The Stable Spaces survey

Key findings from 76 organisations and individuals about physical infrastructure in the arts

by Dr Melissa Laing


VOGELMORN INDOOR BOWLS
YEAR
CHAMP. FOURS
CHAMP. TRIPLES
CHAMP. PAIRS
CH. SGLS

Contents

Key findings

76

The survey received **76 responses** from organisations and individuals making or presenting their artforms in Aotearoa.

13%

Only a small number of respondents (13%) **own their own buildings.**

65%

Most lease (65%)

22%

…or **move between temporary[1] and domestic spaces** (22%)

47%

There is significant accommodation instability in the arts with 47% of respondents having **moved once or more in the last five years.**

53%

Over half (53%) **of the relocations were forced rather than for strategic reasons.** The single biggest reason for relocation was that the building the respondent occupied was sold or closed.

62%

Almost two-thirds (62%) of leasing respondents **lease space from the commercial sector.**

71%

Leasing is working for a lot of organisations and individuals. But a large majority (71%) **indicated a desire for more security – whether that be a longer-term lease or ownership.**

62%

Almost two-thirds (62%) of respondents are on **temporary or short-term arrangements,** including month-by-month or year-by-year leases and alternative arrangements.

28%

A significant proportion (28%) of the arts sector **are using their homes as workplaces.**

43% vs 15%

Organisations and individuals working out of residential accommodation are **more likely to be dissatisfied than others** with their accommodation (43% vs 15%)

[1] "Temporary" includes meanwhile and pop-up spaces, short-term leases, hour-by-hour rental of public spaces like council buildings, and sub-leases from other organisations

Recommendations

We need to respond

The arts sector, local and national government and the philanthropic sector need to work together to develop strategies to support creatives and arts organisations into stable spaces. Even incremental increases in ownership or ownership-like arrangements will increase organisational stability and ripple into the wider arts community.

The Stable Spaces report identifies four main priorities for achieving this:

- **Developing nationally consistent policy**
  This involves developing a consistent national approach that enables asset transfer, affordable leasehold agreements, and the inclusion of arts facilities and live-work spaces in our developer incentives.
- **Growing the range of available financial instruments**
  This involves addressing funding issues for infrastructure providers, developing a wider range of financing sources than are currently commonly used, and creating collective economies of scale in property management in the arts.
- **Building property development and management expertise**
  This involves providing access to general guidance, expert advice, and mentorship to support the transition into building ownership.
- **Promoting the possibility of building ownership**
  This involves actively promoting the feasibility and process of arts and community building ownership to both national and local government and the arts community.

About the survey

The purpose of the Stable Spaces survey was to establish an overview of how the arts are housed in Aotearoa, and how their housing supports their activities.

Going into the Stable Spaces project I didn't know how arts organisations and individuals were professionally housed, but I thought it was important to know. This lack of data isn't uncommon. In 2011, in a UK report titled 'Community Organisations controlling assets: a better understanding' the authors wrote: "Despite the growth of interest in community control of assets, relatively little is known about the size and shape of the field, about what makes an asset successful (indeed, what constitutes success) and about the challenges of owning or managing different kinds of assets"[2]

This survey is a first step in establishing Aotearoa data. I believe the sector would benefit from a regular housing survey.

The Stable Spaces survey informs the Stable Spaces report which can be found on the stablespaces.nz website.

[2] Mike Aiken, Ben Cairns, Marilyn Taylor and Rebecca Moran, Community organisations controlling assets: a better understanding. (York: Joseph Rowntree Foundation, 2011) https://www.jrf.org.uk/sites/default/files/migrated/migrated/files/community-organisations-assets-full.pdf

Method

Participants were invited to take part in an online survey between 21 February and 4 April 2023.

Respondents from the Aotearoa arts community were approached by the researcher. A broad cross-spectrum of art practices, organisation types and property choices were included, as detailed below. The sample was further expanded via paid advertising on The Big Idea.

The survey questions focussed on three key areas:

- How are arts organisations and creative practitioners housed, and how does their housing affect their budgets?
- Does their housing enable them to deliver their goals and undertake long-term planning and development? Does this include supporting programme expansion, community building and staff stability?
- Is there a demonstrable demand for long-term accommodation?

Categories of housing

The survey tailored the questions in section one to respondents owning, leasing or having an alternative arrangement.

Own	Hold a freehold (fee simple), leasehold, unit title or cross-lease title to the property.
Lease	Hold a fixed-term or periodic lease or a licence-to-occupy for the property.[3]
Alternative arrangement	This broad category included: working from home (either by necessity or strategy); itinerant teaching and hire-by-the-hour spaces; occupying space under the understanding you will move with minimal notice when the building is leased, renovated or demolished; hiring space for the specific duration of the project; running projects outdoors; and being (professionally) unhoused.

There was some slippage between the three categories when it came to residential accommodation. Organisations and individuals working from home responded across all three options, depending on their situation.

[3] Informally, the terms lease and rent are used interchangeably to refer to a contractual agreement between a tenant and owner. In this document I have chosen to use the term "lease" to refer to the contractual agreement and "rent" to refer to the regular sum of money paid to occupy the property.

Rounding

The percentages are all provided in round numbers. The careful reader will notice that some graphs add up to 99%, 101% or 102% as a result.

Why individual artists as well as arts organisations are included in the survey

According to the 2023 arts sector profile[4], independent artists and arts organisations in Aotearoa are predominantly self-employed or work in a small-to-micro enterprise of fewer than 20 employees. Self-employed arts and culture workers make up 40% of the sector. This is a significant proportion of the sector and 2.5 times the overall self-employment rate in Aotearoa of 16%.

[4] Infometrics, 2023 Sector Profile, Arts in New Zealand. (Wellington: Manatū Taonga, 2023) https://www.mch.govt.nz/sites/default/files/2024-03/arts-sector-profile-2023.PDF

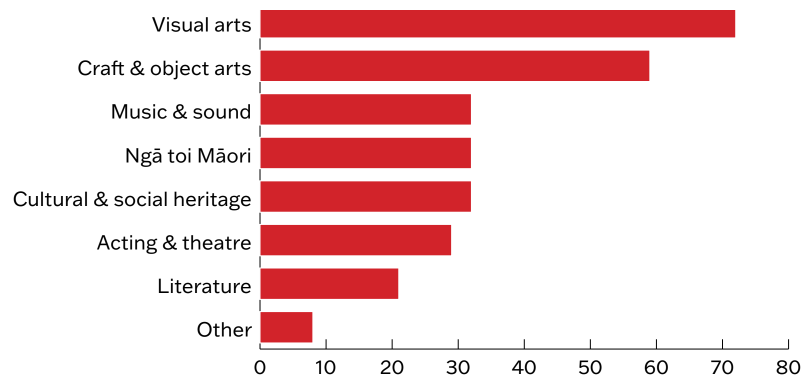
Metrics

Sample information

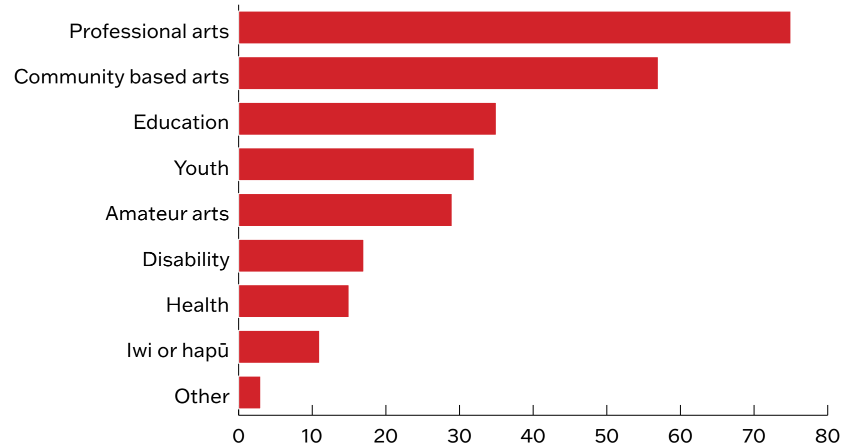
Stable Spaces received 76 responses from across New Zealand.

In purely statistical terms, this sample size is indicative rather than conclusive. However, its reliability is increased where there are strong skews in responses to some questions. Valuable context is provided through the qualitative component of this research.

What art forms are represented in your organisation?[5]



What sectors are respondants working in?

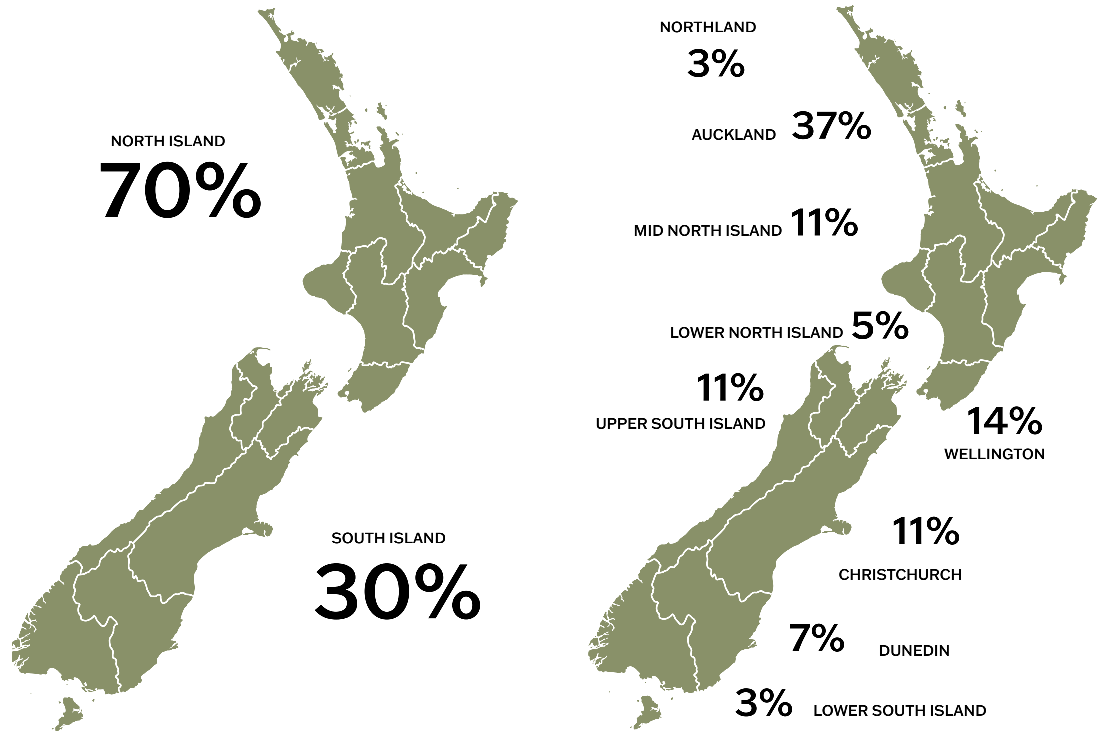


[5] Respondents had the option of selecting multiple answers to the questions what artform(s) they supported and what sectors they worked in. 71% of the respondents supported multiple artforms and 63% worked in multiple sectors.

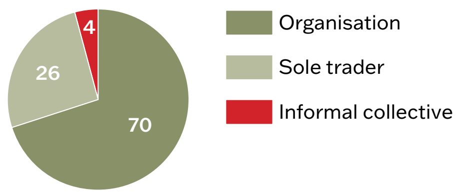
The research focuses on the envelope of artforms supported by Creative New Zealand and therefore excludes architecture, film, television and game design from its scope.

The visual arts and craft & object arts responses are significantly higher than in comparative research into the sector commissioned by Creative New Zealand. This indicates a potential overweighting in the data to the needs and practices of these sectors.

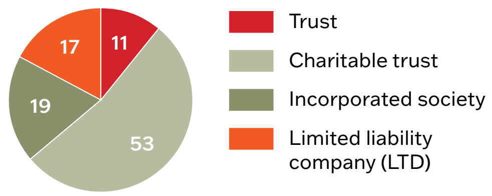
Where are respondents located?



Who is the respondent representing?



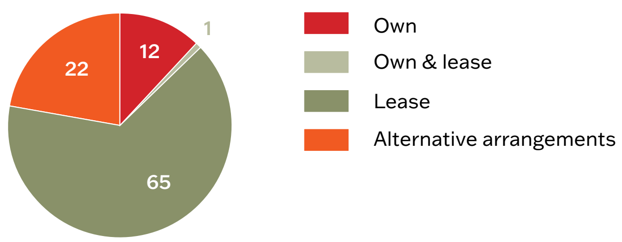
What legal structure are the organisations using?



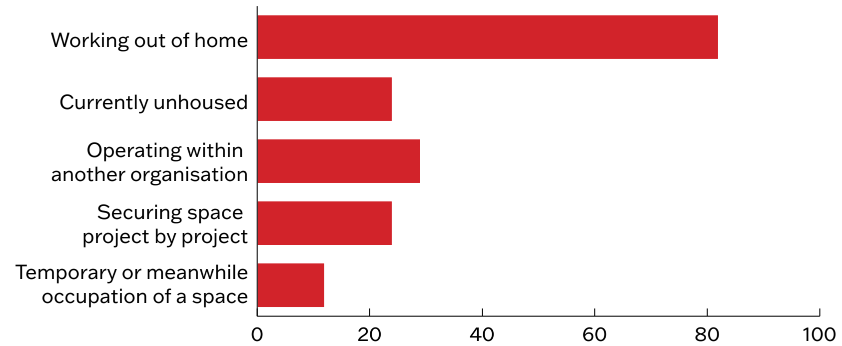
How are the arts housed?

Two-thirds of respondents lease premises and 22% have alternative arrangements. Only 13% own a building.

Among those who own their own accommodation, half own publicly-accessible infrastructure such as rehearsal spaces, collective studios, galleries and theatres. The other half work from the home they own.



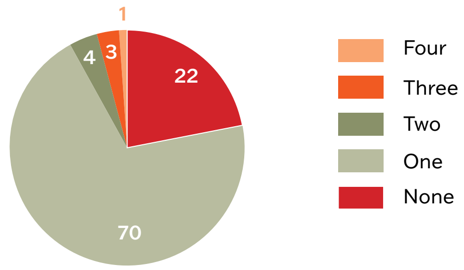
What are the alternative arrangements?



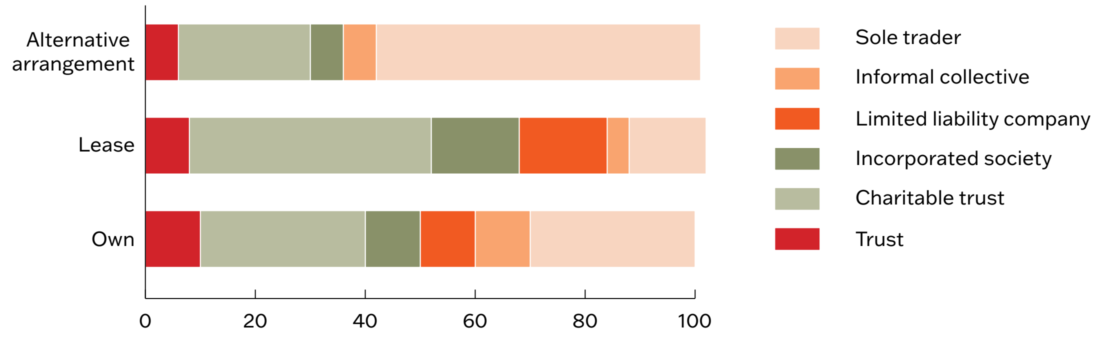
Note to figure: Respondents could select more than one option.

The majority of the sample are working out of their homes. This included organisations taking hybrid work-from-home and office, remote by design, and peripatetic approaches.

Few (8%) of those who lease or own occupy more than one property.

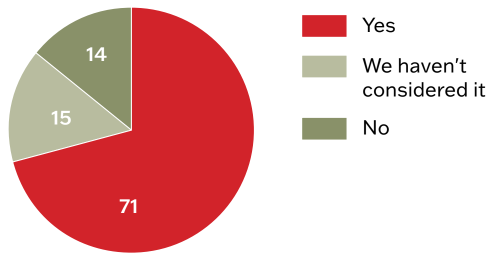


Sole traders were more likely than organisation employees to work from home or move between temporary spaces

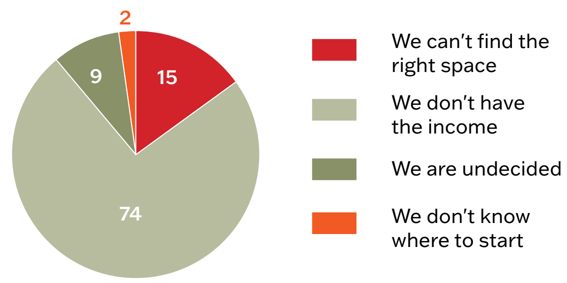


Most respondents who lease or make alternative arrangements want to secure long-term accommodation.

Are you interested in securing long-term or permanent accomodation?



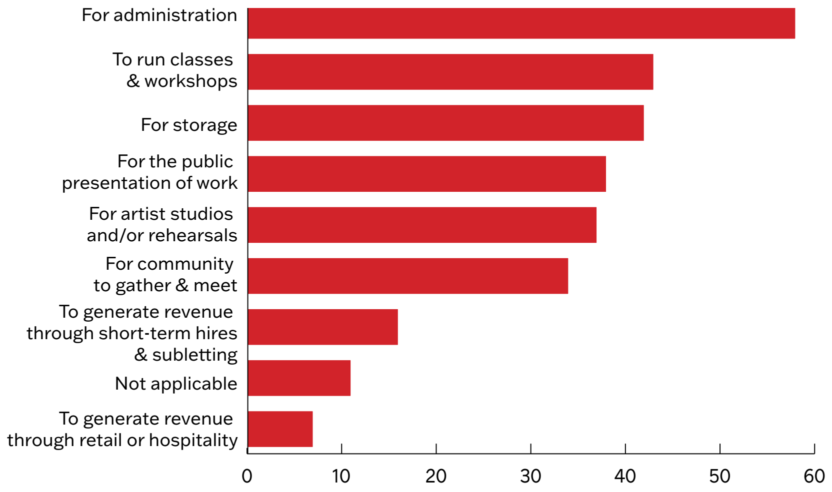
What is the main barrier to securing long term accomodation?



- Almost three-quarters (71%) of those who did not already own are interested in securing long-term accommodation – whether that be owning or ownership-like control.
- Three-quarters (74%) of those who indicated interest in securing long-term accommodation felt their income or funding was the major barrier to securing such accommodation. Only 15% could not find appropriate space.

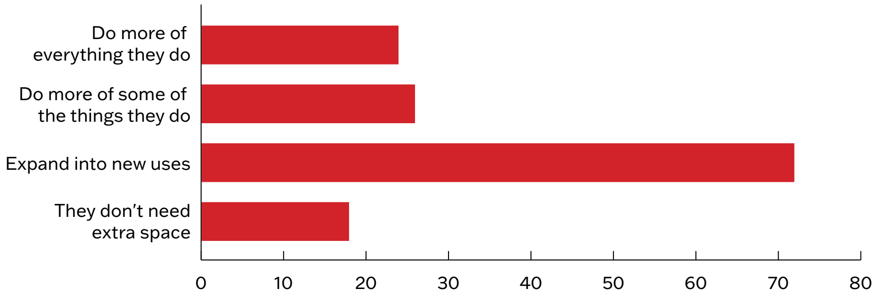
How are the arts using their space?

They are using what they have[6]:

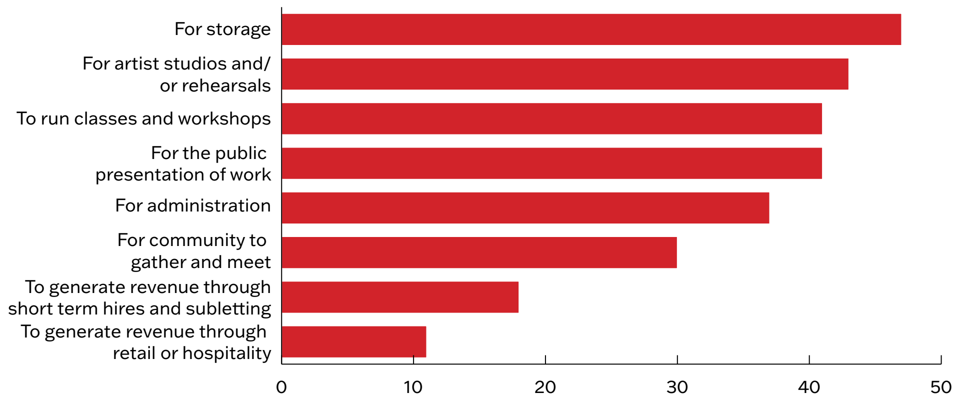


Most want extra space to expand into new activities.

They want space to:



Ways they'd like to grow their space options

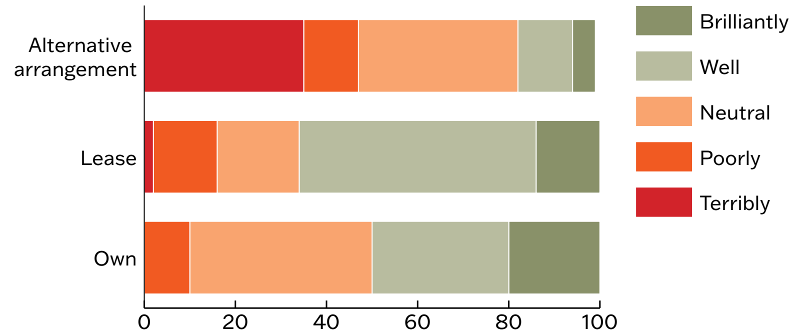


[6] Respondents were asked to select up to five uses of space from the list provided

Are arts organisations and individuals supported and enabled by their accommodation?

Owners and those with leases were more likely to be satisfied overall with their accommodation than those with alternative arrangements - suggesting that some were in alternative arrangements because they could not secure even leased space.

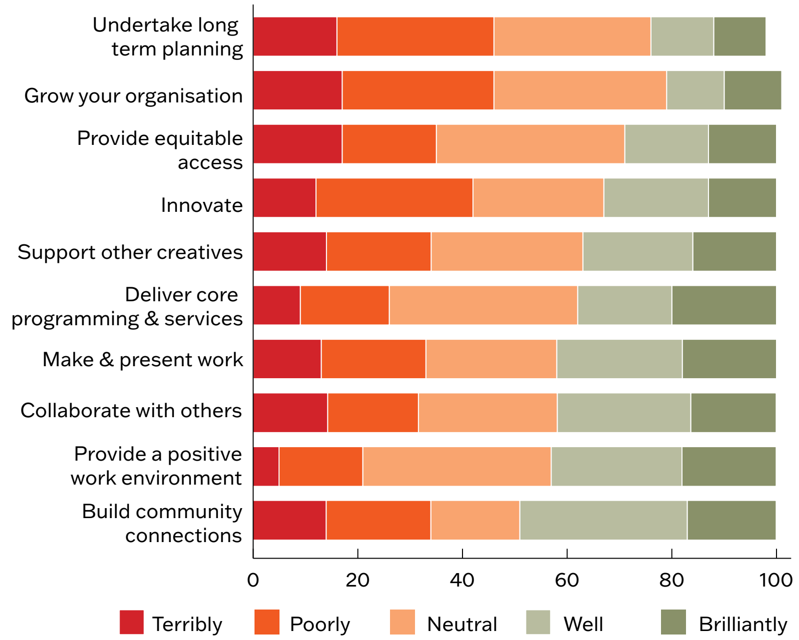
How well does your current accomodation suit your organisation?



Do buildings support the respondents' activities?

Respondents were asked to rate how their current accommodation impacted their ability to undertake, grow and improve their activities, from core programming and providing a positive work environment to innovating, collaborating and building community.

How does your accommodation impact your ability to:



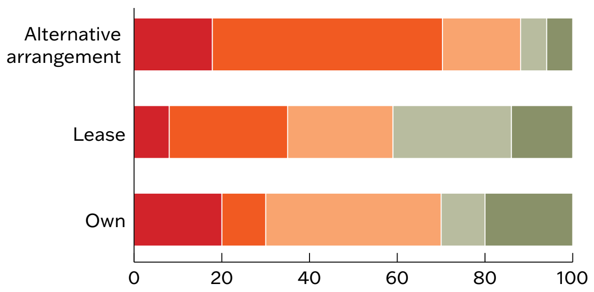
- Overall, almost half of respondents feel their accommodation situation constrains their ability to undertake long-term planning (46%), innovate (42%) and grow (46%).
- Their particular accommodation enables many respondents to provide a positive work environment (43%) and build community connections (49%) – but others find their accommodation constrains community connections.

When analysed by accommodation type it is clear that majority of respondents with an alternative arrangements feel inhibited by their accommodation, or rather, the lack of it.[7]

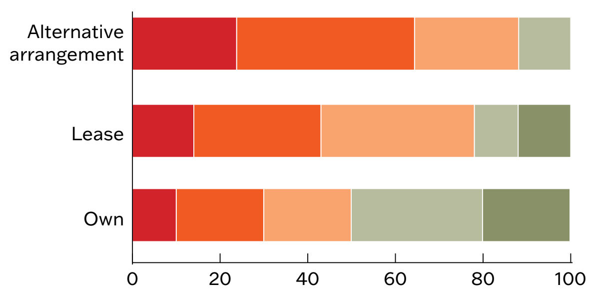
Building owners are more likely to report that their accommodation enables them to undertake long term planning and support other creatives.

How does your current accommodation impact your ability to:

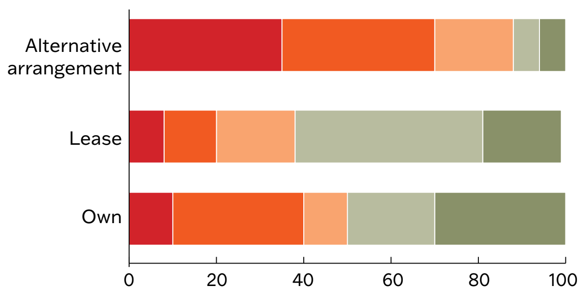
Innovate



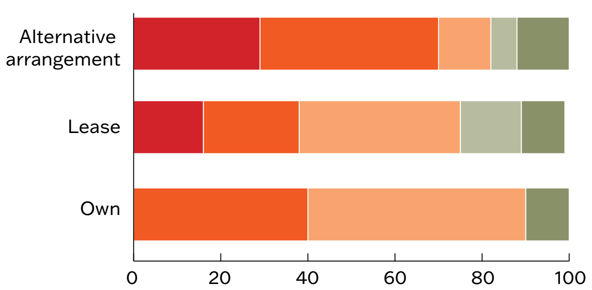
Undertake long-term planning



Build community connections

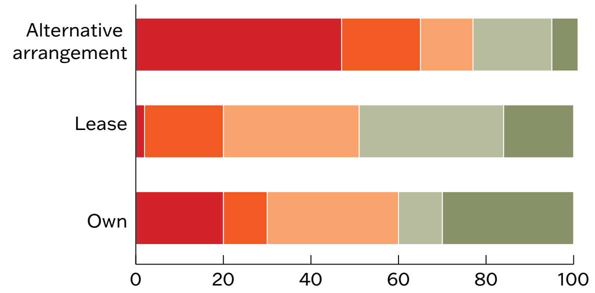


Grow your organisation

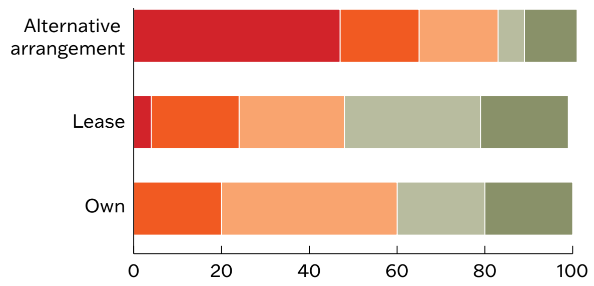


[7] There was a strong neutral response throughout the evaluative questions. Respondents varied their ratings across the questions in a way that indicated engagement with the survey. This leads us to assume that the accommodation in question allows an activity to happen, but it is neither a proactive aid nor a hindrance or was not relevant to the respondents' ability to achieve the outcome. For example the ability to grow an organisation may be constrained by income, not building size.

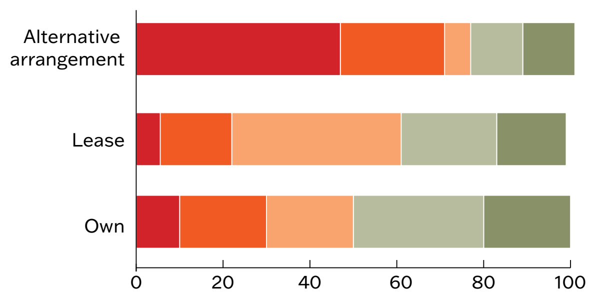
Collaborate with others



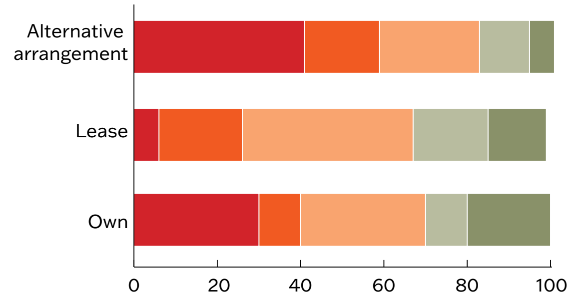
Make and present work



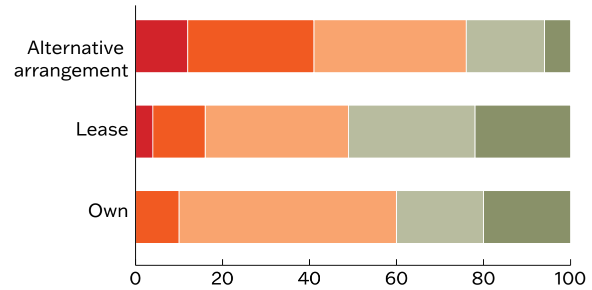
Support other creatives



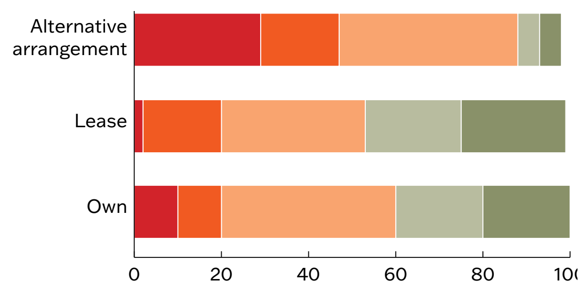
Provide equitable access



Provide a positive work environment

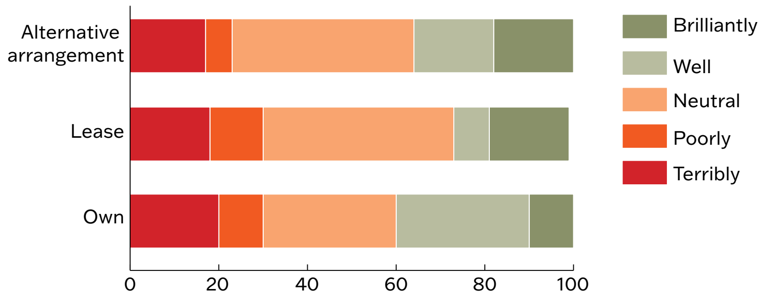


Deliver core programming and services



What is the impact of accommodation costs on financial stability?

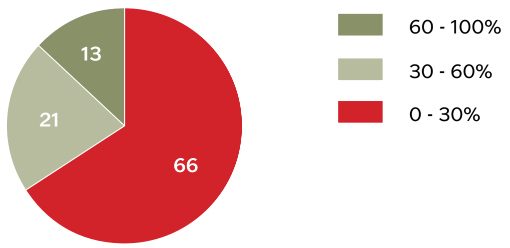
How do the costs of your current accomodation support your financial stability?



The survey returned some evidence as to the impact of accommodation costs on financial stability. The results show while owners are more positive about the impact of their accommodation costs, the majority of respondents feel that their accommodation costs have a neutral effect on their organisations.[8]

Cost of accommodation as percentage of income

Two-thirds of arts organisations and individuals are doing as well as or better than the expected benchmark for small and medium enterprises when it comes to the proportion of their income they spend on accommodation.



According to a 2020 NZ Business article, “rents generally equate to around 22% – 28% of expected turnover, [while] food and beverage/hospitality business rents generally equate to 6 – 8%.”[9]

Almost one-third of respondents (32%) are spending over 30% of their income on accommodation. This could indicate that professional accommodation costs are over-burdening one third of the NZ arts sector.

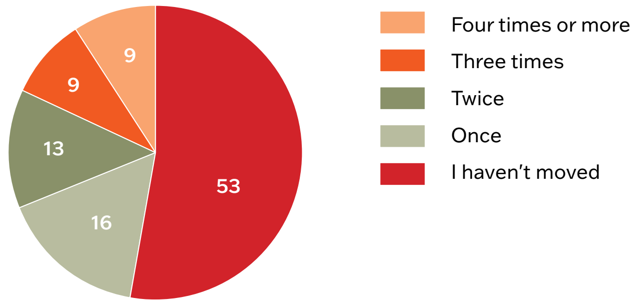
[8] Impact responses vs accommodation-cost-to-income ratio responses did not always align. For example an organisation reported that accommodation cost them 1% of their income but indicated that this impacted them negatively. At the opposite end of the scale, an organisation reporting that accommodation cost them 70% of their income indicated that this impacted them positively.

[9] Glenn Baker, “Commercial rents: a time for cool heads”, NZ Business, April 27, 2020. https://nzbusiness.co.nz/news/commercial-rents-time-cool-heads

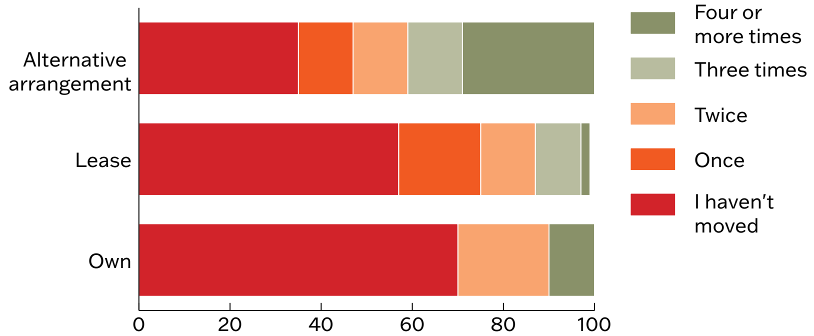
How stable is accommodation in the arts?

There is significant accommodation instability in the arts with 47% of respondents having moved once or more in the last five years.

How many times have you moved in the last five years



Those that own are less likely to have moved in the last five years.



Notes to Figure: the 30% of owners who had moved more than once, had most recently transitioned into ownership.

Relocations can be forced or chosen for strategic reasons.

Forced relocation reasons include:

- A lease or agreement not being renewed
- The cost of the lease increases
- Problematic landlord behaviour
- The building is sold, scheduled for redevelopment, or deemed unsafe
- Loss of income or funding
- Primary leaseholder moving

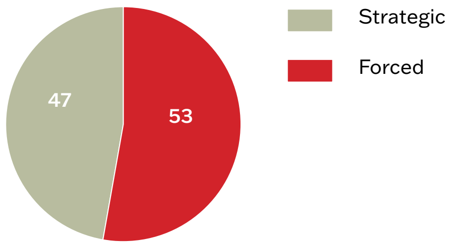
Strategic relocation reasons include:

- Identifying a more appropriate or cheaper space
- Seeking to improve space accessibility
- Outgrowing a space
- Identifying that core activities or space uses have changed
- Buying property

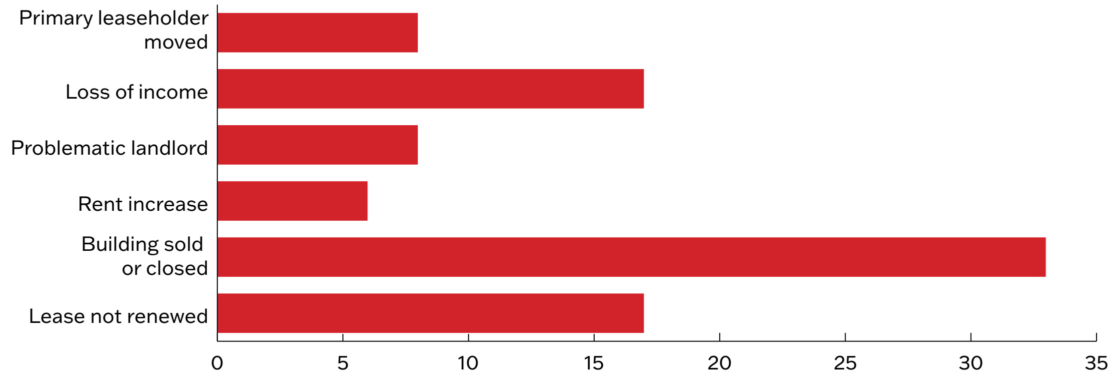
A sustainable sector is able to prioritise moving for strategic reasons. While forced moves can lead to strategic property opportunities, they are not ideal and can throw an organisation or individual into crisis.

How do the reasons for moving break down?

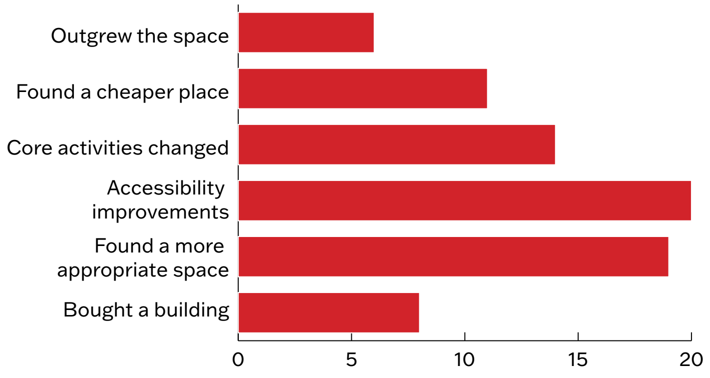
The single biggest reason for relocation was that the building was sold or closed.



Forced relocation reasons



Strategic relocation reasons



The cost of leasing

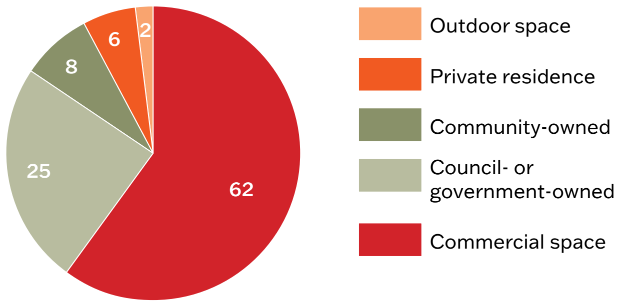
Who owns the property they lease?

Respondents have mostly secured commercial leases for their space.

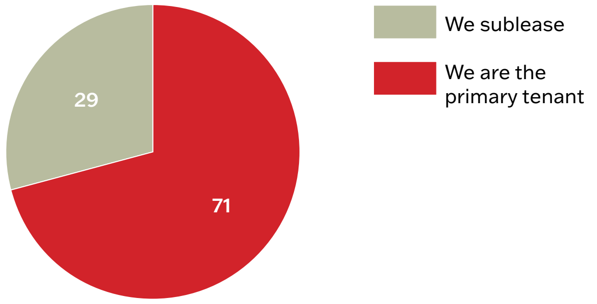
Council- or government-owned spaces make up only a quarter of leasing respondents' housing.

A significant minority of leasing respondents (29%) hold a sub-lease rather than a primary lease.

Types of leases

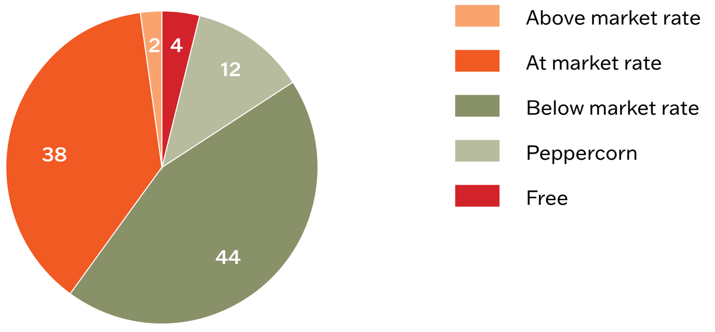


Who holds the lease?



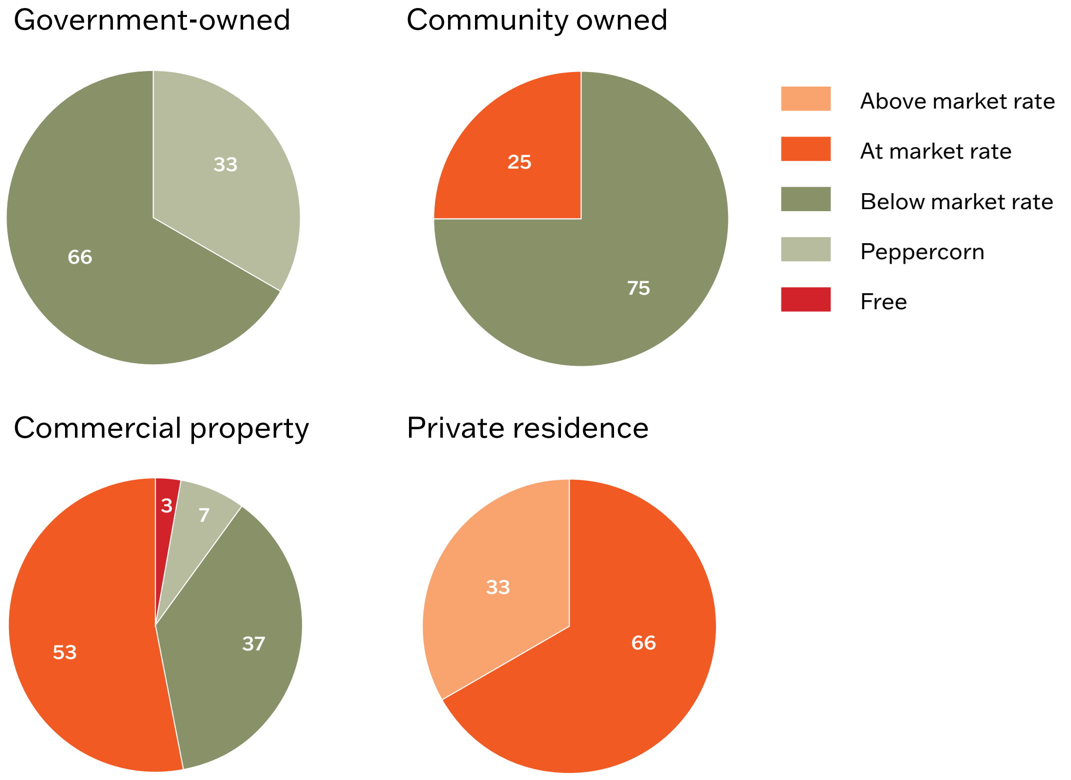
What are they paying for their accommodation?

The majority of the leasing respondents (60%) pay less than market rates.

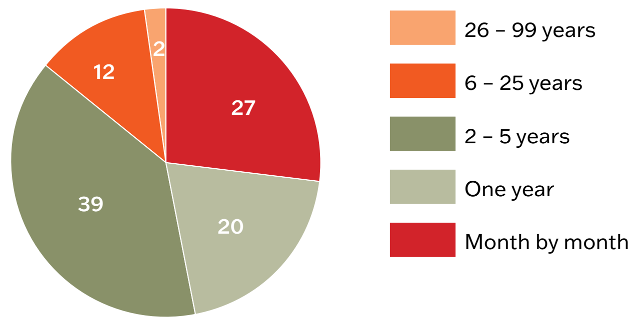


Rent settings for different types of landlords

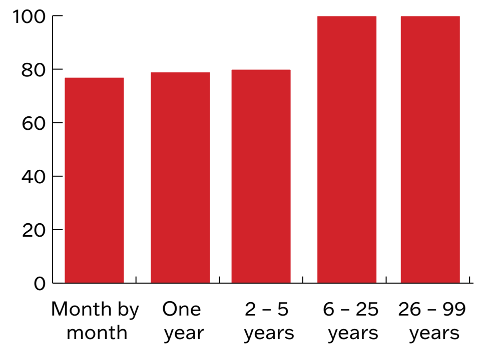
The commercial leasing sector supports the arts through free, peppercorn and below-market rate rents.



How long are the leases, and can they be renewed?

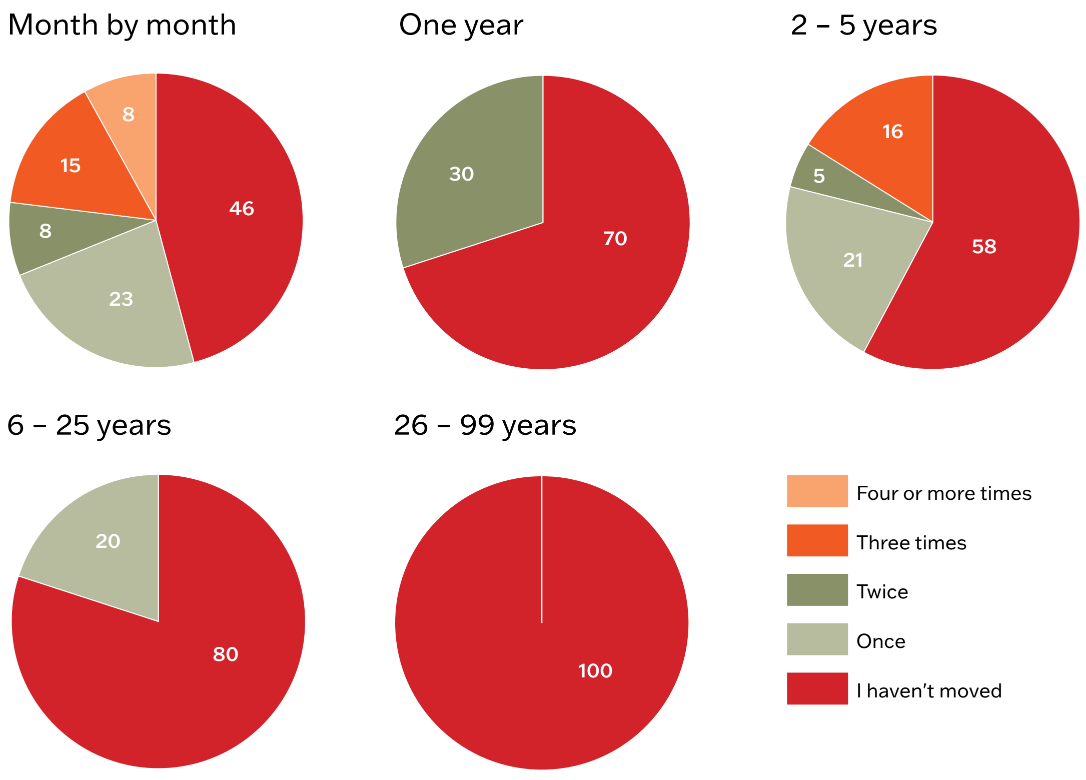


What percentage of leases have a right of renewal?



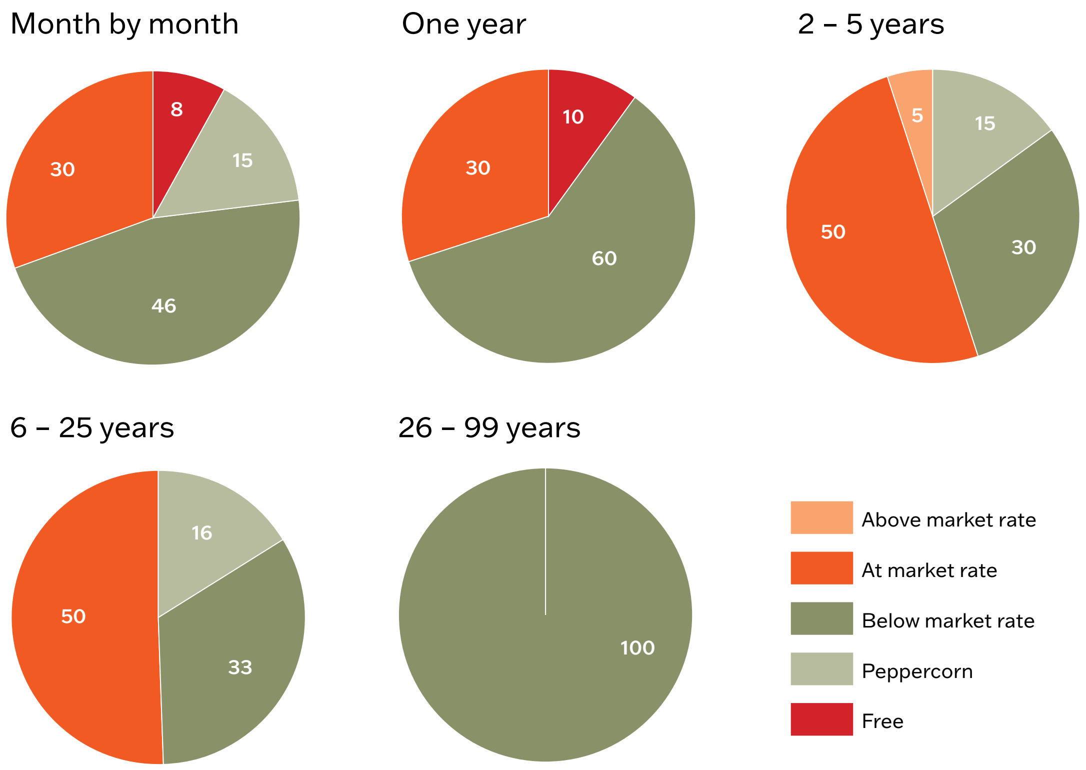
Almost half of the leasing sample are on short-term leases of one year or less. Most of them have an expectation that their lease will be renewed – either as a periodic lease, or through a contractual right of renewal. However, the maximum right of renewal would only be one more year, leaving the organisation or individual vulnerable to forced relocation through a price change or lease termination.

As the lease duration increases, the frequency of relocation decreases



Lease duration has an impact on the rent.

A longer lease may increase stability, but it comes with an increased likelihood of paying a market rent.



Acknowledgements

Advisors

Thank you to Molly Mullen and James Littlewood who helped me design the research and stay on course, providing editorial feedback on early drafts.

Molly Mullen is a senior lecturer in applied theatre at Waipapa Taumata Rau, University of Auckland. She is an ethnographic researcher with a particular interest in the diverse economies of applied theatre and community-based arts practice.

Writer and filmmaker James Littlewood was the director of Going West, a literary organisation in West Auckland, between 2019 and 2024. In an earlier iteration of his career he was a design researcher and innovation facilitator, having spent eight years in market research and banking.

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