State of the Arts Survey

Aotearoa
February-March 2022

Report on survey findings

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Acknowledgements

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Executive Summary

This report presents the findings from an online survey of those in the creative sector in Aotearoa, between February-March 2022. This is the second national survey in a series of surveys intended to track the state of the arts sector in Aotearoa. In total there were 707 respondents nationwide, and results are discussed below.

Creative freelancers dominated the total sample: More respondents reported being a creative freelancer (61%) than any other role in the creative sector. This was followed by unpaid/voluntary creative individuals (25%), and leaders of a creative not-for-profit (17%).

Visual and performing arts were strongly represented in the total sample: Respondents were active in many creative areas. Visual arts was the most prominent area reported (47%), followed by performing arts (41%) and music (25%).

Respondents have shifted towards a more pessimistic view about their financial position: Respondents rated their outlook on whether their creative work would support their financial position in the next 12 months (from 1 meaning very pessimistic to 6 meaning very optimistic). Compared to the September-October survey, pessimism increased from 60% to 68%, and optimism fell from 38% to 29%, indicating a shift towards a pessimistic view.

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 37% to 24%) and those who expect staff or contractor numbers to stay the same or reduce had increased (from 38% to 46% and 8% to 15% respectively).

Respondents' views 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 44% to 52%, and optimism fell from 54% to 46%, indicating a shift towards a more pessimistic view.

More respondents reported that audience appetite for their creative work had decreased: With 37% reporting audience appetite being less than usual, 23% reporting that it was the same as usual and 25% reporting that it was more. Overall, the average rating was 1.9 out of 3 (from 1 meaning less than usual to 3 meaning more than usual). This is 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.

- Respondents shared their concerns about 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.
- The ability to connect with audiences and potential buyers of creative work. Some were worried that audiences won't return and that low visitor numbers meant fewer purchasers of art and other creative works.
- Ongoing cancellation of events, with people reporting both the financial and emotional costs.
- Some were worried about 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.
- Systemic issues such as which groups are in decision-making positions in the creative sector and the design of funding structures.
- How the stress of the pandemic was impacting on their well-being, particularly mental well-being, and of others around them.
- Some were worried about the loss of highly skilled people from the creative sector.
- Other themes included: the lack of value placed on the creative sector; the difficulty with trying to develop a career in the creative sector; the number of venues that are closing and the worry that some of these closures may be permanent; increasing inequities; and problems with supply chain issues affecting the ability to perform and/or create works.

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:

- People shared that they felt most positive about their creative practice and/or their ability to at least do some work.
- Having the time and space to develop new works, explore ideas or study.
- Audience enthusiasm for the creative industries, including enthusiasm for Māturanga Māori, international interest and potentially pent-up market demand for creative products and services.
- The lifting of COVID-related restrictions, particularly after the Omicron wave and returning to normal.
- Community connections and support within the creative sector plus opportunities for partnering and collaboration.
- The potential for innovation and creativity and the creative sectors' role to engage with diverse communities.
- Respondents shared that they felt positive about the resilience of creative people.
- The 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.
- Other themes included: the opportunities created by digital platforms and media; the intrinsic value of artists and creative activities; any opportunities for performing; the move towards indigenous frameworks and economic prosperity for Māori and receiving positive feedback about creative work.

1. Introduction and approach

This report presents findings from an online survey of people in the creative sectors in Aotearoa 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). Initial surveys were conducted in Tāmaki Makaurau and Pōneke in June-July 2021. This national survey was undertaken from September 2021.

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. 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 database distribution (via Te Taumata Toi-a-Iwi, Arts Wellington, 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.

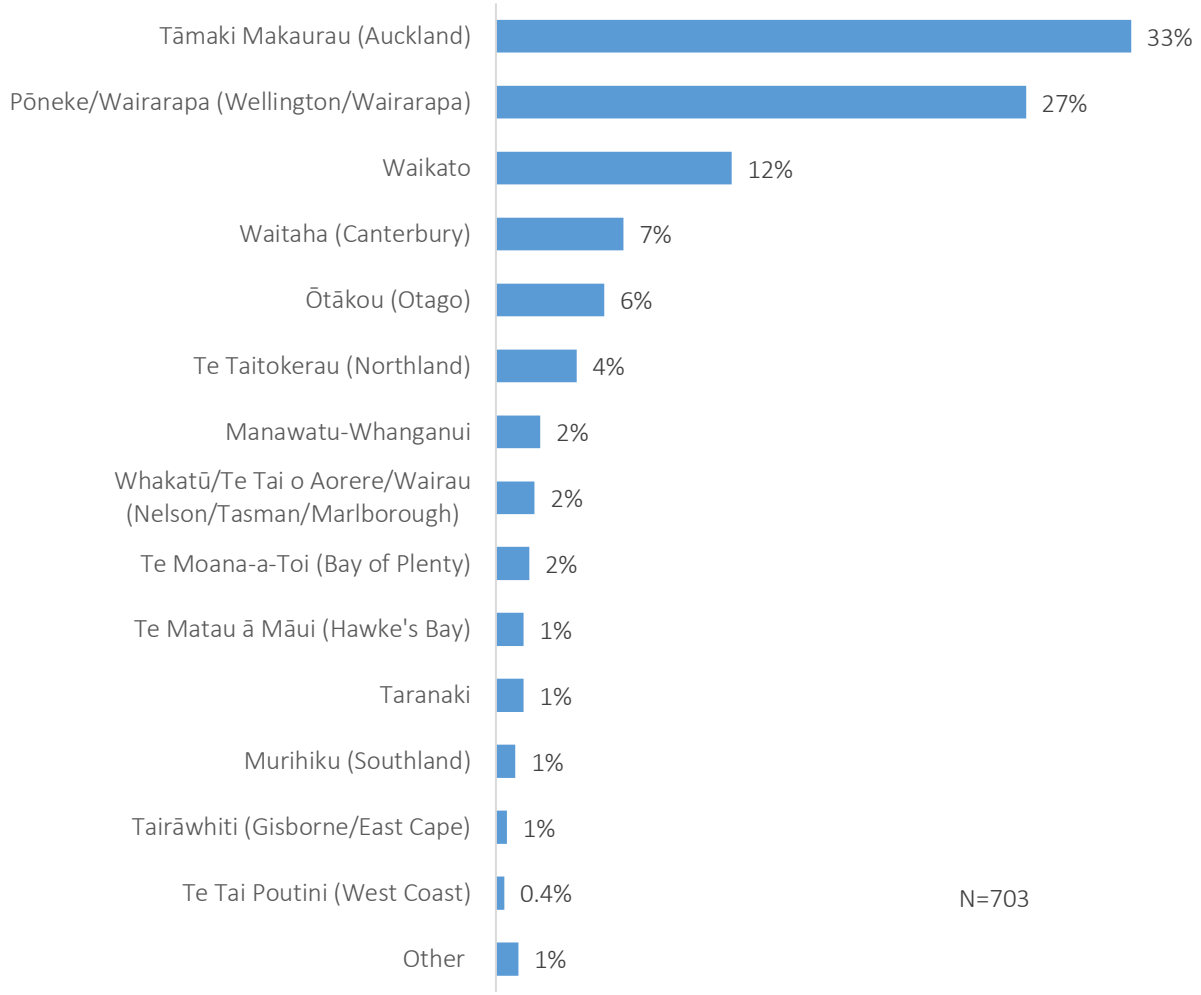
In total there were 707 responses. This was a higher response than the previous survey (530 responses). Tāmaki Makaurau had the highest number of responses with 33%, followed by Pōneke which had 27% of responses (Figure 1). Between surveys, the proportion of Pōneke respondents declined (34% to 27%) whereas the proportion of Tāmaki Makaurau respondents remained at similar levels (30% to 33%). There was also a decline (18% to 12%) in responses from Waikato. 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 three 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 in 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 original June-July survey captured the Alert Level 1 setting.

This report focuses on results for all of Aotearoa using the total sample (N=707).

Figure 1: Areas in Aotearoa where respondents were mainly based



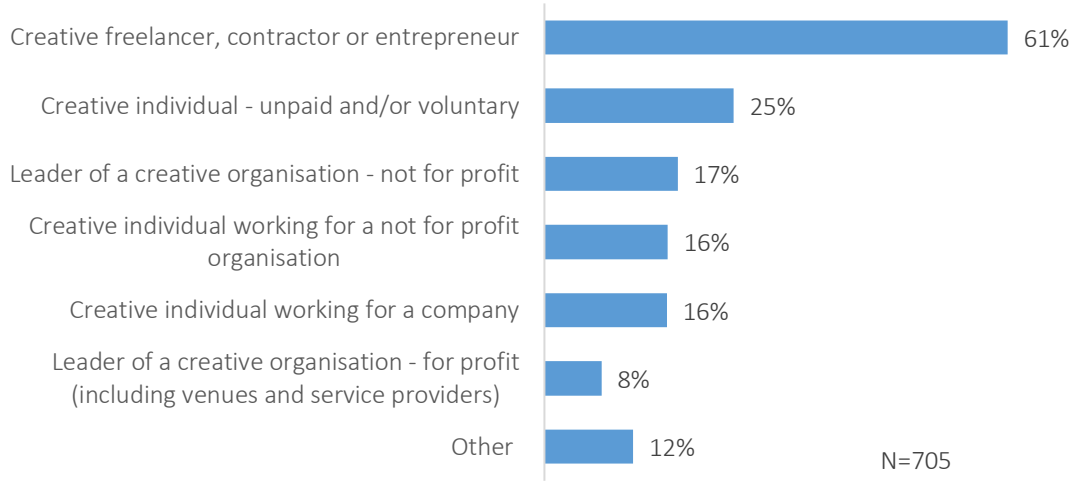
2. Roles of respondents

Creative freelances dominated the total sample

Most respondents were freelancers (61%), unpaid creative individuals (25%), and leaders of a creative not-for-profit (17%). Other respondents were creative individuals working for a company (16%), creative individuals working for a not-for-profit (16%) or leaders of creative for-profit organisation (8%). The remaining respondents who selected 'other' mentioned roles such as educator, board member, and director (12%).

Compared to the previous survey there were more creative freelancers in the most recent sample (increase from 50% to 61%) and a smaller representation of leaders of a creative not-for-profit (decreased from 23% to 17%). The proportions of the remaining roles were relatively similar between the two samples. A further breakdown of roles between surveys can be found in the Appendix (Figure 10).

Figure 2: Respondents' roles in the creative sector

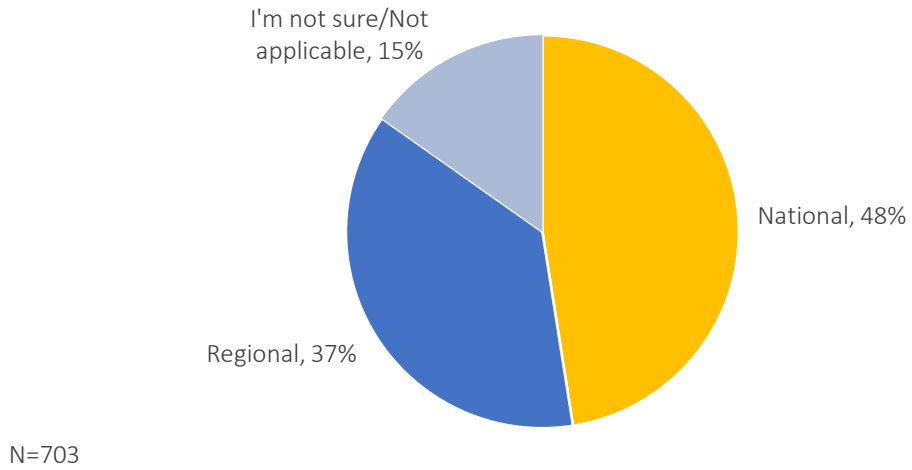


Note: Multiple responses were allowed

More respondents had work that was nationally focused

Of the respondents in the survey, 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



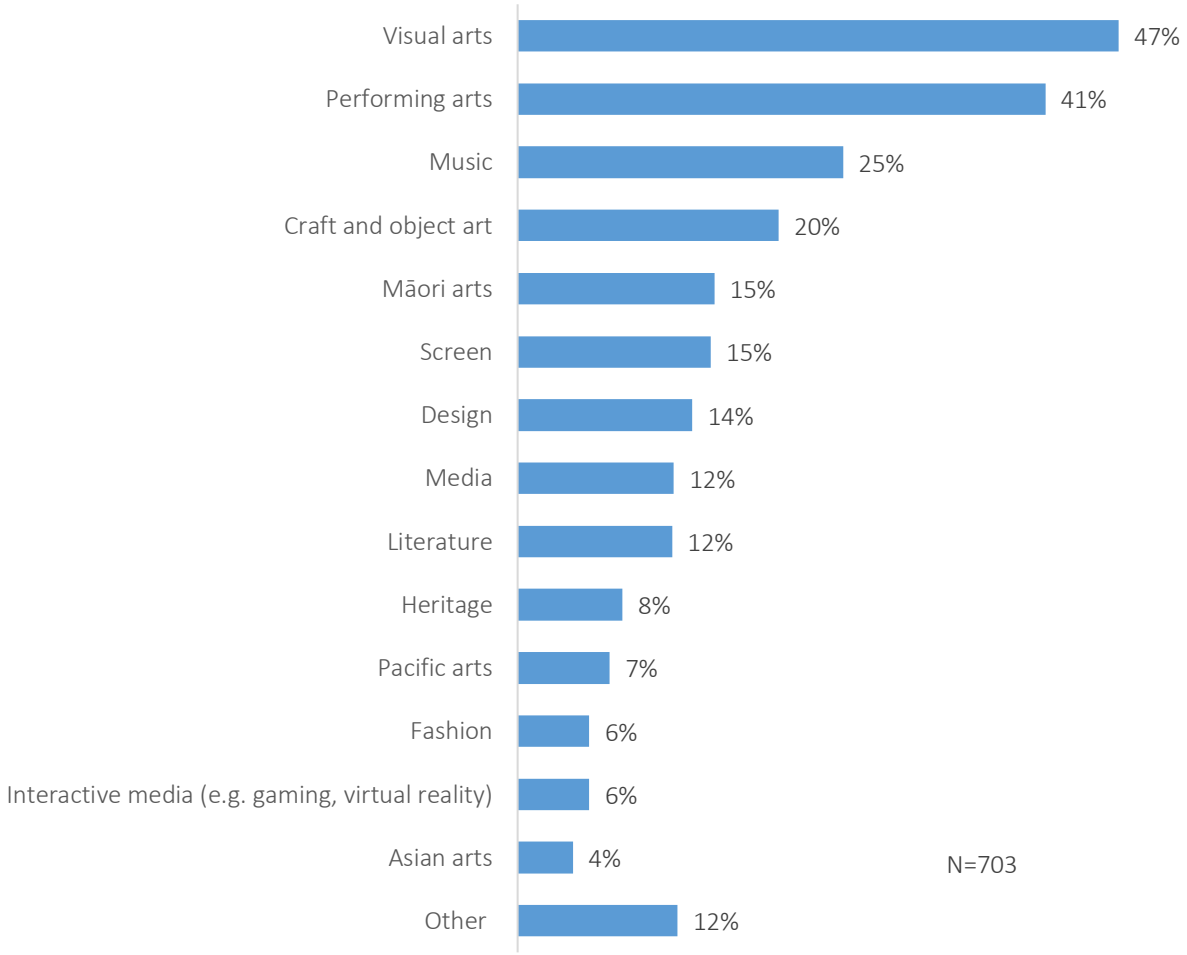
Visual and performing arts were strongly represented in the total sample

From the survey it is evident that respondents work in a variety of creative areas. When asked which of the following best described their area of work, the largest number of creatives were involved in visual arts (47%), followed by performing arts (41%) and music (25%). Some respondents were involved in craft and object art (20%), Māori arts (15%), screen (15%), and Pacific arts (7%) (Figure 4).

Compared to the previous survey areas of creative work remained at similar proportions. There was however a decrease in representation from performing arts (from 47% to 41%).

A full breakdown of creatives roles between surveys can be found in the Appendix (Figure 11).

Figure 4: Respondents' creative area of work



Note: Multiple responses were possible

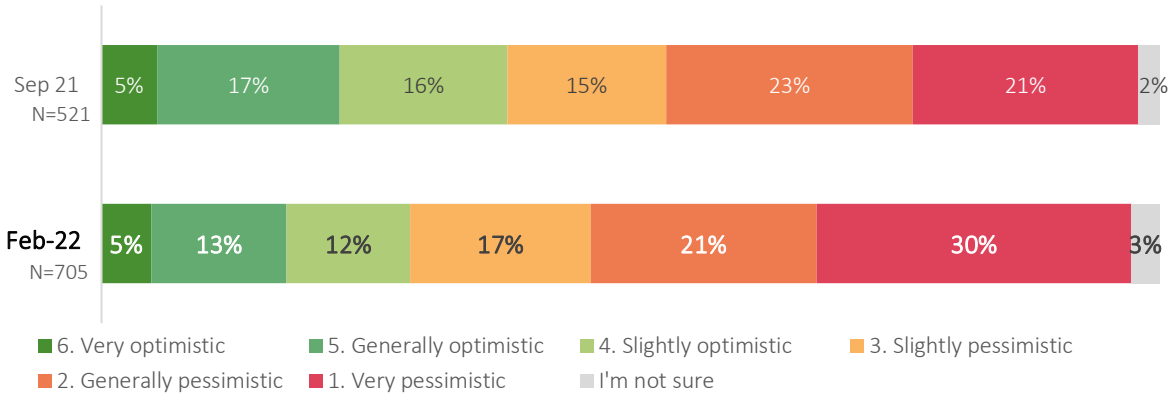
3. Financial position

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

Respondents 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 60% to 68% and optimism dropped from 38% to 29%. This indicates a shift towards pessimism (Figure 5).

Overall, the average rating was 2.7 out of 6 in the latest survey, compared to 3.0 in September-October.

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

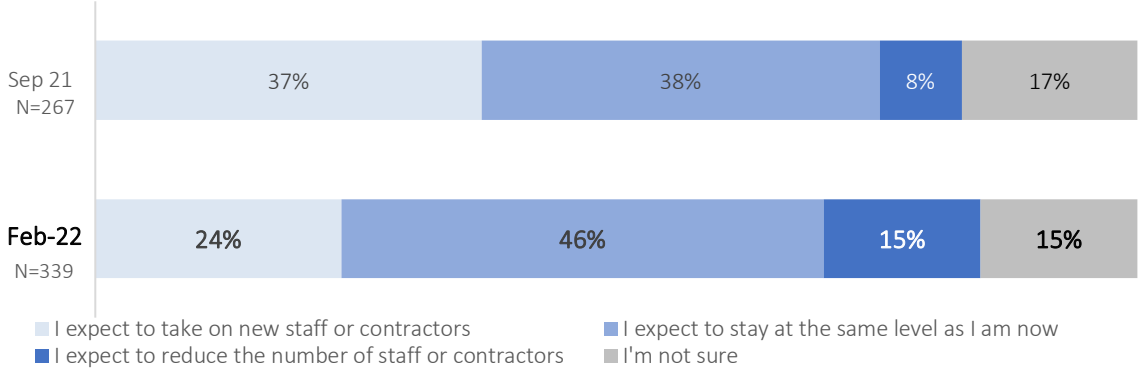


Fewer respondents expected to either increase their current staff or contractor numbers, compared to the previous survey

Respondents were also asked if they expected to take on new staff or contractors in the next 12 months; this question applied to 48% of respondents (N=339). Most respondents expected their current staff or contractor numbers to stay at the same level (46%), followed by respondents who expected to take on new staff or contractors (24%). There were a few who expected to reduce the numbers of staff or contractors (15%), and some did not know (15%).

Figure 6 shows that the number of respondents who expect to take on new staff or contractors had decreased (from 37% to 24%) and those who expect staff or contractor numbers to stay the same or reduce had increased (from 38% to 46% and 8% to 15% respectively).

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



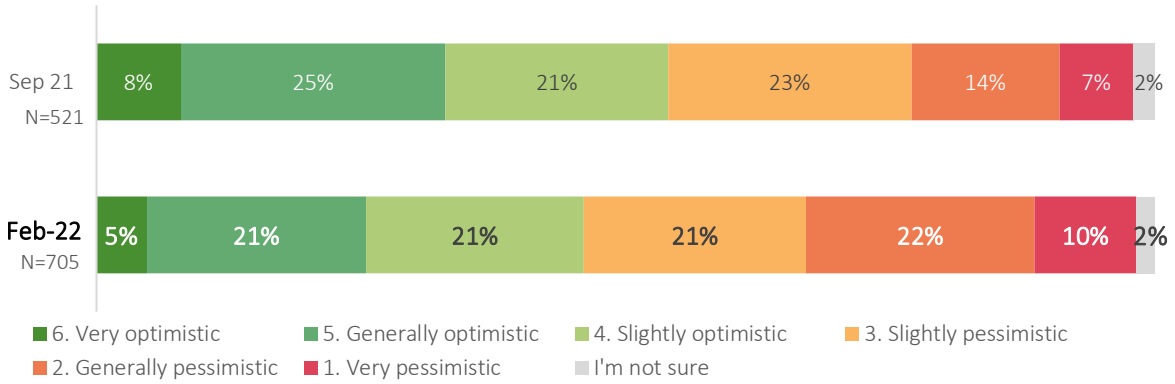
4. Creative position

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

Respondents were asked how optimistic or pessimistic they were about achieving their own or their organisations' creative goals in the next 12 months. Respondents were asked to rate the statement on a scale of 1 to 6, where 1 was 'very pessimistic' and 6 was 'very optimistic'. Compared to the September-October survey, pessimism increased from 44% to 52%, and optimism dropped from 54% to 46%. This indicates a shift towards pessimism (Figure 7).

Overall, the average rating was 3.4 out of 6, compared to 3.7 in September-October.

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

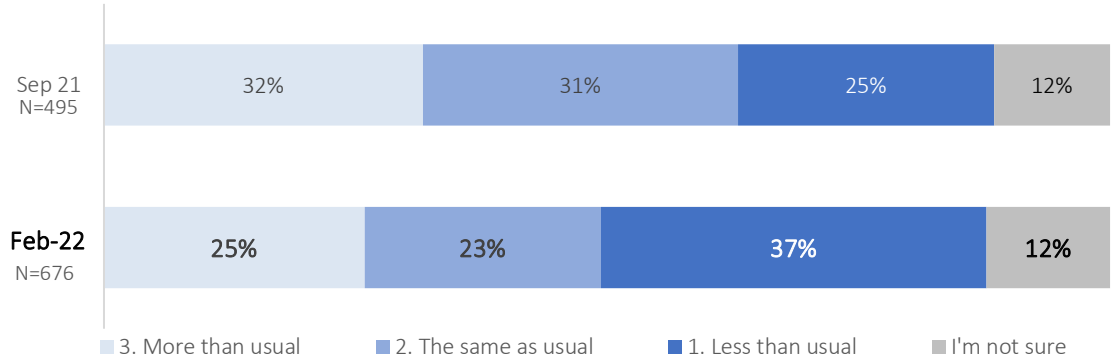


Respondents' perception of audience appetite for their creative work seems to have decreased

Respondents were also asked to rate what their perception of audience appetite was for their creative works (either their own or their organisation's) in the past three months. Most respondents indicated that audience's appetite for their creative work was less than usual (37%). Some reported that it was more than usual (25%), or about the same (23%), and others were not sure (12%).

Overall, the average rating was 1.9 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 indicates a shift towards pessimism (Figure 8).

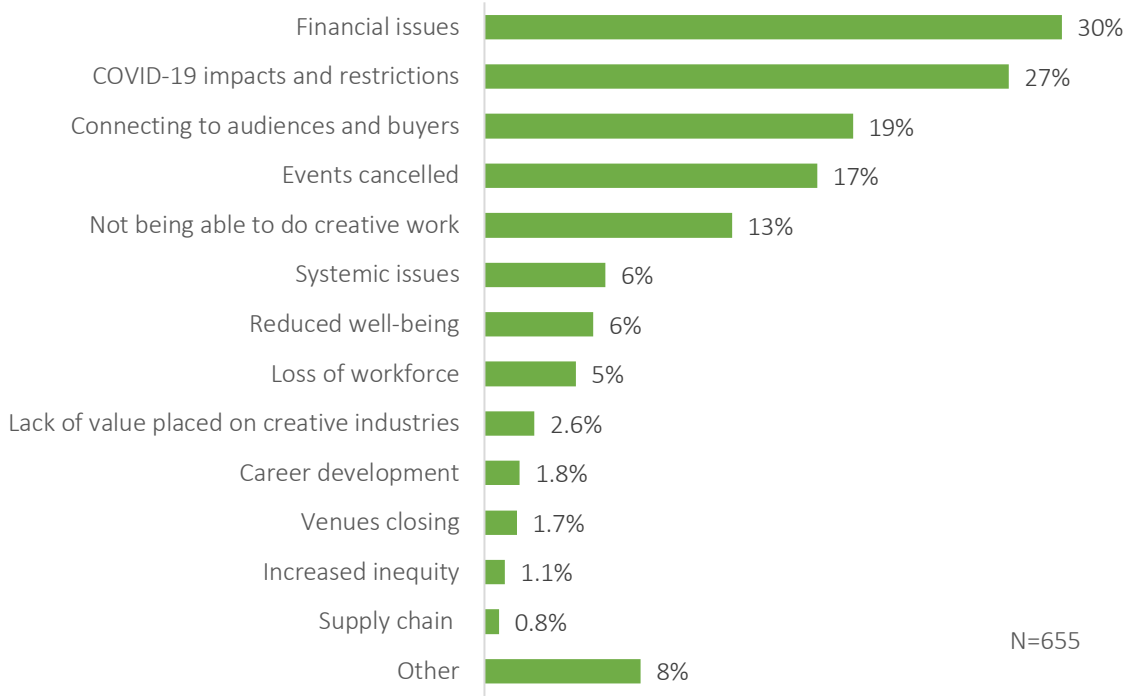
Figure 8: Respondents' perceptions of audience appetite for their creative work (their own or their organisation's) in the past three months



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, 655 people responded to this question. Their responses were coded and Figure 9 below shows the percentage of responses within different themes.[1]

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

Thirty percent of respondents shared that they were most worried about financial issues in 2022.

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

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.

For some people, the funding criteria was too tight.

> *A lack of funding to deliver the projects we have waiting to go. To many tight restrictions on funding criteria, makes it feel as though we slip through the net.*

> *That funding will continue to go to the organisations with capacity and skills to put forward strong applications, and the smaller ones will be left out/unsuccessful. I am worried that funding or financial support will be tied to an expectation to deliver work, rather than just keeping us afloat - there is an absurd expectation that if we just give money for projects then we'll be fine, when in reality projects are being cancelled left right and centre. We need funding to SURVIVE, not funding to develop and create new work that is impossible to deliver during the pandemic.*

Some were most worried about how funding was allocated and believed that funding or financial support was not getting to people who need it the most.

> *I am concerned that the injection of financial support to the creative industries during the pandemic will go towards institutions and individuals who are more comfortable and could secure sponsorship or support elsewhere with relative ease.*

Others expressed concern that they were unable to demonstrate their loss of income due to the pandemic and therefore did not qualify for financial assistance.

> *The new funding sounds wonderful but only applies to proven gigs, which I have not got set up in 2022 like I had in 2021, so I can't prove my lost income the same way, therefore not eligible for support. Yet the lost income is due to not being able to set up gigs in Red.*

> *All of the subsidies are directed towards pre planned contracted work. That doesn't take into account the nature of the arts hustle. You do a thing. People see the thing. More opportunities present themselves. I had a show cancelled in August for which I received subsidy but because I didn't do that it broke the momentum and now I don't have more work. There's no way to quantify this. Basically all my opportunities have dried up and there's no support.*

Respondents were also worried about having enough income to live on.

> *I'm worried I'll not earn enough money to support myself and my kids.*

> *As an actor, I am concerned that there won't be enough projects going ahead during covid, which means not enough work for me. Covid also means it is incredibly difficult for me to perform/make money off any work I create.*

Others were worried about whether their businesses would survive and if they will be able to the pay their bills.

Being able to pay our bills (staff, raw materials, insurance, power, workspace, etc) with less customer flow and the rising cost of labour, energy, materials and shipping.

Going broke and losing my staff and them losing their livelihoods / futures that they have built for themselves.

Other financial concerns included the struggle of breaking even or generating income off live events with the current restrictions on audience numbers; the public not being able to afford to engage in the arts; not being able to afford to work in the creative sectors because of low pay rates; the costs associated with creative activity and worries about a general economic downturn and rising costs of living.

COVID-19 impacts and restrictions

Many of the survey respondents (27%) expressed concern 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.

More closures because of covid. So tired of having our productions interrupted by lockdowns and rules.

Some felt that restrictions on event numbers associated with being in "red" were having a particularly detrimental impact on the creative sector.

Struggling to survive as many events have cancelled and a lot of our business relies on providing lighting staging and audio for these events. Also struggling to survive at audience levels of 100 or less. No matter what is said this is not viable to pay everyone at an affordable ticket price.

Respondents wanted more engagement with the events industry to develop safe ways for larger events to proceed.

The reduction to capacity numbers as a blanket rule doesn't allow for the industry to develop infrastructure that is harm reduction focused. Complete prohibition of activity (or limit to 100pax) is not the correct response, there should be more discussion with the events industry to develop covid friendly ways to function, like is happening in Europe.

Some people were worried that they could not participate in creative activities because they were not vaccinated.

Institutions not allowing me to engage with my audience and or make my creative work because I am not vaccinated.

The impact of border restrictions was another area of concern, with border restrictions not allowing international cast and crew in.

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

Sustainable practice and navigating the impacts of Covid in my mahi in all aspects.

Disruption caused by omicron meaning performances can't go ahead or venue staff unable to work.

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.

Sustainability, staying safe and if it will ever be safe for someone like me - with an underlying condition - to ever teach singing or perform in person again.

Health and safety, means we are less inclined to want to risk crew for mahi, and our clients less inclined to be able to need our mahi. Catch 22.

Another concern was uncertainty and associated difficulties with planning for the future.

Connecting to audiences and buyers

Respondents (19%) shared their worries about being able to connect with audiences or to find people who wanted to purchase their creative products and services.

People were worried that they have made work that won't be seen because audiences were staying away from live performances.

Making work that will not be seen due to reduced audience size and cancelled/postponed events.

Others were concerned about whether audiences will return.

That we cannot perform for our audience and we will lose them as we are a fairly young company and only just making a name for ourselves.

The impact of the pandemic on book and art sales was a concern for many people. Respondents noted that the postponement and/or cancellation of events and exhibitions had made it difficult to connect with buyers.

Reduced exposure due to cancelled or postponed exhibition opportunities & restrictions on events related to these. Reduced foot traffic as a result of COVID & inability to engage with potential customers, resulting in little or no sales.

Due to Covid and lockdown galleries have a backlog of exhibitions cancelled and are therefore not looking to take on new artists. Having recently returned to NZ, I am struggling to find an outlet for my work which is necessary to make sales.

So many in-person literary events have been cancelled because of the pandemic, and book sales and reader-author relationships have been badly affected.

Respondents expressed concern about the reduced numbers of tourists and low visitor numbers which was having an impact on their income.

Fewer visitors to our small town and therefore to our little gallery.

No tourists no sales and no workshops

The cancellation of events

Respondents (17%) shared their worries about the amount of unpaid work that results from events that are subsequently cancelled, and that it was uneconomic to try to hold events (note that with reference to the comment below, we note that a range of support has been put in place since February 2022 through Ministry for Culture and Heritage, including financial support to sole traders/freelancers, and support and underwriting for events).

> *That we will put in hours of administrative work to book in events, preparation towards such event then be cancelled and receive little to no compensation.*

They reported that cancellations are costly from a financial as well as an emotional perspective.

> *Putting lots of planning and preparation in only to have something cancelled in the late stages. Has happened so many times in the last 2 years it is draining and difficult to find the energy to initiate new projects.*

> *All our performances with festivals and private sector has been cancelled, with no money or motivation to work towards to, we can fall in a big black hole of inactivity/uncreative.*

Not being able to do creative work

Respondents (13%) shared their concerns about not being able to work in the creative industries.

> *Arts organisations have even less money than usual, to put on concerts, which means fewer gigs/less performance work for me.*

> *Working solely as an actor or freelancer right now is just completely out of the question in terms of sustainability. Finding creative work feels very hard at the moment even though there seems to be a hunger for it at the moment.*

For some, their worries related to not being able to do the type of work that they really enjoyed and found satisfying.

> *I'm a freelance film editor working across art + commercial projects. My main concern is losing artistic work generally which is why I do what I do. TVC editing wont go away but it's the opposite of meaningful work. I love editing feature films, experimental art projects, documentaries etc but it is increasingly difficult to make enough money from this to get by.*

Some were having to work outside creative fields in order to support themselves leaving little time for their creative practices.

> *I'm worried that I'll need to take on more hours of paid work to support my creative practice financially. Which means less time for my art practice, which ultimately means it will be longer before I exhibit again.*

> *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.*

Systemic issues

People shared concerns (6%) about systemic issues that impact on the viability of the creative sector in Aotearoa / New Zealand. Some noted that the amount of funding available to them wasn't enough to pay creatives properly.

> *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.*

There was concern over the ability of funders to support independent artists and the not-for-profit sector effectively.

> *In the ability of Creative NZ and the Ministry of Culture & Heritage to dispense support easily and effectively to independent artists and not-for-profits across all arts sectors. Funding is provided to edifice companies, while support for independent artists/creatives is hard to access and not sustaining, and often technically prohibitive for many.*

Many noted that way funding and financial assistance packages have been designed meant that they weren't eligible for support.

> *And whilst I like the performance and events industry, we really need a better funding model for those that don't fit into those boxes.*

> *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.*

Others were worried about how COVID-19 relief funds were being allocated and the lack of a long-term vision.

> *There is such little consideration of actually addressing long-term and systemic needs and a lot of money towards projects that feel ill-advised/like 'good-ideas' but will yield little or no long term value. There seems to be no coherent vision (or even accurate understanding) of what's needed from these organisations. This is most worrying.*

Some expressed their concern about the general condition of the New Zealand creative scene and the inability to recognise new talent and progress.

> *The New Zealand art world is generally utterly incapable of processing the aesthetics and ideas coming out of underground hyper cultures. They have no prior schema to attempt any kind of pattern matching around these matters, and they are too arrogant in their position of authority and security to bother to learn how to understand such cultures and their work[...]. What is more concerning is the massive and nearly completely unrecognized generational divide between the pre-Internet generations and the post-Internet generations in the creative sector in this country. It is a class divide as well as a generational divide [...].*

Reduced well-being

Respondents shared their concerns (6%) about how the stress of the pandemic was impacting on their well-being and of others around them. People reported that they are losing hope.

A lot of us are losing hope. I'm losing collaborators to exhaustion, financial troubles, and death. Everyone feels desperate. The risks in performing arts used to be about ticket sales and having a good show. Now its about whether a show can go ahead at all, to an audience of 10 or 40. It's a huge strain on the performer and producer.

They shared the detrimental impacts on mental well-being.

The morale of those in the arts industry is very low, people are scared for when they'll be able to work again, pay their bills, and the ongoing mental health strains caused by such uncertainty and lack of support by the government during this tricky time. I think it's making artists (on and backstage, ushers, bar staff, it takes a whole community of folks to put a show on!) are feeling like they don't matter and can't rely on the government to support them, even though we accept that we can't work right now due to the omicron outbreak.

Burnout and mental health for the core team - very little income and constant contingency planning (often wasted effort as so many unknowns) coupled with reduced incomes - and lack of the "psychic income" that comes from audiences/performance.

Some shared the impacts on their creative practice.

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.

Loss of workforce

Respondents were worried (5%) about the loss of skilled people from the creative sector through creatives leaving the industry.

We have lost a huge pool of people from the industry - performers, designers, technical people.

Arts adjacent suppliers/contractors may go out of business and our predominantly freelance workforce will have no option but to leave the industry due to uncertainty, leaving a huge vacuum of skilled workers and suppliers of the equipment and services required to present live arts & entertainment.

Respondents were concerned that highly skilled people will move into other industries.

The health of our industry. That we lose brilliant individuals to the trades sector.

Other people were worried about current talent shortages in some areas.

Talent shortages for highly technical creatives - visual effects artists, animators, game developers.

Finding the right team that can do all the tech work for my NFT project, developers, smart contract writers, web developers etc.

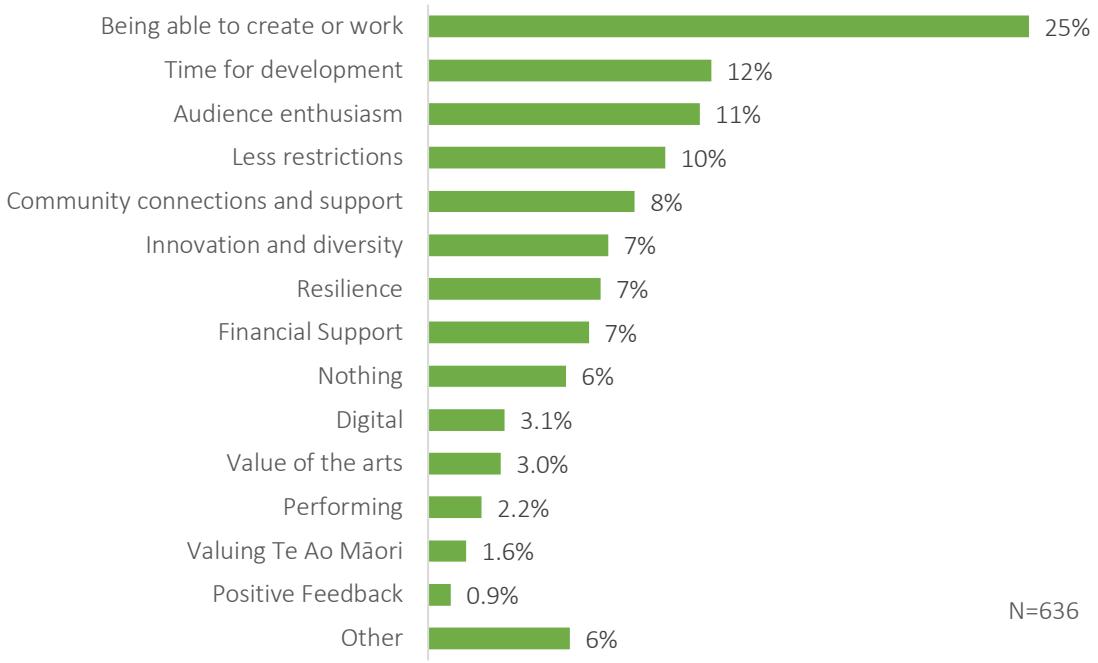
Other themes

Respondents were also concerned about the lack of value placed on the creative sectors (2.6%); the difficulty with trying to develop a career in the creative sectors (1.8%); the number of venues that are closing and the worry that some of these closures may be permanent (1.7%); increasing inequities where privileged groups do well in the current environment and others remain excluded from participating (1.1%) and problems with supply chain issues affecting the ability to perform or create works (0.8%).

6. Areas of optimism in 2022

Respondents were asked: "What are you feeling most positive about for 2022 in regards to your creative work, or the work of your organisation?". Overall, 636 people responded to this question. Their responses were coded and Figure 10 below shows 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

A quarter of respondents (25%) shared that they felt most positive about their creative practice and/or their ability to at least do some work.

> *I am lucky to work in voice over and have regular clients. Although I also work as a singer and all that work has gone, my primary income is voice over which has been quite stable.*

> *I continue my mahi no matter what.*

Some shared achievements that they felt positive about.

My creative work has continued to gain audience mainly internationally. I hope to continue working on it and develop it more so that it can become more stable.

We have made a great piece of work. That in itself has been immensely rewarding. We trust that our tiny audiences will still get a lot out of it.

Time for development

People felt positive (12%) about having the time and space to develop new works, explore ideas or study.

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

I am studying this year to give myself time to expand my practice and grow as an artist.

Audience enthusiasm

Even though many people expressed concern about declining audiences for creative goods and services , 11% of respondents felt most positive about audience enthusiasm for the creative industries. For example people noted the appetite for mātauranga Māori.

The appetite of audiences for matauranga Māori.

Sharing the beauty of toi Māori and te ao Māori with communities.

Others reported that opportunities were opening up and these are being received positively.

More opportunities to exhibit my work gradually starting to happen.

When there is work, both the artists and audience are very enthusiastic.

Some people felt most positive about the high demand for their work.

Work is strong and regular and customers want my work.

I feel like this will be a huge year of growth for my Arts Trust and for me as a recording artist in the music industry.

Others noted that there is international interest in New Zealand work and potentially pent up market demand.

That we have weathered the storm before and our waka is well-prepared. Some optimism that we might be able to engage internationally.

People's appetite for art appears to be stronger, with less money being spent on travel, hopefully some of that can be directed to the arts.

Fewer restrictions

Ten percent of respondents reported that they were feeling most positive about the lifting of COVID-19 related restrictions, for example, after the Omicron wave.

Hope that post-omicron variant we might settle into a stable national protection framework. Restrictions we can work with but changing levels and regional lockdowns were so disruptive last year.

That the COVID pandemic may peak and restrictions will be removed

Others were feeling positive about people being more used to living with COVID-19.

People are now used to how to be around COVID, so we're better able to forge forward with plans, than we have been in 2020 and 2021.

Some were looking forward to the borders reopening which would make it easier for some industries to function.

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'.

Things going back to the old norm where I could just focus on working my ass off then share the fruits of that labour with whānau, friends, community and the world.

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 (8%) that they felt most positive about the community connections and support within the creative sector.

Our sector as a whole coming together to advocate for and support each other.

The creative community is super supportive, and I'm excited to see collaborations unfold.

Respondents shared that they have identified opportunities for partnering and collaboration during the pandemic that may not have happened otherwise.

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.

Innovation and diversity

Some respondents (7%) 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?

The necessity to adapt and for organisations to think outside the box in order to create work will be beneficial to all who are involved.

The challenge to innovate public programmes and explore our online space.

People were also feeling positive about the creative sector's role to engage with diverse communities.

> *The vital inclusive part we play in engaging diverse communities to experience, take part in social arts and learning and the wellbeing benefits that result.*

> *New ways of thinking creatively about reaching different audiences*

Some thought that the number of people leaving the arts sector could result in greater diversity.

> *The amount of people leaving the industry due to lack of work will make way for new comers, who are generally younger and more diverse, therefore the industry is diversifying and progressing as a result.*

Resilience

Seven percent of respondents reported that they felt most positive about the resilience of creative people.

> *That creatives are resilient and will weather the storm.*

Some felt that insights from experiences during the pandemic could be applied in the future.

> *How resilient our sector is and how much we're learning from "process" while product might be interrupted.*

> *Applying all that we've learned in meeting the challenges of 2021, and being able to apply that moving into 2022.*

Financial support

Some respondents (7%) reported that they were feeling most positive about the financial support they had received and their ability to keep creating.

> *I have been fortunate to receive an award which has a substantial financial grant attached to it. This means I can afford to continue to work on my art practice full time.*

> *We are very fortunate to have a solid funding relationship with CNZ and a group of private donors that enables us to plan and to continue to create new work. We have a new play that was developed over lockdown last year ready to premier late this year. So we're still creating.*

Some valued government efforts to support the creative sector.

> *MCH's event cancellation fund is a very welcome change, albeit it a clumsy process.*

> *That government funding will help us through the times we have no income.*

Others had received international awards or funding which they felt most positive about.

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

Other themes

Respondents also reported that they felt most positive about: the opportunities created by digital platforms and media (3.1%); the intrinsic value of artists and creative activities (3%); any opportunities for performing (2.2%); the move towards indigenous frameworks and economic prosperity for Māori (1.6%) and receiving positive feedback about their work (0.8%).

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

> *I have nothing to look forward to. I'm tired. I'm burnt out. People who don't need support keep getting funded while those who do are made to fight for scraps in a race to the bottom. Hell, I'm mostly filling out this form for that draw for $200, that's how bad it is.*

> *I'm finding it difficult to feel positive about anything.*

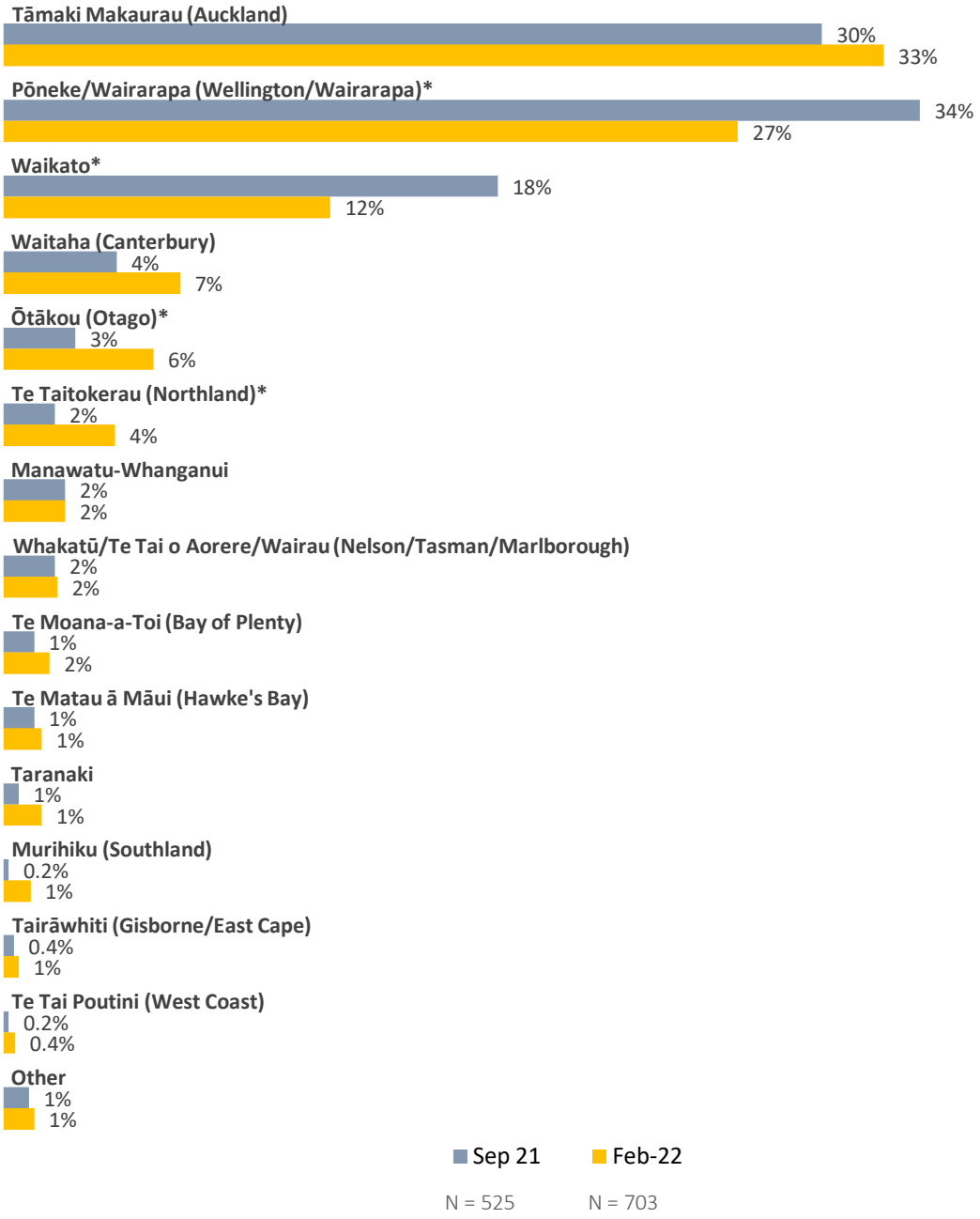
7. Next steps

This survey is the third quarterly survey of the cultural and creative sectors in Tāmaki Makaurau and Pōneke 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

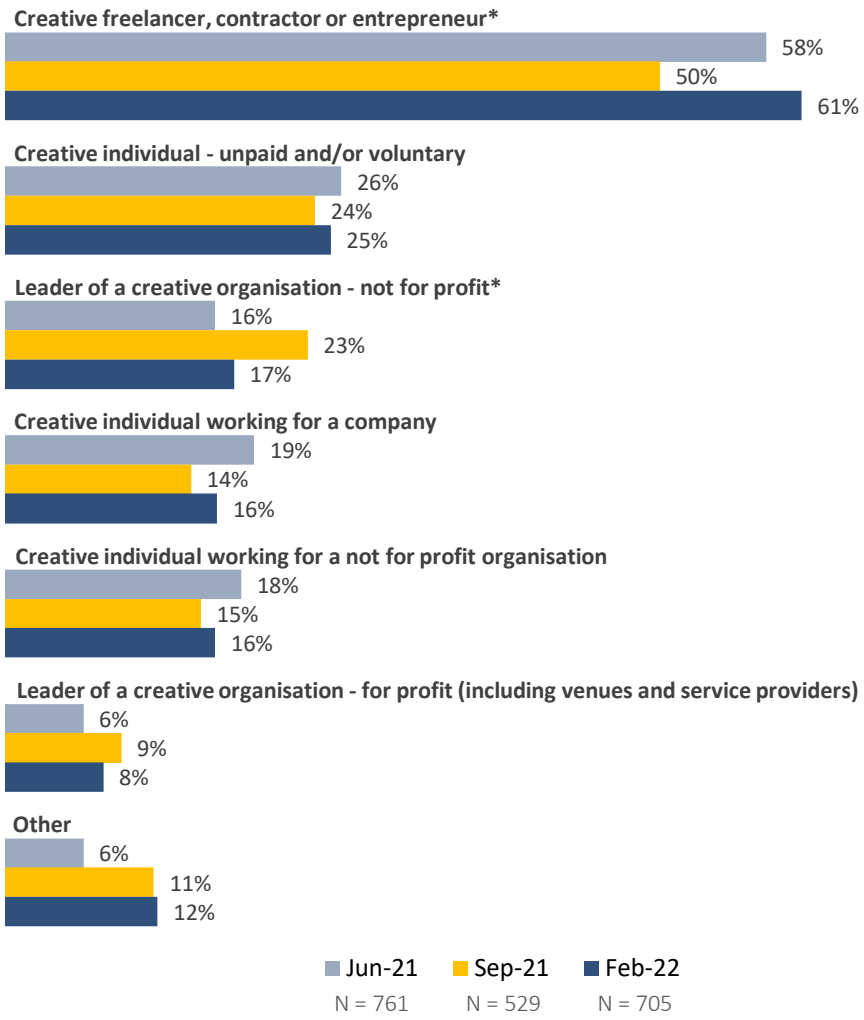
Figure 11: Areas in Aotearoa where respondents were mainly based compared to the last survey



** 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

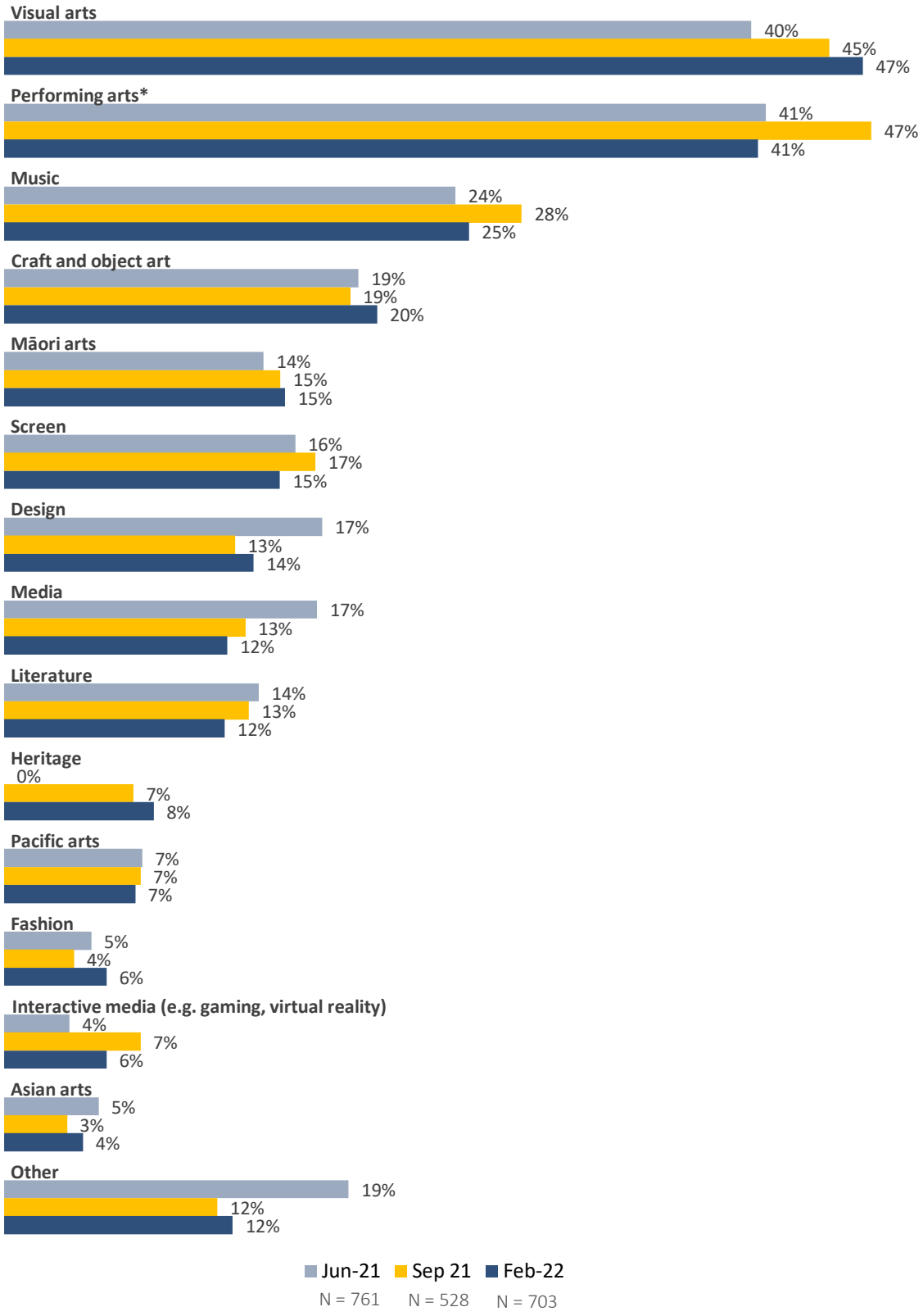
Figure 12: Respondents' roles in the creative sector across surveys



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

Note: Multiple responses were possible

Figure 13: Respondents' creative area of work across surveys



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

Note: Multiple responses were possible