

**Manatū
Taonga**

Ministry
for Culture
& Heritage



COVID-19 Response Impacts Report 2020/21 Summary

**Te Rangahau me te Arotake | Research & Evaluation
Manatū Taonga | Ministry for Culture and Heritage**

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Introduction

In March 2020 the cultural sector was facing significant challenges from COVID-19.

From early 2020 a range of data confirmed that the cultural sector was at significant risk due to the global pandemic; for example, that the loss of productivity (GDP) in the sector would be twice as much as the economy as a whole and about 11,000 jobs would be lost by March 2021.

Diverse sources identified significant viability risks to cultural sector organisations and creatives, at-risk cultural content and mātauranga Māori, and wide impacts on all New Zealanders' ability to participate in cultural activities.

In response, the government announced a targeted recovery package to the cultural and media sectors

Budget 2020 announced targeted investment to support sector recovery from COVID-19 and to maintain the sector's critical role and contribution to Aotearoa New Zealand. Manatū Taonga is the responsible government agency, in partnership with funded agencies and sector stakeholders, to deliver the 40+ initiatives that comprise Manatū Taonga's COVID-19 Response. This includes the Arts and Culture Recovery Programme (\$374m) as well as the Media Sector Support Package (\$50m).

The COVID Response was structured to provide short-term relief to address critical immediate risks (known as *Survive* initiatives), longer-term investment in adaptation to a post-COVID operating context (known as *Adapt* initiatives), and support for the sector to 'build back stronger' through transformed practices and relationships (known as *Thrive* initiatives). *Survive* initiatives are the focus of the 2020/21 report with a small amount of data from *Adapt* and *Thrive* initiatives.

Manatū Taonga has measured the impacts of the COVID Response in 2020/21 against three overarching outcomes

A programme-wide approach was used to guide impact measurement across the diverse initiatives that comprise Manatū Taonga's COVID Response. Specific impact measures were set at the initiative level collaboratively with reporting organisations, and the collective contribution of initiatives was assessed around three overarching outcomes:

Whakahaumanu Ōhanga Economic Recovery

The sectors are economically stable, sustainable and adapting to a post-COVID environment. The sectors make a positive contribution to wider COVID economic recovery.

He Kuhunga, He Whai Wāhitanga Māmā Better Access & Participation

New Zealanders have access to and participate in diverse and rich cultural experiences in a post-COVID environment.

He Rāngai Ngangahau, He Rāngai Auaha Vibrant, Innovative Sectors

The sectors collaborate, adapt and innovate in new ways, enhancing the quality, equity and relevance of content, knowledge, products and services in a post-COVID environment.

This summary and full report use data from a subset of initiatives

The 2020/21 report includes only those COVID Response initiatives that were delivered or substantially underway in the financial year July 2020 to June 2021, and where impacts data were available. A list of included initiatives is provided below.

Initiative Type	Initiatives Included in 2020/21 Impacts Reporting
<i>Survive</i>	<ul style="list-style-type: none"> • Antarctic Heritage Trust – Remaining Viable from the Impact of COVID-19 • Media Sector Support Package (administered by Manatū Taonga) • Retain Core Capability of Heritage New Zealand Pouhere Taonga • Retain the Museum of New Zealand Te Papa Tongarewa’s Core Capability • Screen Production Recovery Fund (administered by NZ Film Commission and NZ On Air) • Te Matatini - Seeking Funding For COVID-19 Related Costs • Waitangi National Trust – Surviving the Effects of the COVID-19 Pandemic
<i>Adapt</i>	<ul style="list-style-type: none"> • Creative New Zealand Retain Core Arts Infrastructure and Deliver Arts Projects in Communities (Creative Communities Scheme top-up [\$900k] only) • Expansion of Creatives in Schools (administered by the Ministry of Education) • Museum Hardship Fund (Round 1 only; administered by Te Papa Tongarewa) • NZ Music Recovery – Aotearoa Touring Programme (administered by the New Zealand Music Commission) • NZ Music Recovery – New Music (administered by NZ On Air) • Pasifika Festivals Initiative (Tasi 2020 wave only; administered by Creative New Zealand)
<i>Thrive</i>	<ul style="list-style-type: none"> • Mātauranga Māori Te Awe Kōtuku (Creative New Zealand initiatives only)

A few factors need to be considered when reading the results

- Results are focused on the parts of the sector that received support from Manatū Taonga’s COVID Response through to June 2021, not the cultural sector as a whole. These findings cannot be generalised to the experience of all sector organisations.
- The findings relate to the period to June 2021 and do not include the experience of the COVID Delta outbreak in Aotearoa New Zealand commencing mid-2021. Parts of the sector remain vulnerable to the evolving impacts of COVID-19, particularly the direct effects of differing and raised Alert Level/‘Traffic Light’ restrictions, and closed borders.
- The results are cautious about over-attributing outcomes to Manatū Taonga’s COVID Response versus other factors such as wider government support and strong economic conditions during parts of 2020/21.
- There is some variability in data quality.

Results

The package contributed to recipients' financial viability, preservation of employment, and capacity to operate

There is strong evidence that Manatū Taonga COVID Response funding assisted recipients to remain financially viable. Evidence includes:

- *Media Sector Support Package*: 78% of Support Package funding recipients surveyed reported that the package made a major or moderate contribution to their cashflow relief position
- *NZ Music Recovery – New Music*: 73% more proposals funded over 2019/20, including 40% increase in artists supported by New Music- Singles grants
- *Screen Production Recovery Fund*: 90+ productions supported to be financially viable

The COVID Response was effective in supporting recipients to maintain staffing levels and prevented job loss. Evidence includes:

- *Aotearoa Touring Programme*: Supported 176 artists and crew to tour Aotearoa New Zealand
- *Museum Hardship Fund*: 49% of funding recipients used funding to preserve current jobs; 20% of funding recipients used funding to create new jobs – totalling 44.5 roles preserved or created
- *Screen Production Recovery Fund*: Funding administered by New Zealand Film preserved jobs of 1654 crew, 438 actors and 729 extras, and created jobs for 232 crew and 25 actors
- *Te Awe Kōtuku – Creative New Zealand*: Supported 124 employment opportunities in first 7 months

Wider evidence indicates that the government investment in the sector has created jobs and lessened the loss of forecast employment to March 2021.

Infometrics forecast that the targeted government investment in the sector had created 1,576 jobs to March 2021. The latest sector employment forecast to March 2021 estimates total employment of 92,708 at March 2021, a loss of 1,578 jobs from 1 April 2020 but significantly less than a 2020 forecast of 11,000 lost jobs.

Despite the disruptions of COVID-19, Manatū Taonga's COVID Response enabled recipients to operate and maintain service delivery, with some exceeding delivery targets and/or increasing service delivery over 2019/20 levels. Evidence includes:

- *Antarctic Heritage Trust*: Digital content shared with 3.7m people, 61% higher than 2019/20
- *Heritage New Zealand Pouhere Taonga*: 316 events held, 35% more than 2019/20
- *Media Sector Support Package*: 63% of funding recipients surveyed reported the Support Package enabled them to stay operational
- *Te Papa Tongarewa*: 65,351 learning hours (87% over target), 634 museums, galleries and cultural organisations supported (154% over target)

Manatū Taonga's COVID Response enabled cultural participation to strongly rebound when COVID-19 conditions allowed

Manatū Taonga's COVID Response enabled strong participation across the sector despite COVID limitations and facilitated access in the regions.

Evidence includes:

- *Antarctic Heritage Trust*: 3590 students and members of the public in 54 locations participated in Hillary's Hut VR experience programme
- *Aotearoa Touring Programme*: 1441 shows and 176 music artists supported to deliver performances across 105 towns/cities in Aotearoa New Zealand
- *Creative NZ – Creative Communities Scheme*: 1,013 projects completed resulting in 116,917 reported participants (COVID Response investment funded approximately 24% more projects)

Border restrictions supported surges in domestic audiences for some Manatū Taonga COVID Response recipients as New Zealanders explored their culture and heritage. Evidence includes:

- *Heritage NZ Pouhere Taonga*: Total visitors at staffed properties increased from 185,562 in 2019/20 to 219,199 in 2020/21
- *Te Papa Tongarewa*: 894,292 visitors to Te Papa in 2020/21 – 95% were kiwis compared to 53% in 2019/20
- *Waitangi National Trust*: Domestic visitors to the Treaty Grounds increased over twice that in 2019/20, from 36,715 to 84,830 visitors

Initial results show Manatū Taonga’s COVID Response has supported the protection and preservation of some aspects of mātauranga Māori, taonga and te reo Māori, as well as participation in some Māori cultural activities. Evidence includes:

- *Te Matatini*: 10 regional events held with in-person participants attending from at least 13 regions as well as streaming via Māori TV and online platforms
- *Te Awe Kōtuku – Creative NZ*: Supported 973 participants over first 7 months of the programmes; Investment of \$934,422 in 13 initiatives to cultivate and retain mātauranga toi and ngā toi Māori practices in 13 regions via Toi Ake Fund

It is too early to thoroughly evidence how Manatū Taonga’s COVID Response is contributing to the outcome of Vibrant, Innovative Sectors.

- Some preliminary data from Creative New Zealand indicate that some COVID Response programming supported the creation of new innovative works, working more effectively and in partnership with iwi/Māori, and building cross-sector collaborations in 2020/21

Conclusion

The targeted government response has been broadly successful in addressing the immediate risks posed by COVID-19 in 2020/21 however sector vulnerabilities remain in 2021/22

The targeted COVID-19 response has been generally successful in supporting recipients to survive the immediate financial and operational risks COVID-19 presented in 2020/21. This has, in turn, supported the preservation of cultural participation by New Zealanders during this time. Wider Government support and favourable public health and economic conditions also contributed to these strong sector and population outcomes. However, parts of the sector remained vulnerable to COVID-19 risks and ongoing effects, particularly raised Alert Level restrictions and closed international borders.