

**Manatū  
Taonga**

Ministry  
for Culture  
& Heritage



# **COVID-19 Response Impacts Report 2020/21**

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

**DECEMBER 2021**

# Ngā mihi

## Acknowledgments

*Ehara taku toa i te toa takitahi, engari he toa takitini*  
*Success is not the work of one, but the work of many*

Manatū Taonga Ministry for Culture and Heritage would like to acknowledge the many organisations and individuals who have contributed to this work, along with the wider sector that continues to deliver cultural experiences and opportunities for New Zealanders despite the challenges of COVID-19.

### **Special thanks to:**

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New Zealand Film Commission  
New Zealand On Air  
New Zealand Music Commission  
Te Matatini  
Te Papa Tongarewa  
Waitangi National Trust

And all others who shared their data, insights, and ideas in this work.

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# 1 Executive Summary

## **The cultural sector was at serious economic risk from COVID-19 in early 2020**

In March 2020 the cultural sector was facing dramatic economic risks due to COVID-19. There was potential for significant negative impacts on individuals and organisations in the sector and the cultural participation of all New Zealanders. Cultural activity was acutely and dramatically disrupted, and the sector was assessed as much more vulnerable than the economy as a whole.

## **The Government established a targeted investment to support sector recovery from COVID-19**

In Budget 2020, the Government approved a targeted COVID-19 Response to support sector recovery to be administered by Manatū Taonga in partnership with funded agencies and sector stakeholders. This includes the Arts and Culture COVID Recovery Programme (\$374m) as well as the Media Sector Support Package (\$50m).

## **Three overarching outcomes have guided the measurement of impacts across Manatū Taonga's COVID Response**

Manatū Taonga has adopted a programme-wide approach to assess impacts across the COVID Response, rather than at the initiative level alone, against 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.*

## **The following factors need to be considered when reading the results below**

The key findings are summarised below. When reading these, please note:

- These findings exclusively relate to the Manatū Taonga COVID Response initiatives that were completed or substantially delivered in 2020/21 and for which there were available impacts data. These initiatives (inclusive of the Media Support Package) received funding of approximately \$140m.
- The results are focused on parts of the sector that received investment via the COVID Response – not the cultural sector as a whole. These findings cannot be generalised to the experience of all sector organisations in 2020/21.
- It is difficult to differentiate the exact contribution of the COVID Response from other factors such as wider government support and strong economic conditions.

- While the results are positive, parts of the sector remain vulnerable to the evolving impacts of COVID-19 – particularly the direct effects of differing and raised Alert Level restrictions, and international border restrictions.
- There is some variability in data quality from initiatives.

## **These are the key impacts of Manatū Taonga’s COVID Response in 2020/21**

### **Whakahaumanu Ōhanga Economic Recovery**

- Manatū Taonga’s COVID Response directly enabled a wide range of recipient creatives, businesses, and organisations to remain financially viable.
- The COVID Response was effective in supporting recipient organisations to maintain staffing levels, preventing job loss and, in some cases, creating new jobs.
- Despite the disruptions of COVID-19, recipients continued to operate, with service delivery increasing in some areas.
- Some recipients used COVID Response funding to adapt to COVID-19.
- It is too early to assess the sector’s contribution to the wider COVID-19 economic recovery resulting from this investment, however high-level modelling shows some positive impacts of Government investment on national employment.

### **He Kuhunga, He Whai Wāhitanga Māmā Better Access & Participation**

- The COVID Response enabled cultural participation to continue across Aotearoa New Zealand, with recipients reporting strong audiences, including in the regions.
- The COVID Response also supported the preservation of mātauranga Māori in specific circumstances and enabled participation in some Māori cultural activities. In 2020/21, initiatives delivered with this focus included Te Matatini’s Whakangahau events and Creative New Zealand’s Mātauranga Māori Te Awe Kōtuku programmes.
- Some recipients reported significant increases in domestic in-person participation in 2020/21, particularly at museums and heritage places. There was some evidence of growth in online audiences.
- Though several initiatives targeted support to specific communities and groups, data in 2020/21 was not available to assess access and participation impacts for specific groups across the COVID Response (e.g. Māori, Pacific peoples, traditionally underserved and minority communities).

### **He Rāngai Ngangahau, He Rāngai Auaha Vibrant, Innovative Sectors**

- The majority of initiatives delivered in 2020/21 focused on immediate survival with some adaptation activities. Therefore, it was not possible to measure the more transformational, complex impacts which comprise this outcome.
- Preliminary data from some of Creative New Zealand’s initiatives indicate that the COVID Response is supporting the creation of new innovative works, working more effectively and in partnership with iwi/Māori and building cross-sector collaborations.

## **The COVID Response delivered largely positive results for recipients and New Zealanders in 2020/21, though some parts of the sector remained vulnerable**

The assessment of 2020/21 impacts data indicates that the COVID Response has delivered largely positive results for recipients and New Zealanders consistent with the impacts sought during that time. The COVID Response enabled the ongoing supply of diverse cultural content and experiences and New Zealanders strongly engaged with these when conditions permitted. However, some parts the sector and cultural participation outcomes were highly sensitive to COVID-19's direct effects of raised Alert Level restrictions and closed international borders during this time. For these organisations, individuals and audiences, COVID-19's evolving presence in Aotearoa New Zealand introduced vulnerabilities and risks that were still present at the end of 2020/21.

## 2 Introduction

This report provides the results of impact measurement activity for a subset of COVID Response initiatives delivered in the first full financial year of Manatū Taonga's COVID-19 Response.

### Significant risks of COVID-19 to the cultural sector

From early 2020 a range of data confirmed that the cultural and media sectors were at significant risk due to the COVID-19 pandemic, and particularly after its arrival in Aotearoa New Zealand. In April 2020 Infometrics forecast that to March 2021 the loss of productivity (GDP) in the sector would be twice as much as the economy as a whole, and about 11,000 sector jobs would be lost by March 2021. Diverse sources identified significant viability risks to cultural sector organisations and creatives, risks to cultural content and mātauranga Māori, and negative impacts for all New Zealanders through lost cultural participation opportunities.

It is estimated that the sector could only operate at half (46%) of its normal productivity during Alert Level 4 and 77.6% at Alert Level 3. Based on a sector GDP forecast of \$10.98 billion in the year to March 2021, that is a financial loss of about \$16.1 million per day at Level 4 and \$6.7 million at Level 3.

The sector experience of the Pandemic in 2020/21 surfaced some specific vulnerabilities to key COVID-19 impacts, including to public gathering restrictions, closed/restricted international and local borders, and weaker economic conditions:

- The economic dependence of large parts of the sector (e.g. heritage and live events) on in-person public participation, and limited ability to supply this experience or content digitally
- Reliance on funding from sources that generally contract during difficult economic conditions – e.g. philanthropy, commercial advertising, corporate sponsorship, and local government funding
- Dependence on domestic and international tourism revenue (e.g. cultural heritage sites), export revenue through international touring and sales, and the free flow of labour to Aotearoa New Zealand to support cultural events and content (e.g. international film crews and artistic and production talent)
- The somewhat fragile employment structure of the cultural sector workforce, with high proportions of informal, casual, part-time and contract work
- Cultural spending being a discretionary spending area and therefore sensitive to consumer spending contractions.

### A targeted investment to support cultural sector recovery

In response to these acute risks, Budget 2020 announced targeted investment to support sector recovery from COVID-19 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 COVID 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, longer-term investment in adaptation to a post-COVID operating context, and support for the sector to 'build back stronger' through transformed practices and relationships.

As such, the scope of the initiatives can be categorised into three categories, which are used throughout this report:

- **Survive** initiatives focus on 'keeping the lights on' – remaining viable, preserving employment, continuing to provide cultural content and experiences.
- **Adapt** initiatives focus on helping organisations adapt to COVID-19 and be more sustainable and resilient over time, including developing new skills, new employment opportunities, new content/services and delivery mechanisms.
- **Thrive** initiatives focus on sector transformation – working more collaboratively, building relationships, improving equity, increasing access/participation, transforming operational models, fostering innovation.

*Survive* initiatives by their nature were the first to be delivered in 2020/21 with (as a general rule) *Adapt* and some *Thrive* initiatives following. The focus of this report is on the *Survive* initiatives and some *Adapt* initiatives as detailed below.

## A programme-wide approach to measuring impacts

In order to assess the overall impacts of the COVID Response, Manatū Taonga used a programme-wide approach. Initiative-level data was synthesised across the COVID Response outcomes as a whole, to judge progress towards the three overarching outcomes outlined below.

These data include reporting from funding recipients and delivery agents on impact measures which were set collaboratively as well as, in some cases, targeted initiative-level evaluations. During analysis, consideration is given to the size of any impacts and how strongly the results can be attributed to the funding.

The table below identifies the three overarching outcomes for Manatū Taonga's COVID Response, along with what was measured in 2020/21 to assess impacts for each outcome. These measures were chosen based on the scope of the initiatives delivered in 2020/21, and what data were available in this timeframe.



## Manatū Taonga Overarching Outcomes and Impacts Measured in 2020/21

Outcome	Impacts Measured in 2020/21
<p><b>Whakahaumanu Ōhanga Economic Recovery</b></p> <p><i>The sectors are economically stable, sustainable and adapting to a post-COVID environment. The sectors make a positive contribution to wider COVID economic recovery.</i></p>	<ul style="list-style-type: none"> <li>• Financial viability of institutions and ecosystems/improved cash flow</li> <li>• Preservation and creation of new jobs and employment opportunities</li> <li>• Preservation of service delivery</li> <li>• New skills development, including career development (limited measurement)</li> <li>• Māori development opportunities (limited measurement )</li> <li>• Emerging resilience, sustainability and adaptation (limited measurement)</li> </ul>
<p><b>He Kuhunga, He Whai Wāhitanga Māmā Better Access &amp; Participation</b></p> <p><i>New Zealanders have access to and participate in diverse and rich cultural experiences in a post-COVID environment.</i></p>	<ul style="list-style-type: none"> <li>• Protection/preservation of taonga, mātauranga Māori, and te reo Māori</li> <li>• Preservation/rebounding of participation levels</li> <li>• Development of new content, activities, and delivery mechanisms</li> <li>• Maintenance of sustainable and diverse NZ content, products, services, and public interest journalism / Preservation of diversity of local media services</li> <li>• Lower barriers to participation, particularly for underserved groups (limited measurement)</li> </ul>
<p><b>He Rāngai Ngangahau, He Rāngai Auaha Vibrant, Innovative Sectors</b></p> <p><i>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.</i></p>	<ul style="list-style-type: none"> <li>• Greater equity within the sector for Māori and other underserved groups (limited measurement )</li> <li>• Strengthened iwi/Māori relationships and partnerships (limited measurement)</li> <li>• New high quality and innovative works/content that appeals to diverse New Zealanders (limited measurement)</li> <li>• New cross-sector collaborations along with new bridging relationships outside the sector and with Manatū Taonga (limited measurement)</li> </ul>

## Initiatives included in this report

The subset of initiatives included in this report are described in the table below. Eligible initiatives were those that were complete or substantially underway in 2020/21 and had usable impacts data.

### Manatū Taonga COVID Response initiatives included in this report

	<b>Initiative Name</b> [Short form (where applicable)]	<b>Purpose</b>
<b>Survive Initiatives</b>	<b>Antarctic Heritage Trust - Remaining Viable from the Impact of COVID-19</b> [Antarctic Heritage Trust]	Funding for the Antarctic Heritage Trust to continue its heritage conservation work in Antarctica and continue programming.
	<b>Waitangi National Trust - Surviving the Effects of the COVID-19 Pandemic</b> [Waitangi National Trust]	Funding to the Waitangi National Trust to ensure that the Waitangi Treaty Grounds are open to the public.
	<b>Screen Production Recovery Fund</b>	Funding distributed through New Zealand On Air and the New Zealand Film Commission for the additional costs incurred by screen productions already invested in that were shut down, delayed or constrained by COVID-19 restrictions.
	<b>Retain Core Capability of Heritage New Zealand Pouhere Taonga</b> [Heritage NZ Pouhere Taonga]	Funding to Heritage New Zealand Pouhere Taonga over two years. Addresses core capability funding, existing cost pressures and continuing heritage operations.
	<b>Retain the Museum of New Zealand Te Papa Tongarewa's Core Capability</b> [Te Papa Tongarewa]	Funding to Museum of New Zealand Te Papa Tongarewa to maintain core operations and critical infrastructure.
	<b>Te Matatini - Seeking Funding For COVID-19 Related Costs</b> [Te Matatini]	Funding to Te Matatini to deliver 12 regional community kapa haka events in place of the postponed 2021 festival.
	<b>Media Sector Support Package initiatives</b>	Funding to support New Zealand media organisations through the immediate impacts of COVID-19 and lockdown.

	<b>Initiative Name</b> [Short form (where applicable)]	<b>Purpose</b>
<b>Adapt Initiatives</b>	<b>Creative New Zealand Retain Core Arts Infrastructure and Deliver Arts Projects in Communities</b> [Creative NZ Creative Communities Scheme]  Reporting on Creative Communities Scheme top-up (\$900k) only	Funding administered by Creative New Zealand to provide additional support for its investment clients, resilience grants to artists, additional funding to local communities through its Creative Communities Scheme, and additional funding to under-served communities including Māori, Pacific and regional communities.
	<b>Museum Hardship Fund</b> Reporting on Round 1 only	Funding administered by Te Papa for contestable grants to small and medium-sized organisations in the museum sector that have been impacted by COVID-19.
	<b>Pasifika Festivals Initiative</b> Reporting on Tasi 2020 wave only	Funding administered by Creative New Zealand to provide short-term financial support for Pasifika festivals around Aotearoa New Zealand to recover from the immediate and sustained impacts of COVID-19.
	<b>New Zealand Music Recovery-Aotearoa Touring Programme</b> [Aotearoa Touring Programme]	Two-year programme to support increased touring activity in Aotearoa New Zealand by New Zealand artists administered by New Zealand Music Commission.
	<b>New Zealand Music Recovery-New Music</b> [New Music]	Funding to boost New Zealand On Air's New Music programmes and support the production of new music.
	<b>Expansion of Creatives in Schools</b> [Creatives in Schools]	Funding (through Vote Education) administered by the Ministry of Education over three years to expand the Creatives in Schools programme. Supports creatives to deliver learning in schools.
<b>Thrive Initiatives</b>	<b>Mātauranga Māori Te Awe Kōtuku- Creative New Zealand initiatives only</b> [Te Awe Kōtuku- Creative NZ]  Includes: Tārai Waka Programme, Taonga Pūoro Programme, Te Tairāwhiti Arts Festival, Toi Ngāpuhi, Toi Ake Fund	A set of programmes designed to protect, cultivate and retain critically endangered mātauranga Māori related to heritage ngā toi Māori (Māori arts) and foster distinctive arts and cultural practices.

## 3 Results

This section presents the key impacts of the COVID Response in 2020/21. The results are organised by the three COVID Response outcomes as described in the Introduction. For each outcome, key findings are discussed in detail with related supporting evidence. The results also draw on select non-programme data and evidence to add weight or nuance to results.

### Considerations when reading this report

The findings about the impacts of the COVID Response should be read with the following in mind:

- This report analyses parts of the sector that received investment via the COVID Response – not the cultural sector as a whole. The findings cannot be generalised to the experience of all sector organisations in 2020/21, although the report does present some sector-wide insights.
- The report focuses on the subset of Manatū Taonga COVID Response initiatives that were substantially or fully delivered in 2020/21.
- At the end of 2020/21 parts of the sector remained vulnerable to the impacts of COVID-19 and particularly raised Alert Level restrictions and closed borders. The report timeframe is before the Aotearoa New Zealand COVID Delta outbreak from mid-2021.
- Attributing outcomes to the COVID Response isolated from other factors such as existing funding, wider government support, and strong economic conditions is difficult. These other factors have influenced positive sector and cultural participation outcomes during 2020/21.
- Due to the type of data available, data quality is variable. For example, some measures do not have baselines and there was a heavy reliance on self-reporting from recipients.

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

A key focus of the *Survive* bids and the first wave of some *Adapt* bids was ensuring the sectors survive the impacts of COVID-19 and adapt to a rapidly changing operating environment.

## Key findings

### Key Evaluation Questions:

How effectively has the Manatū Taonga COVID Response contributed to the economic viability/sustainability of the sectors (institutions and people)?

To what extent has the Manatū Taonga COVID Response contributed to the sectors creating wider value to the COVID-19 economic recovery?

- Manatū Taonga’s COVID Response directly enabled a wide range of recipient creatives, businesses, and other organisations to remain financially viable.
- The COVID Response was effective in supporting recipient organisations to maintain staffing levels, preventing job loss and, in some cases, creating new jobs.
- Despite the disruptions of COVID-19, recipient organisations continued to operate. In some areas, service delivery outcomes were better than expected.
- Some recipients used COVID Response funding to adapt to COVID-19.
- It is too early to assess the contribution of the COVID Response to the wider COVID-19 economic recovery, however high-level modelling shows a positive impact of Government investment on national employment.

“The Support Package was pivotal in keeping us in business in such a difficult time. I doubt whether we would have been able to continue without it.”

– Media Sector Support Package funding recipient

### Initiatives included

#### *Survive*

- Antarctic Heritage Trust
- Heritage NZ Pouhere Taonga
- Media Sector Support Package
- Screen Production Recovery Fund
- Te Matatini
- Te Papa Tongarewa
- Waitangi National Trust

#### *Adapt*

- Creatives in Schools
- Creative NZ- Creative Communities Scheme
- Museum Hardship Fund
- New Music
- Aotearoa Touring Programme
- Pasifika Festivals Initiative

#### *Thrive*

- Te Awe Kōtuku-Creative NZ

## Detailed results

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

The COVID Response funding supported a wide range of recipients across the cultural sector to remain financially viable and/or solvent, from individual creatives to medium-sized businesses, museums, productions, radio stations and community groups, to national organisations such as Te Papa. These impacts were evident for both those recipients Manatū Taonga directly funded, such as Crown entities, and recipients funded through delivery agents.

#### Impact Highlights

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

### Manatū Taonga's COVID Response was effective in supporting recipients to maintain staffing levels and prevented job loss.

Recipients reported that Manatū Taonga COVID Response funding strongly supported the preservation of jobs, and enabled organisations to retain their staff in the face of the widespread cancellations and closures caused by COVID-19. In some cases, recipients also used funding to create new jobs. These new jobs related primarily to the immediate requirements of COVID-19 protection and service provision, for example around health and safety.

“Due to Screen Production Recovery Fund [SPRF] we had funds to contribute towards a pickup shoot, employing all new crew. It would be fair to say that SPRF preserved the roles of the entire crew. Without the SPRF, the project could have had its global audience potential compromised.”

– GFC (Subtle Art) Ltd.  
Producer Matthew Metcalfe

#### Impact Highlights

- |  |   |
|--|---|
| <b>Te Awe Kōtuku-Creative NZ</b>       | Supported 124 employment opportunities in first 7 months  |
| <b>Museum Hardship Fund</b>            | 49% of funding recipients used funding to preserve current jobs<br>20% of funding recipients used funding to create new jobs<br>totalling 44.5 roles preserved or created |
| <b>Screen Production Recovery Fund</b> | Funding administered by NZ Film Commission preserved jobs of 1654 crew, 438 actors and 729 extras, and created jobs for 232 crew and 25 actors                            |
| <b>Aotearoa Touring Programme</b>      | Supported 1441 shows by 176 music artists across 105 towns/cities in Aotearoa New Zealand   |

**Non-programme data indicates that the government investment in the sector has created jobs and lessened the loss of forecast employment to March 2021.**

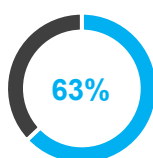
In mid-2021, Infometrics used a macro-economic modelling technique to estimate that targeted government investment in the sector had created 546 sector jobs and indirectly a further 1,030 jobs (many of which would also be in the core arts and creative sector) to March 2021. The latest arts and creative sector profile employment forecast to March 2021 estimates total sector employment of 92,708, a loss of 1,578 jobs from April 2020 but significantly less than the initial forecast in 2020 of just under 11,000 jobs lost.

**Despite the disruptions of COVID-19, recipients continued to operate and maintain service delivery, with some exceeding delivery targets and/or increasing service delivery over 2019/20 levels.**

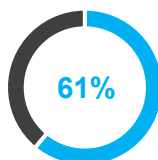
Manatū Taonga’s COVID Response enabled organisations across the cultural sector to stay operational and to continue delivering their services to New Zealanders despite the closures and cancellations relating to COVID-19.

**Impact Highlights**

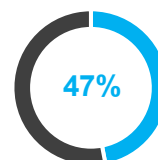
**Media Sector Support Package impacts on operations and service delivery**



of funding recipients surveyed reported the Support Package enabled them to stay operational



of funding recipients surveyed reported the Support Package enabled them to maintain content production and/or distribution



of funding recipients surveyed reported the Support Package enabled them to pay suppliers

**Examples of strong service delivery results in the heritage sector**

Organisation	Actual Delivery 2019/20 / Delivery Target 2020/21	Actual Delivery 2020/21	
		Actual Delivery 2020/21	% Increase
Antarctic Heritage Trust	Digital content shared with 2.3m people in 2019/20	Digital content shared with 3.7m people	+61% over 2019/20
Heritage NZ Pouhere Taonga	234 events held in 2019/20	316 events held	+35% over 2019/20
Te Papa Tongarewa	Target for 2020/21: 35k learning hours 2.8m visits to website 250 museums, galleries and cultural organisations supported 780k visits to Te Papa	65,351 learning hours 3.57m visits to website 634 museums, galleries and cultural organisations supported 894k visits to Te Papa	+87% over target +28% over target +154% over target  +15% over target

In some cases, services delivered well exceeded planned targets and/or increased over 2019/20 levels. This was especially apparent in the heritage sector.

“We greatly appreciate the additional funding received this year as part of the COVID-19 Recovery Budget that allowed us to operate with certainty. This funding ensured every dollar donated to the Trust this year went directly to programme delivery.”

– Antarctic Heritage Trust

### **There is some evidence that organisations used Manatū Taonga COVID Response funding to help adapt to COVID-19, including supporting skills development.**

In 2020/21, most *Adapt* initiatives largely responded to organisations’ immediate needs, with greater focus on skills development and adaptation evident in planning for subsequent funding rounds and future delivery. Some recipients have used funds toward skills development or sustainability, or had sustainability outcomes. However, the greater focus was on staffing and maintaining operations/service delivery.

A key element of maintaining service delivery was pivoting delivery models or adapting services/content, for example by moving offerings online and/or designing content or marketing that specifically appealed to the domestic market.

“One thing that is special to me is that this wānanga and our kaiako have empowered me to BE an artist, to have confidence that I can do this as a ‘career’, that I am worthy of being an artist.”

– 2020/21 Te Awe Kōtuku-Creative NZ wānanga participant

#### **Impact Highlights**

- 40%** of Round 1 recipients of the Museum Hardship Fund used funding to develop sustainable practices
- 74%** of creatives participating in the Creatives in Schools programme reported the programme contributed to building a sustainable career to at least a moderate degree
- 80** new up-and-coming artists linked with experienced music producers to work on new material through NZ Music Recovery- New Music Development
- 973** participants engaged over 7 months in Creative NZ’s Te Awe Kōtuku initiatives, where participants developed specialist technical skills alongside knowledge of tikanga and karakia



General comment by Te Papa about how it pivoted towards local visitors in 2020/21:

“Despite the 'new normal' forcing us to face significant challenges, it also turned out to be an opportunity to reconsider our relationship with domestic audiences. As a result of COVID-19, we developed an ambitious and innovative programme for the summer season, primarily targeting New Zealanders with events, activities, and content aimed at engaging visitors of all ages and making the museum an even more central place for discovery, learning, and interaction. This programme eventually contributed to attract visitors to the museums and sustain attendance.”

– Te Papa Tongarewa

**It was too early in 2020/21 to assess if and how much the sector has contributed to the wider COVID-19 economic recovery, however high-level modelling shows some direct and indirect positive impacts of Government investment on national employment.**

Wider government support has had a positive impact on employment in eligible parts of the sector. In 2020 the Government’s wage subsidy scheme paid out \$14b in subsidies to up to 1.66m workers– approximately 75% of the total workforce. This subsidy has been calculated to have kept unemployment to a peak of 5.3% versus an estimated 8%, saving around 175,000 jobs nationally.

In terms of Manatū Taonga’s COVID Response, in the mid-2021 economic forecast commissioned by Manatū Taonga, Infometrics modelled that government financial intervention through the COVID Response created 1,576 jobs and additional national economic productivity of \$306m in GDP: \$53m directly and \$253m through multiplier effects.

Within the cultural sector, there is tentative (forecast) evidence of wider economic impacts through increased domestic participation. However, the financial loss of international visitors is not completely offset through domestic participation revenues.



## 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.***

This outcome focuses on ensuring that diverse New Zealanders can continue to access and participate in cultural experiences through the challenges created by COVID disruption.

### **Key Evaluation Questions:**

To what extent has the Manatū Taonga COVID Response facilitated increased **access** to NZ media, content and activities by diverse New Zealanders?

To what extent has the Manatū Taonga COVID Response strengthened the quantity and scope of **participation** in the sectors by diverse New Zealanders?

### **Key findings**

- Manatū Taonga's COVID Response enabled cultural participation despite COVID disruption, with recipients reporting strong participation across Aotearoa New Zealand, including outside the main centres.
- The COVID Response also supported some preservation of mātauranga Māori and participation in some Māori cultural activities. In 2020/21, initiatives delivered with this focus include Te Matatini's Whakangahau events and Creative NZ's Mātauranga Māori Te Awe Kōtuku initiatives.
- There were significant increases in domestic in-person audiences after the 2020 lockdown period, particularly at museums, heritage places, and live events.
- Though several initiatives have targeted support to specific communities, data was not available to assess the impacts of the COVID Response for specific groups in 2020/21 (e.g. Māori, Pacific peoples, other traditionally underserved and/or minority communities).

"I know the wānanga has changed the course of my life... I will be unpacking all that I have experienced for some time."

– 2020/21 Te Awe Kōtuku- Creative NZ wānanga participant

### **Initiatives measured**

#### **Survive**

- Antarctic Heritage Trust
- Heritage NZ Pouhere Taonga
- Media Sector Support Package
- Screen Production Recovery Fund
- Te Matatini
- Te Papa Tongarewa
- Waitangi National Trust

#### **Adapt**

- Creatives in Schools
- Creative NZ- Creative Communities Scheme
- Museum Hardship Fund
- Aotearoa Touring Programme
- New Music

#### **Thrive**

- Te Awe Kōtuku- Creative NZ



## Detailed results

**There is evidence that Manatū Taonga’s COVID Response enabled strong participation across the sector despite COVID limitations and facilitated access in the regions.**

Manatū Taonga’s COVID Response supported a range of opportunities for both creative participation (e.g. creatives/practitioners) and receptive participation (e.g. audience members/visitors), which have been delivered amid the ongoing COVID disruption. These opportunities include (but are not limited to):

- Continued and new products, works, services, and activities
- Professional and career development opportunities
- Arts, culture and heritage events, festivals, productions and performances.

Several initiatives focused on lowering barriers to participation, particularly in the regions, with programming offered throughout Aotearoa New Zealand as well as online.

“[MHF funding has supported] the creation of a new exhibition space that will hold temporary exhibits based on local stories/events. This will mean greater audience participation in our local history and allow an education programme to be developed for the local schools with the Aotearoa NZ Histories curriculum in mind.”

– Museum Hardship Fund Round 1 funding recipient

### Impact Highlights

#### Antarctic Heritage Trust

- Digital content shared with 3.7m people
- 3590 students and members of the public in 54 locations participated in Hillary’s Hut VR experience programme

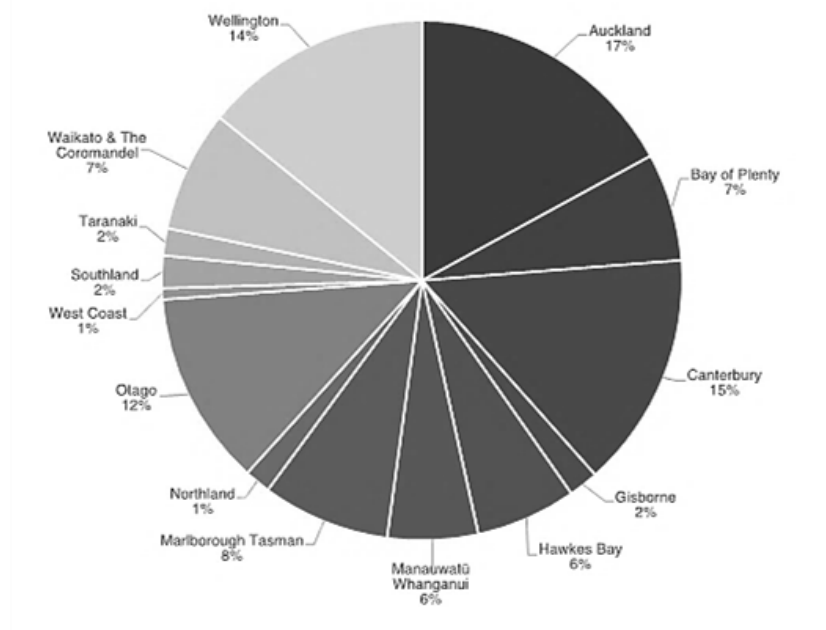
#### Creative NZ- Creative Communities Scheme

- 1,013 projects completed resulting in 116,917 reported participants (COVID Response investment funded approximately 24% more projects)

#### Aotearoa Touring Programme

- 1441 shows and 176 artists supported to deliver performances across 105 towns/cities in Aotearoa NZ
- 20%\* increase in the range of towns visited by NZ artists, with 54% of shows outside the three main centres
- The South Island had 12%\* more live shows by NZ artists, and performances in Dunedin increased by 27%\*
- 14% of supported shows were for all ages/youth audiences
- 25% of recipients were Māori artists

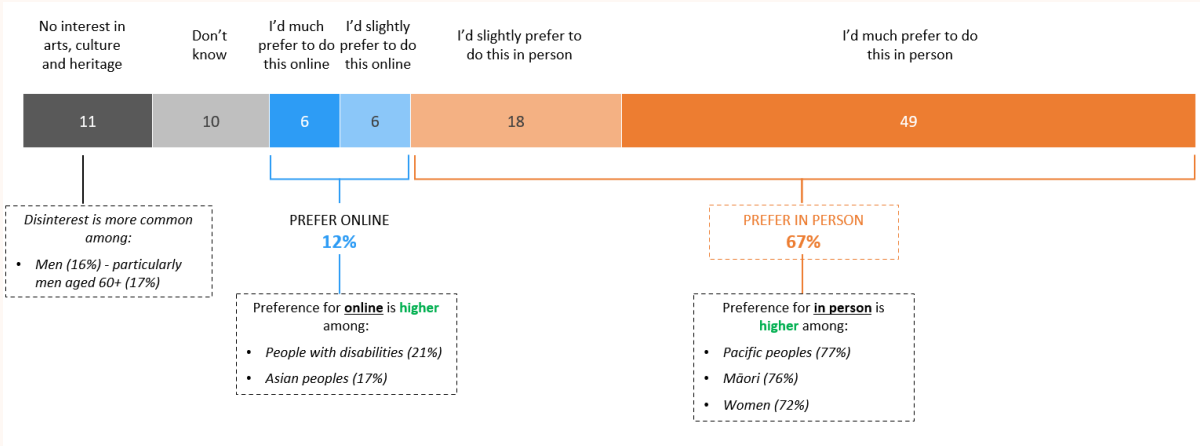
NZ MUSIC COMMISSION:  
Aotearoa Touring Programme Supported Shows By Region 2020-2021



\*estimated figure



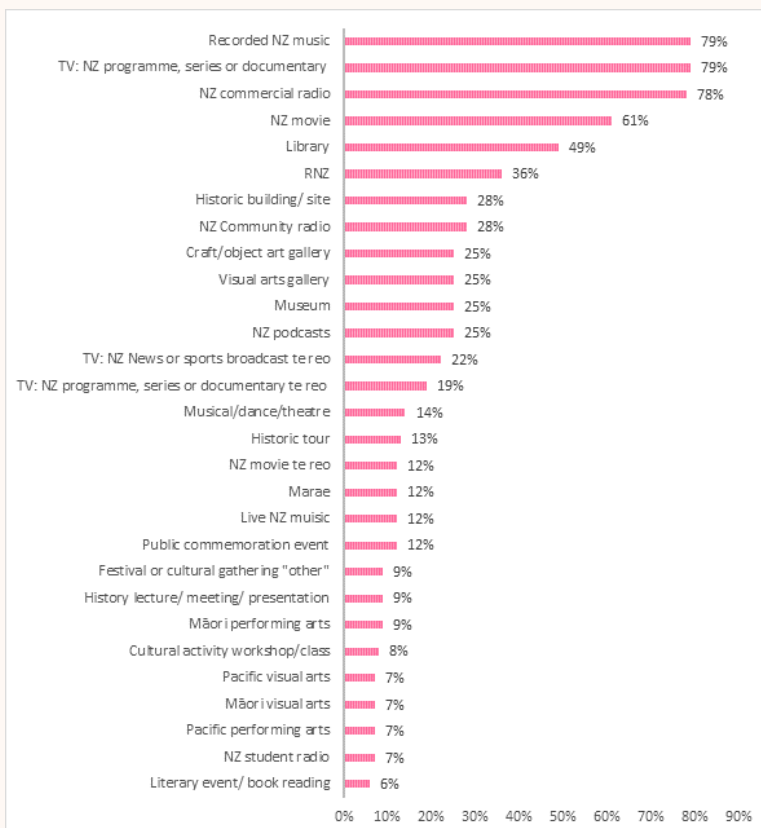
There is some non-programme evidence that New Zealanders substituted in-person participation with digital opportunities during Alert Level restrictions. However, most people were eager to get back to in-person participation when this option was available. In Manatū Taonga’s 2020 cultural participation research, 67% identified an overall preference for in-person participation with just 12% preferring online participation.



Source: New Zealanders’ cultural participation in 2020 and future participation in a post-COVID environment.

This research also showed that in late 2020, there was strong cultural participation by NZ adults during a period of partial Alert Level restrictions, and higher rates of intended future cultural participation. The following chart provides an overview of this reported cultural participation in late 2020.

### Percentage of New Zealanders 18+ participating in cultural activities at least occasionally in late 2020 (Some Alert Level restrictions in place)



Source: New Zealanders’ cultural participation in 2020 and future participation in a post-COVID environment.



**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.**

Due to the timing of programme delivery, it is too early to explore the impacts of Manatū Taonga’s COVID Response in the preservation and protection of mātauranga Māori, taonga and te reo Māori. However, preliminary results suggest the Response made some targeted progress in this area. Initiatives delivered in 2020/21 with this focus include Te Matatini’s Whakangahau events and Creative NZ’s Te Awe Kōtuku initiatives. Additionally, 35.6% of Museum Hardship Fund Round 1 funding recipients identified the preservation of mātauranga Māori and/or taonga as a focus of their projects.

“Te aro pū ki te taha whakawhanaungatanga, wānanga whakapapa, whakaharatau i te tinana, wairua me te hinengaro i waenga i ō karangatanga maha, whakatangata anō ai koe i roto i tō ao Māori ka mutu, i te ao hurihuri hoki hei Māori.”  
– Te Matatini Whakangahau event participant

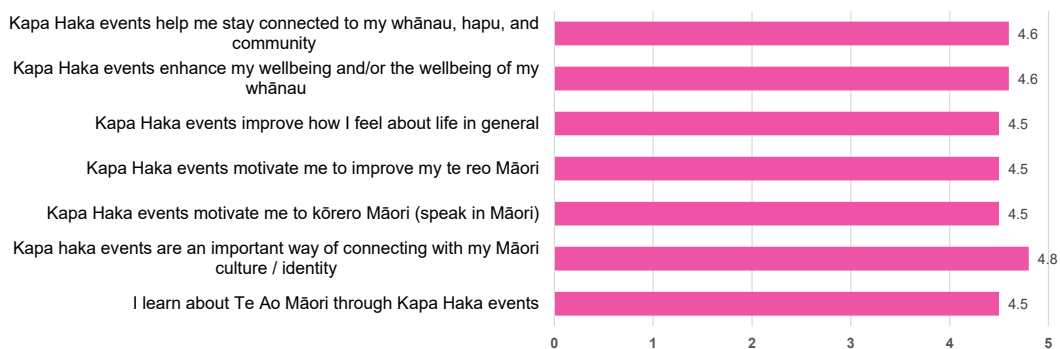
**Impact Highlights**

- 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**
  - Four partnership programmes protecting critically endangered artforms (Tārai Waka and Taonga Pūoro) and at-risk regional mātauranga via Te Tairāwhiti Arts Festival and Toi Ngāpuhi
  - 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

**Te Matatini Whakangahau survey results:**

**Event participants’ views on the benefits of the events (n = 1191)**

(Scale: 1 is Strongly Disagree and 5 is Strongly Agree)



“He koanga ngākau te kite i te hunga tamariki/ mokopuna e tū ngātahi ki runga i te atamira i te taha i o ō rātou mātua, kaumātua hoki. Kia tū i runga i te rangimārie, i runga anō hoki i te wairua ngāhau. Ko rātou ngā rangatira o te āpōpō, mā rātou e taurima i ēnei kaupapa. He pai hoki te kite i te whakawhanaungatanga, te noho tahi me te whānau.”

– Te Matatini Whakangahau event participant



“I thoroughly enjoyed the kids performances, watching all my Nephews and Nieces. This was an extraordinary feeling for them and experience. To see so much support through not only Whānau but Businesses and people was incredible. Being a Student in Te Reo Māori made me think of my own Journey and where I am heading towards. To be able to speak Māori not only fluently and comfortably is something of a dream of mine. I know I can achieve this through other Kapa Haka Competitions alike.”

– Te Matatini Whakangahau event participant

“The last couple of years have been some of the most challenging years of my career in the practice of tārai waka. The investments that have come from Creative New Zealand, Te Hā o ngā Toi and Te Awe Kōtuku funding have been instrumental, in we as practitioners of tārai waka, being able to continue our mahi. We have been able to create wonderful job opportunities in our communities, extend our reach into our younger generation and also into public engagement... beyond being able to continue to work on our rakau and carved waka (and in the process carving people) the ultimate investment has been on the wellbeing of our people.”

– James Eruera, Tohunga Tārai Waka, 2020/21 Te Awe Kōtuku- Creative NZ

### Border restrictions supported surges in domestic audiences for some Manatū Taonga COVID Response recipients

Although international border restrictions halted international audiences and performing artists, some recipients reported significantly higher domestic audiences and visitors, for example the heritage sector, where some museums and heritage places experienced a significant boost through domestic tourism in 2020/21. This is credited to New Zealanders discovery of their own cultural assets as a substitute for international travel and a general sense of needing to explore Aotearoa New Zealand.

“Our closed borders presented a unique opportunity for local artists to own the stages at summer music festivals across the motu, helping drive an increase in chart, airplay and streaming success over the year.”

- NZ On Air (2020/21)

### Impact Highlights

#### Heritage Visitor Numbers 2019/20 vs. 2020/21

Organisation	2019/20	2020/21	Comment
Heritage NZ Pouhere Taonga (total visitors at staffed properties)	185,562	219,199	2020/21 figure includes significant increase in domestic visitors
Te Papa Tongarewa (total visitors to Te Papa)	1,108,283	894,292	95% were domestic visitors in 2020/21, compared to 53% in 2019/20
Waitangi National Trust (total visitors to Waitangi Treaty Grounds)	100,078	88,685	Domestic visitors to the Treaty Grounds increased over twice that in 2019/20, from 36,715 to 84,830 visitors



# 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 outcome focuses on new ways of working, sector transformation and innovation. Due to the nature and timing of initiatives delivered in 2020/21, it is too early to identify the full impacts of Manatū Taonga's COVID Response in these areas.

## Key findings

### Key Evaluation Question:

To what extent has the Manatū Taonga COVID Response contributed to vibrant and innovative sectors, including:

- New ways of working together?
- Strengthened iwi/Māori relationships?
- Cross-sector relationships/ecosystems?
- Preservation and enhancement of media plurality?

- The majority of initiatives delivered in 2020/21 focused on *Survive* and some *Adapt* activities. Therefore, it was not possible to measure the more transformational, complex impacts which comprise this outcome.
- However, partial initiative-level data from Creative New Zealand are suggestive of the potential medium to longer-term impacts of the COVID Response.
- These preliminary data indicate that some of Creative New Zealand's COVID Response initiatives are supporting the creation of new innovative works, working more effectively and in partnership with iwi/Māori and building cross-sector collaborations.

"The Screen Production Recovery Fund allowed the production to engage with the Tūhoe community with more confidence— knowing the cast and crew had been tested, cleared of Covid, and we had robust H&S [health and safety] protocols in place. Local marae were empowered to develop safe food prep methods which worked for them. We became attuned to potential breaches, and constantly strived to be agile in our response."

– Selina Joe and  
Reikura Kahi,  
MURU Production

### Initiatives included

#### ***Survive***

- Screen Production Recovery Fund

#### ***Adapt***

- Creative NZ – Creative Communities Scheme
- Pasifika Festivals Initiative

#### ***Thrive***

- Te Awe Kōtuku – Creative NZ



## Detailed results

**Partial 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.**

Preliminary data from Creative New Zealand's COVID Response initiatives are available (Creative Communities Scheme top-up – \$900k of \$25m COVID Response fund, Pasifika Festivals Initiative, Te Awe Kōtuku). These data provide some insight into the potential of Manatū Taonga's COVID Response to have more transformational and longer-term impacts across the sector. More information will be available from funds delivered directly by Manatū Taonga from 2021/22.

### Impact Highlights

#### Iwi/Māori Partnerships

In the first 7 months of the four partnership programmes within Creative NZ's Te Awe Kōtuku fund, opportunities were created for more uri Māori, including whānau, hapū and iwi to have access to and participate in mātauranga toi from their rohe which supports strengthened taonga tuku iho.

For example, Toi Ngāpuhi created four wānanga and one exhibition (involving 429 participants and employing 66 ringatoi/artists with whakapapa from around Te Tai Tokerau) to protect and retain distinctive Ngāpuhi mātauranga toi and artform practices through the connection of Ngāpuhi tohunga and pūkenga with emerging practitioners and taiohi (16-24 year olds) committed to a career in the arts and cultural sector.

#### Innovation

Creative NZ's Creative Communities Scheme supported 1,013 projects to be completed in 2021, approximately one quarter of which were funded by the \$900k top-up provided by Creative NZ's \$25m COVID Response fund.

#### Cross-Sector Collaborations

Creative NZ's Pasifika Festivals Initiative has supported the cohesion and strengthening of the va of the festival ecosystem through a collaborative design model, and connected 20 (out of 27 possible) festival organisers with business development organisation Pacific Business Trust.



## 4 Conclusion

### **Manatū Taonga's COVID Response has delivered largely positive results for direct recipients and New Zealanders**

The synthesis of 2020/21 programme data indicates that, with reference to the outlined considerations in section 3, Manatū Taonga's COVID Response has delivered largely positive results consistent with the impacts sought in 2020/21 for the overarching outcomes of *Economic Recovery* and *Better Access and Participation*.

The third overarching outcome (*Vibrant, Innovative Sectors*) is a significant focus of *Adapt* and *Thrive* bids in 2021/22, however in 2020/21 there was not much evidence to draw insights in this area.

### **The cultural sector's experience of COVID-19 was diverse in 2020/21, with some areas hit harder than others**

The COVID-19 experience in Aotearoa New Zealand evolved from COVID-19 free, to closed borders and a national lockdown, to lowered Alert Levels and a brief travel bubble with Australia, to further raised Alert Levels affecting Auckland in particular.

National data confirms that experiences within the sector differed markedly. Some parts of the sector were relatively COVID-resilient but other parts were structurally vulnerable to one or more of COVID's major impacts. For example, live performance activities could not fully function except at Alert Level 1. Another case, the media sector, was not disabled by Alert Level changes directly and attracted large audiences as public information channels became critical. However, many media organisations suffered evaporating advertising revenues, a knock-on effect of dramatically reduced business activity due to COVID. Similarly, there were reports of creative workers losing their 'day jobs' in vulnerable sectors such as hospitality.

Although employment in the sector to March 2021 is predicted to have declined by approximately 1.7%, recent analysis by Stats NZ has identified that the sub-industry classification *Artistic Activities* was one of the hardest hit employment areas, losing 10% of employed people for the 12 months to February 2021.<sup>1</sup>

### **Cultural participation rebounded strongly**

Engagement in cultural experiences in 2020/21 was also diverse but largely positive in the circumstances. Some New Zealanders participated online, others jumped back into in-person participation, while others remained cautious about the health risks of being in crowds. Some cultural sites experienced unprecedented domestic visitors. Objectively in some areas of cultural activity there was more access to New Zealand culture than previously – for instance, expanded touring and festival performances of New Zealand music, new digital experiences, and above 20% local music played across New Zealand radio in 2020/21.<sup>2</sup> New Zealanders explored their country in great numbers as discretionary travel funds were used domestically. The COVID Response's short-term focus on keeping creatives and organisations afloat enabled the supply of cultural content and activities to be ready to meet high demand when Alert Level restrictions eased from late 2020.

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<sup>1</sup> See <https://www.stats.govt.nz/news/air-transport-industry-hit-hardest-by-covid-19>.

<sup>2</sup> See <https://www.nzonair.govt.nz/news/local-music-on-radio-hits-highest-peak-since-records-began/>

## **The impacts of COVID-19 on New Zealand's economy, cultural sector and cultural participation are ongoing**

In 2021/22 the COVID Response is in some respects focused where it was at the start of 2020/21– supporting the sector with emergency relief funding due to the COVID Delta outbreak, and continuing to invest in longer-term adaptation, resilience, innovation and sustainable success. The 2020/21 features of lockdowns, other public health restrictions, and closed borders re-emerged or persist at the beginning of 2021/22. The experience of the COVID Delta outbreak, which has stalled many cultural activities, has reinforced the dynamic, fragile, and uneven nature of sector recovery and participation behaviours within this global pandemic.

## **While challenges persist, Manatū Taonga's COVID Response provided essential support to the sector in 2020/21**

In the 2020/21 context, the targeted support provided to the cultural sector through Manatū Taonga's COVID Response contributed to short-term economic survival and functioning of recipients, and directly and indirectly shored up and (in some cases) increased and diversified cultural participation. The sector also benefited significantly from positive economic conditions overall and other government support. These COVID Response and 'non-programme' factors collectively contributed to a resilience in significant parts of the sector that enabled the delivery of strong cultural content and experiences to New Zealanders at a critical time.

## 5 References

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