THE IMPACT OF COVID-19 ON THE HUNTER REGION'S ARTS AND CULTURE SECTOR

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Report prepared for

Formerly ICAN — Independent Creative Alliance Newcastle

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OVERVIEW

The arts and culture sector is integral to the social, civic and economic well-being and vitality in Australia and has formed important creative hubs in many regional areas such as Newcastle and the wider Hunter Region. Arts participation in childhood and youth is linked to creativity, positive academic and social outcomes which supports the growing body of evidence identifying creative skills as essential to the workforce of the future.

Together with tourism and hospitality, the arts and culture sector was amongst those most negatively impacted by the COVID-19 pandemic. COVID-19 had an immediate effect on employment and income and, for especially younger people, associated social and psychological impacts of social isolation, challenges reaching audiences and creative expression. Despite this, during COVID-19, the arts and culture sector has been critical to maintain overall community and individual well-being and social cohesion, made possible through innovative online and digital platforms.

The arts and culture sector in Australia was already under great strain prior to COVID-19 with ongoing cuts to funding and lack of investment at all levels. COVID-19 especially highlighted pre-existing unsustainable structures in the sector, such as self-employed, part-time workers and freelancers who have less stable earning flows and who often work on a casual basis. These individuals were further marginalised as a result of COVID-19 both economically in terms of accessing grants and subsidies and sometimes socially with a reduction in in-person contact with each other and their audiences.

While the crisis was felt throughout the arts and culture sector, the impact was not equal for all activities and workers. Nor was it equal across Australian cities and regions, or across individuals and different arts and culture organisations. Little research has been completed in Australia to date on the local and regional impact of COVID-19 on the arts and culture sector and this research aims to highlight the impact of COVID-19 in Newcastle and the Hunter Region to inform policy and strategic planning for the city and its arts organisations.

KEY FINDINGS

The findings are sourced from an online survey of people and organisations in the arts and culture sector in Newcastle and the Hunter Region.

In terms of impact of COVID-19:

- 60% of survey respondents reported a loss of income from their artistic/creative work but 63% of these indicated that they felt they would be able to cope financially.
- Those most affected by job losses were aged 18-34 years who are generally more vulnerable to income insecurity and often working more than one job and on a casual/contract basis.
- Prior to COVID-19, 60% supplemented their income with paid work in another sector, with the majority employed in education and training and this dropped to 10% post-COVID-19.
- People aged 55 and over demonstrated greater resilience, both economically and psychologically and the greatest impact was on decreased social activities and community connection.
- 55% overall experienced decreased social activities and increased stress, anxiety or depression, 45% said they felt anxious/worried about the state of the world and 42% reported increased social isolation or loneliness.
- These figures sky-rocketed for under 35 years with 80% experiencing increased stress and/or anxiety and/or depression with 71% feeling increased isolation and loneliness.
- More than 40% linked their lack of creative productivity to the inability to access the supplies, resources, spaces and/or people necessary for their artistic/creative practice.

In terms of pivot during COVID-19:

- Approximately 70% utilised technology or new ways of promoting or sharing their art during COVID-19 and more than half wish to continue to deploy their art in new ways online.
- However, almost 60% found it was difficult to pivot their creative/artistic practice online.
- Many increased their digital skills/capability/capacity and developed new skills or hobbies.
- Many found a renewed sense of the importance of 'my art/my practice'.
- However, many found it challenging to understand the funding and income support available and to then access this.

In terms of recovery from COVID-19:

- 11% indicated they were still fully unemployed in April 2021 which is more than double the overall Newcastle and Lake Macquarie unemployment rate.
- The majority (80%) of young people (aged under 35 years) are significantly concerned about future employment, almost double that of their older counterparts.
- Only 12% of respondents agreed/strongly agreed that there is a sufficient level of local advocacy and support to navigate the post-COVID-19 landscape, compared to a high 69% who felt otherwise.
- Those with high income dependency on the arts (75% or more of their income is from the arts sector pre-COVID-19) and people aged under 35 years are more likely to disagree that there is adequate local advocacy and support for the arts in Newcastle.
- Almost half identified the need for more collaborative spaces, followed by performance, exhibition and rehearsal space.
- In addition, many see the need for increased participation by the private sector (and less dependence on the public sector) to provide affordable spaces, to bring artists together.

In terms of resilience in the future:

- Most people are less positive although not strongly pessimistic with 41% reasonably confident that their income will remain steady in the next 12 months.
- However, 43% are less certain about their financial situation in 2021.
- 54% feel the Newcastle arts and culture sector in 2021 will be more positive than in 2020.
- 49% feel somewhat or very optimistic about the outlook for the Newcastle arts and culture sector.

KEY RECOMMENDATIONS

Key recommendations for potential responses to drive resilience include:

Employment and income responses

1. Design accessible and higher value income support measures for young people to access in times of crisis.
2. Develop medium to long term commission-based income streams for artists.
3. Establish special loans and guarantee mechanisms for arts organisations, for example, to enable them to continue to invest in cultural content to deliver a more consistent revenue stream and greater employment opportunities.
4. Consider alternative funding mechanisms which can reach both local, regional and global funders, for example, crowdfunding or philanthropic sources.

Health, well-being and creativity responses

5. Deliver ongoing and accessible locally based mental health care and support and counselling services, especially for younger people in the sector.
6. Relieve financial strain associated with job/income loss by offering subsidised and/or affordable housing options, rent subsidies etc., especially for younger people in the sector.
7. Leverage individuals and organisations in the regional art community who have strong global and international experience to expand engagement and form partnerships with international artists and arts organisations.
8. Identify and develop a database of potential existing support health and well-being resources.

Innovation and digitisation responses

9. Provide a legal framework and advice around copyright /IP to support the income of artists with digital distribution platforms.
10. Develop capacity building programs for artists in collaboration with the IT team at the University of Newcastle, for example, or through other online universities local businesses on digital and financial literacy.
11. Develop volunteering programs with local businesses to support individuals and arts organisations to digitise and innovate.
12. Consider using a collaborative front end to promote smaller groups and individuals with point-of-sale capability, for example, like Etsy.
13. Develop a whole of sector digital marketing and communications strategy to highlight the value of the arts and culture sectors for the economy and regional community.
14. Develop a place branding strategy together with local tourism to promote an iconic cultural/arts identity for Newcastle and the Hunter Region.

Funding, support and advocacy responses

15. Advocate for policies which ensure organisations, businesses and government agencies honour contracts agreed with freelancers and artists in crisis/emergency situations. Potentially use leverage with insurance companies.
16. Develop a centralised web-based information and support hub (one stop shop), for example, to inform and provide assistance to individuals and organisations in Newcastle and the Hunter Region about available grants and application processes.
17. Implement initiatives or formal digital and face-to-face programs to improve networking of freelancers and individual artists to improve collaboration and support structures.
18. Advocate for affordable housing and rent for people working in the arts and culture sector (for housing and performance spaces) in Newcastle and the Hunter Region.
19. Develop an evidence base of the arts and culture infrastructure requirements in Newcastle and the Hunter Region and engage key stakeholder to develop a plan to fill gaps.
20. Form partnerships with other sectors for use of private and public spaces (indoor and outdoor).
21. Identify underutilised public space which could be repurposed for lower than market rates for performance or studio spaces, for example, Salamanca Arts Centre in Hobart.
22. Offer incentives/subsidies for a period of time, for example, like the NSW Government COVID-19 voucher scheme to boost the number of regular attendees of arts and culture (especially those who are not regular participants and/or have less available discretionary spend on arts and culture).

CONCLUSION

This research has provided insights into some of the main challenges experienced by the arts and culture sector in Newcastle as a result of COVID-19, many of which were present prior to the pandemic and exacerbated because of it. There are clear patterns around impacts for younger people in the sector with lack of job security in their 'main profession' and the casual nature of their other employment. Mental health issues continue to be an issue and access to sufficient infrastructure apparent. Emphasis also needs to be placed on the local and regional community to support the arts both in terms of 'core' regular audiences and encouraging those people who are less regular to participate.

Whilst many individuals and organisations were able to pivot during COVID-19, using mainly digital interfaces and technology, there are still ongoing structural and policy challenges which may need to be addressed if the arts and culture sector is to play a significant role in a post-industrial Newcastle.

In particular, the response to resilience needs to be sector-led but enabled with a wide range of government and non-government stakeholders. These stakeholders need to be part of the solution to the long term resilience and sustainability of the arts and culture sector in Newcastle.

1 Introduction

1.1 OVERVIEW

> *Artists are among Australia's greatest assets – they play an invaluable role in our country's culture, identity and workforce. They connect us, tell our stories and challenge us to experience different perspectives. They interpret our past, imagine our futures and reflect our humanity. The vast majority of Australians agree that artists make an important contribution to Australian society and are proud when Australian artists do well overseas*.[1]

The industries of arts, culture and creativity are fundamental to the building blocks which make a thriving community. In Australia, arts and cultural activity accounts for $111 billion which is 6.4% of Gross Domestic Product (GDP).[2] On a social level, arts and cultural organisations play a significant role in supporting community connectedness and social wellbeing.

The arts sector has been particularly affected by COVID-19. Since many artists and creatives require large audiences, the impact of restrictions has been immediate and resounding.[3] Australians give great importance to, and regularly participate in, the arts and culture industries. A survey of 3,000 people found that 95% of Australians engaged in the arts in some way in the previous year and 85% agreed that the arts sector makes for a richer and more meaningful life.[4]

The industry, however, was not without its challenges prior to COVID-19, with substantial reductions over the past decade in Australian government funding and grants. Reduced funding by all governments and donors has placed great pressure on the arts sector and cultural organisations to prove their value to both the community and to government and philanthropic organisations.

Often referred to as the 'creative city', Newcastle is home to more artists per capita than any other region in Australia.[5] The impact of COVID-19 on the art and culture sector in regional areas, like Newcastle and the Hunter Region, is yet to be fully explored which is why the findings from this research are important.

1.2 THIS RESEARCH

The University of Newcastle was commissioned by the Independent Creative Alliance Newcastle (ICAN) (now known as Hunter Creative Alliance), funded by the City of Newcastle (CN) through the Special Business Rate program, to undertake research to investigate the impact of the COVID-19 pandemic and the effect it has had on individual artists and arts organisations in the Newcastle Local Government Area (LGA). The aim is to deliver an important baseline to benchmark the current state of play for the arts and culture sector in Newcastle and inform policy and strategic planning for the city and its arts organisations. Specifically, this research will:

- Provide a high level contextual analysis of the current state of the arts and culture industries in Australia including its economic and non-economic contributions to society, pre-COVID-19 challenges and subsequent impacts associated with COVID-19
- Establish an evidence base of the impact of COVID-19 on artists and organisations in Newcastle
- Provide future strategies and an approach to strengthen and build greater resilience in the local arts and culture sector.

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[1] Australia Council for the Arts 2017. *Connecting Australians: Results of the National Arts Participation Survey. Australia Council for the Arts, Sydney*. Available at: http://www.australiacouncil.gov.au/research/connecting-australians/

[2] Australian Government Department of Communications and the Arts, Bureau of Communication and Arts Research 2018. *Cultural and creative activity in Australia 2008-09 to 2016-17*. p.56. Available at: https://www.communications.gov.au/publications/cultural-and-creative-activity-australia-2008-09-2016-17

[3] Byrnes, K. 2020. *State of the Australian arts industry: Impacts of COVID-19*. Available at: https://www.myob.com/au/blog/australian-arts-industry-covid-19-impacts/

[4] Australia Council 2014. *Arts in Daily Life: Australian Participation in the Arts*. Available at: https://www.australiacouncil.gov.au/workspace/uploads/files/research/arts-in-daily-life-australian-5432524d0f2f0.pdf

[5] City of Newcastle (n.d.). *Art and Culture*. Available at: https://newcastle.nsw.gov.au/explore/art-culture

1.3 METHODOLOGY

The project methodology included:

- A desk top review of sector specific research, academic papers and media commentary of:
  - The importance of the arts and culture sectors to the Australian economy and associated social wellbeing benefits
  - The impacts of COVID-19 on the arts and creative sectors nationally and the response strategies adopted to mitigate them
  - The culture and arts sector in Newcastle
- Field research which included an online survey, focus group and key informant interviews with both sector representatives and locally-based artists across Newcastle to:
  - Provide a comparative analysis of the pre- and post-COVID-19 context in terms of employment, income, advocacy and support
  - Understand the economic, psychological and creative impacts of COVID-19
  - Identify the future intentions and overall outlook of the sector for both arts organisations and local artists.

Unlike the desk top review, which provided a high-level contextual analysis of how the arts and creative sectors have been impacted by COVID-19 to date, the field research focused on grassroots 'professionally practicing artists', as per the Australia Council's definition of artists (see Section 1.4). The most common occupations of survey and interviewed participants included: visual artist, writer, curator/artistic director, teacher, actor/performer/director, art worker and musician/singer. Interviewees and the focus group participants were determined in consultation with ICAN (now known as Hunter Creative Alliance) and conducted digitally and face-to-face.

See Appendix A for the details of the online survey, including an overview of responses, the limitations of the survey and the survey instrument.

1.4 NOTE ON DEFINITIONS

There are various and varying definitions and discussions on what constitutes the cultural and creative industry. This definition also changes between countries. At a high level, the creative and culture industry is generally considered to consist of four sub-sectors: the arts, design, media and information technology and an additional 13 domains.[6]

However, given that the purpose of the research was to understand the impacts of COVID-19 on locally-based artists in Newcastle, the field work also focused on the 'artist' population by artist type as per the Australia Council definition of *professionally practicing artists:*

> …*those currently working or seeking to work in their chosen occupation* referring to the term professional as those '*intended to indicate a degree of training, experience or talent and a manner of working that qualify artists to have their work judged against the professional standards of the relevant occupation*.[7]

[6] McIntyre P. et al. 2019. *Creativity & Culture Production in the Hunter*. Available at: https://soci.newcastle.edu.au/hci/wp-content/uploads/sites/291/2019/02/HCI-Report-Visual-Arts.pdf

[7] Australia Council 2020. *Creating our Future: Results of the National Arts Participation Survey*. Available at: https://www.australiacouncil.gov.au/research/wp-content/uploads/2020/08/Creating-Our-Future-Spotlight-on-economic-value-and-future-success.pdf

2 The arts and culture sector in Australia

2.1 OVERVIEW

This section provides a high level overview of the arts and culture sector in Australia, including its economic and social contributions, as well as some of its continuing challenges. Globally, the arts and culture sector has been one of the most affected sectors as a result of COVID-19 with the forced closure of venues, social isolation and social distancing measures all of which have severely impacted on arts and culture organisations and individual artists.

The impacts of COVID-19 are identified at a national level, with some international comparison, including the response strategies of government, private and non-profit sectors to support the renewal and recovery of the sector and their cultural economies. To date, much of the available information around the impacts of COVID-19 on the arts and creative industries looks very broadly at the arts and culture sector as a whole and not the individual sub-divisions of this broader creative eco-system. There is very little available data or research to date on how COVID-19 has impacted the arts and culture sectors in the regions of Australia and more specifically the challenges experienced and recovery strategies being adopted.

2.2 THE IMPORTANCE OF THE ARTS AND CULTURE SECTORS

The arts and culture sectors are integral to the social, civic and economic well-being and vitality of a country. Arts participation in childhood and youth have been linked to creativity, positive academic and social outcomes which is consistent with the growing body of evidence which identifies creative skills as essential to workforces of the future. In recent years, multiple predictions about workforces of the future in both Australian and international studies have identified increasing need for creative thinking skills.[8]

Three areas of economic and social value to society from arts and culture are described as: [9]

- **Intrinsic value** – the unique and personal value of individual art forms and cultural experiences
- **Instrumental value** – the outcomes of art and culture, including employment, tourism, education and social wellbeing for individuals and communities
- **Institutional value** – the value created by arts and cultural institutions and their relationship and interaction with society.

Much existing research focuses predominantly on the instrumental value of arts and culture, as instrumental value is often the central focus of government funding. However, it could be argued that instrumental value is in fact dependent on the intrinsic and institutional value of art and culture, through improved education, mental and physical well-being and social cohesion.

These value and overall benefits and contributions of the arts and culture are discussed below.

Economic and employment value

As noted in Section 1.1, arts and culture contributed over $111 billion a year to Australia's economy in 2016-17, employing almost 200,000 people and accounting for 6.4% of Australia's GDP. In addition, every million dollars invested in the arts creates nine jobs.[10] This is significantly higher when compared to other labour intensive industries such construction which only generates approximately one job with the same amount of investment. This demonstrates the contribution of the arts, culture and creative sector to the sustainability of the Australian economy.

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[8] Australia Council 2020. *Creating our Future: Results of the National Arts Participation Survey*. p.63. Available at: https://www.australiacouncil.gov.au/research/wp-content/uploads/2020/08/Creating-Our-Future-Spotlight-on-economic-value-and-future-success.pdf

[9] Wearring, A., Dalton, B. & Bertram, R. (2020). Sector Briefing: Arts & Culture, The social impact of Australia's arts and cultural sector, University of Technology Sydney, p14. Available at: https://www.socialimpacttoolbox.com/wp-content/uploads/2020/11/Making-A-Difference-The-Social-Impact-of-Australias-Arts-Cultural-Organisations.pdf

[10] Brown, B. 2020. *Economic importance of the arts and entertainment sector.* Available at: *https://australiainstitute.org.au/wp-content/uploads/2020/12/Background-Brief-Economic-importance-of-arts-and-entertainment-WEB.pdf*

A well-funded and overall thriving arts sector has an indirect trickledown effect on the local economy, including for example: [11]

- The creation of a locally vibrant and thriving environment which may encourage people to move to an area or visit the area as a tourist and spend money
- The formation of a creative centre or cluster which encourages others to move to the area and stimulate the local economy.

Arts tourism impact

Arts festivals and events are powerful drivers for regional, domestic and international tourism. For example, the 2019 Adelaide Festival generated an estimated $76.8 million in associated spending for the state with 19,046 visitors coming from interstate or overseas for 141,258 bed nights.[12] Both domestic and international arts tourism were growing prior to COVID-19 and arts tourists are high value tourists who tend to stay longer and spend more. From large scale festivals and events, to visits to artist workshops and studios, the arts attracts domestic tourists to both metropolitan and regional locations and to unique offerings in different parts of Australia.[13]

Social wellbeing and cohesion contribution

Perhaps the most important contribution the arts and cultural organisations have on a society is that they contribute positively to the health and wellbeing of a society, building community cohesion and the cultural and economic strength of communities.[14]

Innovation and creative stimulation

Creative skills have been integral to the fast-growing industries in Australia. In the past decade and prior to COVID-19, the creative economy was growing at a rate nearly twice that of the Australian workforce. As well as developing talent and job growth, investment in arts and creativity can cultivate new ideas, technologies and cutting-edge innovation. One in four Australians rank investment in art which pushes boundaries and drives innovation in their top three priorities for public or private investment in the arts.[15]

2.3 PRE-COVID-19 CHALLENGES AND SECTOR VULNERABILITIES

It is important to highlight that the arts and culture sector was not without its challenges and vulnerabilities before the COVID-19 pandemic. One of the most significant limitations is considered to be the lack of a *National Arts, Culture and Creativity Plan* which should be an up-to-date public policy paper which defines the framework to efficiently address the policy, legislative, regulatory and investment settings that span the cultural and creative industries. [16]

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[11] Holden J. 2007. *Publicly-Funded Culture and the Creative Industries*. Cited in: *A New Approach, 2020, Australia's cultural and creative economy: A 21st century guide*. Available at: https://www.humanities.org.au/wp-content/uploads/2020/09/ANA-InsightReportFive-WorkingPaper.pdf

[12] Australia Council 2020. *Creating our Future: Results of the National Arts Participation Survey*. p.64. Available at: https://www.australiacouncil.gov.au/research/wp-content/uploads/2020/08/Creating-Our-Future-Spotlight-on-economic-value-and-future-success.pdf

[13] Australia Council 2020. *Domestic Arts Tourism: Connecting the country* and Australia Council 2018. *International Arts Tourism: Connecting cultures*.

[14] Wearring A, Dalton B. & Bertram R. 2020. *Sector Briefing: Arts & Culture, The social impact of Australia's arts and cultural sector*. Available at: https://www.socialimpacttoolbox.com/wp-content/uploads/2020/11/Making-A-Difference-The-Social-Impact-of-Australias-Arts-Cultural-Organisations.pdf

[15] Australian Government Department of Communications and the Arts, Bureau of Communication and Arts Research 2019. *Creative skills for the Future Economy*. Available at: https://www.communications.gov.au/publications/creative-skills-future-economy

[16] A New Approach 2020. *Australia's cultural and creative economy: A 21st century guide*. Available at: https://www.humanities.org.au/wp-content/uploads/2020/09/ANA-InsightReportFive-WorkingPaper.pdf

In addition, the arts and culture sector has been hit by significant reductions in government funding. Australian Government arts funding declined by nearly 20% between 2008 and 2014 and since 2013, the government has repeatedly delivered budgets which are considered to lack meaningful and substantial funding for arts and culture.[17]

Between January 2017 and December 2019:

- $300 million was cut from the Australian Government's cultural budget
- 65 arts organisations lost Australia Council funding
- The Book Council lost $6 million in funding
- The ABC lost $100 million a year in direct and indirect funding.[18]

In conjunction, at the end of 2019, the Australian Government relocated the Department of Communications and the Arts to the Department of Infrastructure, Transport, Regional Development and Communications. This suggests to some not only a reduction in funding but the diminishing importance of the arts and culture sectors to the non-economic well-being of a country.

Another ongoing challenge for the sector is that it is dominated by self-employed creatives, part-time workers and freelancers who often have less stable than average earning flows and who often work on a casual basis. As a result, they have reduced access to sick benefits and other social protection. This places these individuals at a higher risk, both economically in terms of accessing grants and subsidies, and socially, in terms of mental health.

2.4 COVID-19 AND THE IMPACTS ON THE ARTS AND CULTURE SECTORS

The impacts experienced by the arts sector as a result of COVID-19 are not unique to Australia, with the OECD noting that the cultural and creative sectors were amongst the most affected industries by the pandemic, with jobs at risk ranging from 0.8 to 5.5% of employment across OECD regions. The OECD also notes that venue-based industries were the hardest hit and the impacts are likely to have long term consequences. A range of issues will affect the sector's likelihood of recovery, including anticipated lower levels of international and domestic tourism and travel, decreases in purchasing power and reduction of public and private funding for arts and culture, especially at the local level.[19]

In terms of unemployment and job losses, many sources highlight that three-quarters of the casual workforce of performing arts centres had been dismissed, with over half (55.3%) of full-time and part-time staff working at significantly reduced hours.[20] According to *I Lost My Gig*, an initiative of the Australian Festivals Association, as at 27 April 2020, the total lost income reported by over 12,600 respondents was $340 million with the loss of almost 300,000 work opportunities. In addition, 96% of participating sole traders and small businesses expect financial losses beyond September 2020.[21]

Australian-wide data is available from the ABS Weekly Payroll Jobs Index sourced from Australian Tax Office Single Touch Payroll. The data represents 77% of businesses with under 20 employees and 99% of businesses with 20 or more employees, however it excludes self-employed and micro businesses, with under four employees. Figure 1 shows that the creative and performing arts sector was heavily impacted by onset of the COVID-19 induced NSW-wide lockdowns in late March/early April. By 11 April approximately 30% of jobs within the sector had been lost compared to a month prior to 14 March 2020.

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[17] Reid, L. 2020. *The arts sector is already suffering. This year's budget just pours salt on the wound*. Available at: https://www.theguardian.com/culture/2020/oct/08/the-arts-sector-is-already-suffering-this-years-budget-just-pours-salt-on-the-wound

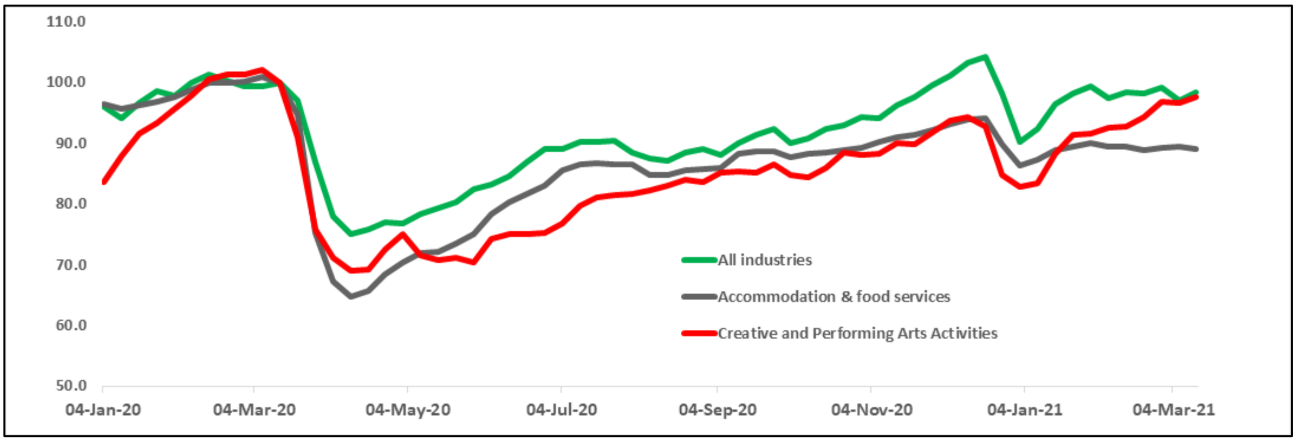
[18] Wearring A, Dalton B. & Bertram R. 2020. *Sector Briefing: Arts & Culture, The social impact of Australia's arts and cultural sector*. p.16. Available at: https://www.socialimpacttoolbox.com/wp-content/uploads/2020/11/Making-A-Difference-The-Social-Impact-of-Australias-Arts-Cultural-Organisations.pdf

[19] OECD 2020. *Culture shock: COVID-19 and the cultural and creative sectors*. Available at: https://www.oecd.org/coronavirus/policy-responses/culture-shock-covid-19-and-the-cultural-and-creative-sectors-08da9e0e/

[20] https://www.myob.com/au/blog/australian-arts-industry-covid-19-impacts/

[21] I lost my gig 2020. *I lost my gig*. Available at: https://ilostmygig.net.au/i-lost-my-gig

Figure 1: Recovery from COVID-19 across different industry sectors



Source: ABS, Weekly Payroll Jobs and Wages in Australia. Note: indexed 100=jobs at 14 March 2020 when Australia had its 100th COVID-19 case.

The creative and performing arts sector was more heavily impacted than all other industry sectors with the exception of accommodation and food services which had lost 35% of jobs by 11 April 2020. The sector's recovery was also more gradual than other industries. By late June 2020 employment remained 25% below the pre-lockdown figure compared to a 10% drop for all industries Australia-wide. Employment in the creative and performing arts recovered more strongly by mid-December 2020, to dip again in January 2021 which may partly reflect an annual seasonal dip in the December to January period. However, by 13 March 2021, employment in the sector was 2.4% below the prior year and approximately on par with the Australian trend for all industries (1.6% lower).

COVID-19 has made uneven, contract and casual work even more precarious and has affected the mental health of many working in the arts and culture sector. Not only has the loss of income and employment been a major contributor, but the loss of a community connections, hope, feeling disconnected and powerless have also impacted many.

Notwithstanding the prevalence of major socio-economic impacts on the arts and culture sectors, a recent European Union study noted that many organisations and workers in the cultural and creative sectors have been empowered by their experiences and have initiated the beginnings of a more sustainable system.[22] Rather than returning to the 'old normal', to a sector with a multitude of challenges and limitations, COVID-19 has created an opportunity to review practices. For example, reviewing vulnerable working situations and fragile remuneration structures such as those of freelancers and temporary workers. Other positive outcomes highlighted included:[23]

- Innovation in the sector to experiment with new alternatives such as new digital distribution formats
- Formation of new partnerships and greater sectoral unity through joint actions
- Increased contribution to the well-being of citizens, social innovation and social cohesion.

This is supported by the OECD report which identified a sharp increase in the delivery of digital content by the arts sector of OECD countries and that while this has mostly been provided free of charge to date, the development of digital engagement platforms is likely to have *opened the door to future innovations*.[24]

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[22] IDEA Consult, Goethe-Institut, Amann S. and Heinsius J. 2021. *Cultural and creative sectors in post-Covid-19 Europe: Crisis effects and policy recommendations*. Available at:
https://www.europarl.europa.eu/RegData/etudes/STUD/2021/652242/IPOL_STU(2021)652242_EN.pdf
[23] Ibid.
[24] OECD 2020. *Culture shock: COVID-19 and the cultural and creative sectors*. Available at:
https://www.oecd.org/coronavirus/policy-responses/culture-shock-covid-19-and-the-cultural-and-creative-sectors-08da9e0e/

2.5 RESPONSE STRATEGIES TO SUPPORT THE SECTOR

In April 2020, the Australian Government announced a $27 million emergency relief fund to support the arts in Australia. This package targeted regional and Indigenous organisations and included the repurposing of $5 million of the Australia Council's existing pool for small, quick release grants.[25]

Additional funding was provided as follows:

- $10 million for the Regional Arts Fund
- $7 million for Indigenous art centres and art fairs
- $10 million for the charity Support Act to provide immediate crisis relief to artists, crew and music and live performance workers.

Most recently, on 19 April 2021, the Australian Government announced $5 million for the *Playing Australia Regional Recovery Investment*. This will support performing arts touring in regional and remote Australian communities as they rebound from the impacts of COVID-19.[26]

Partnership formation has also been part of the relief plan. The Australian Government created the *Creative Economy Taskforce* which consists of twelve industry experts who will assist in the implementation of the Government's $250 million creative economy support package.[27]

Other economic and monetary grants included:

- Income support measures for self-employed and freelancers, including funding for those not covered by mainstream income assistance programs
- State loans/guarantees for companies
- Income subsidies for employees
- Tax deferrals/tax credits/tax relief
- Subsidies for self-employed persons
- Grants for affected companies
- Training for artists or support for new production processes, for example, digital presentation of art works.[28]

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[25] Wearring A, Dalton B. & Bertram R. 2020. *Sector Briefing: Arts & Culture, The social impact of Australia's arts and cultural sector*. p.14. Available at: https://www.socialimpacttoolbox.com/wp-content/uploads/2020/11/Making-A-Difference-The-Social-Impact-of-Australias-Arts-Cultural-Organisations.pdf

[26] Department of Infrastructure, Transport, Regional Development and Communications 2021. *Support for the cultural and creative sector announced in 2021*. Available at: https://www.arts.gov.au/covid-19-update

[27] Department of Infrastructure, Transport, Regional Development and Communications 2020. *Covid-19 update*. Available at: https://www.arts.gov.au/covid-19-update

[28] The German Federal Government's Centre of Excellence for the Cultural and Creative Industries 2020. *Ongoing report of the Federal Government's Centre of Excellence for the Cultural and Creative Industries about the 'COVID-19 Impact on the Cultural and Creative Industries in Germany. Economic Effects in a Scenario Analysis'* Available at: https://kreativ-bund.de/wp-content/uploads/2020/05/Short_paper_Impact_Report_COVID_191.pdf

There were other locally based support initiatives activated in response to COVID-19 by local governments across Australia. Examples include:

- Melbourne was among the first to offer quick response grants to artists and creatives to invest in new works and digital presentation of works and performances
- Offerings from regional cities, included the one-off *Creative Wollongong Quick Response Grants* for arts and performance which supported the development of new work in any media. The program included a digital sharing option so that artists could offer an online performance or workshop that would be shared on a Council platform, as well as an option to perform at a Council event within the following 24 months
- Other regional cities, such as Geelong, established an arts advisory panel. *Geelong COVID-19 Arts Recovery* aims to hear directly from people working in the arts, cultural, entertainment and heritage to help shape Council's response and grants package
- The City of Ballarat released *Be Kind – Be Creative* to provide the whole community with an opportunity to respond creatively to new and changing circumstances
- In Western Australia, support groups ran *The Connection Project* which were weekly zoom sessions for Western Australian arts practitioners.

Specific support provided by the City of Newcastle is detailed at Section 3.3.

Examples of global recovery and emergency support measures[29]
Italy: Social safety nets were extended to seasonal workers in tourism and entertainment and interventions in favour of authors, artists, performers and agents. Other measures included: a campaign to relaunch 'the image of Italy in the world' for cultural and tourism purposes, emergency fund for live arts, cinema and audio-visual (€130 million) and vouchers for tickets already bought. **Japan:** Specific measures to support freelancers in the arts and cultural sector by municipal governments, such as Fukuoka City which is supporting up to 500,000 JPY (AUD$6,000) per facility for live houses, halls, theatres etc, attempting to distribute online contents and taking safety measures. **Luxembourg:** The government amended its social assistance laws so that in the event of pandemics and terrorist attacks, the government can: extend the social assistance scheme to independent and freelance professional performing artists with the possibility of a monthly social assistance benefit up to the minimum social wage for qualified persons and additional daily allowance; and reduce the income conditions normally required to be able to access aid schemes in proportion to the duration of the exceptional event. **Barcelona and Berlin:** Specific support measures for local culture companies and professionals, both with financial transfers and with programmed booking of shows after reopening. **Estonia**: The government passed a temporary amendment to the *Creative Persons and Creative Societies Act*, guaranteeing a minimum wage for six months for freelance creative practitioners.

[29] Australia Council 2021. *Responses to COVID-19 from arts agencies around the world: Recovery and emergency support*. Available at: https://www.australiacouncil.gov.au/workspace/uploads/files/300620-recovery-digital-and-em-5efe9c0b8c6e8.pdf

3 The arts and culture sector in Newcastle and support following COVID-19

3.1 OVERVIEW

A recent report indicated that:

> *… from a regional development perspective, creative industries play a more important role in communities than just the jobs they provide. Creative industries play a role in the attraction and/or retention of regional populations and therefore may be vital for broader socio-economic vibrancy of regional communities*.[30]

At present, very little evidence is available in relation to the impacts of COVID-19 on the arts and cultural sector in Newcastle and the Hunter region. As noted in Section 1.3, this research aimed to understand the pre-/post-COVID-19 financial, creative and psychological impacts on local artists.

3.2 THE CREATIVE AND CULTURAL SECTOR IN THE HUNTER REGION

The following provides a snapshot of the creative and cultural economy in the Hunter Region.[31]

- In 2019, the creative industries in the Hunter Region employed close to 10,000 people and contributed a little under $1 billion to the Region's Gross Regional Product (GRP)
- There was an increase in the number of people employed in the creative industries between 2011 and 2016, representing a substantial cumulative annual growth rate of 2.0% when compared with 0.6% in the general workforce
- There is a rapidly growing trend toward outsourcing, freelancing and the casualisation of the workforce
- Many workers in the creative and culture sector work cross-sectorally in order to earn a sufficient income. There is also a great deal of mobility between professions. Workers in the creative industries are often defined as T-shaped, that is, they are specialised vertically as well as multi-skilled horizontally
- Regional artists have strong international links with many having lived or spent time abroad developing their art expertise and subsequently remaining connected through commercial means. Others arrive in the Region also bringing a high level of expertise with them. Such migratory patterns have a positive net inflow of skilled operatives for the Region.
- Workers in the creative industries in the Region are globally active fuelled by globalisation and digitisation of the sector.

[30] Achurch H. 2019 *Regional Growth Prospects: Strategic Investment in Food Processing, Tourism, Advanced Manufacturing and Creative Industries* Canberra: The Regional Australia Institute. Cited in McIntyre P. et al. 2019. *Creativity & Culture Production in the Hunter*. Available at: https://soci.newcastle.edu.au/hci/wp-content/uploads/sites/291/2019/02/HCI-Report-Visual-Arts.pdf.
[31] McIntyre P. et al. 2019. *Creativity & Culture Production in the Hunter*. Available at: https://soci.newcastle.edu.au/hci/wp-content/uploads/sites/291/2019/02/HCI-Report-Visual-Arts.pdf

3.3 CITY OF NEWCASTLE SUPPORT FOR THE ARTS SECTOR DURING COVID-19

The CN committed $150,000 in one-off grants to artists to assist with artist fees and projects.[32] In addition, two arts projects were funded as part of five successful projects under the CN's *Industry Response Program*.

These included:

- **Field Frequency: Smart City LIVE Music TV Show**: A live-stream music series to showcase a diverse range of established musicians and new talent
- **Hunter Writers Centre Multi-Arts Activation**: Designed to benefit local arts, cultural, and tourism businesses through exhibition studio spaces for Indigenous and non-Indigenous writers, musicians, visual and digital artists, to develop work for exhibitions of cultural and maritime history and stories of local sites.

A number of unsuccessful applications from the *Industry Response Program* were subsequently funded through other CN grant schemes including events sponsorship, Special Business Rate program and arts grants. This research project is supported by CN funding through the funded by the City of Newcastle through the Special Business Rate program

Five original *Industry Response Grant* applications were successful through other CN funding opportunities. These projects included:

- Project funding for a series of events over three weeks in November and December to *Wake Newcastle from its COVID slumber* run by Newcastle Art Space
- *Created in Newcastle* film project to deliver new ways of reconnecting film, arts and culture across the city precinct
- A Hunter campaign to promote Newcastle Food Month via digital and traditional media
- A newly created *Makers and Traders Project* 360 digital interface using virtual tours and podcasts to enable visitors and encourage booking, sales and connection
- A project to build permanent lighting/lightscape infrastructure for Civic Park.

In addition, the arts and culture sector was represented on the CN's *Taskforce Leadership Team*, a 17-member collaborative forum established to identify non-health impacts for Newcastle businesses and community and generate local solutions.

[32]City of Newcastle 2020. Arts and culture grants. Available at: https://www.newcastle.nsw.gov.au/community/grants-and-sponsorships/arts-and-culture-grants

4 The impact of COVID-19 on Newcastle-based artists

4.1 OVERVIEW

As noted in Section 1.3, a series of in-depth interviews, focus groups and an online survey were conducted with sector representatives, arts organisations and individual artists. These highlighted four impact areas which included:

- Employment and income impacts
- Health, well-being and creativity impacts
- Innovation and digitisation of the arts benefits
- Funding, support and advocacy impacts.

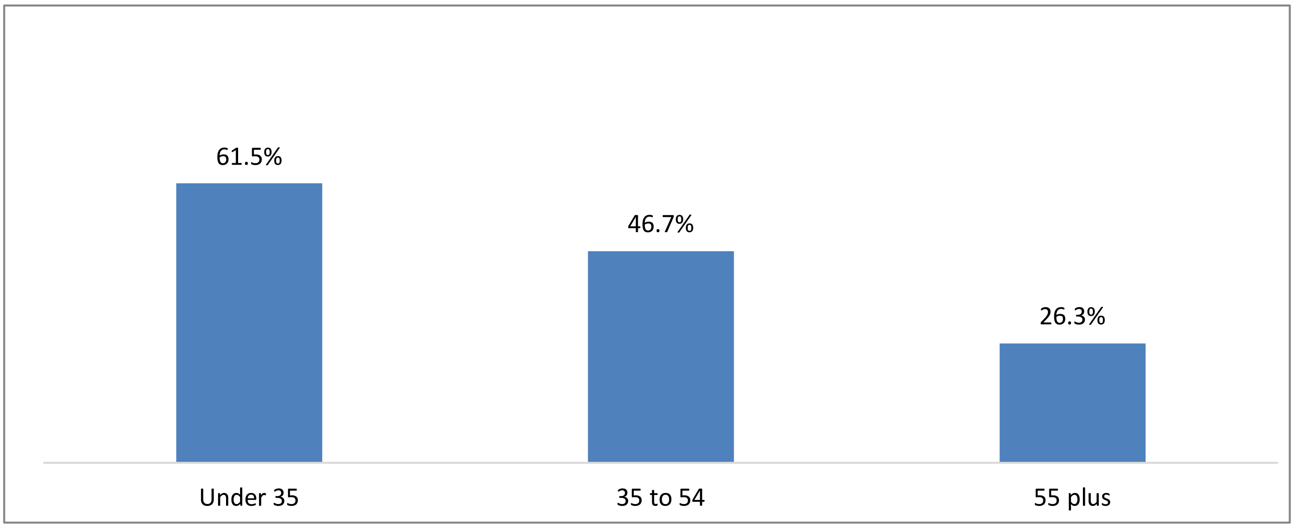
The positive and negative impacts are detailed in this section and provide a detailed summary and analysis of what the local arts community experienced and how it was impacted by COVID-19. Where possible, pre- and post-COVID-19 comparisons have been made.

4.2 EMPLOYMENT AND INCOME IMPACTS

One of the most severe and immediate affects of the COVID-19 lockdown to the local art community was the loss of jobs and income. The impacts included:

- 60% of survey respondents reported a loss of income from their artistic/creative work, highlighting a significant category of creative practitioners in some form of financial distress. Those most affected were aged 18-34 years
- 44% of all respondents who experienced income loss were eligible for JobSeeker or JobKeeper. A higher proportion of those aged under 35 years reported they lost income and were eligible for JobKeeper or JobSeeker (61.5%). This is shown in Figure 2.

Figure 2: Respondents who experienced a loss of income and were eligible for JobKeeper or JobSeeker by age



Source: ICAN Online Survey.

- As of March 2021, 11% of respondents indicated they were fully unemployed which is more than double the overall Newcastle and Lake Macquarie unemployment rate
- Those aged under 35 years were more likely to be fully unemployed (17.9%) than survey respondents overall, compared to 10% for 35-54 years and 7.9% for those aged 55 years and older

- The rate of unemployment for 35 years and under is higher than the unemployment rate for 35 years and under in Newcastle and Lake Macquarie (approximately 9%, using a three month moving average)
- 60% of respondents have experienced some loss of income from their creative practice since COVID-19 but 63% indicated that they felt they would be able to cope financially. Those with a high dependence on the arts and culture sector were more likely to have reduced their reliance on the sector for income and more likely to have experienced a loss of income from creative practice. However, 59% of this group felt they could cope financially despite their lost income
- Pre-COVID-19, 60% of respondents supplemented their income with paid work in another sector, with the majority employed in education and training. However post-COVID-19, there was a drop of almost 10% in the total number of people who supplemented their income with other paid work which reflects a slow recovery across all art sub-sectors and a slow recovery of other sectors traditionally relied on to supplement income, including food and hospitality services.

Impact on with creative sector in Auckland[33]

Te Taumata Toi-a-Iwi in New Zealand commissioned a survey (n=146) of the impact of COVID-19 on Auckland's creative sector:

- 58% of those surveyed had experienced an event cancellation and a further 36% indicated they had to postpone an event
- 66% of respondents felt they would be able cope despite the cancellation of events
- 66% of respondents received government wage subsidy package.

Young people aged under 35 years were most affected cohort by job losses. This aligns more broadly to youth unemployment across Australia, which as at February 2021 was more than double that of the overall unemployment rate (12.9% and 5.8% respectively).

Australia-wide, JobKeeper disproportionately excluded younger workers, as they were more likely to be recent workforce entrants, who switch jobs more than older workers and tend to be employed in casual or other forms of insecure work.[34] Such employment conditions resonate strongly with those employed in the arts and culture sectors, as also noted in Section 2.

In Australia in 2019, young people (aged 18-24 years) comprised 17% of the workforce yet accounted for 46% of all short-term casual employees.[35] Of those employed casually, 26.4% had been with their employer for less than 12 months, compared to 6.5% of those aged 25 and over. This means that one in four young people employed casually were not eligible for JobKeeper, compared with only one in 16 of their older counterparts.[36]

The survey results show a higher proportion of young people receiving JobKeeper/JobSeeker, compared to Australia-wide data. This may be linked to the age category discrepancies (18-34 years in the ICAN survey, compared to 18-24 years in the ABS data) and/or because the ICAN survey classifies JobKeeper/JobSeeker under one category compared to two separate categories with the ABS data.

In terms of job confidence, Figure 3 shows that the majority (80%) of young people (aged under 35 years) are significantly concerned about future employment, almost double that of their older counterparts. This may again be linked to the general nature of young people's early experience of the workforce defined by casual and other forms of less than secure work. Their older aged counterparts may already be established

[33] Te Taumata Toi-a-Iwi 2020. COVID-19: *Further reflections of impact on the Creative Sector in Tamaki Makaurau*. Available at: https://www.tetaumatatoiaiwi.org.nz/wp-content/uploads/2020/11/COVID-follow-up-survey-report-201106.pdf

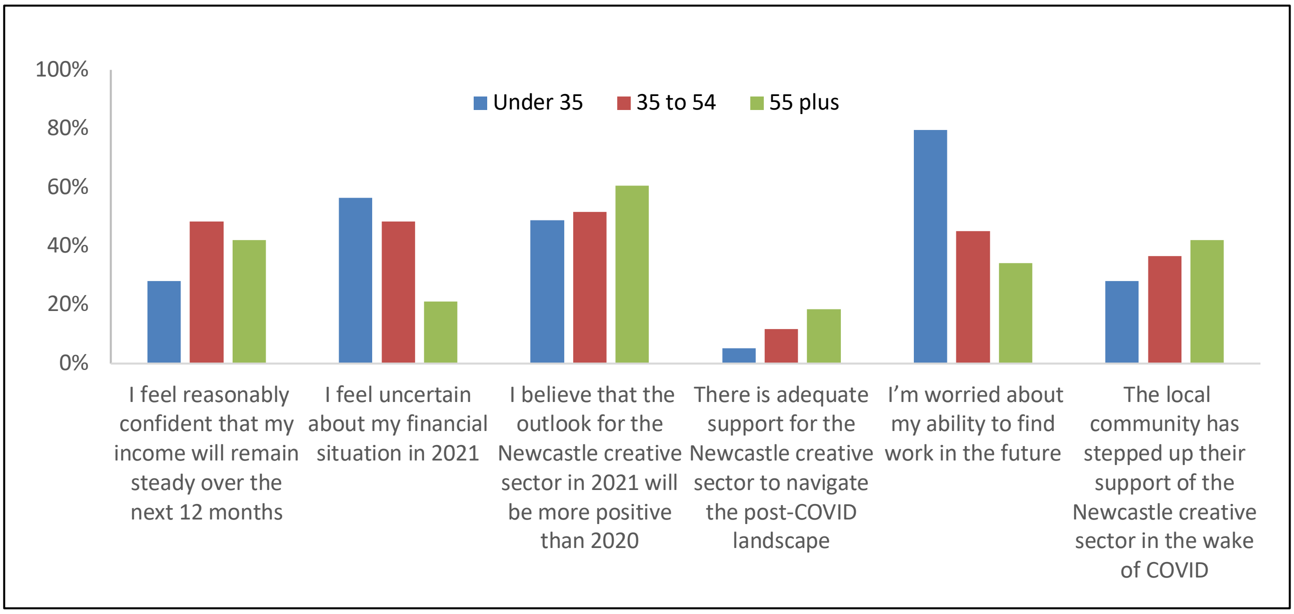
[34] Ausralian Government, Treasury Department 2019. *Jo-to-job transitions and the wages of Australian workers*. Available at: https://treasury.gov.au/publication/p2019-37418b

[35]Parliament of Australia 2020. *Impacts on casual workers in Australia: A statistical snapshot*. Available T: https://www.aph.gov.au/About_Parliament/Parliamentary_Departments/Parliamentary_Library/pubs/rp/rp1920/StatisticalSnapshotCasualWorkersAustralia#_Toc39756320

[36] ABS cited in The Conversations 2019. *JobKeeper and JobMaker have left too many young people on the dole queue*. Available at: https://theconversation.com/jobkeeper-and-jobmaker-have-left-too-many-young-people-on-the-dole-queue-158294

in the sector, be self-employed and/or have additional jobs. Younger people, aged under 35 years were also less confident about their income and overall financial situation in 2021.

Figure 3: Future outlook post COVID-19 by age



Source: ICAN Online Survey.

Low levels of confidence among young people towards future employment and income possibilities may also be a reflection of some independent variables (which were not included in the survey instrument) such as living costs, tenure type (for example, rental accommodation, living at home or own home), household make-up (for example, partner/spouse and dependent children) and household income. These variables may provide additional understanding of the actual situation of the affected age cohorts and help to develop a more targeted policy and practice response.

Summary of findings for employment and income
• Younger people more vulnerable to job insecurity
• Loss of income from artistic/creative work affects young to middle aged (18 to 54 years)
• Majority of recipients of Job Keeper/Job Seeker aged 18-34 years
• Older people more resilient in terms of income
• Challenges to accessing funding

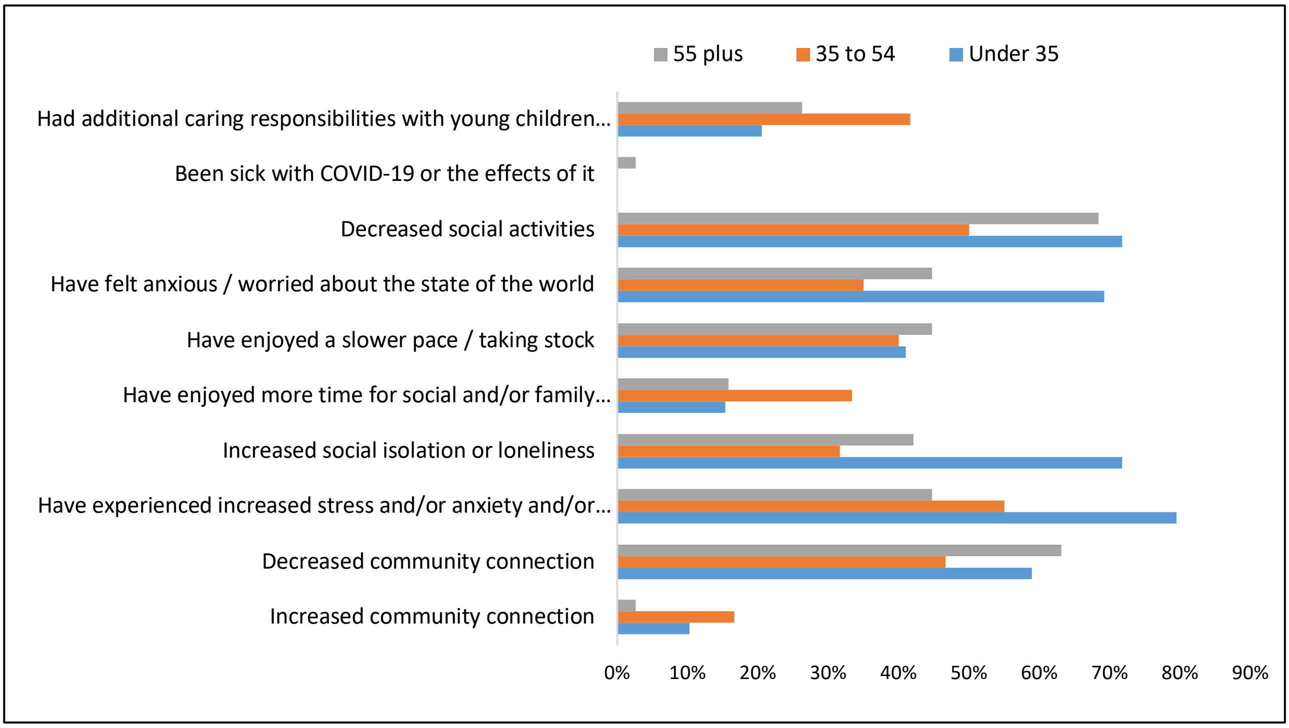
4.3 HEALTH, WELL-BEING AND CREATIVITY IMPACTS

In terms of personal impacts associated with COVID-19:

- 55% of all respondents experienced decreased social activities and increased stress, anxiety or depression, 45% said they felt anxious/worried about the state of the world and 42% reported increased social isolation or loneliness
- Over 40% of respondents linked their lack of creative productivity to the inability to access the supplies, resources, spaces and/or people necessary for their artistic/creative practice
- For the 55-plus cohort the greatest impact was on decreased social activities and community connection

- 80% of respondents aged under 35 years experienced increased stress and/or anxiety and/or depression and 71% felt increased isolation and loneliness. These measures are both significantly higher than their older counterparts. This is shown in Figure 4.

Figure 4: Personal impacts of COVID-19 by age

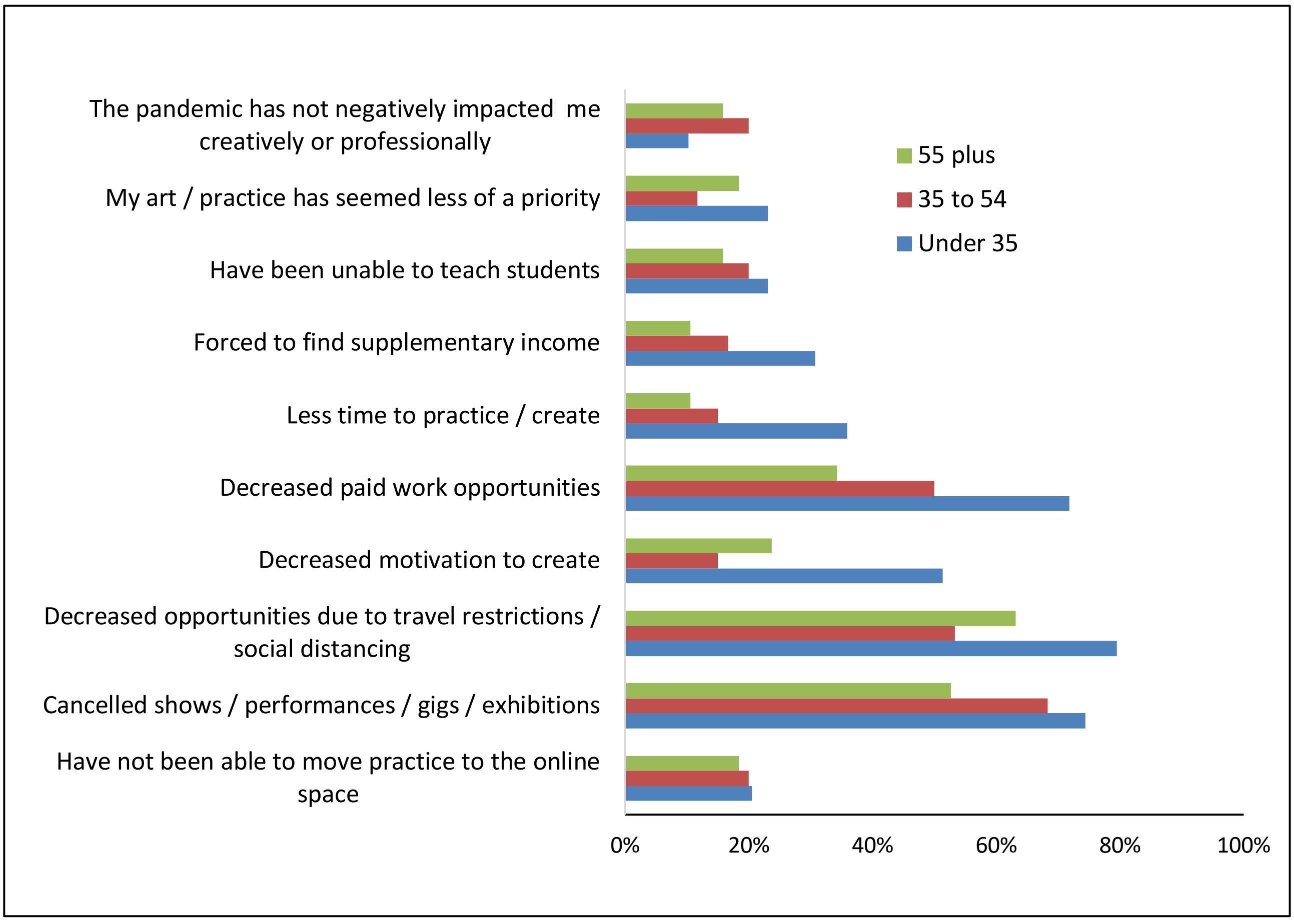


Source: ICAN Online Survey.

This may indicate that older people are generally more resilient from a mental health perspective to adjust to the social isolation enforced by COVID-19.

The majority of respondents reported some form of negative impact professionally or creatively from COVID-19, most commonly from cancelled events. Other negative impacts included decreased opportunities, decreased paid work opportunities and decreased motivation to create. Negative impacts, in particular in terms of fewer paid work opportunities, were more pronounced for those who had a high income dependency on the arts (earned 75% of their income pre-COVID-19 from the sector) and people aged under 35 years. This is shown in Figure 5.

Figure 5: Negative impacts creatively and professionally



Source: ICAN Online Survey.

53% reported that their productivity in terms of their creative output had somewhat or drastically decreased since the COVID-19 impacts of lockdown and social distancing. Positive impacts were more reported than negative impacts and included:

- Increased digital skills/capability/capacity (see also Section 4.4)
- Renewed sense of the importance of my art/my practice
- Developed new skills or hobbies.

It is also important to note that following rapid house price growth from the mid-2010s the Newcastle LGA is relatively less affordable than at the start of the last decade. The latest housing affordability index for the National Cities Performance Framework ranks Newcastle, Lake Macquarie and Maitland's housing affordability just fractionally below Melbourne's with a ratio of dwelling prices to household income of 7.6. Over the COVID-19 period, vacancy rates in rentals in Newcastle have also been close to zero.[37] This is likely to have had a significant impact on access to affordable accommodation and associated cost of living within the LGA for those without a foothold in the housing market or with intermittent work and/or low income.

Respondents also highlighted some pre-existing issues in the local arts and culture sector in relation to creative capacity and lack of collaborative opportunities with existing arts studios and organisations. Some felt that this has worsened since COVID-19.

[37] ABC 2021. *Rental vacancy rates hit zero in Australian coastal towns as they hit COVID capacity*. Available at: https://www.abc.net.au/news/2021-01-08/surf-coast-rentals-at-zero-vacancy/13037172

Similarly, focus group participants identified the limitation and impacts COVID-19 had on their individual performer/artistic creativity:

> *Dancers like to work with each other and COVID had a significant impact on the ability to be creative as you can't partner with a dancer and adhere to social distancing.*
>
> *While it was great to still work professionally using technology, translating movement through screen is very difficult and took away the humanity side of dance*.

Summary of findings for health, well-being and creativity
• High percentage of young people experienced stress, anxiety and depression
• Older people more resilient in terms of mental health impacts from COVID-19
• Limited opportunities for collaboration with existing arts organisations
• Creativity impacted by lack of access to creative supplies/space/ resources/people

4.4 INNOVATION AND DIGITISATION BENEFITS

The ability of the arts and culture sector to digitise in response to COVID-19, for the major part, had a significantly positive impact in maintaining connectivity to the community Importantly. This is because *there is not a single SME, organisation or individual…who has not come to rely on the necessary software, hardware and telecommunications infrastructure to carry out their social, cultural and financial industries*.[38]

Although it is clear that for some sub-sectors, such as performing arts and live music, the digital element cannot replace the need for human interaction, digital technologies have enabled a range of arts organisations and professionals to remain active in producing, distributing and maintain contact with audiences and communities. Approximately 70% of respondents utilised technology or new ways of promoting or sharing their art during COVID-19 and over half wish to continue to deploy their art in new ways online after COVID-19 passes.

Innovation and digitisation in the creative sector in Auckland[39]
Te Taumata Toi-a-Iwi in New Zealand commissioned a survey (n=146) of the impact of COVID-19 on Auckland's creative sector: • 58% of those surveyed in Auckland region's creative sector had moved activities online • 48% developed new ways of delivering services • 47% sought new funding opportunities • 43% conducted contingency planning to meet health and safety requirements.

Despite the overall positive response to digital solutions, almost 60% of survey respondents agreed that it was *difficult to pivot their creative/artistic practice to an online practice*. This may be attributable to a lack of skill and training in online social media and other digital forms, or the nature and type of art form pursued. In addition, the financial costs associated with developing an online presence may have been a barrier to digitisation take-up, or example, the costs associated with website design for selling artworks.

Focus group participants noted both positive and negative impacts in relation to the digital set-up and use of technology during COVID-19. There was particular concern around intellectual property and free online performances and events resulting in a perceived devaluation in their work and lack of appreciation for the arts by the public.

> *The idea of creating content and giving it away really doesn't fit well. It's taken years to get artists to value their work. Great story but doesn't work long-term.*

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[38] McIntyre P. et al. 2019. *Creativity & Culture Production in the Hunter*. Available at: https://soci.newcastle.edu.au/hci/wp-content/uploads/sites/291/2019/02/HCI-Report-Visual-Arts.pdf

[39] Te Taumata Toi-a-Iwi 2020. COVID-19: *Further reflections of impact on the Creative Sector in Tamaki Makaurau*. Available at: https://www.tetaumatatoiaiwi.org.nz/wp-content/uploads/2020/11/COVID-follow-up-survey-report-201106.pdf

Some participants highlighted that increased digitisation created a barrier to already marginalised groups, such as Indigenous and people with a disability, due to access and costs.

> *Access to technology and additional needs such as an Auslan translator would add $1,000 to an online event or workshop.*

However, some also noted that, free workshops and events can build community cohesion, goodwill for an artistic business and communicate how the arts and culture sector has responded.

Summary of findings for innovation and digitisation of the arts
• Need to leverage knowledge and application of digitisation where possible to create greater innovation across the sector, for example, the role of digital technology in generating income/revenue
• Risk of potential intellectual property and copyright violations associated with online
• Lack of skills in IT/digital platforms and financial literacy to promote work
• Lack of public value and appreciation for the arts as a result of using online platforms to carry out work for free
• Not all art forms can be transferred online
• Costs associated with establishing online
• Lack of resources for marginalised groups to ensure continued participation in arts during crisis moment

4.5 FUNDING, SUPPORT AND ADVOCACY IMPACTS

Funding shortages continue to impact the arts and culture sector with years of reduced funding by government and fewer grants. In terms of post-COVID-19 funding and support, respondents were less confident that they would receive the support required from the arts and culture sector to nurture their return to the field in Newcastle. For example:

- Only 12% of respondents agreed/strongly agreed that there is a sufficient level of local advocacy and support to navigate the post-COVID-19 landscape, compared to a high 69% who felt otherwise
- Those with high income dependency on the arts (75% or more of their income is from the arts sector pre-COVID-19) and people aged under 35 years were more likely to disagree that there is adequate local advocacy and support for the arts in Newcastle.

Funding and grants especially continue to be an issue for individual and self-employed artists, with grant availability, access and the application process being a major barrier. In particular, many noted that the application for grants, for example to turn in-person workshops into online workshops through Create NSW was a very challenging process.

> *Micro-business, that is businesses earning less than $75,000 per year were not able to receive any government grants. Most individual artists fall into this group. Cultural and Arts funds were mostly absorbed by Sydney or too hard to get. There should be a better way to have small grants being distributed better, faster, locally in the Hunter, for this region.*
>
> *... while people may value the arts, the lack of government funding and support does not reflect this. Arts did the heavy lifting on the mental health side during COVID but funding was ripped out.*

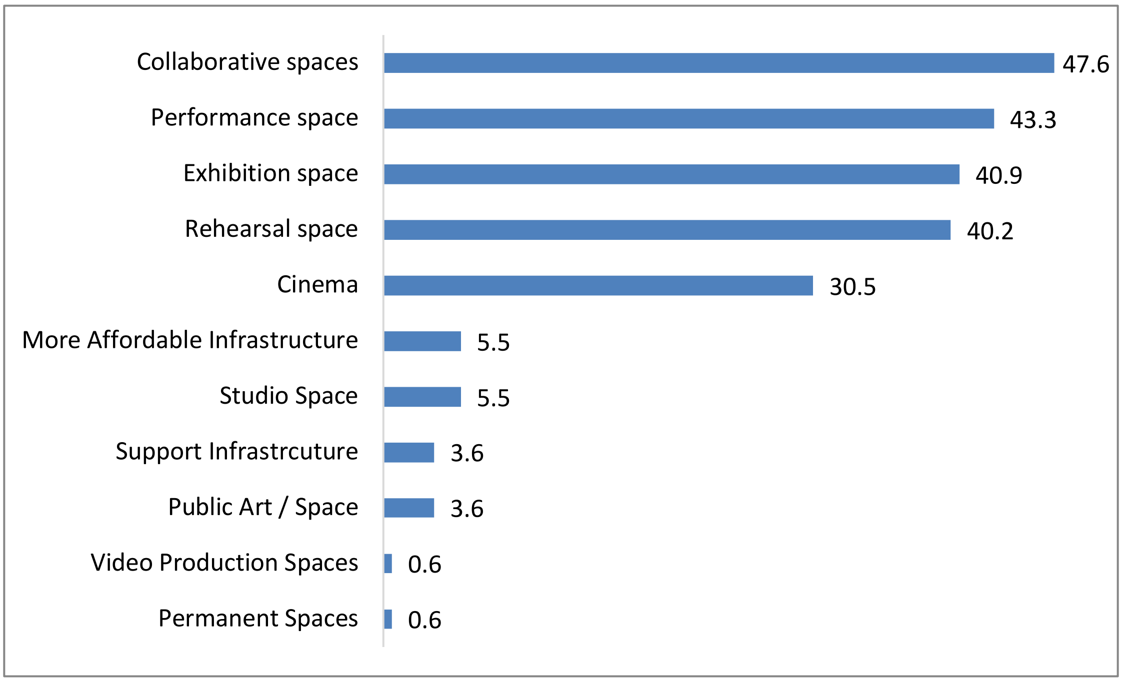
Suggestions for support in the creative sector in Auckland[40]

Te Taumata Toi-a-Iwi in New Zealand commissioned a survey (n=146) of the impact of COVID-19 on Auckland's creative sector. The survey asked about supports needed and popular responses included:

- The need for innovation and strategic advice (52%)
- Fundraising support (45%)
- Digital technology (44%)
- Grant writing (42%)
- Marketing and communications support (42%).

In addition to funding, the provision of cultural infrastructure is fundamental to support and enhance the arts and culture sector. In response to the open-ended survey question on *What infrastructure (or space) is needed*?, almost half of respondents (47.6%) identified the need for collaborative spaces, followed by performance, exhibition and rehearsal space. Despite the shift in digitisation of the industry, and its noted benefits, growth and innovation opportunities, physical art spaces remain the most important places for Newcastle-based artists to create and share their practice. This is shown in Figure 6.

Figure 6: Types of cultural infrastructure (or spaces) needed in Newcastle



Source: ICAN Online Survey.

Focus group participants also suggested how to improve cultural infrastructure in Newcastle including:

- Increased participation by the private sector (and less dependence on the public sector) in providing affordable spaces, for example, through philanthropy organisations, to bring artists together. This can act as a centre for support and give the arts a sense of legitimacy
- Decentralisation of infrastructure and improving access in terms of:
  - Providing infrastructure in the suburban fringes as opposed to the centre of Newcastle
  - Ensuring access to the arts for non-city dwellers, in particular culturally and linguistically diverse groups who live in the suburbs.

[40] Te Taumata Toi-a-Iwi 2020. COVID-19: *Further reflections of impact on the Creative Sector in Tamaki Makaurau*. Available at: https://www.tetaumatatoiaiwi.org.nz/wp-content/uploads/2020/11/COVID-follow-up-survey-report-201106.pdf

In addition the survey asked a more general question about what support is needed for those who did not feel there was adequate support or advocacy for the arts in Newcastle. Top responses were:

- Lobbying of all levels of government on behalf of artists (53.7% of all respondents)
- Financial assistance/grants (51%)
- Development of platforms/hubs designed to promote local artists (46%)
- Opportunities to collaborate (45%)
- Assistance with finding/writing grants (37%)
- Marketing and communications (37%)
- Innovation and strategic advice (33%)
- Fundraising support (31%)
- Access to digital technology (21%)
- Capacity to utilise digital technology (21%).

The results indicate a local arts sector which feels largely unsupported by government with limited access to funding/grants, advocacy and the provision of cultural infrastructure. When people understand the contribution of the arts on the economic and social wellbeing of a society, they also are more likely to support the arts in all its forms. This relates to the intrinsic value of the arts (see Section 1.1) and how arts and culture can add value to the lives of individuals and communities in Newcastle.

Summary of impacts/issues for funding, support and advocacy
• Difficulty in accessing grants and funding
• Insufficient cultural infrastructure and need for more collaborative spaces
• Decentralisation of infrastructure and lack of access to cultural infrastructure by non-urban dwellers
• Lack of confidence in support and funding for Newcastle arts and cultural sector
• Insufficient local advocacy of the arts

4.6 THE FUTURE OUTLOOK POST COVID-19

Survey respondents expressed dissatisfaction with current levels of support for the sector:

- Only 12% agreed or strongly agreed that there is adequate support for the Newcastle arts and culture sector to navigate the post-COVID-19 landscape
- Only just over one third, 36%, agreed or strongly agreed that the local community has stepped up their support of the Newcastle arts and culture sector in the wake of COVID-19.

Whilst many feel more could be done to support the arts (and this need may have existed prior to COVID-19), survey respondents are relatively optimistic, particularly with regard to their own future prospects and ability to practice:

- 82% agree or strongly agree with the statement that they feel confident they will be able to practice and create their art/work in 2021.
- 60% feel somewhat or very optimistic about their future outlook creatively and/or professionally.
- 82% of total respondents agreed with the statement that they feel confident they will be able to practice and create their art/work in 2021.

Suggested priorities for the creative sector in Auckland[41]

Te Taumata Toi-a-Iwi in New Zealand commissioned a survey (n=146) of the impact of COVID-19 on Auckland's creative sector. The survey asked about supports needed and popular responses included:

- The need for innovation and strategic advice (52%)
- Fundraising support (45%)
- Digital technology (44%)
- Grant writing (42%)
- Marketing and communications support (42%).

View on the opportunities available to the Newcastle arts scene by leveraging on the lessons learnt from COVID-19

This is a once in a generation opportunity to establish Newcastle as an arts hub for students, practitioners and audiences/collectors. Newy (plus the Hunter) could become like the 'new Hobart' thanks to the MONA effect there.

Newy needs to generate buzz, attract arts-visitors from near and far, build a new, exciting arts-tourism industry. While murals and events are fine they are only temporary. We really need some permanent, larger 3D installations like a Newcastle Sculpture Walk or Sculptures In Newcastle along the Hunter Harbour to attract visitors all-year round.

The image of the city will be transformed from one of a dirty heavy industrial place to one of creativity and innovation.

Focused grants/funding plus marketing budgets need to be invested in the arts-tourism sector to get a fabulous return on investment. It'd be a win/win/win for artists/visitors/the economy and even the environment; as the region transitions away from dependence on coal mining to export art'n'soul.

Survey respondent.

Thinking about their future financial outlook for 2021, survey respondents tended to be less positive although not strongly pessimistic:

- 41% agreed or strongly agreed that they felt reasonably confident that their income will remain steady over the next 12 months and 29% were neutral
- However, 43% agreed or strongly agreed they felt uncertain about their financial situation in 2021 and a further 28% were neutral.

Respondents were similarly divided in their views regarding the outlook of the Newcastle arts and culture sector post-COVID-19:

- 54% strongly agree or strongly agree the outlook for the Newcastle arts and culture sector in 2021 will be more positive than in 2020 and 29% were neutral
- 49% felt somewhat or very optimistic about the future outlook for the Newcastle arts and culture sector reflecting on their experience of the pandemic whilst 24% were neutral.

[41] Te Taumata Toi-a-Iwi 2020. COVID-19: *Further reflections of impact on the Creative Sector in Tamaki Makaurau*. Available at: https://www.tetaumatatoiaiwi.org.nz/wp-content/uploads/2020/11/COVID-follow-up-survey-report-201106.pdf

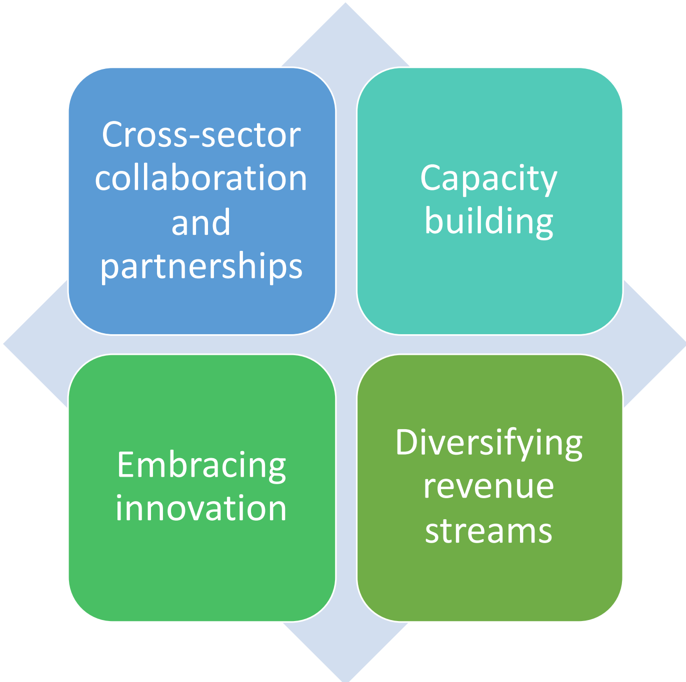
5 Building resilience in the arts and culture sector

5.1 OVERVIEW

The experience of the impact of COIVD-19 is comparable to an emergency or crisis situation. Following any crisis, not only is there urgency to re-establish the status quo to bring stability, there is an opportunity to reassess previous practices and identify effective and forward-looking approaches to achieve greater resilience. This approach is critically valid to the recovery of Newcastle's arts and culture sector post-COVID-19 and its transition towards long-term sustainability.

This section identifies a number of key potential response strategies and opportunities to strengthen and build greater resilience across the Newcastle arts and culture sector in response to the COVID-19 impacts noted in Section 4. Four key enablers for building resilience have been identified and are essential to support change. They are shown in Figure 7.

Figure 7: Key future enablers of resilience



5.2 CROSS SECTOR COLLABORATION AND PARTNERSHIPS

Perhaps the most fundamental aspect of achieving greater resilience across the sector is the formation of inter- and cross-sectoral partnerships with:

- Local, NSW and Australian governments
- Arts, community and philanthropic organisations
- The private sector.

Such successful partnerships and collaboration can contribute positively to the local arts community and the sector more broadly by:

- Adding value and recognition
- Assisting in advocacy and lobbying for policy and practice change
- Offering learning and development opportunities.

For example:

- A local government response might be to commission artists to lead street art interventions in a local developments
- An NSW government economic development response in tourism might be to promote local artists to enhance the region's reputation as a cultural tourism destination
- An education sector response might be to can offer spaces and programmatic, digital support for experimentation and incubation of creative projects.

5.3 CAPACITY BUILDING

Skills acquisition is an important resilience response and may reduce the risk of unstable and uncertain income levels. This also builds potentially longer term sustainability in the sector. Capacity building can occur through formal education channels or informally such as peer-to-peer learning and mentoring. Understanding the existing skills shortages and the potential future skills gaps in the arts and culture sector is crucial to confronting future challenges and to empowering artists and arts organisations. Some areas identified for training and coaching in the arts and culture sectors include:[42]

- Financial and grant writing literacy to better access funding programs
- Management capacities to strategically plan for the future and budget
- Digital skills for adaptation
- Innovation in arts and culture practice and collaboration.

Capacity building may also assist people to pivot in a crisis towards jobs which are not similarly affected. For example, it is likely that survey participants with a second job had casual positions in hospitality or teaching and these roles were also impacted by the same issues as their creative endeavour.

5.4 EMBRACING INNOVATION

COVID-19 accelerated the adoption of a wide range digital solutions for the arts sector. Continued development and innovation in digital technology will not only support the resilience and growth of the creative economy but can translate to innovation in other sectors such as education and health care.

Whilst there is still the need to develop policy and legislation around recent digital advancements in the arts sector, it is important to highlight the positive contributions that this new innovation has on the sector as a whole. Some include:[43]

- Improved economic and financial sustainability
- Improved access of cultural and creative content to a wider range of people including those who are less mobile and/or live in rural and remote areas
- Creation of new market opportunities
- New modes of artistic expression.

5.5 DIVERSIFYING REVENUE STREAMS

Continued funding reductions to the arts and culture sector will drive arts organisations to diversify revenue streams through grants, earned income, private and corporate donations, sponsorship, crowdfunding and loans. As a result, many organisations will benefit from increasing their planning capabilities, risk management and governance as well as preparing longer term financial plans. Individual artists can also diversity revenue streams through not only sales, for example of an artwork, but through

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[42] Ibid

[43] IDEA Consult, Goethe-Institut, Amann S. and Heinsius J. 2021. *Research for CULT Committee: Cultural and creative sectors in post-Covid-19 Europe: crisis effects and policy recommendations*. Available at: https://www.europarl.europa.eu/RegData/etudes/STUD/2021/652242/IPOL_STU(2021)652242_EN.pdf

public speaking, in-person workshops, digital platforms/webinars and offering online courses. Diversifying revenue streams contributes to overall financial stability.

5.6 POTENTIAL RESPONSES TO DRIVE RESILIENCE

This section provides a suggested response to drive resilience in the arts and culture sector in the future. Responses will be enabled via a range of stakeholders including:

- Australian, NSW and local government
- Regional and local arts organisations
- Regional and local arts advocacy groups, for example ICAN (now known as the Hunter Creative Alliance)
- Philanthropic organisations
- Funders
- Banking institutions and insurance companies
- Health and social care sector
- Education sector including higher and further education as well as school education
- Tourism sector
- Local businesses
- Private sector organisations and individuals
- Individuals working in the arts and culture sector
- Volunteers
- Audiences (regular and occasional)
- The general community.

Employment and income responses

1. Design accessible and higher value income support measures for young people to access in times of crisis.
2. Develop medium to long term commission-based income streams for artists.
3. Establish special loans and guarantee mechanisms for arts organisations, for example, to enable them to continue to invest in cultural content to deliver a more consistent revenue stream and greater employment opportunities.
4. Consider alternative funding mechanisms which can reach both local, regional and global funders, for example, crowdfunding or philanthropic sources.

Health, well-being and creativity responses

5. Deliver ongoing and accessible locally based mental health care and support and counselling services, especially for younger people in the sector.
6. Relieve financial strain associated with job/income loss by offering subsidised and/or affordable housing options, rent subsidies etc., especially for younger people in the sector.
7. Leverage individuals and organisations in the regional art community who have strong global and international experience to expand engagement and form partnerships with international artists and arts organisations.
8. Identify and develop a database of potential existing support health and well-being resources.

Innovation and digitisation responses

9. Provide a legal framework and advice around copyright /IP to support the income of artists with digital distribution platforms.
10. Develop capacity building programs for artists in collaboration with the IT team at the University of Newcastle, for example, or through other online universities local businesses on digital and financial literacy.
11. Develop volunteering programs with local businesses to support individuals and arts organisations to digitise and innovate.
12. Consider using a collaborative front end to promote smaller groups and individuals with point-of-sale capability, for example, like Etsy.
13. Develop a whole of sector digital marketing and communications strategy to highlight the value of the arts and culture sectors for the economy and regional community.
14. Develop a place branding strategy together with local tourism to promote an iconic cultural/arts identity for Newcastle and the Hunter Region.

Funding, support and advocacy responses

15. Advocate for policies which ensure organisations, businesses and government agencies honour contracts agreed with freelancers and artists in crisis/emergency situations. Potentially use leverage with insurance companies.
16. Develop a centralised web-based information and support hub (one stop shop), for example, to inform and provide assistance to individuals and organisations in Newcastle and the Hunter Region on available grants and application processes.
17. Implement initiatives or formal digital and face-to-face programs to improve networking of freelancers and individual artists to improve collaboration and support structures.
18. Advocate for affordable housing and rent for people working in the arts and culture sector (for housing and performance spaces) in Newcastle and the Hunter Region.
19. Develop an evidence base of the arts and culture infrastructure requirements in Newcastle and the Hunter Region and engage key stakeholder to develop a plan to fill gaps.
20. Form partnerships with other sectors for use of private and public spaces (indoor and outdoor).
21. Identify underutilised public space which could be repurposed for lower than market rates for performance or studio spaces, for example, Salamanca Arts Centre in Hobart.

Appendix A: Online survey details

A.1 OVERVIEW OF RESPONSES

The online survey was conducted 11 March to 10 April 2021.

There was a total of 192 respondents. Of these, 28 respondents did not answer beyond the initial few questions so only 164 were retained in the analysis. Of these, another 28 respondents withdrew half way through the survey. These respondents have been retained in the analysis but have been excluded where questions have not been completed and data is missing.

In terms of survey respondents:

- People described themselves as:
    - Non-professional artist or arts worker – I work as an artist or arts worker but do not get paid for it: 14%
    - Professional artist or arts worker – I earn my living in the arts and cultural sector: 51%
    - Semi-professional artist or arts worker – I am paid as an arts or cultural worker but also earn money from other sources: 35%
- The age groups were split as follows:
    - 18-24 years: 8%
    - 25-34 years: 20%
    - 35-44 years: 21%
    - 45-54 years: 23%
    - 55-64 years: 16%
    - 65-74 years 11%
    - Over 75 years: 1%
- The gender split was female: 56%, male: 39%, other/prefer not to say 5%.
- 16% identified as living with a disability
- 2% identified as Aboriginal and Torres Strait Islander
- 12% identified as belonging to a culturally and linguistically diverse background
- The most common occupations: visual artist (36%), writer (20%), curator/artistic director (18%), teacher (18%), actor/performer/director (16%), art worker (14%) and musician/singer (13%).

A.2 LIMITATIONS TO SURVEY

A snowballing approach to dissemination was used, mainly through ICAN (now known as Hunter Creative Alliance) via newsletters, the internet and social media rather than specifically seeking out a statistically representative sample.

Looking at the age and sex distribution of the 164 responses included in the analysis, against the age and sex distribution for the Newcastle LGA, the survey has a much higher share of middle-aged respondents aged 35-54 years and a lower share of people aged under 35 years and also a lower share of those aged 55 years and over than the Newcastle LGA population. The survey also has a greater share of females aged 18 year and over (56%) compared to the Newcastle LGA distribution (51%).

A.3 SURVEY INSTRUMENT

COVID-19 Impact on Newcastle Arts and Culture Sector – Research for Creative Newcastle

Online survey

The University of Newcastle is conducting research for Creative Newcastle, a project of the Independent Creative Alliance Newcastle (ICAN), to understand the impact of COVID-19 on the local arts sector. This survey, which has been funded by City of Newcastle's Special Business Rate Program, aims to capture the range of impacts to Newcastle-based artists as a result of COVID-19.

ICAN was established in 2018 by some of Newcastle's leading arts organisations to advocate for the critical role arts and culture plays in the region's identity. By participating in this survey, you will be contributing to an important study of how the Newcastle art sector has been impacted by COVID that will inform future strategies to assist the sector.

The information that you provide will be treated confidentially and feedback will not be linked to you. Only researchers at the University of Newcastle will have access to the survey data and this will be used for the purposes of reporting. Data will be destroyed after 15 years.

The survey should take less than 10 minutes to complete.

About you

1. Tell us how you would you describe yourself as a (tick as many as apply)
   a. Writer
   b. Craft practitioner
   c. Visual artist
   d. Composer/song writer/arranger
   e. Actor/performer/director
   f. Dancer/choreographer
   g. Musician/singer
   h. Arts worker
   i. Curator/Artistic Director
   j. Teacher
   k. Gallery owner
   l. Filmmaker
   m. Other (Please specify)
2. Within the creative sector, where do you obtain your income?
   a. For-profit creative industry business (e.g. for-profit theatre, gallery, art studio or dance company)
   b. Non-profit arts and cultural institution
   c. Government arts and cultural agency (e.g. a grant or contract from a local, state or federal arts agency)
   d. Educational institution (e.g. as a teaching artist, teacher or lecturer/Professor)
   e. Non-creative for-profit business/private sector (e.g. restaurant, bank, consultancy)
   f. Non-creative non-profit institution (e.g. social services organisation)
   g. Non-creative government agency

h. Individuals (e.g. sales/commission)

i. I do not earn revenue through my creative practice

j. Other (please specify)

The next few questions are about time devoted to creative sector **work and income sources PRIOR TO COVID-19 (i.e. prior to March 2020).**

3. PRIOR TO COVID-19: What percentage of your total time in a "normal" month was devoted to work (i.e. practicing/producing) in the creative sector? (to the closest %)

   a. 100%

   b. 75%

   c. 50%

   d. 25%

   e. 0%

4. PRIOR TO COVID-19: What percentage of your income in a "normal" month was derived from work (i.e. practicing producing) in the creative sector (to the closest %)?

   a. 100% (Skip next question)

   b. 75%

   c. 50%

   d. 25%

   e. 0%

5. PRIOR to COVID-19: Did you supplement your income with paid work in another industry?

   a. Yes

   b. No (SKIP TO Q7)

   c. Don't know / not sure

6. If yes, which industry was your supplementary income derived from?

   a. Mining

   b. Construction

   c. Retail

   d. Hospitality – accommodation and Food Services

   e. Professional/office work

   f. Administration/office work

   g. Education/training

   h. Arts and recreation

   i. Other (please specify)

The next few questions are about time devoted to creative sector work and income sources as a result of COVID-19 (i.e. since March 2020)

7. How has the COVID-19 pandemic negatively impacted you creatively and professionally? (Select as many as apply)

   a. Have not been able to move practice to the online space

b. Cancelled shows/performances / gigs / exhibitions
c. Decreased opportunities due to travel restrictions/social distancing
d. My art / practice has seemed less of a priority
e. Decreased motivation to create
f. Decreased paid work opportunities
g. Less time to practice/create
h. Forced to find supplementary income
i. Have been unable to teach students
j. The pandemic has not negatively affected me creatively or professionally
k. Other (Please specify)

8. How have you been impacted by COVID-19 personally? (Select as many as apply)
    a. Increased community connection
    b. Decreased community connection
    c. Have experienced increased stress and/or anxiety and/or depression
    d. Increased social isolation or loneliness
    e. Have enjoyed more time for social and/or family commitments
    f. Have enjoyed a slower pace/taking stock
    g. Have felt anxious / worried about the state of the world
    h. Decreased social activities
    i. Been sick with COVID-19 or the effects of it
    j. Had additional caring responsibilities with young children or aged friends and relatives
    k. Something else (Please specify)
9. Have you experienced a loss of income from your artistic/creative practice as a result of the COVID-19 pandemic?
    a. Yes
    b. No (SKIP to Q12)
    c. Don’t know/not sure
10. (Optional question) What is the estimated amount of income that you have lost or anticipate losing? (in dollars)
11. Do you feel that you will be able to get by financially in light of your lost income?
    a. Yes
    b. No
    c. Don’t know/not sure
12. Have you experienced any positive impacts professionally as a result of the impacts of COVID-19? (Select as many as apply)
    a. More time/space to practice and create art
    b. Developed new skills or hobbies

c. Increased digital skills/capability /capacity
d. Renewed sense of purpose as an artist
e. Found new markets/clients/students
f. More engagement with local community
g. Increase in sales/income
h. Increased connectivity/collaboration with other artists
i. Increased motivation to create
j. Increased paid work opportunities
k. Renewed sense of the importance of my art/my practice
l. More time or space to create
m. I have not experienced any positive impacts creatively or professionally
n. Something else (Please specify)

13. SINCE COVID-19 (i.e. after March 2020): What percentage of your total time in a "normal" month was devoted to work in the creative sector? (to the closest %)
    a. 100%
    b. 75%
    c. 50%
    d. 25%
    e. 0%
14. SINCE COVID-19 (i.e. after March 2020): What percentage of your income in a "normal" month was derived from work in the creative sector (to the closest %)?
    a. 100% (SKIP to Q17)
    b. 75%
    c. 50%
    d. 25%
    e. 0%
15. SINCE COVID-19 (i.e. after March 2020): Have you supplemented your income with paid work in another industry?
    a. Yes
    b. No (SKIP to Q17)
    c. Don't know/not sure
16. If yes, which industry is the supplementary income derived from?
    a. Mining
    b. Construction
    c. Retail
    d. Hospitality – accommodation and Food Services
    e. Professional/office work

f. Administration office work
g. Education/training
h. Arts and recreation
i. Other (please specify)

17. Have your non-creative job(s) been negatively affected by COVID-19? (Select all that apply)
    a. Yes I have been laid off
    b. Yes I have had to transition to a virtual set-up
    c. Yes I have had to extend my hours/work
    d. Yes, my hours/pay have been cut
    e. No, my non-creative job(s) have not been affected
18. Have you become fully unemployed because of COVID-19?
    a. Yes
    b. No
19. If you have experienced lost income, have you been eligible for Job Keeper or Job Seeker?
    a. Yes
    b. No
    c. Don't know/not sure

Creative impacts

20. What has happened to your creative output since the COVID-19 impacts of lockdown and social distancing?
    a. Productivity drastically decreased (SKIP to 21)
    b. Productivity somewhat decreased (SKIP to 21)
    c. No change (SKIP to 23)
    d. Productivity somewhat increased (SKIP to 22)
    e. Productivity drastically increased SKIP to 22)
    f. Not applicable (SKIP to 23)
21. You indicated a decrease in your creative productivity. What do you attribute that decrease to?
    a. Stress, anxiety and/or depression about the state of the world
    b. Family or social responsibilities
    c. Having to devote more time to non-creative work / income generation
    d. Having to devote more time to other non-financial activities
    e. General lack of motivation
    f. Inability to access the supplies, resources, spaces and / or people necessary for my artistic/creative practice
    g. Other (please specify)
22. You indicated an increase in your creative productivity. What do you attribute that increase to?
    a. It is an outlet for stress, anxiety, and/or depression that I am feeling about the world (SKIP TO 23)

b. Decrease in other responsibilities or tasks means more time for creativity (SKIP TO 23)
c. This crisis has inspired me and sparked new ideas
d. Generating art feels important in this moment, so I feel obligated to produce more (SKIP TO 23)
e. I have to generate more work to earn money (SKIP TO 23)
f. Other (please specify) (SKIP TO 23)

23. Specifically, what elements of the pandemic inspired you? (Select as many as apply)
    a. The collective impact of the pandemic on the world
    b. Impact of social isolation/disconnection
    c. Changes in hygiene practices and human contact
    d. Impacts to mental health – either personally or as experienced by others
    e. The nature of the disease itself
    f. Observation of lifestyle changes
    g. Other? (Please specify)

Pivot/response

24. Has the impact of COVID-19 required you to change how you…(Likert scale - strongly agree to strongly disagree)
    a. Create or practice your art?
    b. Engage with other artists?
    c. Distribute/sell your art or practice?
    d. Teach your art or practice?
    e. Engage with your audience/users/the community?
25. What changes have you had to make artistically and/or professionally as a result of COVID-19? (Select as many as apply)
    a. Move activities online
    b. Develop new ways of delivering services
    c. Cleaning/disinfecting protocols
    d. Modified practice due to social distance protocol requirements
    e. Contingency planning to meet health and safety requirements
    f. Ceased practice
    g. Sought new funding sources
    h. Connected with other artists remotely
    i. None
    j. Something else (Please specify)
26. Have you utilised technology or new ways of promoting or sharing your art?
    a. Yes
    b. No (SKIP to Q28)
27. What technology or innovation have you used? (Open ended)

28. Have you provided your art or creative practice free of charge as a result of the impacts of COVID-19?
    a. Yes
    b. No (SKIP to Q30)
29. If yes, why did you feel the need to provide a free service/offering? (Open ended)
30. Please indicate your level of agreement with the following statements (Strongly agree to strongly disagree)
    a. It was difficult to pivot my creative/artistic practice to an online practice
    b. I will continue to deploy my art in new ways online after the pandemic passes

Cultural Infrastructure

31. Do you feel that the cultural infrastructure (or spaces for artists) currently available in the City of Newcastle is sufficient?
    a. Yes (SKIP to Q33)
    b. No
    c. Don’t know/not sure
32. (IF NO) What infrastructure (or spaces) is needed? (Open ended response)
    a. Performance space
    b. Exhibition space
    c. Cinema
    d. Collaborative spaces
    e. Rehearsal space
    f. Other

Advocacy and support

33. In your opinion, is there adequate local advocacy and support for the arts in Newcastle?
    a. Yes
    b. No
    c. Don’t know/not sure
34. If no, what support is needed?
    a. Assistance with finding writing grants
    b. Development of platforms / hubs designed to promote local artists
    c. Lobbying of all levels of government on behalf of artists
    d. Fundraising support
    e. Innovation and strategic advice
    f. Financial assistance/grants
    g. Access to digital technology
    h. Capacity to utilise digital technology
    i. Marketing and communications
    j. Opportunities to collaborate

k. Something else (Please specify)

Outlook and future intentions

35. Please indicate your level of agreement to the following statements: (Likert scale strongly agree/strongly disagree)
    a. I feel confident I will be able to practice and create my art/work creatively in 2021
    b. Now more than ever, the Newcastle creative sector need to adapt and change in order to survive
    c. I feel reasonably confident that my income will remain steady over the next 12 months
    d. I feel uncertain about my financial situation in 2021
    e. I believe that the outlook for the Newcastle creative sector in 2021 will be more positive than 2020
    f. There is adequate support for the Newcastle creative sector to navigate the post-COVID landscape
    g. I'm worried about my ability to find work in the future
    h. The local community have stepped up their support of the Newcastle creative sector in the wake of COVID
36. Reflecting on your experience of the COVID-19 pandemic, how do you feel about your future outlook creatively and/or professionally?
    a. Very optimistic
    b. Somewhat optimistic
    c. Neither/neutral
    d. Somewhat pessimistic
    e. Very pessimistic
37. Reflecting on your experience of the COVID-19 pandemic, how do you feel about the future outlook for the Newcastle creative sector?
    a. Very optimistic
    b. Somewhat optimistic
    c. Neither/neutral
    d. Somewhat pessimistic
    e. Very pessimistic
38. ICAN is considering changing its name. Please indicate which of the following is your preference for a new name:
    a. Hunter Creative Alliance
    b. Hunter Creative Arts Alliance
    c. Independent Creative Alliance Network
    d. Hunter Arts and Cultural Alliance
    e. Independent Cultural Arts Network
    f. Hunter Regional Creative Arts Association

Demographics

39. Which of the following best describes you? (select one)
    a. Professional artist or arts worker – I earn my living in the arts and cultural sector
    b. Semi-professional artist or arts worker – I am paid as an arts or cultural worker but also earn money from other sources
    c. Non-professional artist or arts worker – I work as an artist or arts worker but do not get paid for it

40. What is your age?

a) 18-24

b) 25-34

c) 35-44

d) 45-54

e) 55-64

f) 65-74

g) 75+

41. What is you gender?

a) Female

b) Male

c) Other

d) Prefer not to say

42. Are you a person living with a disability?

a) Yes

b) No

43. Are you Aboriginal or Torres Strait Islander?

a) Aboriginal

b) Torres Strait Islander

c) Both Aboriginal and Torres Strait Islander

a) No

b) Prefer not to say

44. Do you identify a belonging to a culturally and linguistically diverse background?

a) Yes

b) No

45. What is your postcode (Where you live, work or spend most of your time)? (Open ended)

46. Do you have further comments about this project or the impact of COVID-19 on the Newcastle arts sector? (Open ended)

Thank you and close

THE UNIVERSITY OF NEWCASTLE AUSTRALIA

HUNTER RESEARCH FOUNDATION CENTRE

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