COVID-19: Impact on the Creative Sector in Tamaki Makaurau

Report for Te Taumata Toi-a-Iwi

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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 survey of Auckland's creative sector on the impact of COVID-19. The survey was distributed via email and social media networks over the first two weeks of April 2020. A snowball sampling approach was undertaken, in which recipients were encouraged to distribute the survey to others in the sector. In total, 332 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

Almost half of those participating in the survey were creative freelancers, contractors or entrepreneurs (48%). Some 16% were leaders of a creative not-for-profit organisation, and 12% were leaders of commercial creative enterprises. A further 12% were creatives working for an organisation. The remainder were unpaid creatives or indicated other roles. Over two-thirds (72%) were working full-time in their roles, and the remainder (28%) were part-time.

One-third of respondents (34%) were male and two-thirds (64%) were female. Some 75% were European/Pākehā, 10% were Māori, with the remainder spread across a range of ethnic groups.

Event cancellations

COVID-19 has had widespread impacts on respondents' creative sector activity. 83% of respondents indicated they had to cancel an event, hui or gathering, or project or service because of COVID-19, and a further 6% were considering this.

Many of these cancelled events were scheduled for some months from when the lockdown was initiated; 35% were scheduled in 2 to 3 months from when the lockdown began in late March, and a further 19% 4-6 months from lockdown

Financial impacts

Participants widely reported financial uncertainty as a result of cancelled activity. Only 45% said that they personally would be able to financially get by without the cancelled activity, compared 14% who could not get by, and 42% who were unsure. Respondents were even less confident about their organisations (where this was applicable), with only 35% able to get by, compared to 16% who they thought would not get by and 48% who were unsure.

Answers to open-ended questions about financial costs indicated a range of impacts for individual respondents, from some saying no impact, to as high as $200,000. People from creative organisations also reported significant losses, ranging from less than $1000 to $900,000.

Of those who had staff, only 27% would be able to sustain staff payments, 38% would not be able to, and 35% were unsure. Respondents were less confident about sustaining payments to contractors, with only 21% able to sustain payments, 50% unable to sustain payments, and 30% unsure.

Key priorities and concerns

The need for financial support to the creative sector was widespread concern, with participants indicated the following issues:

- Professional and business viability
- Immediate financial survival
- Impact on creative work/industry
- Wellbeing of self/others
- Using this time constructively
- Impact on the creative sector generally

A range of non-financial priorities were also raised, including strengthened communication and information flows to the creative sector; effective governance from government and sector leaders; support with marketing and tech/digital skills; work and support in finding work; forums with other creatives; and mentoring and advice.

Accessing support

Three-quarters (76%) of relevant respondents had been able to access the government's wage subsidy package, and a further 7% intended to. 10% had not been able to and 8% were unsure at this point.

At the time the survey was distributed, the Creative New Zealand Emergency Response Package was planned but not yet available. At that point, 30% of respondents were intending to access Creative New Zealand's emergency response package, 18% were not intending to, and 52% were unsure. This is likely to be due to lack of knowledge of the criteria for the response package at that stage.

Looking ahead

When asked, on a scale of 1 to 6, if they expected to be working in the creative industry in six months' time, 39% were confident, and 19% were not confident. The uncertainty of the current environment was notable, with some 43% who were borderline pessimistic (20%) or optimistic (23%).

Some 42% of respondents had a business continuity plan in place, 37% did not and 20% were unsure.

Most respondents, where relevant, were maintaining contact with clients/customers, with 68% emailing, 50% using social media and 39% making direct contact.

In the face of the COVID crisis, suggested priorities for the creative sector going forward were financial support; collaboration and mutual support; recognition of the value of the arts; leadership; new spaces and platforms to showcase, share and monetize; disruption to current systems and structures; capacity building and nourishing local sector and content.

1. Introduction

Background

The COVID-19 pandemic has caused widespread disruption to the social fabric and economic foundations of countries around the globe. A consistent theme from many countries -19 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. The COVID-19 environment has at least temporarily brought a halt to these and many other ways of simply making a living.

Te Taumata Toi-a-Iwi (formerly Arts Regional Trust) commissioned Dovetail, an Auckland-based research and evaluation company, to undertake a rapid survey of the creative sector on the impact of COVID-19 is having in Tāmaki Makaurau. The survey was undertaken early into the onset of COVID-19, at a time when its impacts were already being felt.

Approach

The survey was distributed via email and social media networks over the first two weeks of April 2020, just as Aotearoa had entered a five-week lockdown period.

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, 332 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.

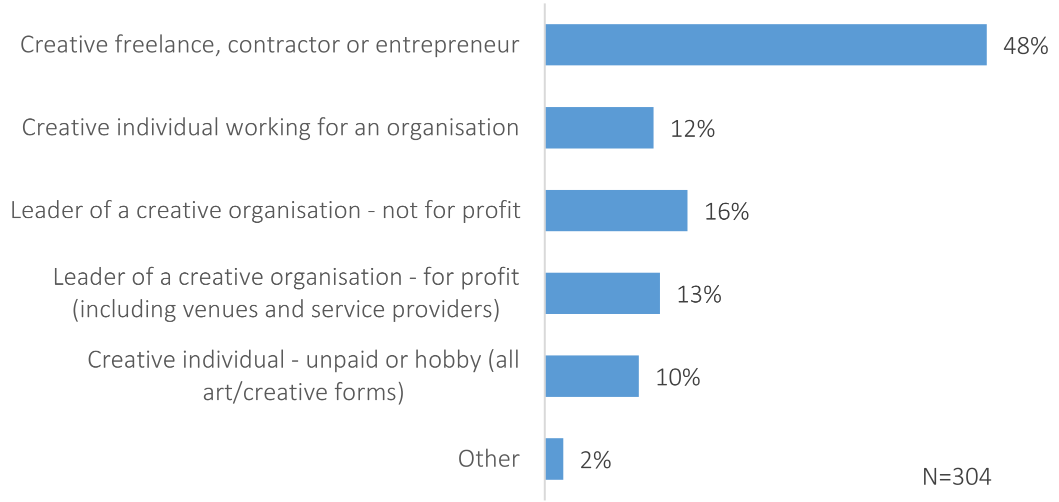
The survey was limited to those based or working in the Auckland region; 49 respondents were excluded from the survey who were from outside the region (i.e. a total of 381 people accessed the survey, of which 332 were then able to complete it).

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

2. Survey participants

Almost half of those participating in the survey were creative freelancers, contractors or entrepreneurs (48%). Some 16% were leaders of a creative not-for-profit organisation, and 12% were leaders of commercial creative enterprises. A further 12% were creatives working for an organisation. The remainder were unpaid creatives or indicated other roles (Figure 1).

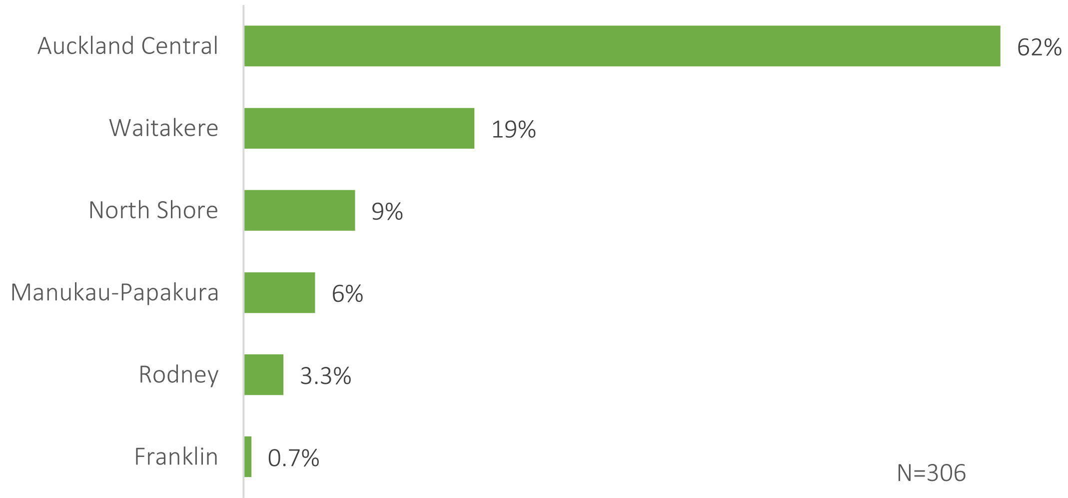
Figure 1: Role in the creative sector



Over two-thirds (72%) were working full-time in their roles, and the remainder (28%) were part-time.

Nearly two-thirds of eligible respondents were based around central Auckland, with the remainder spread across other parts of Auckland (Figure 2).

Figure 2: Areas in Auckland where survey respondents were based



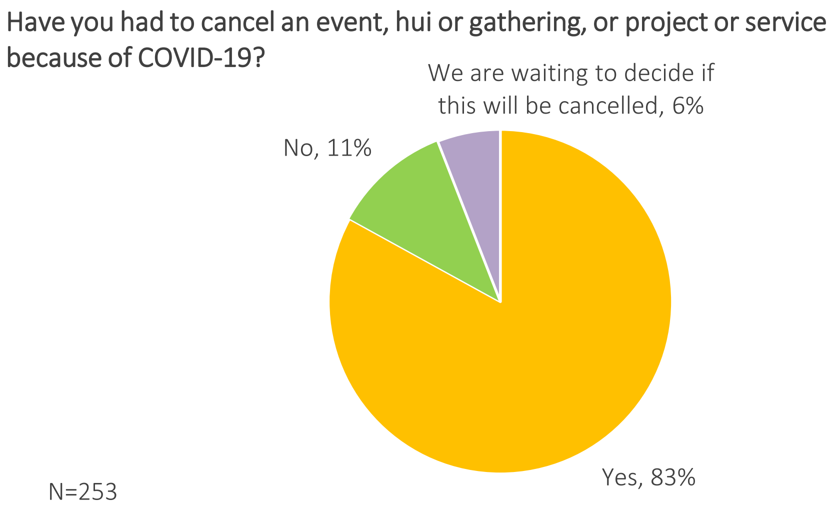
One-third of respondents (34%) were male and two-thirds (64%) were female. Some 75% were European/Pākehā, 10% were Māori, with the remainder spread across a range of ethnic groups. More details on the demographic profile of survey participants can be found in Appendix 1.

3. Immediate impacts of COVID-19

Loss of events, projects or services

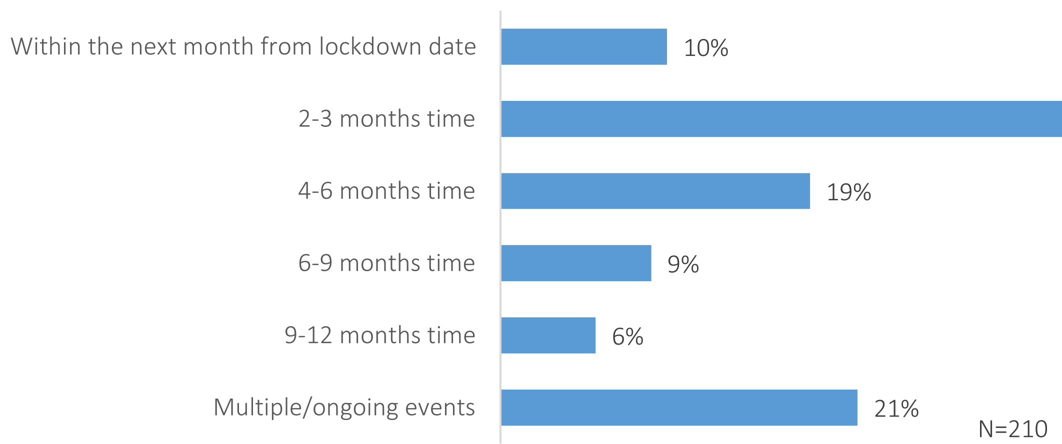
COVID-19 has clearly had widespread impacts on respondents' activity in the creative sector. 83% of respondents indicated they had to cancel at least one event, hui or gathering, or project or service because of COVID-19, and a further 6% were considering this (Figure 3).

Figure 3: Reporting event or project cancellation due to COVID-19



The uncertainty of the sector environment as a result of COVID-19 meant that it was not only short-term projects that were cancelled, but some with long-term duration as well. Respondents were asked when the event was scheduled for, and answers were categorised into dates from when the lockdown started. As indicated in Figure 4 below, many of these cancelled events were scheduled for some months from when the lockdown was initiated; 35% were scheduled 2 to 3 months from when the lockdown began in late March, and a further 19% 4-6 months from lockdown. A further 21% had cancelled multiple separate events, or were unsure of how long they would have to cancel ongoing events (for example weekly classes or performances).

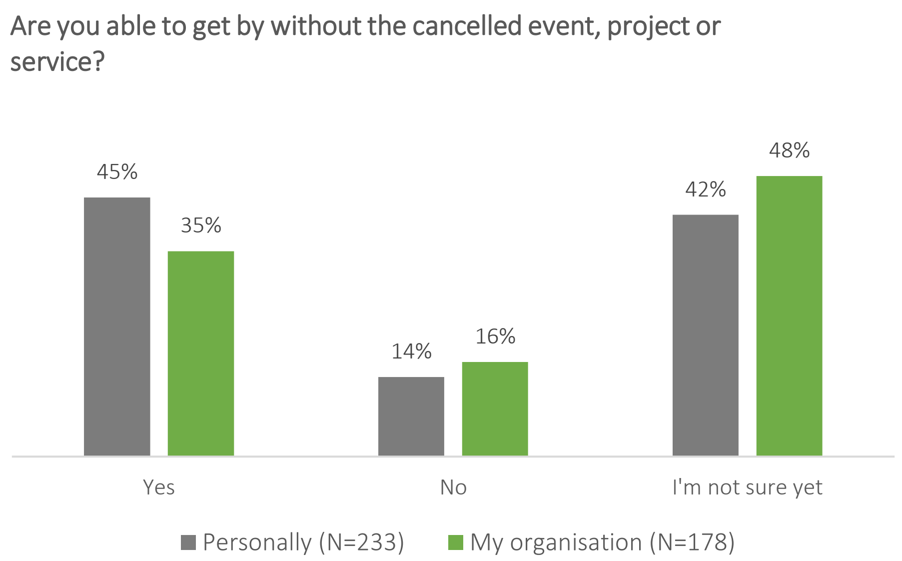
Figure 4: Intended scheduling of cancelled events, projects or services



Financial impacts

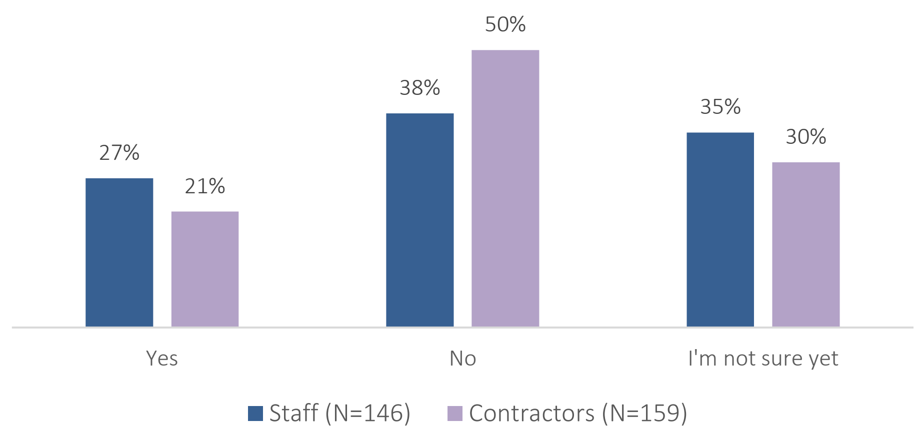
Participants widely reported financial uncertainty as a result of cancelled activity. Only 45% said that they personally would be able to financially get by without the cancelled activity, compared to 14% who could not get by, and 42% who were unsure. Respondents were even less confident about their organisations (where this was applicable), with only 35% able to get by, compared to 16% who thought they would not get by and 48% who were unsure (Figure 5).

Figure 5: Respondents' perception of personal and organisational ability to get by with cancelled event or project



Of those who had staff, only 27% would be able to sustain staff payments, 38% would not be able to, and 35% were unsure. Respondents were less confident about sustaining payments to contractors, with only 21% able to sustain payments, 50% unable to sustain payments, and 30% unsure.

Figure 6: Ability to sustain payments for staff or contractors



Estimated value of impacts

Personal impacts

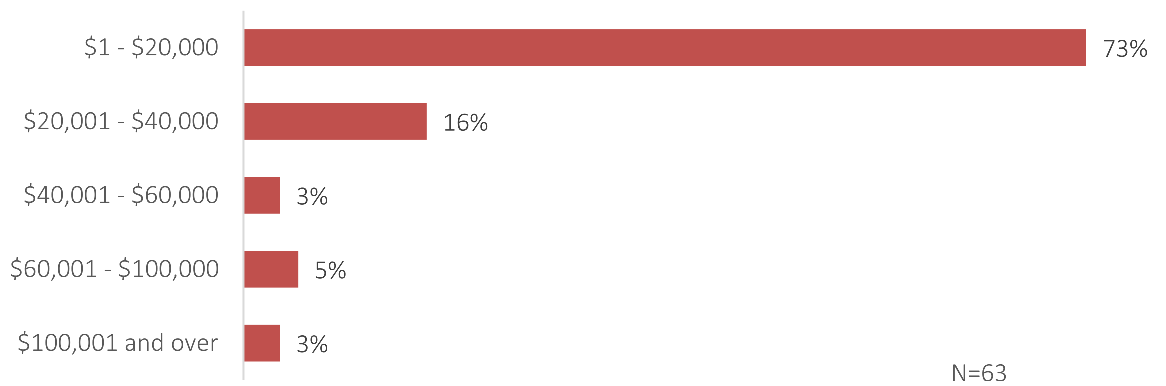
Survey participants were asked "if you have had to cancel the event, project or service, in monetary terms what have been the financial impacts of this for you personally?" This open-ended question yielded a range of responses, not all of which lent themselves to simple categorisation.

For the purposes of analysis, we have focused on respondents who indicated direct monetary impacts. For these respondents (63 responses received), there was a range of responses from some saying no impact, to as high as $200,000.[1]

Furthermore, out of the total responses to this question, 15% of responses indicated no financial impact (31 of the 213 responses received).

The range of estimated impacts are set out in Figure 7 below. Please note that these figures should be treated with caution given the difficulties of accurately estimating impacts across the whole sample.

Figure 7: Estimated personal income losses (from those reporting direct monetary impact values)



The descriptive responses written in reply to this question provide a telling indication of the range of impacts for many in the creative sector. For many individuals, the impact of COVID-19 has led to substantial losses and uncertainty for the future:

> *Thousands of dollars - hard to calculate due to nature of freelance, but potentially over a 4-week lockdown $12k, over the next 6 months $70k.*
>
> *No income and no future for those projects, in the current COVID-19 environment. Basically, a whole heap of work done expecting to be reimbursed for time -- rather have ended up out of pocket instead -- I'm sure I'm not in a minority in this regard.*
>
> *Loss of contract fees and booking & management commissions. Planned projects for the rest of 2020 all deferred or cancelled. Equally the lack of certainty means prospectively there is no ability to plan or secure more work for the next 3-6 months, perhaps longer. Estimated losses and opportunity costs ~$100k.*

[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.

I already prepared for a year, I paid for all the materials and art space for created this project. I was waiting for this event and sale [of] my works to continue my art next year.

Several respondents wrote of the importance of the wage subsidy provided by the New Zealand Government to assist businesses and individuals affected economically by the virus. However, many respondents highlighted that even with the wage subsidy there was often a 20% loss of income.

Employer immediately applied for wage subsidy on my behalf, immediate drop to 80% of regular wage for the foreseeable future.

My organisation shortened my contract and moved to 80% of hours and pay for the rest of it. So a 20% decrease, in addition to losing two weeks of work at the end of the contract.

Personal accounts of the effects of COVID-19 extended beyond impact on income. For some, the immediate impacts are less financially burdensome, but nevertheless are accompanied by uncertainty and a sense of loss:

We have managed to break even on the show but only because the venue waived all their expenses. So we have been extremely lucky. The impact has mostly been emotional. We were also able to sell the show to an international buyer, but the tour is indefinitely postponed.

I have lost out on income from my freelance gigs that were cancelled. I am lucky enough to have other writing jobs to get me through these four weeks of lock down, however, I feel uncertain about the rest 2020 financially.

Unable to complete project in the originally funded timeframe, which means I will likely need to find full-time work asap but also aware that the chance of finding a job in this climate is very slim.

Furthermore, the impact of ongoing social restriction was noted by some respondents, who were worried about lack of opportunity and to connect and network with others in the creative sector:

I get new clients mainly through live events so the impact may not be felt until time goes on and I see whether I am still able to bring in new clients through other avenues.

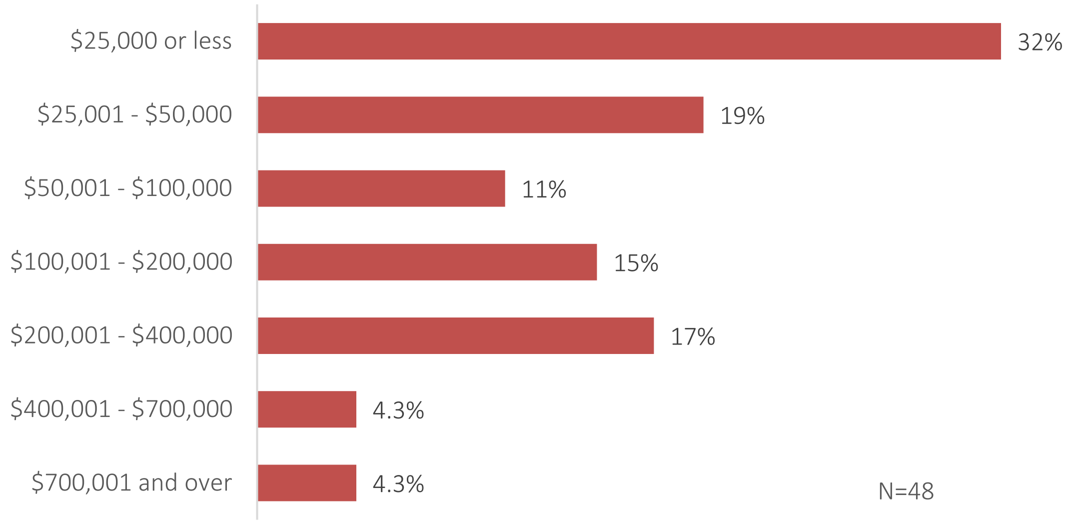
Less clients due to inability to mingle and meet.

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 48 respondents were able to provide an estimate.

A range of responses were received, ranging from less than $1000 to $900,000. The range of estimated impacts are set out in Figure 8 below and similarly indicate substantial losses of income have been incurred. As with the previous figure, these should be interpreted with caution.

Figure 8: Estimated organisational monetary impacts (from those reporting direct monetary values)



The descriptive responses to this question highlight the scale of disruption COVID-19 has had at the organisation level. Some spoke of the immediate impact of cancellation:

> *Cancellation has resulted in the loss of the majority of our income.*
>
> *Large financial losses due to paying out already booked contractors, loss of income due to non-attendance, loss of income due to pre-purchasing of resources which now cannot be used.*
>
> *The financial impacts are across all work in progress, as well as an indefinite delay on starting a new project. The financial impacts for my business are severe.*

A strong theme that emerged across responses to this question was that the loss of income, allied with uncertainty for the future, threatens many organisations' viability:

> *We have no money now to make our planned music videos and short films, to buy the equipment, pay director, cam op etc, plus we don't have the income we would have paid ourselves.*
>
> *Very tenuous stability, unsure if the business will continue to be viable.*
>
> *Concerning - worries about whether we can cover overheads for more than 3 months from the impact of cancellations and postponement of projects and lost sales from closed outlets.*
>
> *It will take us several months to recover PROVIDED projects resume from where they had been put on hold, and this cannot be determined in the short term.*
>
> *Loss of income, means loss of staff. Our core business is centred around serving our rangatahi and our local community. This 100% affects our ability to be operational.*
>
> *One of our organisations has effectively lost all work, bookings and expected/booked revenue for the rest of 2020, both domestic and international. It is likely the organisation will have to be wound up.*

Some responses outlined methods they were taking to manage the uncertainty, and disruption to work as usual. These methods incorporated adaptations to normal delivery, but with significant challenges:

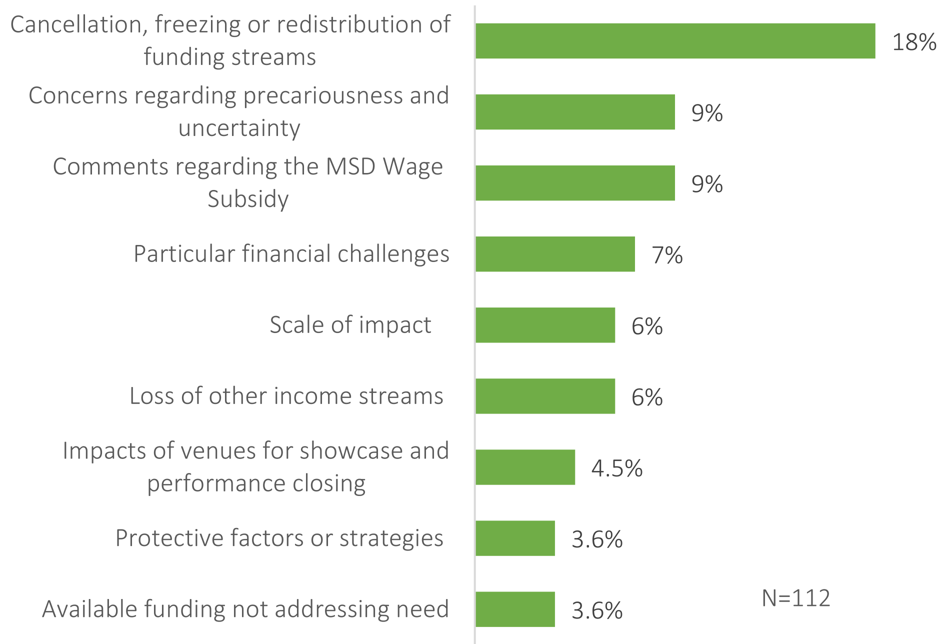
> *It's been much more difficult creating the work and planning for future projects, a challenge to gather people for pre-production and rehearsal plus currently impossible to get audiences in due to the lock down, create work at quality when everyone else is worried about how to feed themselves and pay rent - understandably difficult circumstances. We are having to reconfigure our work to online channels like most groups and organisations are doing which is a challenge to the art form.*

> *We are very uncertain as to how we will create and develop the necessary new works for future tours in an environment of "social distancing" and Level Four / Level Three isolation requirements. We are looking at digital streaming and broadcast of some works, however contemporary dance by its very nature is intensely physical, and requires high levels of collaborative interaction. Understanding how this might now be resolved in a series of disaggregated and independent personal spaces without the social interaction that is central to the experience as an audience will take some time to work through.*

Other sustainability or funding impacts

A wide range of responses were offered when asked if there were any other funding or sustainability impacts. These are summarised in Figure 9 below and discussed in sections that follow.

Figure 9: Other sustainability or funding impacts



A further 20% indicated no other issues.

Cancellation, freezing or redistribution of funding streams

Many respondents (18% of those received) talked about how they had been impacted by the cancellation, freezing or redistribution of funding streams on which their practice or organisation depended.

Some participants spoke generally about the impacts of cancelled funding on the viability of their operations, and others were more specific. Of those respondents that specified the nature of deferred grants or other funding, the suspension of CNZ grants, and the consequent impact on projected future funding was most frequently described. A key theme in these responses is that the cancellation of these funding rounds has impacted the ‘planning and potential’ of individuals and organisations, well beyond the current crisis wrought by the lockdown.

> *All of the funding applications we had in were repurposed so we’re currently in limbo trying to service the overheads that can’t be put off.*

> *Suspended CNZ grants mean work for later in the year is impacted.*

Confirmed or anticipated cancellation of contracts and funding from Auckland Council was another lost or threatened source of revenue, described by one-quarter of the respondents discussing the loss of grants and other funding. Some of these respondents were awaiting decisions regarding the continuation of Council contracts, however, overall expectations did not appear to be high.

> *Council cancelled contracts despite having a duty to support charities at this time more than ever. 'Not an essential service'.*

> *We had other contracts lined up through clients that have also been affected due to the nature of the work being in public spaces with Panuku Development Auckland. This now affects our ability to meet our operational bills and overheads.*

Suspension of funding from gaming sources that are not receiving income due to venue closures was another lost revenue source that received several mentions. One participant described how they received one-sixth of an anticipated $46k payment from their key funder, that was to sustain their work for three months.

Feelings of precariousness and uncertainty

Concerns regarding the precariousness of their career, niche, industry or the sector and its current model were voiced by 9% of respondents. These people described a sense of scarcity, feeling ‘in limbo’ and questioned the viability of their organisations both in the current climate and going forward. One person wondered whether it will be a ‘race to the bottom’ of people needing to undercut rates for their services.

> *The sustainability impacts on our organisation are large and especially during lockdown but then when we come out of this will all our participants be comfortable returning? We're not sure on the impact yet.*

> *Basic worry about the uncertainty and the new order that will affect live events in general -- is there a life after COVID-19?*

Comments regarding the wage subsidy

A further 9% of respondents took the opportunity to make comments regarding the MSD wage subsidy scheme. A few people noted the helpfulness of the wage subsidy, while close to one-third of those that mentioned the scheme said it was tiding them over for the time being. A number made criticisms of the scheme, namely that the sum available was too small or that 'seasonal based' or contract workers in the sector were disadvantaged by the scheme's eligibility criteria.

> *Sometimes it's tricky for self-employed seasonal based workers to determine how many hours we work each week. Over a year it probably works out to part time hours but because my job is seasonal over summer months, I work full time. So I applied for the part time govt subsidy but in reality, the amount of work I lost was more full-time hours.*

> *We are not eligible for wage subsidies for contracts. Our members who have lost gig income are not eligible either as their incomes are erratic. The lost income will need to be addressed when we get back in the office, but it will be a tough year for us.*

Particular financial challenges

The challenge of dealing with specific costs or other financial challenges was a further theme in 7% of responses. Participants described struggling to meet the cost of 'overheads', 'rent', 'storage' and other operating costs. Several people spoke about the impact of having to refund funding received for a project that can no longer be delivered. One person noted that their business had reserves built up, but that they had many operating costs to cover and no income being generated. Another shared that they just require the payment of existing invoices.

> *No help for fixed costs for small business (Rent/Opex)... Bank loans are hard for arts business as we are basically insolvent now.*

> *As the event was midstream funding received has been spent and public programming not fully delivered. Puts me in a quandary as can't afford to repay the funding. The event was largely self- funded with only 10% publicly funded.*

Scale of impact

Some 6% of respondents took the opportunity to highlight the scale of the impact of COVID-19 on their organisation or industry.

Some people noted the length of time it would take for their activity to resume post-lockdown. Others considered the interconnectedness, both of players within the creative sector, and between the sector and other industries and businesses and the economic impacts of this interdependence. Further themes were the impact of COVID-19 on momentum and the unsustainable level of loss within the sector.

> *This misconception that we all just start up after the lockdown - many of us deliver project work year on year so the projects are not even possible (if at all) until 2021.*

> *After lockdown, it will still take another 3-6 months to set up more event bookings and content work.*

Loss of particular income streams

The loss of certain markets, customers and income streams was a further theme from 6% of participant responses. Some highlighted their reliance on other businesses and sectors for customers and collaborators. The impact of schools closing was one example given. A few participants talked about how they had commissions or other projects being 'put on hold' or 'cancelled or indefinitely postponed'. Another highlighted the impact of their workshop no longer being able to run classes, and a further person spoke of having lost a teaching contract at AUT.

> *Simply put we are experiencing a downturn in business due to businesses not spending money. Thus it doesn't directly impact a event, project or service but more so impacts our overall ability to find and secure new business opportunities.*

Impacts of venues for showcase and performance closing

Other participants (4%) highlighted their concern about the potential impact of gallery and venue closures. Musicians worried that venue closures would leave them nowhere to perform and of the wider loss to the creative community if iconic, independent venues close.

> *Many art galleries will not survive this, and so a large part of the economic ecosystem for artists will be destroyed.*

> *Unsure if the venue we use will remain open after taking a financial hit. It is a small bar. Finding venues will be different when we return to being able to perform.*

Available funding not addressing need

A further 4% of respondents shared how in one way or another the current funding/support available to the creative sector was not meeting their needs, or those of the sector more generally. Most of these people commented on the inadequacies of CNZ funding, either because the pool available is too small, the focus of funding does not meet their needs or because their organisation is exempt. One such participant described how their venue 'falls between the cracks' because it does not fit the criteria of CNZ and other funding portals, and yet lacks the protection of being a Council-run venue.

> *Much of the emphasis in emergency response funding so far has been on how to present new work or new projects, but for many of us – large arts organisations, venues etc. – we simply need money for business continuity. Particularly for those of us who are not CNZ investment clients, funding towards operating costs, retaining staff, and keeping the doors open and the lights on is our most vital need right now.*

> *CNZ's current/announced emergency relief/response plan of $16M into the arts sector works out to just under NZ$3.50 per capita. Singapore is investing SGD$55M in a country just under 6M, which works out to just over SGD$9.00 per capita (~NZ$10.75 per capita). Germany has announced a staggering €50B (NZ$92,159,750,000 – count the zeros!) aid package in a country just over 83.7M; this works out to NZ$1,100 per capita. I think the numbers clearly tell the story of where the arts and culture sector sits within the list of priorities in New Zealand. We are thankful that there is relief. But is it good enough?*

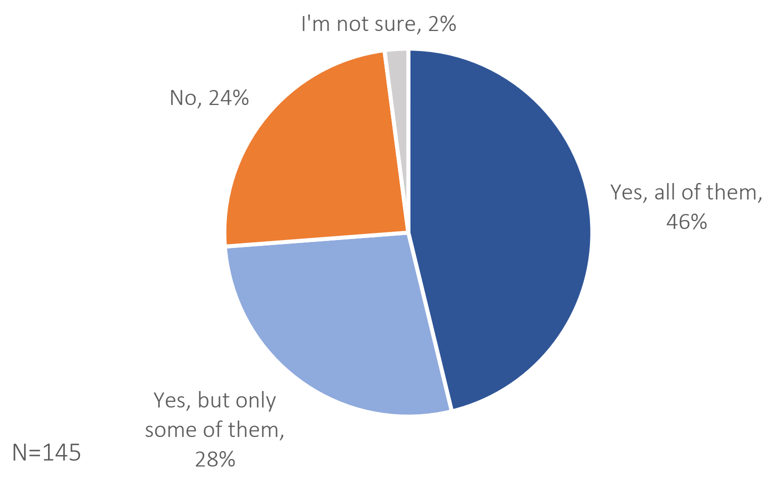
Protective factors or strategies

A further minor theme from 4% of participant responses were those that highlighted certain factors they felt increased their resilience at this time or strategies/areas of focus for addressing the challenges wrought by COVID-19. These people noted that those in the sector 'must support each other', highlighted both the challenge and importance of sustaining 'momentum' in this climate, and of 'maintaining a resilient creative mind' and 'flexible approaches in order to pivot pre-COVID-19 plans'. One person shared how having other incomes lessened their vulnerability.

Working from home

Respondents were asked if their staff or contractors were able to work from home in lockdown. Of those who were able to respond, almost half (46%) said they could work from home, one quarter (28%) said some of them could work from home, and a similar proportion (24%) said they could not (Figure 10).

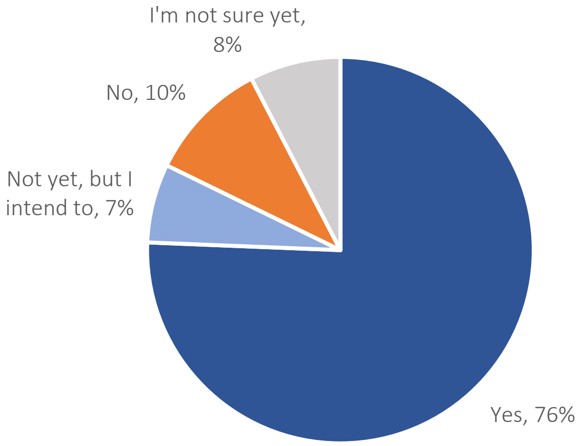
Figure 10: Ability for staff and contractors able to work from home in lockdown



4. Accessing support

Three-quarters (76%) of relevant respondents had been able to access the government's wage subsidy package, and a further 7% intended to. Of the remainder, 10% had not been able to and 8% were unsure at this point (Figure 11).

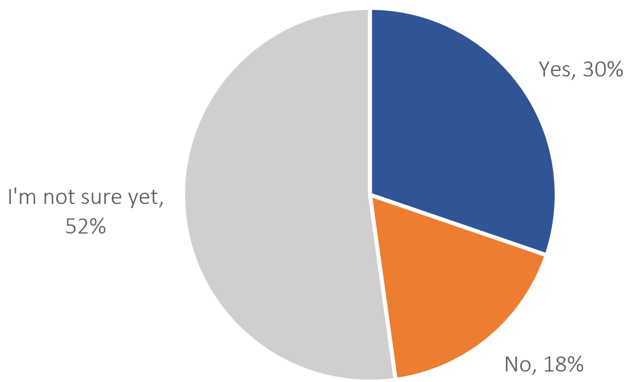
Figure 11: Accessing government wage subsidy package



N=197

At the time the survey was distributed, the Creative New Zealand Emergency Response Package was planned but not yet available. When asked about intentions, some 30% of respondents were intending to access the emergency response package, 18% were not intending to, and 52% were unsure (Figure 12). This is likely to be due to lack of knowledge of the criteria for the response package at that stage.

Figure 12: Intending to access Creative New Zealand's Emergency Response Package



N=205

5. Key priorities and concerns

Participants were asked to provide feedback on their key priorities or concerns currently. Significant themes are detailed in Figure 13 below and are discussed in sections that follow.

Figure 13: Key priorities and concerns of survey participants

Professional and business viability

Maintaining professional work

When asked about their key priorities or concerns, a common theme from many respondents (21%) was that their key focus was the practical task of keeping the organisation, service or project for which they were responsible going during this difficult time.

Many of these respondents shared the steps they were taking to ensure that their organisations remained viable in the current climate. This included ensuring that the team and infrastructure of their organisations were maintained, with the concern that staff and contractors be supported and provided with ongoing, meaningful work featuring prominently.

> *Financial sustainability, supporting staff, communicating with membership base to provide value.*

For some of these participants, finding ways to meet operational overheads such as rent was a key focus, while others spoke of the need to meet certain costs to ensure that a project was able to maintain momentum. For a few respondents, this involved seeking paid work outside the sector in order to be able to deliver on projects.

> *My priority was to pay my script advisor which has also been taken care of to meet this year's seed and fresh shorts deadlines.*

Other respondents spoke about finding new ways to deliver value to members, client and the creative sector more generally, along with 're-imagining what core activities and programs look like'. This primarily involved moving events or other offerings online.

The key priority of my primary project is to create and deliver online content that meets the project's vision, mission and goals. At the same time, we are figuring out how to connect with our audience, which is now more scattered (across many bubbles) than in pre-COVID times.

Getting our artists-under-management market-ready for when things open up again. Advocacy in the sector. Restructuring and pivoting to meet the requirements and opportunities of the current and expected future scenario.

Organisational and business viability

A further key theme in participant's responses was a pressing sense of precariousness, with 21% of respondents in some way questioning the sustainability of their organisation, project or profession. There was a theme in some of these responses that while survival had always been a challenge, it now felt near impossible. Other respondents reflected on the challenge of dealing with uncertainty, planning ahead, or imagining how their offering might be viable in 'the new world order'.

Concerned about the viability of contemporary jewellery sales in the coming year as a self-employed maker. Concern with our ability as a partnership to offer jewellery classes which fund our shared workshop and provide a part time contractor wage to us all.

The unknown. How long will the shutdown be? How long can we stay in limbo?

Some participants reflected on the interconnectedness both within the creative sector and of the sector with the wider business community, noting they would struggle to remain sustainable as their clients, collaborators or venues lost revenue or closed down.

A lot of my clients are also directly affected by COVID-19, so their business might cease to exist, leaving me without a client base.

Others were anticipating losing their jobs or wondered if there would continue to be a market for their skills, and a few people expected to have to leave the creative sector in order to sustain themselves. Others felt that their business or organisation falls into a 'gap', leaving them unable to access supports and therefore remain viable.

What happens on the other side? Will there be people who want/need my skills?

Whether the project I am working on will be up and running again. Do I need to look at other career options - going back to administration work?

Immediate financial survival

A further 17% of participants who provided feedback on their key priorities or concerns stated bluntly that at this time they were preoccupied with financial survival.

Respondents described having bills yet no income to service them, relying on credit cards, loans, losing savings or just scraping by week-to-week. One person described feeling increasingly distraught waiting for their COVID-19 subsidy package payout to come through.

Trying to negotiate with landlord. Trying to source bridging finance.

Some participants described the impact this financial precariousness was having on their creative practice, with a few stating that while they would love to be able to use this lockdown period constructively, concerns about their basic survival were too overwhelming.

> *Survival on the daily. Looking after my family. Wanting to be creative but the pressure of family at home and financial need takes priority.*

While some respondents anticipated their situation would improve once lockdown ended, others were more pessimistic, foreseeing shortages of jobs and opportunities and the long-term impacts of cancelled projects projecting into the next few years.

> *My concerns are being able to cope financially until the arts events I'm involved with are back up and running.*

> *I'm worried about what the rest of 2020 looks like financially.*

Creative and personal impacts

Impact on personal art form and industry

Concern for the impact of COVID-19 on their artform or industry accounted for around 13% of responses to this question and these concerns appeared to come mainly from those working in the live music, theatre/drama, film and visual art spaces. A substantial number of these concerns were voiced by people who worked in media requiring a live audience, with many wondering how live gigs could be viable in a social-distancing environment, with one participant stating that her medium 'doesn't exist anymore'. One person worried that performers may no longer want to perform live, and another questioned 'when normal socialising at an event level will become acceptable again?'.

> *My main work requires a live audience...My concern is how soon will people be confident to return to social events?*

> *Feels very uncertain and wonder when anyone will actually gather in a theatre again.*

> *How long the restriction will be in place, what will be the state of the economy and gigs and events after the lockdown/mitigation efforts?*

Some participants questioned how the visual art market will survive, both locally and internationally with gallery closures and the economic downturn cited as key concerns. As in responses to other questions, the interdependency of the creative sector was highlighted. For example, one participant worried about the ability of her industry to 'pick up again' once there have been closures of many peripheral trades associated with event production. There was also concern about the impact of travel restrictions on the viability of international projects, particularly in the film industry.

Wellbeing

Concern for the physical and mental wellbeing of themselves and others accounted for 7% of comments regarding current key concerns and priorities. Some participants described focusing on keeping themselves well, but the vast majority of these responses expressed concern for others, including staff, volunteers, friends, family and community members. Key concerns included keeping people ‘safe from the virus’, supporting the COVID-19 response and mitigating the material and psychological impacts of this downturn.

> *I'm concerned about the most vulnerable in our society.*

> *Mental and physical wellbeing of staff, contractors, the wider public.*

Using this time constructively

For some participants, making good use of the current lockdown was their key priority, with 5% sharing that they were focusing on preparing themselves for change. These preparations took a range of forms, including taking stock, upskilling, planning, organising finances and systems and cleaning workspaces. A few respondents explained they were using this time to obtain their own equipment in order to be more flexible and mobile.

> *Priorities – take this time to tidy up our thoughts and offerings. get ready for a potential change of tack.*

Further themes

A further theme in participant responses was concern regarding the impact of COVID-19 on the broader creative sector. Respondents raised concerns about the impacts the downturn may have on the diversity of the sector. A few people questioned how the sector will continue to function with the projected loss of so many personnel form a wide range of areas, and wondered what they could do personally to support the sector.

> *Currently we are all at such great risk, but I can already see and am concerned that representation and inclusion will be further down the priority list.*

> *The arts industry faces very unique challenges in response to Covid-19. With the shut-down of the mass gatherings and events for the indefinite future, this is going to cause devastating financial and mental distress across the industry…The arts is already systemically under-funded, and many contractors…live gig to gig, and paycheck to paycheck, without the reserves to keep them afloat in unprecedented circumstances such as this.*

A small number of participants noted impacts on their creative practice as their key area of concern. Respondents described how the lockdown has left them unable to use their workspace, limited their access to supplies, or restricted their access to their creative community and professional development. One performer noted that they were missing their live audience, and another described feeling a halt of their sense of momentum.

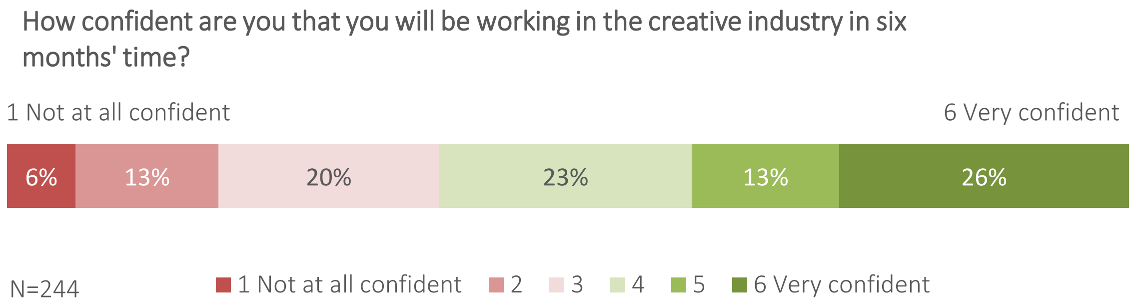
Another small number of participants raised future health and safety as a key area of concern. This group of respondents were concerned with how they would manage health and safety in a COVID-19 environment once their operations were up and running again, including potential responsibility for contact tracing and hygiene management and associated costs.

6. Looking ahead

Expectations for continued participation in the creative sector

When asked, on a scale of 1 to 6, if they expected to be working in the creative industry in six months' time, 39% were confident, and 19% were not confident. The uncertainty of the current environment was notable, with some 43% who were borderline pessimistic (20%) or optimistic (23%) (Figure 14).

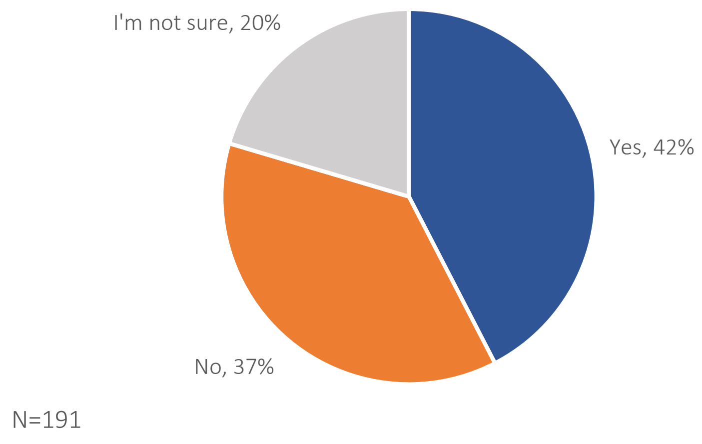
Figure 14: Confidence of continued working in the creative sector



Business planning and customer/client communications

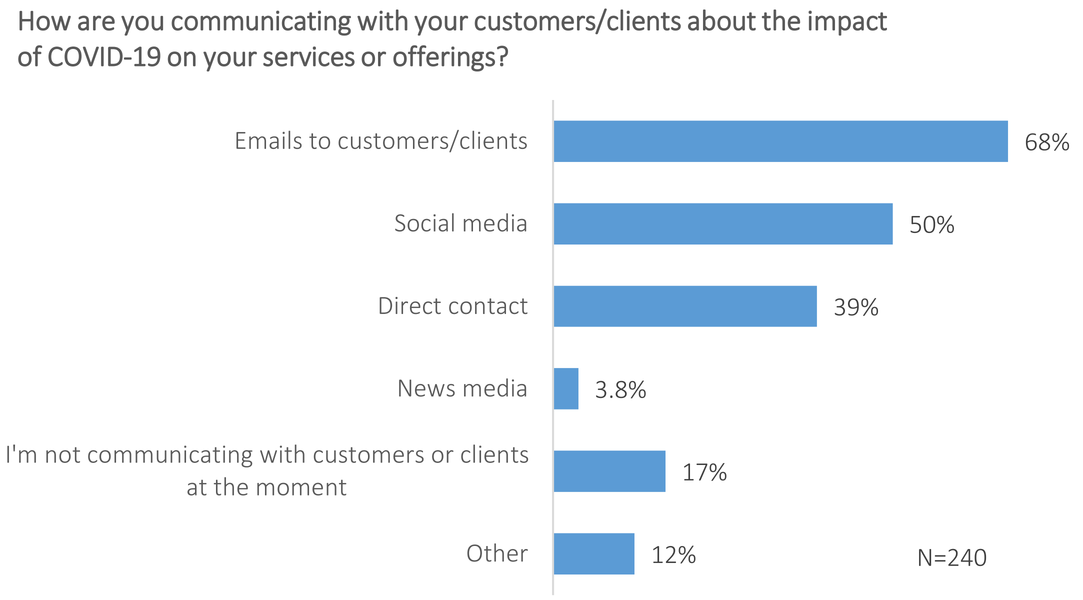
When asked if they had business continuity plans in place, 42% indicated they had plans, 37% did not and 20% weren't sure (Figure 15).

Figure 15: Business continuity plan in place



Most respondents, where relevant, were maintaining contact with clients/customers, with 68% emailing, 50% using social media and 39% making direct contact. Only 17% were not communicating with customers or clients (Figure 16).

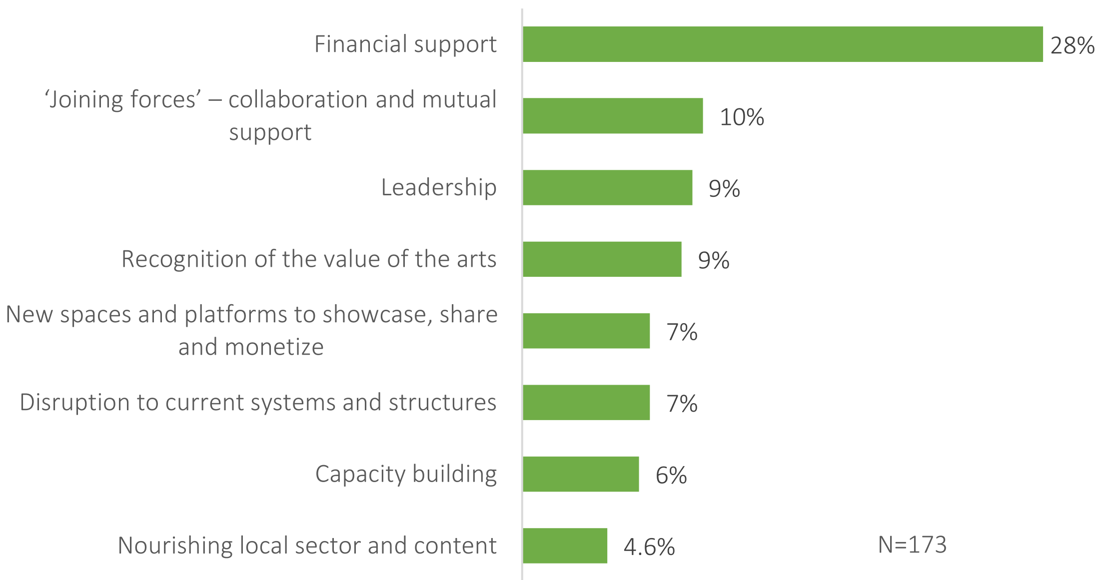
Figure 16: Communication with customers and clients



Priorities for the creative sector

Participants were asked to reflect on what is most needed for the creative sector as it faces the future. Summarised responses can be found in Figure 17 below and are discussed further in sections that follow.

Figure 17: Suggested priorities for the creative sector



Financial support

The need for more financial support accounted for 28% of responses. Most of these respondents spoke in general terms about the need for more 'money', 'grants', 'financial support' or 'funding'. Of the specific examples given, a universal basic income or similar for those working in the sector was the most frequent suggestion.

> *A universal living wage for everyone so we can survive things like this.*

> *Sustainable financing to enable people to think about creating not simply surviving. Living wage as arts grant perhaps?*

Other suggestions included financial aid for artists not contingent on project delivery and targeted financial support for operations and infrastructure. A few respondents requested more investment from government, including sector relief packages and tax rate reduction. One person raised the need for access to sick pay for self-employed contractors.

Funding to ensure the viability of independent venues and promoters was promoted by some, particularly to support those that do not already receive arts subsidies. Targeted funding opportunities to address certain issues was suggested by two respondents, with climate change and mental health given as examples.

Critique of current funding bodies and processes was a further theme. Changes to CNZ and its funding process was requested by two respondents, with one person feeling the organisation had been too slow to get funds open. A few people noted the need for fairness, including egalitarian distribution of support, and one highlighted that funding must go to creatives rather than sector administrators.

'Joining forces' – collaboration and mutual support

The need for members of the creative sector in all their diversity to work together, sharing resources and knowledge was a further key theme in participant feedback. Around 10% of responses followed this theme, talking about the need for sector coordination and collaboration and the importance of 'sticking together', 'supporting one another', 'working together', 'comradery', 'kindness' and 'unity'. Cross promotions were given as one example of how creatives could work together.

> *Hope = plans, funding, comradery, communication… gathering everyone in.*

> *Community support. And just coming together I truly believe. People get hung up on the financial support, but for someone like myself whom has gone through this isolation solo...*

The importance of inclusiveness was highlighted by a few respondents, who spoke of this as a time to be 'non-judgmental', have 'open minds' and help 'EVERY type of professional'.

> *Collaboration and innovative ways to use online platforms.*

> *That we get together and use this opportunity to reaffirm the importance of local artistic practices.*

One person suggested coordinating support networks, noting they would love to help in this way. A sector specific counselling line staffed by creatives was another suggestion.

Leadership

The need for leadership, or particular behaviours or actions they would like to see from those in governance roles was emphasized by around 9% of participant responses. A need for leadership that is ‘strong’, transparent’ and has ‘direction’ was highlighted. The importance of ‘creatives working at the grass roots’ being listened to and involved in decisions about their futures was raised by a number of respondents.

> *So often those in places of power and influence think they must have the answers or consider they do, when so much common sense and ideas from the grass roots can make a difference. They are also more in touch with the situation.*

Buy-in and leadership from government was seen as key by some, with one respondent believing a minister positing for the creative industries was integral. Some respondents said they would like their representative organisations to lobby the government for a significant response and strategy for the arts, including planning for ‘the comeback’. The need for ‘more infrastructure’ was a further comment.

> *We need something like a New Deal for the creative sector...shows, events, installations and commissions funded by the Council or someone/thing.*

> *Improved structural support that is equitable and not based on legacy arrangements.*

> *Currently work has been cancelled for up to a year, it would be helpful to have a plan in place moving forward, a plan indicating how and when we are able to move forward in stages would be useful.*

Recognition of the value of the arts

The need for sufficient appreciation and recognition of the creative sector was another key theme from 9% of responses to this question. Participants talked about the need for recognition at all levels – from government to the business community, media and wider society.

Some respondents felt that the creative sector deserves greater recognition as a contributor to the economy, some believing that sufficient provision must be made to support its players during difficult times, as is the case with other productive sectors. Respondents also wanted to see the public having greater respect for the arts and seeing creatives’ contribution as ‘worthy work’. Some wanted to see the media giving as much attention to arts as it does to sport.

> *Recognition from mainstream media, business and policy makers that arts are an important and valued part of community on a par with health, education and social services.*

> *Enforce in the public and in the industry that creative work is worthy work, that deserves adequate remuneration. A shift away from the 'Spotify' approach (albeit an exciting platform), where thousands of plays may only garner a few dollars. Not an easy task, but a shift in the minds of the public who believe that creative work should be free, "for exposure", "isn't that hard" or isn't worth decent pay.*

There was a theme in some responses that with greater exposure for the arts and the skills of those who make up the sector, more opportunities could arise within and 'outside the sector’ for creative people to contribute their talent, imagination and skills to society. Participants wanted to see their industry bodies and leaders more generally actively promoting the arts and their value for society.

Recognition of the value of the arts. This is through publicity and news of the sector, leaders actively showing their support as well as financial which is the life blood needed.

New spaces and platforms to showcase, share and monetize

A desire for access to both physical and digital spaces in which to create and share work was a further theme from 7% of responses to the question of the sector's most pressing need. Roughly one quarter of respondents sought access to physical spaces to practice, exhibit and market their output, with the rest highlighting the need for digital spaces with a range of functions.

Some participants simply stated the need as for 'digital tools for online delivery', while others were more specific. Performers sought platforms that would enable them to engage and retain their live audiences, and artists described the need for avenues to continue to have voices heard. Others felt that encouraging more people to engage with creative sector in the digital space was critical.

Working out ways we can connect with audiences without them physically coming, and then making them feel safe when they are able to return to our spaces.

Innovative ideas to continue producing/presenting art despite the changes in society.

Others sought avenues through which they could market work and skills – local and international platforms to showcase, share and monetize during this time of social distancing. A few respondents felt that digital mediums through which practitioners could stay in touch, create and collaborate were required.

Disruption to current systems and structures

That significant, systemic change to the sector is a necessity featured in the comments of participants, making up 7% of responses. These people sought 'structural change', 'a new approach' or 'a twenty-first century approach' that was more effective and equitable. This group of respondents saw the current crisis as presenting 'an opportunity to do things differently'. They wish to see 'disruption to current system' – in terms of the functioning of the sector and the bodies that sustain it. These people saw potential to remake the system - 'a revamped artists model', that is more aligned with the needs of practitioners.

We need to concentrate on seizing this moment to make systemic change. This is the time to fix the system.

A complete upheaval, the destruction of exploitative organisations and models such as PANNZ, all major arts festivals, the buyer's market… reinvention on artists terms, a re-valuing of artists labour, integration into local communities.

The creative sector continues to be significantly fragmented and hierarchically structured in terms of decision-making and resource distribution. Removal of the gatekeepers, deconstruction of the existing power structures…

For a few participants, COVID-10 presented not only an opportunity to develop a more cohesive sector, but highlighted the current opportunity to develop new opportunities and ways of working, particularly in relation to creative practice that is sustainable, low impact or experiential.

We need champions to challenge the current paradigm and recovery efforts – this is not just a moment to consider how to resuscitate the impacted arts and creative sector, but it is a moment where we should be asking how to we rebuild the sector to be greater than it was pre-COVID-19.

Capacity building

A desire for capacity building was a further theme in participant accounts, accounting for around 6% of responses. Requests were made for support in the form of professional guidance and mentoring in a rage of areas including financial management, business continuity, especially during a long-term crisis, crisis management, consolidation and leadership, strategy and facilitation and ways to further monetize online content. One person suggested that some of this support could come from the rest of the business community.

Others requested training in marketing, the innovative use of online platforms, digital recording and streaming. However, one person highlighted that many creative practitioners have no income at present and will therefore be unable to invest in training. One person suggested access to a specialist recruiter to find support within or outside the sector for staff/contractors who are losing their jobs and don't know where to find a new one in the current situation.

I think we will definitely be looking in the future to add more online elements to our programming but will need more technical assistance to ensure it is of high quality.

Financial management training, advice on marketing or exposure to new markets.

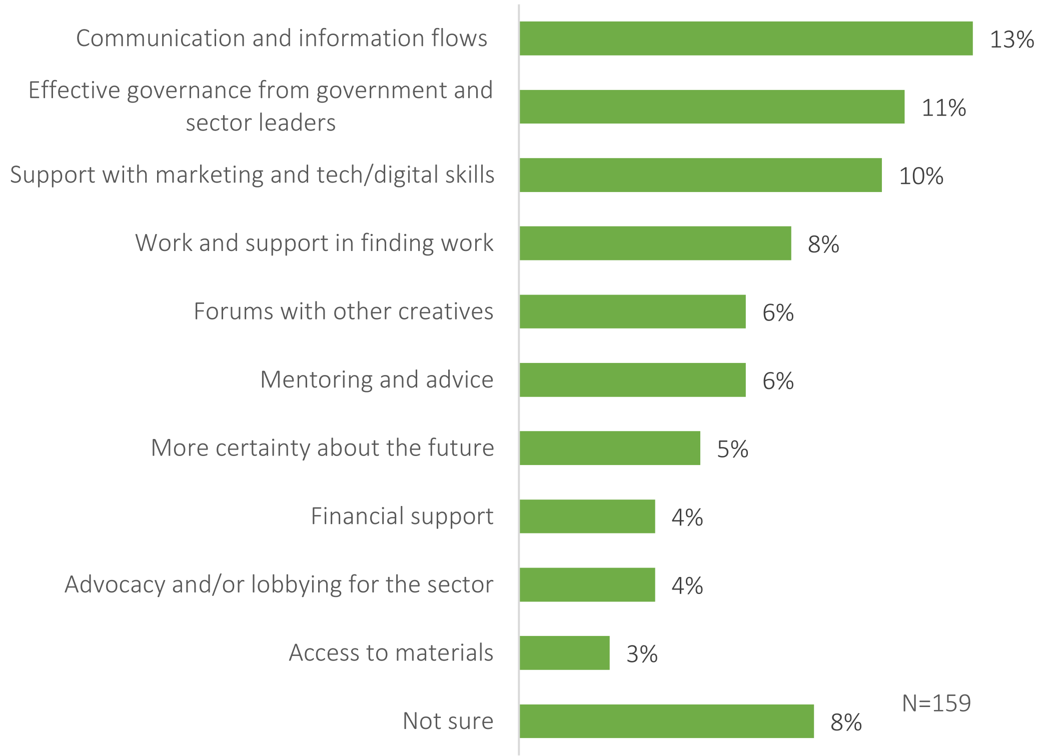
Nourishing local sector and content

One more minor theme that featured in 5% of participant responses was the importance of fostering local workforce and content. The need for better NZ training was highlighted, and some suggested that local contractors and businesses should be given priority for projects, including those in the film industry and government opportunities. One respondent said that requiring local radio stations to play at least 50% local content would ease the pressure on struggling musicians.

Non-financial support

Survey participants were asked, “apart from financial support, what would be most helpful for you at this time?”.

Figure 18: Suggestions for non-financial support



Strengthened communication and information flows to the sector

A desire for the communication of both pertinent information and positive messages of support and encouragement was the most frequently cited account of what else would be most helpful at this time, accounting for 13% of responses. There was a desire from respondents to hear of how their colleagues in the industry are coping in the current situation. These people suggested that insight into how other institutions, companies and individuals in different industries are faring would be helpful. Some noted that they wanted to hear from a range of industry members at different levels, recognised and up and coming, and in different roles and types of employment, including their strategies for managing at this time.

> *I'm very interested in stories that share how other creative teams, groups and organisations are delivering their projects - and how these projects will continue to pivot into a post COVID world.*

Some respondents said they would like to be kept up to date with any strategic decisions made at local or central government level that impacts the sector. Participants specified that these updates should be clear and easy to access. Sharing research and best practice, including studies on what is successful, after an event such as this was a further suggestion.

Estimates of when it might be possible to engage in certain activities such as filming or events of particular sizes were also suggested, with 'a timeline' being one example.

Ensuring health and safety in a contagious post-lockdown environment, the rights of workers, and guidance for recent graduates of fine arts course wanting to be a part of New Zealand's creative industries were three examples given. The need for clear, real-time guidelines for those holding events and other activities to follow during the various stages of the government restrictions were requested by a few respondents. One person requested an organisation to take on the task of creating guidelines and working with venues to ensure they are all on the same page with regards to regulations and procedures, and therefore ready to reopen once the lockdown is over.

> *Clear and transparent communication in terms of what production companies, producers, funders and regional councils are expecting the future to be like and what plans they are putting into action to sustain the industry.*

> *Resources for how to operate business at the various risk levels and trying to understand how it might impact the industry long-term and whether our business will be sustainable in this climate.*

Supportive, positive communications with the arts community were also perceived to be helpful at this time. Respondents shared that they appreciated 'reaching out' - being talked to and having their opinions sought, with assisting with collaborations and providing boosting each other's profiles further suggestions.

> *I think mainly keeping communications and language positive that this won't last forever, and that we will all find a way forward to keep providing great creative services to our communities.*

Effective governance from government and sector leaders

A need for effective leadership emerged as a further key theme from 11% of respondents. Respondents wanted to know that there is a clear strategy for their sector, its recovery and future plans for promoting the arts, and many felt that planning processes much be inclusive of those working within the sector. Some wished to see more strategic planning for their particular industry. Better and more inclusive arts leadership was seen as an important need by some, and as with responses our other questions, advocacy around the value of the arts was seen by some as a key part of this work.

A few people felt that 'more government support' for the sector would be most helpful. Some spoke in general terms, while others made specific suggestions such as 'a local content support scheme' and 'support for bonafide artists in the future - not the unemployment benefit'. Another person wanted to see more transparency with regards to the government's arts and culture strategy

> *A concerted response from the sector as a whole (separate to CNZ) around what value the arts can offer - an advocacy campaign, not just with central / local government, but with the public as a whole.*

> *An understanding from funding bodies that the fundamental nature of how art is produced and presented will change and this needs time and support to develop.*

> *Better thinking around creative support for artists - broadening arts leadership to be more inclusive.*

Support with marketing and tech/digital skills

The value of advice and training in the areas of tech/digital skills, marketing and to a lesser extent financial management was a further key theme from 10% of responses to this question. One participant noted that ‘this is a great time to focus on upskilling’. A few respondents requested promotion and marketing support, including using online platforms and generating a client base.

A desire for ‘higher technical expertise’ in the digital space was raised by most respondents seeking support or training. Limited experience in the online/digital space was a common theme within these responses, with many sharing that a chance to upskill in this area would be useful. ‘Communications support to re-imagine projects in an online environment’, guidance around creating web-based opportunities, training in using social media and tech forums around home studios were all suggested, with some saying that these offerings must be of a high quality and come at no cost.

> *Training to strengthen digital skills - many of us work in live performance, live events, live branded experience etc - the skill set is very different.*

> *Creative workshops and opportunities, free education to assist with resilience and adapting to new challenges. Are the opportunities within this?*

Work and support in finding work

A further theme was the need for work or work-related support, highlighted by 8% of answers received. Many of these people provided responses such as ‘work’, ‘a job’ or ‘more opportunities to earn from my art’, while others were more specific. Some requested access to information on current and future sector opportunities, either for themselves or their staff, or to know that in the event they closed, their staff would be supported to find new employment. Support and advice on retraining or finding new work outside of the sector was requested by a few respondents, and another sought the ability to supply personnel to essential industries for communications work. One person was keen to know of opportunities to contribute in a volunteer capacity.

Forums with other creatives

The helpfulness of fostering connections and ‘a sense of community/tribe’ for mutual support and learning was a further key theme from 6% of participant responses. These people spoke of a desire for informal opportunities to come together and connect and ‘support to know that we are all in this together’. Respondents sought opportunities to meet and to stay connected by checking in regularly for support, sharing information, opportunities, and learning. A few people spoke of the value they were getting from connecting with others, with one person noting that ‘…staying connected, for whatever reason-is important and helping us to reframe our position while we sit this out’, while another shared that they found the PANNZ weekly hui really helpful.

> *A sense of community within the creative sector. To be in touch and updated with the climate and how everyone is doing.*

> *Just a cool community type hub to just link up with people from all over New Zealand. And somewhere to perhaps log our details/expertise so once Covid19 lockdown is over, it's a bit easier to connect with people, and help others find work or opportunities.*

Mentoring and advice

A further key theme, highlighted by 6% of responses, was that certain forms of mentoring, advice or other support and professional development would be helpful. It was stressed that advice provided should be accessible and sector specific. A desire for mentorship was most frequently cited, peer-to-peer in particular. While many spoke in general terms, some respondents were specific about the areas they required mentorship, and these included support to recalibrate their business plan, business continuity planning, crisis management and leadership, strategy and facilitation. Some respondents said that online resources and tutorials would be useful, and that these should be easy to follow and aimed at the sector or particular industries. However, others required individualised support tailored to their business.

> *Peer mentoring by industry businesses that have been through something similar.*

> *Guidance how to translate skills into other industries through mentorship, professional development etc*

More certainty about the future

Another theme, generally alluded to in 5% of responses was a desire for more certainty about what the future holds, either for themselves personally, their work, industry or the sector more broadly. Some of these people noted that they were aware that providing certainty at this time was no easy task. Some respondents simply sought 'assurance' or 'a crystal ball' while others were more specific:

> *Getting out of lockdown and letting the community see where they are in terms of projects to carry them on. Having events being planned in a more certain way than now.*

> *Knowing that there would be avenues to present/ create post COVID-19.*

Financial support

Some 4% of respondents shared that it is financial support alone that is helpful at this time. Some people spoke in general terms about the need for financial assistance or funds, while others specified a particular need such as help with 'reduced office rental', 'Relaxation of GST and terminal tax payments' or 'access to a larger pool of development funding from the New Zealand Film Commission'.

Advocacy and/or lobbying for the sector

A desire to see more advocacy on behalf of both the creative sector generally and it's various industries was a further minor theme from 4% of respondents. These people asked for 'lobbying at a higher level', 'policy advocacy', 'political currency', and 'pressure on government for creative sector'.

Access to materials

Some 3% of the people that provided answers to this question shared that access to materials required for their practice would be most helpful at this time.

Other themes

Further themes present within multiple participant responses to the question included, more avenues to showcase/create/collaborate, support with childcare and support with digital connectivity. A few people noted that they were doing ok at the moment, or had no other pressing needs.

A significant portion of responses to this question was made up of very specific suggestions that could not be quantified into overarching themes. Examples of such responses include requests for 'general support', 'clear indications of what can and can't be supported in the future', 'A healthy TV3', 'Ensuring we have the infrastructure we need to do business in Auckland', 'New gallery representation' and 'Being able to return to our building so that staff without work can work on physical work inside the building.'

7. Conclusions and next steps

This survey occurred at a point in time of acute change and uncertainty for people in the creative sector, and the responses received reflect this wider context. Participants reported a significant range of impacts that were both financial and non-financial, and for many this placed into doubt the viability of their professions and businesses. Many still expect to maintain their participation in the creative sector in some form, but for others, continued participation was uncertain. Despite the uncertainty, a wide range of suggestions were put forward for how the creative sector can respond to the challenges of COVID-19.

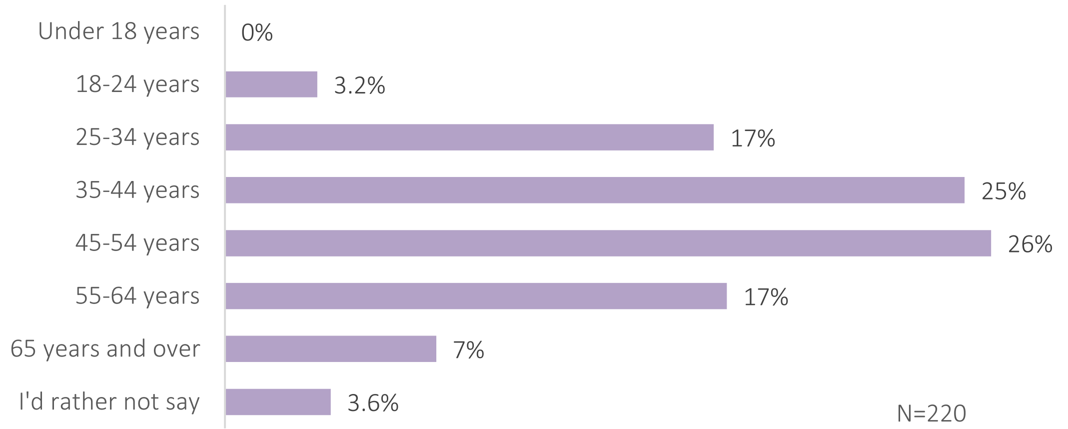
At the conclusion of the survey, respondents were informed that we may look to run this survey again to see how much the situation has changed, and asked if they would be willing to be contacted again. 149 participants indicated that they would be willing to be contacted and provided contact details. This will provide a useful database of potential contacts to revisit the issues covered in this survey later in 2020, should this be useful.

Appendix 1: Demographic profiles of survey participants

One-third of respondents (34%) were male and two-thirds (64%) were female. One respondent identified as gender divers and two respondents indicated they would rather not say.

Half of respondents were aged 35 to 54 years, and those aged 25 to 34 years, and 55 to 64 years were each represented by 17% of respondents.

Figure 19: Age ranges of survey respondents



Some 75% were European/Pākehā, 10% were Māori, with the remainder spread across a range of ethnic groups.

Figure 20: Ethnicity of respondents (multiple responses possible)