vaccination mandates and passes as well as worries about keeping themselves and others safe.
- Ongoing cancellation of events with people reporting both the financial and emotional costs.
- The ability to connect with audiences and potential buyers of creative work; Some were worried that audiences will not return and that low visitor numbers meant few purchasers of art and other creative works.
- Not being able to do creative work because they needed to do other paid work to make ends meet or because there were few opportunities for performing.
- The loss of highly skilled people from the creative sector.
- How the stress of the pandemic was impacting on their well-being, particularly mental well-being, and of others around them.
- Systemic issues such as which groups are in decision-making positions in the creative sector and the design of funding structures.
- Other themes included: the lack of value placed on the creative sector; the difficulty with trying to develop a career in the creative sector and venues closing.

Respondents shared the things they were feeling most positive about in 2022 in relation to their creative work or the work of their organisation. The following themes were identified:

- Their creative practice and/or their ability to at least do some work.
- The lifting of COVID-19 related restrictions, for example, after the Omicron wave and returning to normal.
- Community connections and support within the creative sector plus opportunities for partnering and collaboration.
- Having the time and space to develop new works, explore ideas or study.
- The potential for innovation and creativity and the creative sectors' role to engage with diverse communities.
- Audience enthusiasm for the creative industries including international interest.
- Financial and government support they had received and their ability to keep creating.
- Some people shared that they had nothing that they felt positive about.
- The resilience of creative people and the sector.
- Other themes included: any opportunities for performing; the intrinsic value of artists and creative activities and the opportunities created by digital platforms.

1. Introduction and approach

This report presents findings from an online survey of people in the creative sectors in Pōneke conducted over February-March 2022. The survey occurred at a time when Aotearoa was operating at a 'red light' setting in response to the Omicron outbreak, and there were significant 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 and September-October 2021). Each survey contains different open-ended questions based on current issues facing the sectors. This survey's open-ended questions focused on what participants are feeling the most worried and positive about for 2022 regarding their creative work.

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 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 sector. The sampling approach means that a response rate cannot be accurately calculated.

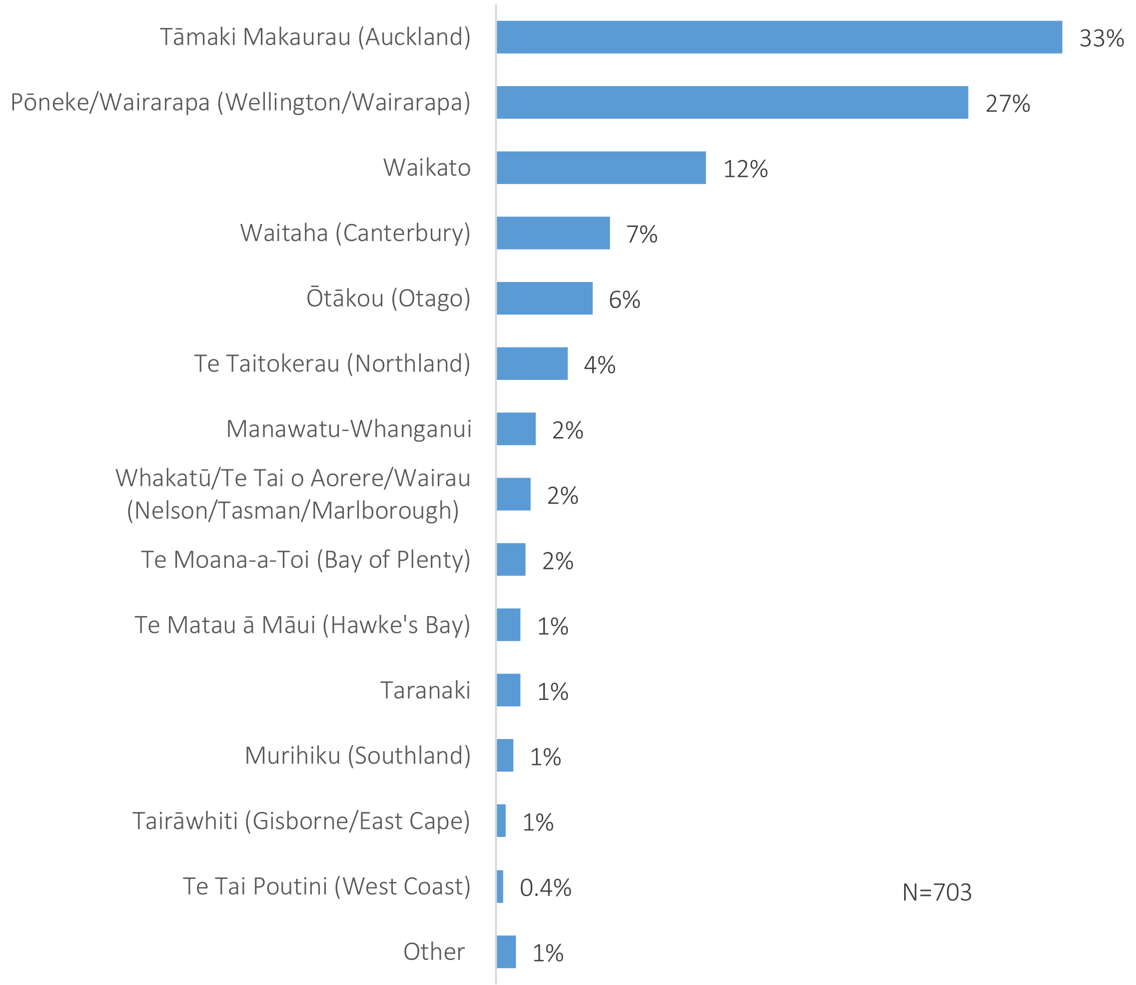
In total there were 707 responses. Pōneke had the second highest number of responses with 191, which accounted for 27% of responses in the survey (Figure 1). There was a greater response number compared to the previous survey (530 responses) however, Pōneke respondents declined from 34% to 27% (N=178 Pōneke respondents September-October 2021 survey). This may be a result of a larger sample size bringing the proportion of respondents by region in line with the national population spread. A further regional breakdown between the most recent surveys can be found in the Appendix (Figure 11).

Due to the overall similarity of number of responses by region, sector, and role from the surveys, some broad comparisons can be made between the surveys.

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

This report focuses on results for the Pōneke/Wairarapa (Wellington/Wairarapa) region.

Figure 1: Where respondents were mainly based in Aotearoa



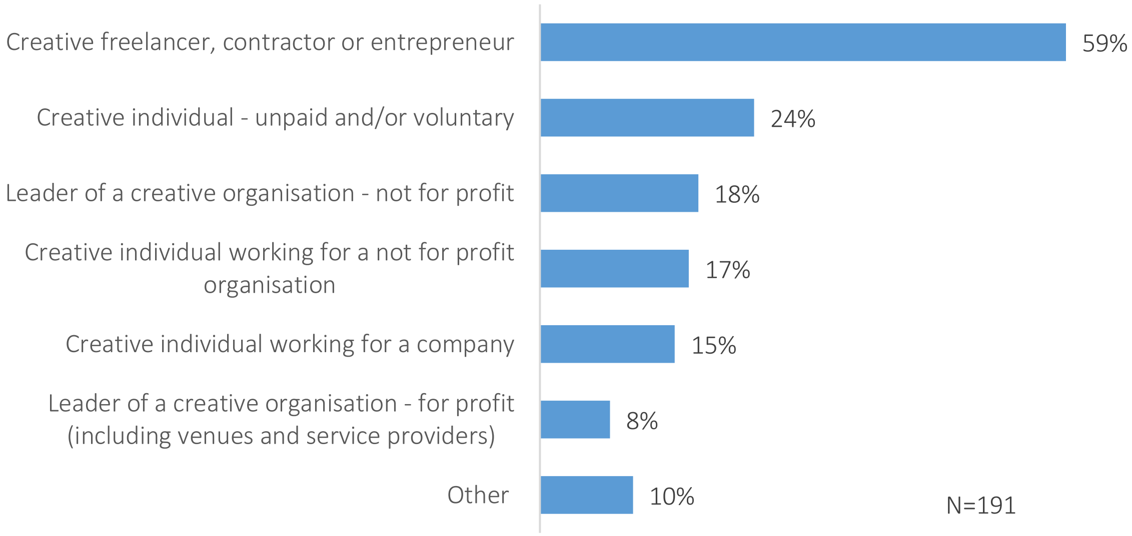
2. Roles of creatives

Creative freelances dominated the Pōneke sample

Most respondents in the Pōneke region were creative freelancers (59%), unpaid creative individuals (24%), and leaders of a creative not-for-profit (18%). Other respondents were creatives working for a not-for-profit organisation (17%), creative individuals working for a company (15%) or leaders of a for-profit creative organisations (8%). The remaining respondents who selected 'other' mentioned roles such as the education sector, arts administrator, or student (10%) (Figure 2).

Compared to the previous survey there were more leaders of a creative not-for-profit (increase from 5% to 18%) and a smaller representation of leaders of a creative for-profit (decreased from 15% to 8%). The proportions of the remaining roles were similar between the two samples. A further breakdown of roles between surveys can be found in the Appendix (Figure 12).

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

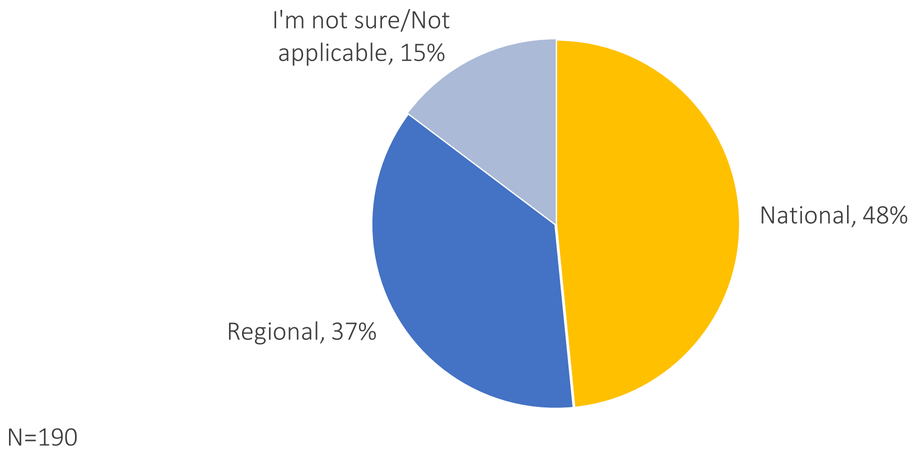


Note: Multiple responses were allowed

The work of creatives in Pōneke was mostly nationally focused

Of the respondents based in Pōneke 48% had work that was nationally focused. A further 37% had regionally focused work and 15% responded that they were unsure, or it was not applicable to them (Figure 3).

Figure 3: Whether respondents work was nationally or regionally focused

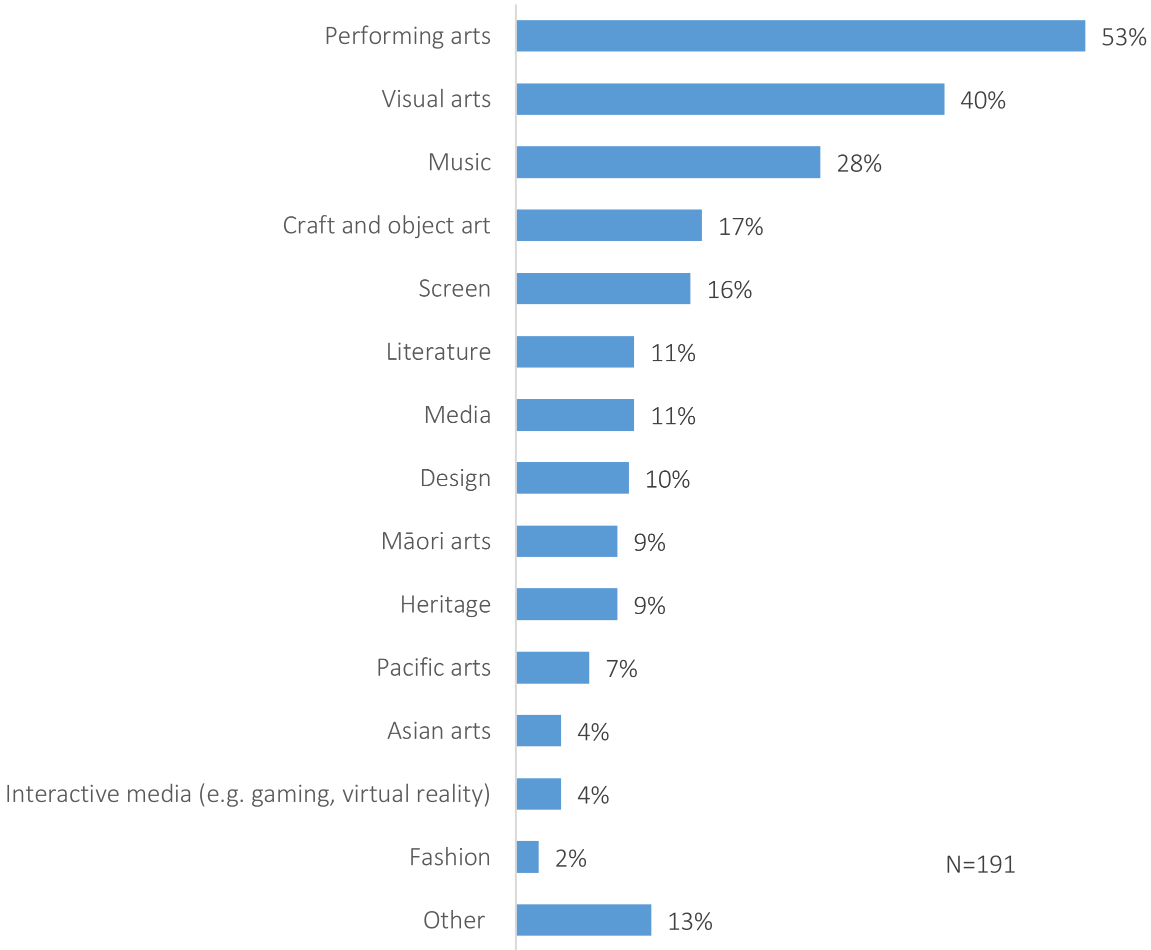


Performing and visual arts were strongly represented in Pōneke respondents

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 performing arts (53%), followed by visual arts (40%) and music (28%). Some respondents were involved in craft and object art (17%), screen (16%), Māori arts (9%), and Pacific arts (7%). A full breakdown of creatives roles in Pōneke can be seen below in Figure 4.

A comparison of creatives areas between surveys can be found in the Appendix (Figure 13).

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



Note: Multiple responses were possible

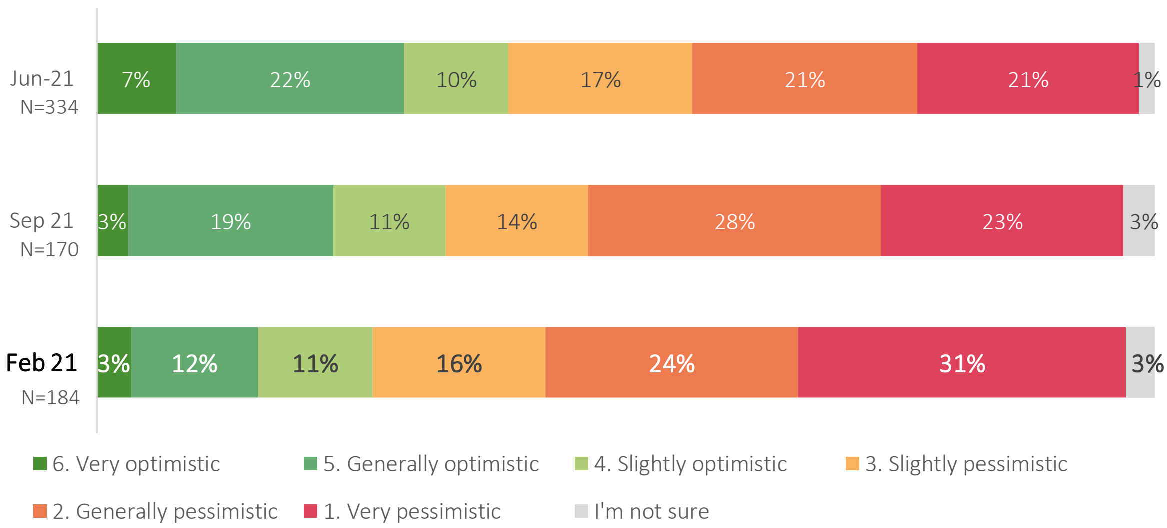
3. Financial position

Pōneke respondents have shifted to become even more pessimistic about their financial position

Creatives were asked how optimistic or pessimistic they were that ‘their work in the creative sector will support their financial position in the next 12 months’. Respondents were asked to rate the statement on a scale of 1 to 6, where 1 was ‘very pessimistic’ and 6 was ‘very optimistic’. Compared to the September-October survey, pessimism increased from 64% to 71% and optimism dropped from 33% to 26%. This indicated a trend of increasing pessimism since the June-July survey (Figure 5).

Overall, the average rating was 2.6 out of 6 in the latest survey, compared to 2.8 in September-October and 3.1 in June-July.

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

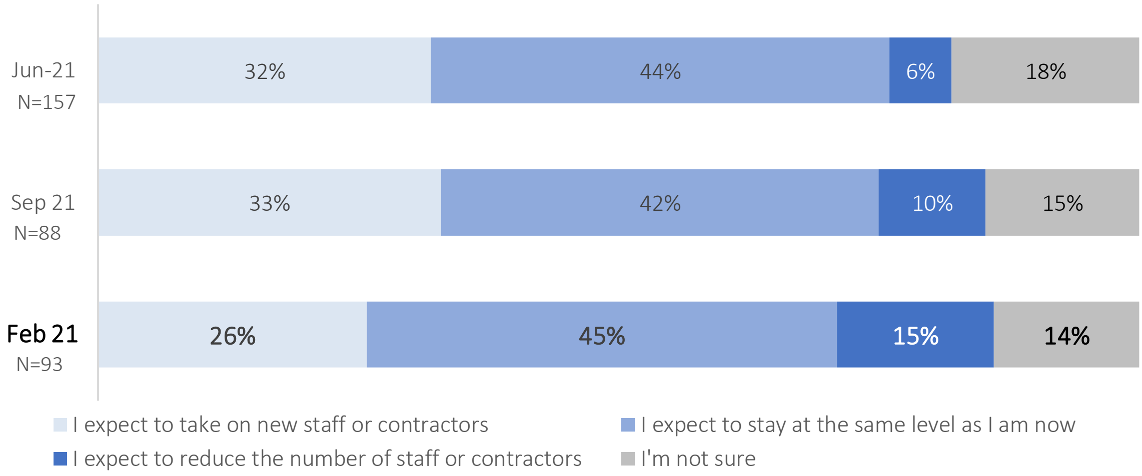


Fewer respondents expected to either increase their current staff or contractor numbers, compared to the previous survey

Respondents were also asked if they expected to take on new staff or contractors in the next 12 months: this question applied to 49% of respondents (N=93). Nearly half of respondents expected staff or contractor numbers to stay the same (45%), followed by some creatives who expected it to increase (26%). There were a some who expected to reduce the numbers of staff or contractors (15%), and others did not know (14%).

shows that the number of respondents who expect to take on new staff or contractors had decreased (from 33% to 26%) and those who expect staff or contractor numbers to stay the same or reduce had increased (from 42% to 45% and 10% to 15% respectively). shows that the number of respondents who expect to take on new staff or contractors had decreased (from 33% to 26%) and those who expect staff or contractor numbers to stay the same or reduce had increased (from 42% to 45% and 10% to 15% respectively).

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



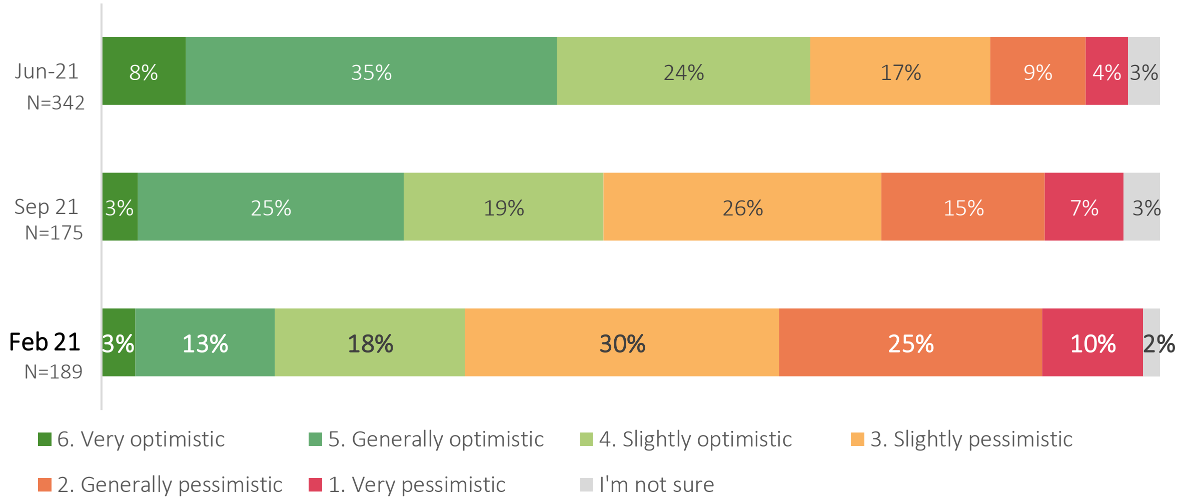
4. Creative position

Pōneke respondents view on achieving their creative goals shifted to become more pessimistic

Creatives were asked how optimistic or pessimistic they were about achieving their own or their organisations' creative goals in the next 12 months. Respondents were asked to rate the statement on a scale of 1 to 6, where 1 was 'very pessimistic' and 6 was 'very optimistic'. Compared to the September-October survey, pessimism increased from 49% to 64%, and optimism dropped from 47% to 34%. This indicates a trend of increasing pessimism since the June-July survey (Figure 7).

Overall, the average rating was 3.1 out of 6, compared to 3.5 in September-October and 4.0 in June-July.

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

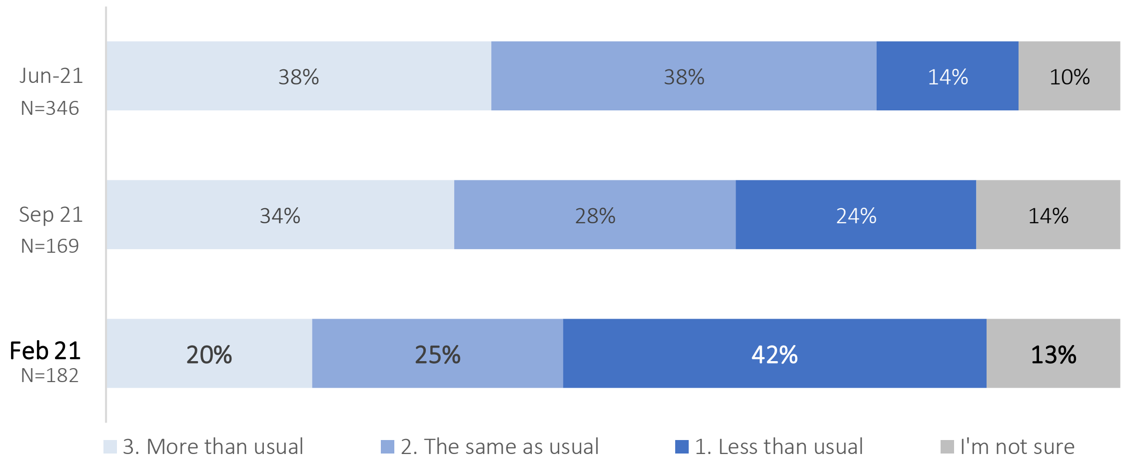


Pōneke respondents' perception of audience appetite for their creative work seems to have decreased

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's appetite for their creative work was less than usual (42%), followed by those who thought it was the same (25%). Some reported that it was more than usual (20%), and some were not sure (13%).

Overall, the average rating was 1.8 out of 3 which suggests that perceived audience appetite was at a moderate level. This is a decrease from the average rating of the September-October survey (2.1) and the June-July survey (2.3), indicating a trend of increasing pessimism (Figure 8).

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

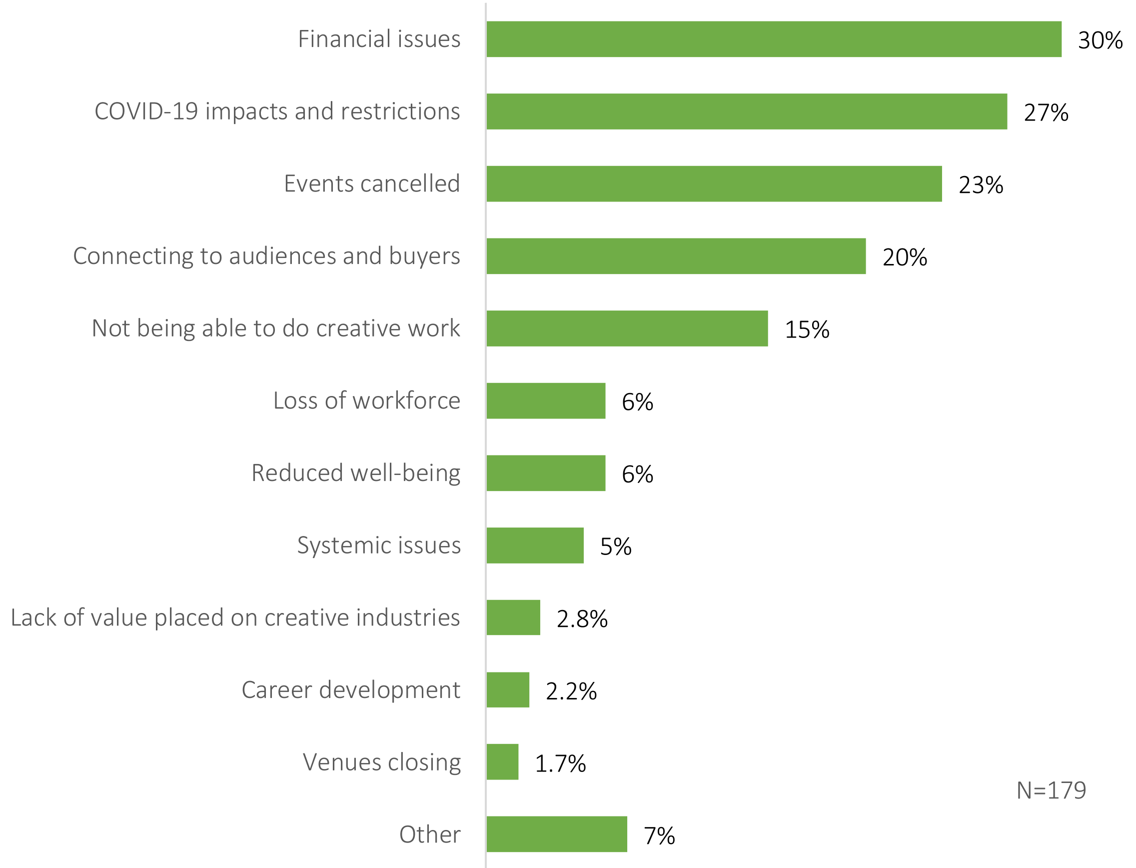


5. Areas of concern in 2022

Respondents were asked: "Please let us know what you are most worried about for 2022 in regards to your creative work, or the work of your organisation". Overall, 179 people responded to this question. Their responses were coded and Figure 9 below show the percentage of responses within different themes.[1]

[1] A single response could be coded into multiple themes if more than one issue was identified.

Figure 9: What are you most worried about for 2022 in regards to your creative work, or the work of your organisation?



Almost of all the worries expressed by respondents related in some way to the pandemic.

Financial issues

Almost one third of respondents (30%) in Pōneke/Wairarapa were most worried about financial issues. People were worried about what they saw as a lack and/or inadequacy of funding or financial support for the creative industries. They expressed concern about whether there is enough funding and if they would be able to access it.

> *Funding for groups such as I run are often complex to come by and have low success rates due to competition. Often, even when successful the money isn't enough to really pay creatives properly for their time and effort, or to plan out a year.*

Some were most worried about how funding was allocated and felt that it wasn't getting to everyone who needed it.

> *Not being eligible for the covid relief grant. A lot of my freelance work doesn't have contracts. I issue an invoice for labour, but without contracts there's no real proof of work that I might have had.*

People reported that they were worried about having enough income especially when unable to go to events.

> *Being able to support the costs of creating & recording music with live shows + the merch sales that come with them (that always exceed online sales in my experience). The recent alert level change has decimated my income for the next few months, with no gigs from now till June at the earliest - it's a scary time. While I am grateful for the recent arts package, I believe a consistent wage subsidy is needed to survive this time.*

Others were worried about the viability of their businesses.

> *Whether we will survive and whether our artists can continue practicing their artform while trying to earn a living (which means normal paid work and not work in the performing arts).*

Other financial worries included not being able to afford to work in the creative sector because of low pay rates and the costs associated with making art.

COVID-19 impacts and restrictions

Just over one quarter of respondents (27%) were most worried about the impacts of COVID-19 and associated restrictions.

Respondents were worried about the public health measures (restrictions) that had been introduced in response to COVID-19.

> *Red means 100 or fewer at shows. Whilst I can probably make this work I believe many will be put off attending events until the numbers go down so I can't really afford to underwrite a tour like I really need to.*

> *Covid disruptions and general chaos, inability to plan and spend so much energy adapting/improvising in changing circumstances. Precarious situation.*

Border restrictions were another area of concern for respondent, with restrictions not allowing international cast and crew in.

Other people were worried about the general impact of COVID-19 on the creative sector.

People were also worried about getting sick from COVID-19 themselves and/or the health and safety procedures required in order to keep others safe.

> *I don't want to perform in badly ventilated rooms, while there is a covid outbreak so that means I am not going to be able to perform for a long time.*

> *Audience limits, artists and staff reluctance to perform with Omicron in the community, artists and staff being close contacts or being Covid positive and making all contributors close contacts mandating 5-10 days of self-isolation.*

Some expressed concern about not being able to work due to vaccine mandates.

Events cancelled

Twenty-three percent of respondents were most worried about the impacts from events that are cancelled.

> *Art events continuing to cancel with no support to reimburse funds spent.*

> *Working as a contractor, and hiring other staff to work on contracts, my chief concern is the high rate of bookings that defer indefinitely, or cancel in response to changing alert levels.*

Some reported that cancellations are costly from an emotional perspective.

> *I am worried that events will continue to be cancelled throughout 2022, which means that there will be no work available to me [...] I am worried that my mental health has suffered so much from my decline in my creative practice, that when I am able to get back to it, I will feel less confident in myself. I already do have a lot of self doubt because of this pandemic and reduced work load.*

Connecting to audiences and buyers

A fifth of respondents (20%) shared their worries about not being able to connect with audiences or to find people who wanted to purchase their creative products.

People were worried that audiences were staying away from live performances and wondered whether they will come back. The negative impact of the pandemic on sales was a concern for many people. Respondents noted the pandemic may prevent people from engaging.

> *Covid-19 keeping people home and not engaging with arts that aren't digital.*

> *Covid affecting audiences for live cinema screenings*

> *Sales and interest in my art and online store that supports my career has dwindled radically in the last six months. I have my first solo art show and feel stressed about investing in an art show when people may not be able to/want to turn up due to Omicron being in the community.*

Not being able to do creative work

Fifteen percent of respondents were most worried about not being able to work in the creative industries.

> *All my work's been cancelled (or tentatively postponed) so until the government announces/opens the $5k support scheme I've got no income. I'm concerned and disheartened that I am not able to do the job which I've trained for and also feel glum about my capability to do unpaid solo creative work to 'keep things going'.*

> *Arts career is over, and there are minimal job opportunities in any arts or arts adjacent industries, especially in Wellington.*

Some people reported that they are most worried about having to work in their fields in order to support themselves leaving little time for their art practice.

That I will have to abandon the idea of supporting myself with my art and go back to an office job.

My partner and I have previously existed in a tiny niche that has now effectively gone. We can not spend another year making proposals for projects that are in festivals and events that fall over. We have already begun work outside the industry and are really sad, but have to be real about this.

Loss of workforce

Six percent of respondents shared that they were most worried about the loss of a highly skilled workforce from the creative sector.

That we lose brilliant individuals to the trades sector.

En masse career-changes to pay rent.

I have left the creative sector [...]. I couldn't take the uncertainty around the industry. It was damaging my mental health as well as my financial health so I left.

Concern was also expressed about the collapse of creative organisations and businesses.

Collapse of creative organisations due to financial pressures (same goes for individuals).

I'm scared the live theatre sector is going to disappear.

Reduced wellbeing

Six percent of people were most worried how the stress of the pandemic was reducing their wellbeing and of others around them.

Burn out from constant pivoting; lack of physical audience engagement; hardship of wider sector and independent artists and practitioners

I'm worried about the mental health of artists that have to work in places they really don't want to be in order to survive and I'm worried that this will have a draining effect on the energy, efforts and exposure of our sector and those who choose to work in it.

Others also shared the detrimental impacts on wellbeing of not being able to engage in the creative arts.

The vaccine mandate has been extremely damaging to the wellbeing of the individuals I volunteer my time to support, individuals have lost key aspects of their lives that provide fundamental coping mechanisms for their well-being, many of the people I work with are in extreme mental, social and physical distress because a huge aspect of what gave their life meaning has been taken away from them.

Systemic issues

Some respondents (5%) were most worried about systemic issues that impact on the viability of the creative sector in Aotearoa / New Zealand. Some were very concerned about the overall lack of support for the creative arts.

> *Funding for groups such as I run are often complex to come by and have low success rates due to competition. Often, even when successful the money isn't enough to really pay creatives properly for their time and effort, or to plan out a year.*

One person noted that strong artists unions overseas meant that creatives are valued and earned more income.

> *The strong unions in places like the USA enable creative freelancers such as myself to earn residuals etc on everything they are ever involved in. This amounts to significant and secure income over the years and a healthier industry that makes better screen content overall because everyone inside a true 'profit sharing' system is valued and compensated adequately for their time, energy and expertise.*

People noted that way funding and financial assistance packages have been designed meant that they were not eligible for support.

> *Not being eligible for the covid relief grant. A lot of my freelance work doesn't have contracts. I issue an invoice for labour, but without contracts there's no real proof of work that I might have had.*

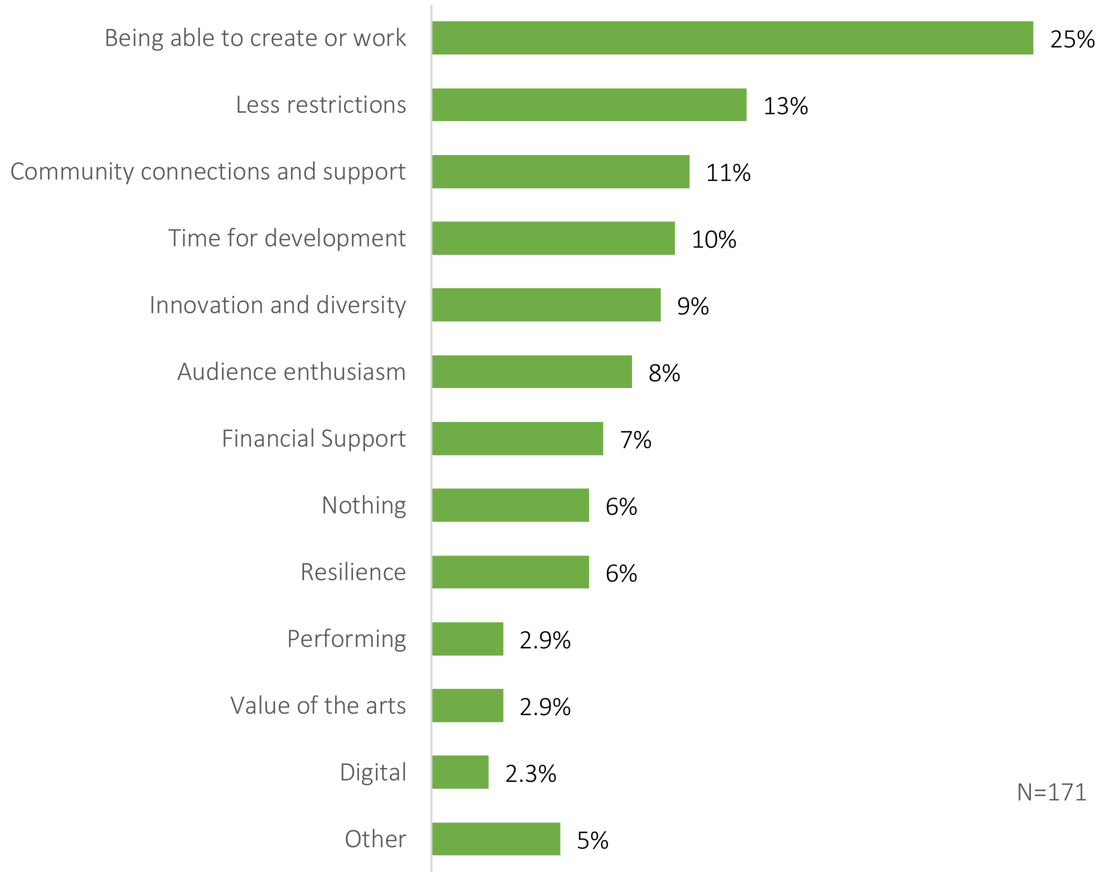
Other themes

Respondents reported that they most worried about the lack of value placed on creative industries (2.8%); the difficulty with trying to develop a career in the creative sector (2.2%) and venues closing (1.7%).

6. Areas of optimism in 2022

Respondents were also asked: “What are you feeling most positive about in 2022 in regards to your creative work, or the work of your organisation?” Overall, 171 people responded to this question. Their responses were coded and Figure 10 below show the percentage of responses within different themes.

Figure 10: What are you feeling most positive about for 2022 in regards to your creative work, or the work of your organisation?



Being able to create or work

One quarter of respondents (25%) were feeling most positive about their creative practice and/or their ability to at least do some work.

> *Spending my time working on creative projects (what I love most!).*
>
> *The creation of new work - being a writer, I can sit at home and write! And make plans for the future.*
>
> *I've just managed to launch exhibition, which has been a long labour of love.*

Less restrictions

Respondents (11%) shared that they were feeling most positive about changes to COVID-19 related restrictions. Some were looking forward to larger audiences.

> *That the restrictions might finally be eased*
>
> *The hope that restrictions on audience numbers will be lifted.*

Others were positive about the borders reopening.

I'm feeling positive that with our borders opening again that the MIQ restrictions will cease causing issues for the film industry to retain long term work.

Respondents shared that they were looking forward to a 'return to normal'.

Opening up of the country and the hope that we might return to a sense of normality. Feeling good about the high vaccination rates.

Community connections and support

People reported (11%) that they felt most positive about the community connections and support within the creative sector.

Feeling the support from fellow creatives, making meaningful connections with like-minded people.

Supportive community and connections in Wellington.

Some were most positive about opportunities for collaboration and partnership.

The possibilities of collaborating on overseas projects.

I feel positive about the levels of connectivity and collaboration that have been established since the pandemic. We now reach out to organisations across Aotearoa and the world to share ideas/solutions, when ordinarily we wouldn't have pre pandemic.   I'm excited to see where partnership working can take us in the near future.

Time for development

People felt positive (11%) about having the time and space to develop new works, explore ideas or study.

I'm feeling positive that I'm going to be studying this year so I won't have to support myself by working in this industry.

New inspiration & ongoing personal self development as an artist

Innovation and diversity

Some respondents (6%) were feeling most positive about the potential for innovation and creativity.

Looking at history, there was the 1918 Spanish Flu, and it was followed by the 1920s a great period of change and creativity... maybe we'll get that?

Time for thinking; opportunity to innovate; shake things up; try new things

People were also feeling positive about engaging with diverse communities.

New ways of thinking creatively about reaching different audiences.

Audience enthusiasm

Respondents (8%) are feeling positive about audience enthusiasm for the creative industries. People reported that when audiences feel safe, they are eager to attend.

> *Audience appetite for creative events, where people feel safe, is way up.*

> *Audiences have a real appetite for the live arts. When pandemic restrictions allow audiences, they really show up!*

Some noted that there is international interest in New Zealand work.

> *[..] We have weathered the storm before and our waka is well-prepared. Some optimism that we might be able to engage internationally.*

Financial Support

Some respondents (6%) reported that they were feeling most positive about the financial support they had received and their ability to keep creating.

> *So far we've had sufficient government support to survive despite cancellations, and our subscribers, sponsors and audience are very supportive and understanding.*

> *I received an international grant which will fuel me this year. This will also allow me to pay other creative collaborators*

Nothing

Some people (6%) shared that they had nothing to feel positive about.

> *I honestly don't think I have any positive feelings about my work prospects for this year. I don't feel (yet—hopefully this changes!) well supported by the government to keep going.*

> *I'm not too sure if I can think of anything positive for the year ahead, because it is all so uncertain. I feel like I am mentally depressed and it is hard to come back from this.*

Resilience

Six percent of respondents reported that they felt most positive about the resilience of creative people and the sector.

> *I'm an optimist so I assume that I will discover new talents or home existing skills while I'm unable to work in live performance.*

> *The continued optimism and energy of the people I work with.*

Other themes

Respondents also reported that they felt most positive about: any opportunities for performing (2.9%); the intrinsic value of artists and creative activities (2.9%) and the opportunities created by digital platforms (2.3%).

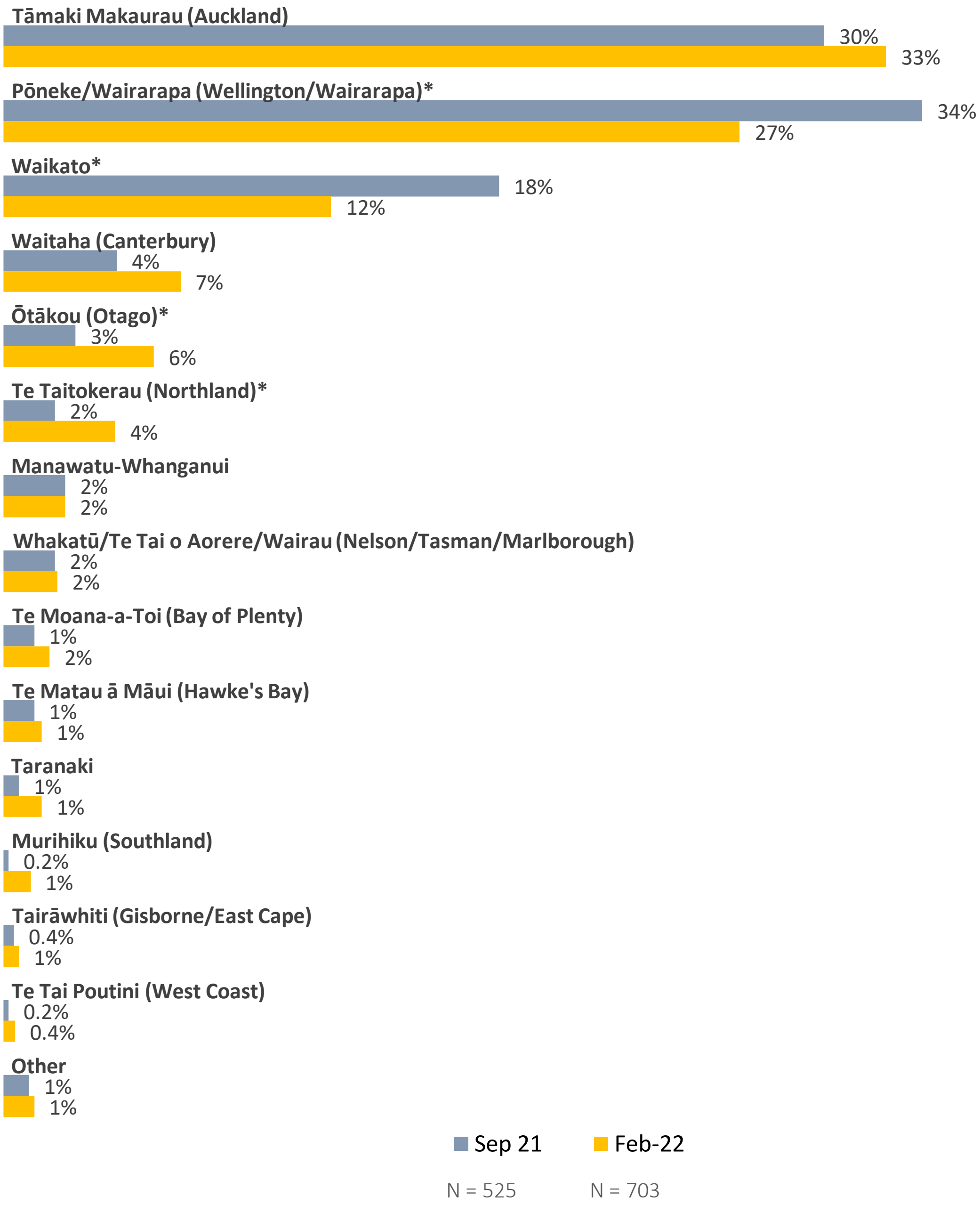
7. Next steps

This survey is the third quarterly survey of the cultural and creative sectors in Pōneke and Tāmaki Makaurau over 2021/22, and the second covering Waikato and nationwide respondents. Reporting on future surveys will continue to look at emerging trends over time and explore a different 'issue of the day' in each survey. The impacts of the most recent COVID-19 Omnicom outbreak and resulting restrictions will continue to be explored. 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 to provide a regular 'pulse check' of the sectors.

The next State of the Arts survey will be conducted later in 2022, likely over May to June.

8. Appendix

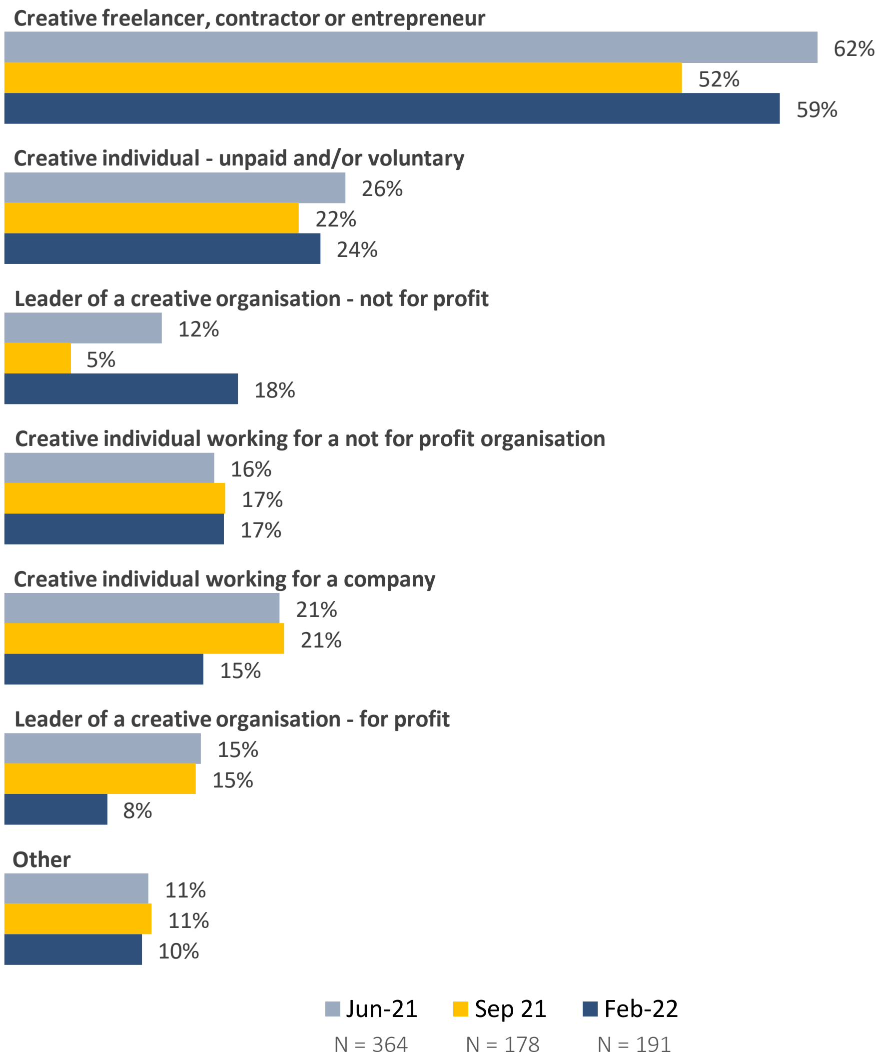
Figure 11: Areas in Aotearoa where respondents were mainly based compared to the last survey



** Response with a statistically significant difference between September 2021 and February 2022*

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

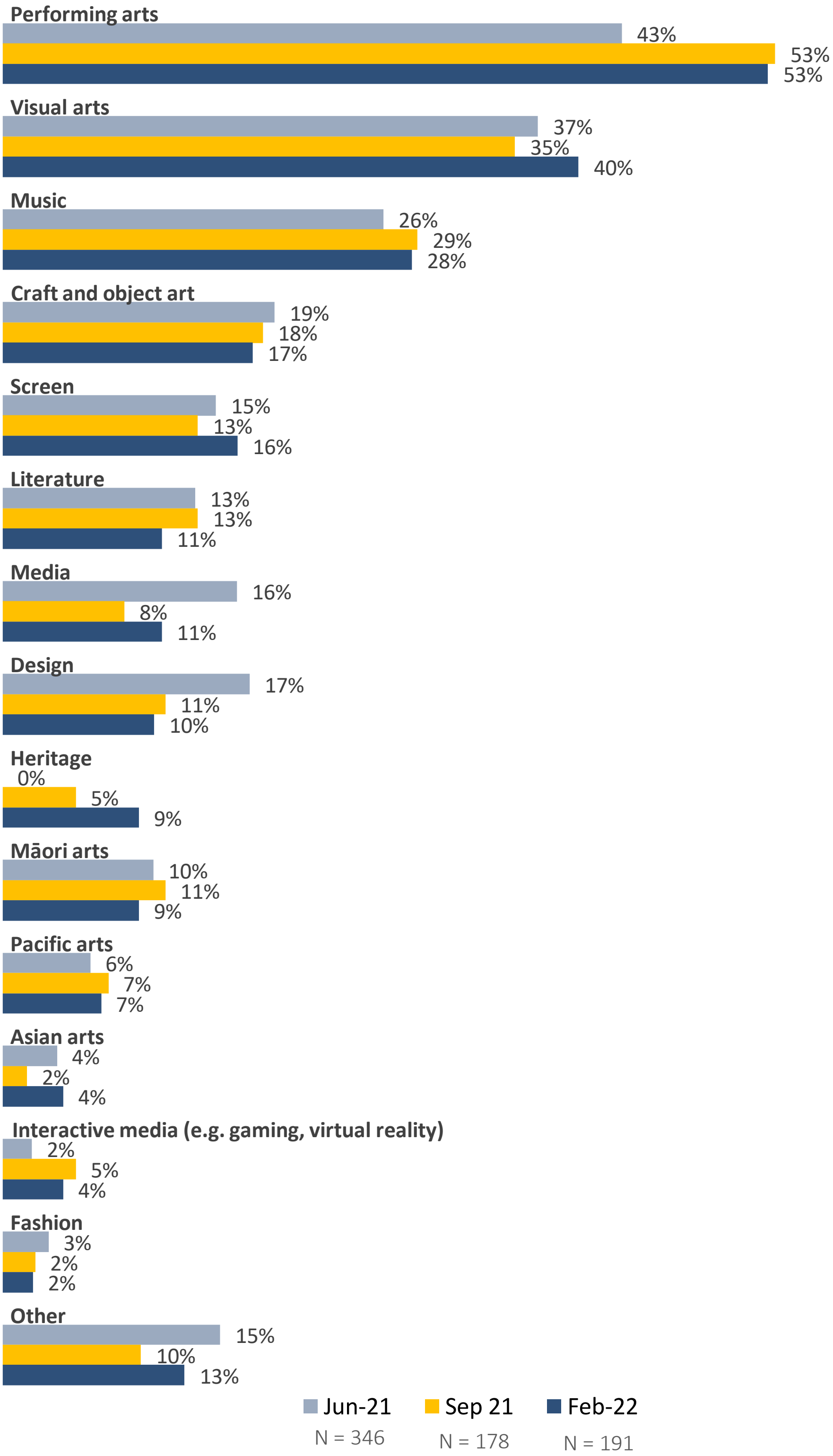
Figure 12: Pōneke respondents' roles in the creative sector across surveys



** Response with a statistically significant difference between September 2021 and February 2022*

Note: Multiple responses were possible

Figure 13: Pōneke respondents' creative area of work across surveys



** Response with a statistically significant difference between September 2021 and February 2022*

Note: Multiple responses were possible