

Te Wao Nui o Toi



**TOI MAI**  
Workforce  
Development  
Council





The Great Forest of Tāne Mahuta



He mahere whakatupu  
wao hei whanaketanga  
mō Toi Pāho.

Toi Pāho — Screen-  
sector Capability and  
Development Plan for  
the Below-the-line  
Workforce.

# HE MAHERE WHAKATUPU WAO HEI WHANAKETANGA MŌ TOI PĀHO



STEM A  
SYSTEMS  
FOR THE  
FUTURE





Ina toua ki te one  
haumako, me pēhea e  
kore ai e tūperepere,  
e pāhautea.

If you plant a seed in  
fertile soil, how can it  
not flourish luxuriantly  
and grow vigorously.

Wharehuia Milroy

INĀ  
TOUA KI TE  
ONE HAUMAKO,  
ME PĒHEA  
E KORE AI E  
TŪPEREPERE,  
E PĀHAUTEA



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# TE WAO NUI O TOI

I ahu mai ngā kōrero mō Te Wao Nui o Toi i ngā wānanga i tēnei kaupapa, me te aha i tīkina atu ko aua kupu whakarite hei whakakipakipa i te ngākau, hei ārahi anō hoki i te ara o Rāngai Whakaata kia kanorau, kia ora, kia toitū.

The theme of Te Wao Nui o Toi stemmed from the project kōrero and became our metaphor to inspire and guide a wider dialogue on how to achieve a diverse, healthy and sustainable Toi Pāho.



He mea whakaaweawe Te Wao Nui o Toi e Te Wao Nui a Tāne, nā whai anō ka riro mā te kupu whakarite e mea ana i te kanorau, te oranga, me te taurikura o te pūnaha hauropi ngahere te rāngai whakaata e kupu.

Ki Te Wao Nui o Toi, he tini ngā momo rākau, taketake mai, tauwiwi mai. E hia nei ōna momo āhuahanga me ōna rahinga, heoti e noho tonu nei ki te pūnaha hauropi. Ahakoa ngā rerenga kētanga ā-rahi, e matea nei te oneone taiora e ngā rākau, waihoki te hekenga tika o te ua, me te tauritenga ā-maru, ā-hihi hoki. E waiwai ana te taurite i ēnei e tupu ururua ai tō te rākau tupuranga. E kitea nei ngā tini mata o te rāngai whakaata i ngā rākau, ka mutu, ko ngā hua me ngā puāwai ngā ihirangi e manahua ake nei.

Inā te waiwai o te mōhio pū ki ngā āhuatanga e tupu pai ai te kākano, e whaiora ai, e whaihua ai hoki i Te Wao Nui o Toi, he hiahia nō te ngahere ki ngā rākau whaiora, e matomato nei te whaihua, e toitū ai, e tau ai tōna hanga.

Te Wao Nui o Toi draws inspiration from Te Wao Nui a Tāne (The Great Forest of Tāne Mahuta), and uses the metaphor of a great, diverse, healthy and thriving ngahere, or forest, ecosystem to describe Toi Pāho.<sup>1</sup>

In Te Wao Nui o Toi, there are many different kinds of rākau, or trees, both native and introduced. They come in all shapes and sizes, but are all part of the ecosystem. Despite their differences, all rākau require rich nutritious soil, as well as just the right amount of rainfall and the perfect combination of shade and sunlight. Balancing these elements is essential to enabling our rākau to grow. Rākau represent the many facets that make up Toi Pāho, and their fruits and flowers are the wonderful pieces of content that they each produce.

Understanding what it takes to grow a kākano, or seed, into a healthy, fruit-bearing rākau in Te Wao Nui o Toi is critical, because our ngahere needs healthy rākau, producing lots of fruit, to ensure our forest is sustainable and attractive.

<sup>1</sup> For the purposes of this project we are using Toi Pāho as the descriptor for the screen sector in Aotearoa. It covers the industries that create and deliver engaging screen-based moving image and audio content for wide distribution, including (but not limited to): film, television, online interactive media, animation, visual effects (VFX) and game development.





Waihoki, kī pai ana Te Wao Nui o Toi i te manu waiwaiā. He āhuetanga ō ia, ō ia manu. Tērā ētahi e kitakita ana, tērā anō ētahi e noho huna ana, kua auaha ētahi, kua aumangea, kua pākaha hoki. Ko tā ngā manu o Te Wao Nui o Toi he whakakanohi i ngā tāngata o te rāngai whakaata. Kaimahi mai, parapara mai, kaipakihi mai, kaiwhakangungu mai, kiritaki mai, aha mai rānei. Topa atu ngā manu huri taiāwhio i Te Wao Nui o Toi, kainga ai ōna tini hua, apuapuhia ōna mātauranga, tikona ai te ngahere ki te hae.

Kāti, kei wareware ki ngā ngārara, he wā ōna engia kua hauarea, e noho ana ki Te Wao Nui o Toi. Anō pea te iti, engari nā rātou te pūnaha hauropi katoa i whakarapa i te mea nā rātou te one e haumako ai, otirā ka riro ko rātou anō hei whāngai i ngā tamariki o Te Wao Nui o Toi, pēnei me ngā manu.

Ko ēnei ngārara te whakaputanga o ngā mea tē kitea, engari ka whai oranga te ngahere i ēnei mea. Ko ēnei ngārara te whakatinanatanga o te ngākau whitawhita, o te wairua whakaohoho, o te manawanui me te auaha. E kī pai ana te one o Te Wao Nui o Toi i ngā ngārara toioranga hei whāngai ngā rākau me ngā manu. Me kore ake ko ēnei, kua tāhorotia katoatia te pūnaha.

Likewise, Te Wao Nui o Toi is bursting with beautiful manu. Each bird has its own characteristic: some are bright and some blend into their environment, some are creative, some are determined, some are quiet and some are bold. The manu of Te Wao Nui o Toi represent the people who make up Toi Pāho. From staff, to talent, to business owners, to trainees, to consumers and more. These manu fly around Te Wao Nui o Toi, eating from its many rākau, consuming knowledge and pollinating the forest.

And finally, we cannot forget about the ngārara, the small and sometimes seemingly insignificant insects, which live within Te Wao Nui o Toi. They are hard to see sometimes, and they are often overlooked, but these insects are a critical part of the ecosystem because they cycle nutrients, aid soil formation and provide food for many creatures of Te Wao Nui o Toi, such as our manu.

These ngārara represent all of the intangible things that fuel the ngahere and keep Te Wao Nui o Toi alive and thriving. They represent passion, inspiration, dedication and creativity. Our soil is abundant with ngārara providing rich nutrients to feed our rākau and manu. Without these, Te Wao Nui o Toi could not sustain itself.



# Te kano ki te rau Executive summary

# TE KANO KI TE RAU



## Te kano ki te rau Executive summary

This report was commissioned by the Toi Mai Workforce Development Council (WDC) and prepared by Assurity Consulting. Its purpose is to convey the unfiltered views of industry to inform alignment between Toi Pāho and vocational training provision for the below-the-line workforce.

Aotearoa New Zealand's film, television and interactive media industries provide creatively fulfilling and highly skilled roles, boundless opportunities, variety, well-paid careers and successful businesses.

There is increasing demand for the sector's products and services; however, its ability to meet that demand is being stifled by difficulties sourcing the skilled below-the-line production workers who make up the majority of screen roles.



Photo by Kyle Loftus on Pexels

Toi Pāho is facing challenges with both taking on new trainees and developing those already employed. Production restraints and scarce availability of experienced workers to bring new entrants up to speed is limiting the sector's ability to provide industry-supported training, and take on new starters. These factors, along with the often short-term nature of screen funding and contracts, mean positions are few and far between for the many who graduate from screen courses.

Like many parts of the creative sector, Toi Pāho has never had an Industry Training Organisation (ITO) to coordinate its vocational training and workforce needs. This means the sector has missed out on the benefits of nationally appropriate qualification products, work-based apprenticeships and other formal training schemes that other critical sectors of the economy have access to.

A central factor in addressing the challenges outlined in this report is a need to value and nurture our taonga by supporting a diverse range of locally produced content. By funding local screen content that can support industry entrants to learn, we develop two taonga in tandem – our kōrero and our people – and set up a symbiotic relationship with international productions that are crying out for skilled below-the-line talent.



Photo supplied by South Pacific Pictures

Consequently, certain pathways into and across Toi Pāho are viewed by some to be exploitative, inward-looking and favouring those with financial means and/or the right contacts.

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This foundational research employed qualitative, quantitative and collaborative approaches towards understanding the wide range of needs faced by industries, employers, workers and prospective workers in Toi Pāho.

The findings of this report and subsequent industry feedback will be used to develop an action plan and advice to the Tertiary Education Commission (TEC), and advice to MBIE for its support of the sector, regarding longer-term investment in vocational education and training for below-the-line screen careers.

Our research has signalled an urgent need for a long overdue realignment between below-the-line workforce needs and vocational education provision. A more cohesive partnership across education, government and industry is needed to build a healthy and collaborative training/workforce ecosystem.

While the mismatch between skills training, vocational pathways and industry needs can be addressed by the vocational education sector and government funders, industry must also take responsibility, for example by providing better visibility on workforce requirements and by fostering diversity within workplaces. Uplift of underserved communities<sup>2</sup> is seen as essential, with these groups notably absent within senior and management roles. There is a need for industry to reassess onboarding and advancement processes and make workplaces more culturally safe and inclusive.

Those who do find entry into what is considered by many to be a 'passion industry' may spend extended periods working for little or no remuneration – looking to build the right experience and contacts to be able to secure employment or charge as a contractor.

<sup>2</sup> Underserved communities refers to (but is not limited to) Māori, Pacific Peoples, Asian, migrant communities, LGBTQIA+, women, tangata whaikaha and neurodiverse people.



# Kia pua i te hua

## Strategic goals and recommendations

This report acknowledges the industry work already underway to address the workforce challenges faced by Toi Pāho. It is now the Government's turn to step up and back the industry on its quest to build a thriving and sustainable Toi Pāho workforce.

# KIA PUA I TE HUA



# TOI PĀHO

Hei puanga hua tuatahi  
Te whakaawetanga  
hei pūhou

**Strategic goal 1**  
Inspiration for a  
new-generation Toi Pāho

[Read more p.95](#)

**Marohitanga tuatahi**  
**Recommendation 1**

Tertiary Education Commission (TEC) to fund, and Toi Mai to coordinate, initiatives that make below-the-line screen careers visible and attractive to rangatahi Māori, whānau, hapū and iwi, and reflect the diversity of underserved communities, including Māori, Pacific Peoples, Asian, migrant communities, LGBTQIA+, women, tangata whaikaha and neurodiverse people.

**Marohitanga tuarua**  
**Recommendation 2**

TEC and the Ministry of Business, Innovation and Employment (MBIE) to fund targeted campaigns that celebrate success, promote the value of creative and technical initiative and enable people to ‘see themselves’ in Toi Pāho roles.

**Marohitanga tuatoru**  
**Recommendation 3**

TEC and MBIE to fund and Toi Mai to coordinate the design of a campaign to attract talent from adjacent industries.



Yoobee South Seas Film School — on location





# FIJAFUFA

Hei puanga hua tuarua  
Hei taunga manu  
hāereere

**Strategic goal 2**  
Accessible and equitable  
Toi Pāho opportunities

[Read more p.98](#)

**Marohitanga tuawhā**  
**Recommendation 4**  
Government agencies to support initiatives that connect rangatahi Māori, whānau, hapū, iwi and underserved communities with creative and technology roles in screen.

**Marohitanga tuarima**  
**Recommendation 5**  
Toi Mai to endorse work-based learning initiatives that create positive industry environments where diverse voices can thrive.



# TOI PĀHO TUATAHOU

Hei puanga hua tuatoru  
Te wao hei akomanga, te  
matarau hei akoranga

## Strategic goal 3

Relevant training and  
support delivered by  
providers and industry

Read more p.100

### Marohitanga tuaono Recommendation 6

TEC to direct funding to programmes  
that align closely with industry and  
industry requirements.

### Marohitanga tuawhitu Recommendation 7

Toi Mai to endorse and TEC to fund  
targeted training that supports  
underserved communities to build  
Toi Pāho careers.

### Marohitanga tuawaru Recommendation 8

TEC to widen its criteria for provider  
funding to include pilot funding  
for non-NZQCF (New Zealand  
Qualifications and Credentials  
Framework) listed, industry-defined  
and delivered short-form courses and  
stackable micro-credentials that are  
flexible, nimble and meet immediate  
industry needs.



Student at Yoobee South Seas Film School, 2022





Maori Capability and Development Plan: March 2023

Maru Nihoniho, Metia Interactive

# IAHAWAUNI

Hei puanga hua tuawhā  
Mahi tahi

**Strategic goal 4**  
Mahi tahi

[Read more p.103](#)

**Marohitanga tuaiwa  
Recommendation 9**  
Industry, Toi Mai, TEC and MBIE to investigate the potential merits of, and help define the purpose of, the nascent initiative towards creating an Industry Training Body for Toi Pāho.

**Marohitanga tuatekau  
Recommendation 10**  
Toi Mai to work with industry towards establishing a medium and long-term workforce capability pipeline.



# OHĀWAŌ TE KŪWAHA Ō

Te kūwaha ki te wao  
Introduction



## Te kūwaha ki te wao Introduction

This initiative forms part of a wider Reform of Vocational Education in Aotearoa. It was commissioned by the Toi Mai Workforce Development Council and funded by the Tertiary Education Commission (TEC) through the Workforce Development Councils (WDCs) and Transitional Industry Training Organisations' (TITOs) COVID-19 Response Projects Fund.

Established in October 2021, there are six WDCs that have a core remit to align education and training with industry needs, and to raise the skills and vocational training available to industries in the medium-to-long term. Coverage for Toi Mai comprises the workforce development activities in relation to employers, vocational education providers, employees and people seeking to be employed, in work related to the creative, culture, recreation and technology sectors. This includes the industries and workforces that comprise Toi Pāho, including film, television and interactive media. In segmenting its sectors for the purposes of workforce development planning, Toi Mai has assigned the name Toi Pāho to this sector (see footnotes <sup>1</sup> and <sup>3</sup>).

Yoobee South Seas Film School — on location

<sup>3</sup> Other sectors covered by Toi Mai include:  
Toi Māori: Taonga Works  
Toi Puaki: Expressive Arts  
Toi Whānui: Enabling Technologies  
Toi-A-Ringa: Art and Design  
Toi Ora: Sport, Recreation and  
Cultural Organisations



The term Toi Pāho will be used in this report instead of the more traditional term ‘screen-sector’. Screen-sector is often used to describe the film and television industries to the exclusion of the interactive media, animation, VFX and game development industries. Today, the lines that separate the film, television and newer interactive media industries are increasingly indistinguishable, and convergence is an inevitable part of the future of storytelling and entertainment. A more all-industry encompassing term is preferable to ensure that government policy and funding settings support the entire sector to grow and compete globally rather than against itself.

Early engagements by Toi Mai with Toi Pāho signalled the need for a long-overdue realignment between below-the-line workforce requirements and vocational education provision. The need for this work was made more urgent because of the expected growth in the sector post-COVID-19, where it is anticipated demand will exceed the supply of skilled below-the-line workers currently available to work in Aotearoa.

On 28 April 2022, the TEC approved a proposal from Toi Mai to design and deliver:

- a national below-the-line workforce capability scan,
- advice to TEC about its longer-term investment in screen vocational education and training,
- advice to MBIE to support its wider work supporting the sector, and
- an action plan with a road map of recommendations, goals, action points and measures that will enable better alignment between the screen industry and its workforce training and development through to 2032.



Photo supplied by South Pacific Pictures



This report conveys the unfiltered views of industry to inform alignment between workforce requirements and vocational training provision. These views have shaped the recommendations presented in this report. Toi Mai is now seeking sector feedback on the recommendations before developing a final action plan that sees industry, vocational education providers and government working together to support a sustainable, inclusive, diverse and thriving Toi Pāho workforce.







Between FY2014/15 and FY2020/21 the total output associated with film and television production activity was NZ\$10 billion, with annual output steadily increasing over the seven years.

Source: Economic Impact of the New Zealand Aotearoa Screen Production Sector, Olsberg (2022)

## He tupunga taupua, he hua ora Supporting and growing a thriving screen workforce

Toi Pāho in Aotearoa is internationally recognised for producing high-quality location, production and post-production products and services. It plays an increasingly important part in this country's economy and — through creative content and intellectual property (IP) — its national brand. It is a sector that many are passionate about, resulting in some extraordinary productions such as the recently critically acclaimed *The Power of the Dog*, *Muru* and *Rūrangi*; and the survival-based video game *Icarus*.

The sector is largely engaged with contracted services for global productions, with over 90 per cent of production expenditure in film and television originating from outside the country. Digital games are currently the single fastest-growing export in Aotearoa.

Toi Pāho boasts a vibrant local scene also, with local content viewed as essential for both expressing and lifting the cultural identity of Aotearoa, and for providing a safe space in which people can learn and enter the many screen industries.





Photo supplied by Toi Whakaari, New Zealand Drama School

During the past 20 years, the sector has demonstrated enormous growth in, and demand for, content production within both local and international markets. The seven years since 2014 saw strong growth in production activity, averaging 20 per cent annually over that period. The sector showed relative growth throughout the COVID-19 pandemic, particularly within game development, which has been described as a ‘recession-proof industry’ due to a tendency for people to buy more games while at home.

Although the sector continues to grow, the pandemic nonetheless severely hampered delivery of film and television productions. Significant and ongoing international demand and workforce competition are leaving many lower-budget home-grown projects without access to the experienced workers needed to complete productions and train newcomers. COVID-19 is still routinely affecting up to 10 per cent of the workforce’s ability to operate in any given moment, straining an already stretched sector and severely limiting the availability of senior staff to develop juniors.

International and domestic production spend for film and television

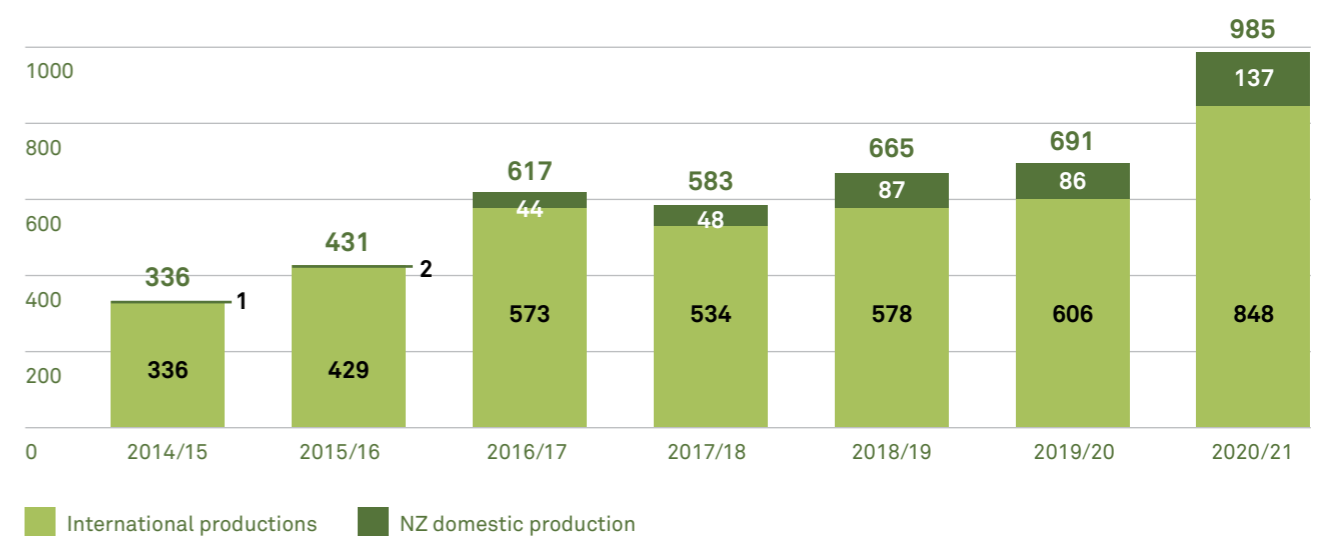
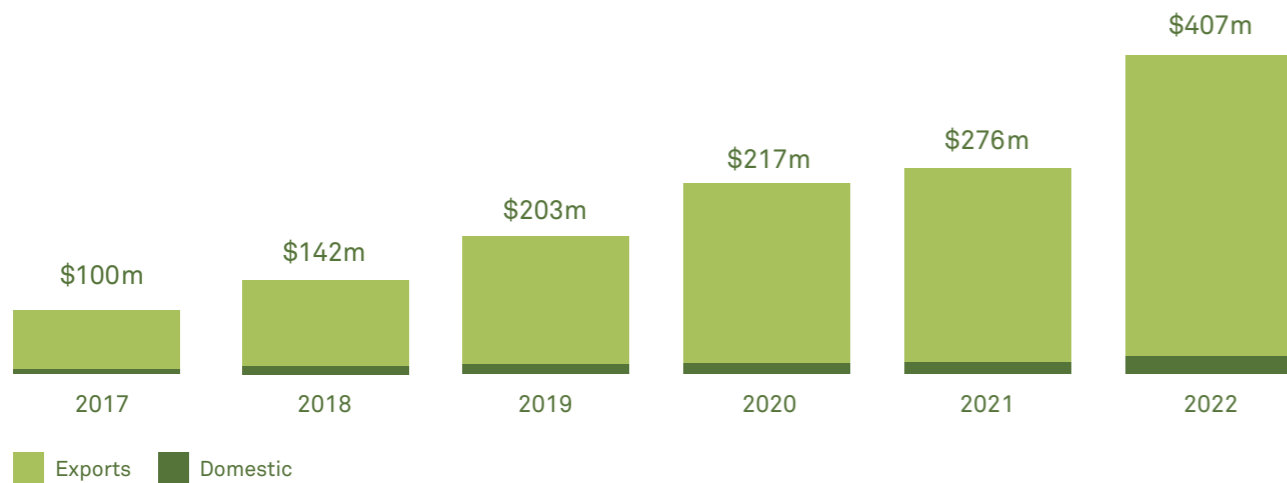






Image courtesy of CerebralFix

### Game development export and domestic revenue 2017-2022



One of the fastest-growing parts of the sector is game and interactive media, with 47% revenue growth for the sector over the past year. The interactive media and video games industry is growing year-on-year, with studios in Aotearoa earning \$407 million in 2022, up from the previous year's revenue of \$276 million.

Source: NZ Interactive Media Industry Survey, New Zealand Game Developers Association (NZGDA) (2022)

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Image courtesy of CerebralFix





90%

The global screen industry relies on a workforce that is agile and ready when a project lands. Prior to the pandemic, immigration was one way of plugging sector skills shortages. Today, the Government's tightened stance on immigration has limited the sector's ability to import workers, constraining its capability to provide international studios with sufficiently skilled local crew to support their productions.

Offshore talent certainly brings huge benefits to this industry, but developing a well-trained, Aotearoa-based production crew pool will add enormous value across the country. Toi Pāho stakeholders, current crew and entry-level workers keen to make a career in screen must be prepared and positioned for upcoming opportunities. By creating a 'set-ready' local workforce, Toi Pāho will be well positioned for sustainable growth to help the economy make a strong recovery from the negative impacts of the global pandemic.

Over 90 per cent of production expenditure in film and television came from outside the country, with the remaining 9.4% coming from productions originating from Aotearoa. In the seven-year reporting period, \$4.3 billion was spent on film and television production activity in Aotearoa.

Source: Screen Production Sector report, Olsberg (2022)



Photo supplied by South Pacific Pictures

MBIE recognises the significance of film, television and increasingly game development to the economic and cultural growth of Aotearoa, and its potential to contribute to GDP, employment and economic diversification.<sup>4</sup> The 2021 MBIE Report on Economic Trends estimated that approximately 14,000 people are working in the film and television sectors, the majority of whom are self-employed or contractors. In addition, there are estimated to be 1,070 employed within the game development sector (NZGDA survey, 2022). Work within the industry is typically project-based, with the number of firms making productions having increased at a rate of 8.3 per cent between 2015 and 2020, the majority of these new firms being owner-operated.

The Government's investment in Toi Pāho is still relatively small, however, at around \$300 million per annum in 2020/21<sup>5</sup> (approximately 0.08 per cent GDP). This funding is distributed through the Ministries of Culture and Heritage (MCH) and Business, Innovation and Employment (MBIE). There is a review of government investment in the [traditional] screen sector<sup>6</sup> underway, including proposed changes to the New Zealand Screen Production Grant. This includes a proposal to introduce a skills levy, which could go some way to supporting this report's recommendations for the film and television industries.

<sup>4</sup> See The benefits of the New Zealand screen industry: [www.mbie.govt.nz/business-and-employment/economic-development/screen-sector/the-benefits-of-the-new-zealand-screen-industry/](http://www.mbie.govt.nz/business-and-employment/economic-development/screen-sector/the-benefits-of-the-new-zealand-screen-industry/)

<sup>5</sup> This amount is minuscule when compared to investments in other sectors. For example, the Government invested \$1.8 billion in the research science and innovation (RSI) sector in 2020 (MBIE, 2021).

<sup>6</sup> See [www.mbie.govt.nz/assets/terms-of-reference-review-government-investment-screen-sector.pdf](http://www.mbie.govt.nz/assets/terms-of-reference-review-government-investment-screen-sector.pdf)



Developing a well-trained, Aotearoa-based production crew pool will add enormous value across the country. Toi Pāho stakeholders, current crew and entry-level workers keen to make a career in screen must be prepared and positioned for upcoming opportunities. By creating a 'set-ready' local workforce, Toi Pāho will be well positioned for sustainable growth to help the economy make a strong recovery from the negative impacts of the global pandemic







Student at Yoohee South Seas Film School, 2022

98%

For the production of Avatar (2022), over 98% of roles were below the line. There were 64 above-the-line and 3,800 below-the-line positions (excluding extras, interns and apprentices).

Source: IMDb; associate producer, film

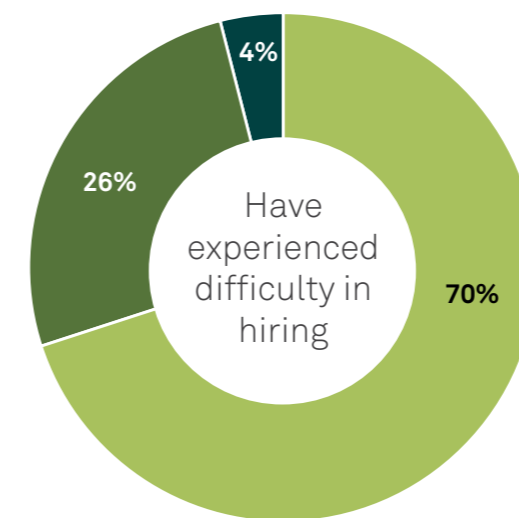
## Kia piki te ora o te takatupu Focus on below-the-line roles

Workers within Toi Pāho fall into two broad role categories: above and below the line. Above-the-line roles are more likely to be seen in the opening credits of a film, television show or game, and include directors, producers, screenwriters, cinematographers, lead cast members and studio owners. Without these roles, projects would not be created or funded.

Below-the-line roles are the long list of crew members' positions that include the production, post-production, programming, art, design and commercialisation required to bring a project from concept to reality. Without these roles, screen products would not be made.

The sector has indicated a shortfall in the below-the-line workforce required to meet post-COVID-19 predicted demand for screen content production. Te Wao Nui o Toi addresses this shortage.

### Screen company recruitment difficulties



Yes No Not sure

Seven in ten screen firms have experienced difficulty in hiring for a particular below-the-line role or skill set over the past year. Some of the most common areas in which companies have difficulty in hiring are production (mid level, three to seven years), production accounting, editorial picture and production department.

Source: Screen Workforce Survey (Company), Toi Mai (2022)





## He manu kai hua, e kore tupu pua Providing visibility and industry-relevant pathways from school

While the products of Toi Pāho are highly visible, an understanding of the roles needed to create films, television shows and games is not so apparent to those outside the sector. In general, people have little or no knowledge about the career pathways available, and there is a common misconception that high levels of mathematical and technical proficiency are a prerequisite for entry to many below-the-line roles, especially within game development. The potential of screen careers is not well understood by young people and their whānau.

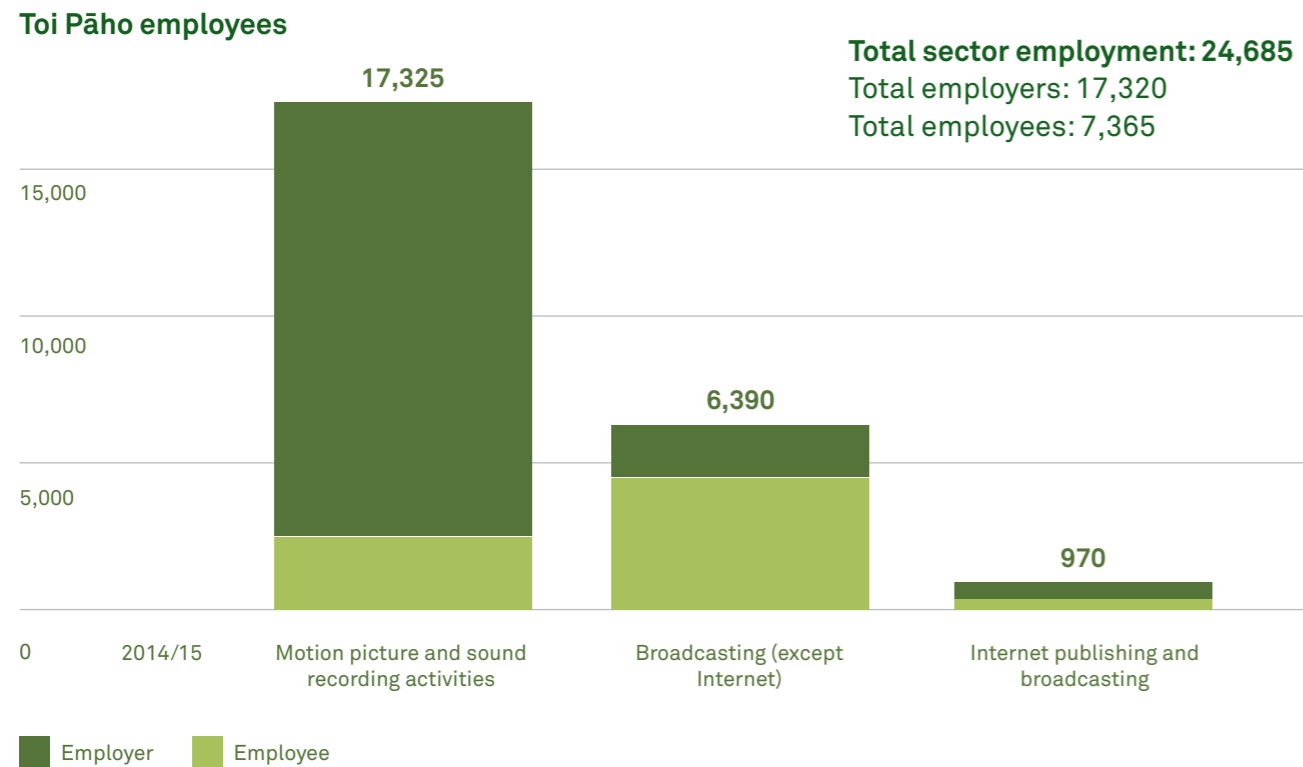
For those who do choose screen pathways, research shows that current training, education and industry pathways towards roles in the sector will not always set candidates up for success. While vocational training and tertiary education programmes in film and media are producing high numbers of graduates with ‘pre-industry’ qualifications, much of this training is perceived by the industry to be divergent from its actual requirements. There remains a significant capability gap between where programmes are taking students and where the industry needs them.



On the industry side, many companies are at present reluctant to take senior talent off productions to bring juniors up to speed, prioritising short-term production demands over capability growth and development. Adding further complication, international clients can be unwilling to allow those seeking work experience onto their productions for confidentiality reasons, limiting opportunities for industry placement and training.

Throughout our research, we heard from training providers that there is little to no visibility as to short-, medium- and long-term screen workforce requirements. This is hindering providers' ability to design and deliver adaptable training programmes that can meet the ever-changing needs of industry.

The vast majority of Toi Pāho workers in Aotearoa are sole traders, with over 70 per cent of screen workers classified as self-employed. This fact is not well understood by screen workforce candidates, and more needs to be done to prepare new entrants for the realities of navigating a career within the 'gig economy'.



Seventy per cent of the Toi Pāho workforce is self-employed (including employers), a figure that aligns with analysis in Economic Trends in the Screen Sector, MBIE (2020). Those findings show that a total of 3,756 of 4,098 firms in the film and television industries had zero employees, indicating that the majority of firms were effectively sole traders or contractors. The proportion of sole traders is growing: between 2015 and 2020 an average annual growth rate of 8.3% was driven by an increase in firms with zero employees.

Source: COVID-19 Recovery Baseline Engagement and Data Project, Toi Mai (2022)







The vast majority of Toi Pāho workers in Aotearoa are sole traders, with over 70 per cent of screen workers classified as self-employed.





Photo supplied by CerebralFix

“The biggest industry challenge is what we call a ‘missing middle’. So we’ve got these big companies of scale, and then you’ve got thousands of freelance contractors. And then, in the middle, we’ve reduced the number of companies to a handful. [We need to] grow and scale that missing middle and take advantage of the opportunities the big projects bring to New Zealand and become more sustainable.”

— Independent screen producer

The scale of contracting within the sector creates its own challenges, with the most experienced workers tending to provide services to a small number of large firms with international, well-paid contracts. This tendency leads to a ‘missing middle’, leaving few workers left to support small- to medium-sized production companies and local projects that can nurture new talent.

# 1.1

NZGDA lists over 120 game development studios across Aotearoa, employing 1,070 FTE workers.

Sources: <https://nzgda.com/> (retrieved 28 November 2022); NZ Interactive Media Industry Survey, NZGDA (2022)





Photo by Kyle Loftus on Pexels

## He wao hua kore A passion industry

We heard that the screen industries, particularly at an entry level, are considered by many outside the sector to be ‘passion industries’: for creatives as a hobby for their own enjoyment, for the privileged who can afford to study creative subjects at a tertiary level, or for those with other means to sustain themselves and their families through intermittent project work.

“There is a stereotype around creative people: ‘anyone can do that kind of thing’, or ‘it’s the arts, so we don’t need to worry about paying’. It’s not seen as a real career.”

— Aspiring writer, director and videographer

Many participants working within Toi Pāho (particularly those in film) described a prevailing view that in order to succeed you need to ‘do the hard yards like everyone else’. While this approach might attract creative individuals with passion and drive, it might also perpetuate a tendency towards work practices that are considered by many to be exploitative, and favours those with the financial runway to be able to work for little or no money.

“I think all creative industries are passion industries.”

— Studio executive, game development

“It’s about who’s coming through the training programmes and who can afford not to have that part-time job.”

— Film producer



## Whangaia te kaupeka whakatiki

### A need to do better for underserved communities

The film, television and game development industries provide content for a diverse and wide-ranging audience; however, some of the work environments that produce this content have been described as monocultural and lacking in fair representation of the cultural identity and demographic make-up of Aotearoa. Of particular concern is an acute workforce gap and shortage of Māori, Pacific and Asian employees within the game development industry. We heard a need and desire for the industry to work towards an inclusive and diverse workforce that is situated within a bicultural archetype.

“Big opportunities within the industry are around diversifying that talent pipeline. It’s about getting more of our stories out there and promoting our distinctive voice on the global stage. A commercial opportunity comes with that if it’s done the right way.”

— Aspiring writer, director and videographer

# 25%

The game development industry is particularly behind in terms of gender diversity, with 65% identifying as male, compared with 25% female.

Sources: COVID-19 Recovery Baseline Engagement and Data Project, Toi Mai (2022); NZ Interactive Games Survey, NZGDA (2021)

Females in Toi Pāho overall



There is a greater proportion of males working in Toi Pāho, with 55% compared with 45% female. The game development industry is particularly behind in terms of gender diversity, with 65% identifying as male, compared with 25% female; 2% in game development identified as neither male or female, and 9% did not respond about gender.

Sources: COVID-19 Recovery Baseline Engagement and Data Project, Toi Mai (2022); NZ Interactive Games Survey, NZGDA (2021)

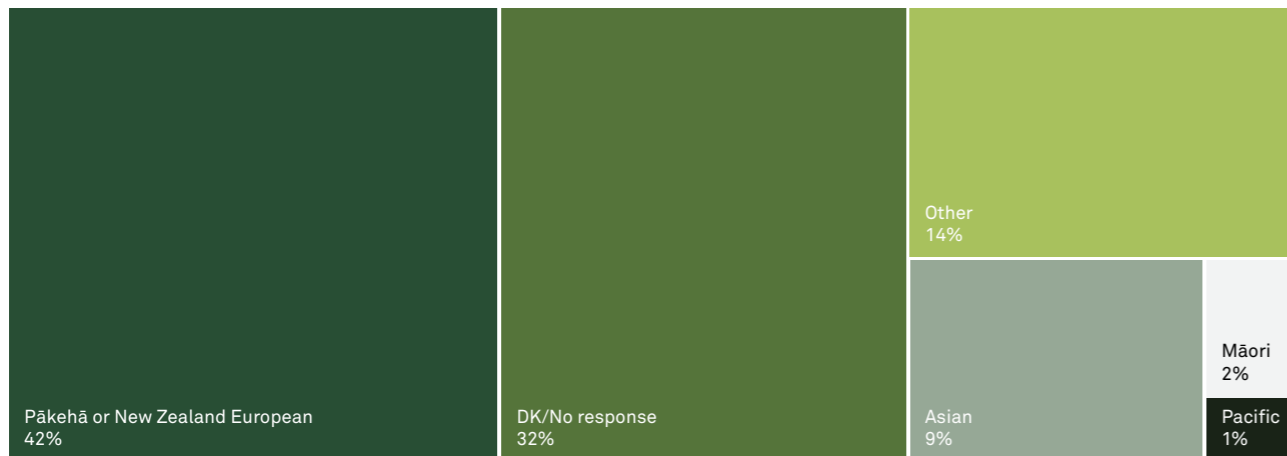




Image courtesy of CerebralFix

Inward-looking pathways into many screen roles are said to amplify a lack of diversity, with the ability to leverage existing social and industry connections viewed as a key to entry. Across the sector, participant voices are unanimous: “If you can’t see it, you can’t be it”. The wide range of screen production roles are not well understood or valued by underserved communities and their families, and are not adequately presented to diverse youth audiences. There is an opportunity to allow underserved youth to identify with, and imagine themselves operating in, production roles by introducing them to Māori, Pacific, Asian, migrant, LGBTQIA+, women, tangata whaikaha and neurodiverse below-the-line role models.<sup>7</sup>

### Game development ethnic diversity



Across the sector, participant voices are unanimous: “If you can’t see it, you can’t be it”. The wide range of screen production roles are not well understood or valued by underserved communities and their families, and are not adequately presented to diverse youth audiences.

There is significant under-representation by Māori and Pacific Peoples in game development, who make up just 3% of the workforce as compared with around 25% (total response) of the population. There is also underrepresentation of Asian communities: 9% of people in the game development industry are of Asian descent, compared with over 15% of the general population (total response).

Sources: NZ Interactive Media Industry Survey, NZGDA (2022); Census, Stats NZ Tatauranga Aotearoa (2018)



Māori and Pacific Peoples in game development make up just 3%.

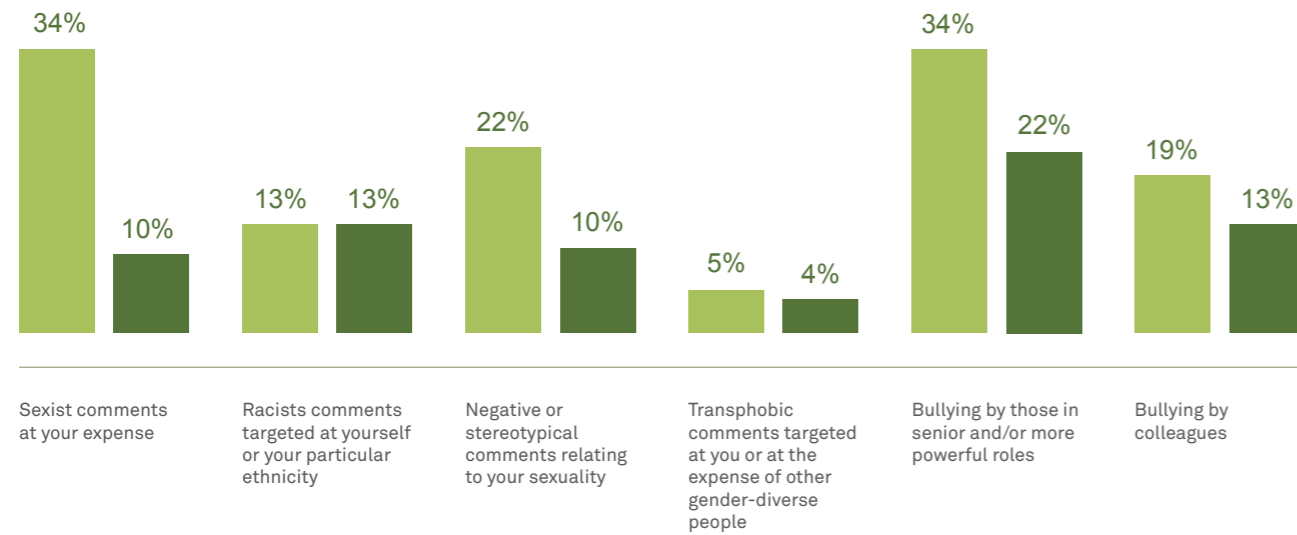
<sup>7</sup> Conversely, the more identifiable above-the-line role models in this sector are described as having become so successful that their pathway is perceived as being unobtainable and fanciful to follow. And yet, we have learnt that film schools and tertiary facilities are being expanded to meet the demand of those who aspire to be directors and producers.



# Te pīkautanga toimaha ki te whai hua

## The ripple effect of production pressures

Film and television workers' experience of negative situations in their current situation



Young people joining the Toi Pāho workforce report a wide variety of experiences. While some outline healthy environments that support diversity, or provide a degree of work-life balance, others lament a lack of Human Resource (HR) practices and describe a need for greater support services. We spoke to some former screen workers who chose to leave the industry altogether after experiencing harassment and disrespectful behaviour.

It is well known within the sector that working long hours is commonplace in order to meet production demands. We heard that even the most senior workers are expected to regularly go over and above, driving many to leave the sector in pursuit of the work-life balance and consistency required to meet family and community obligations. On a positive note, many of these workers return to continue their screen careers later – life circumstances allowing.

Women in film and television are far more likely to experience a range of negative work situations than men, including sexist comments at their expense; negative or stereotypical comments relating to their sexuality; and unspoken barriers and discrimination where they felt personally disadvantaged.

Source: Being Heard report – survey results on gender, diversity and inclusion in [film and television industries Aotearoa], New Zealand Film Commission Te Tumu Whakaata Taonga (NZFC) (2019)

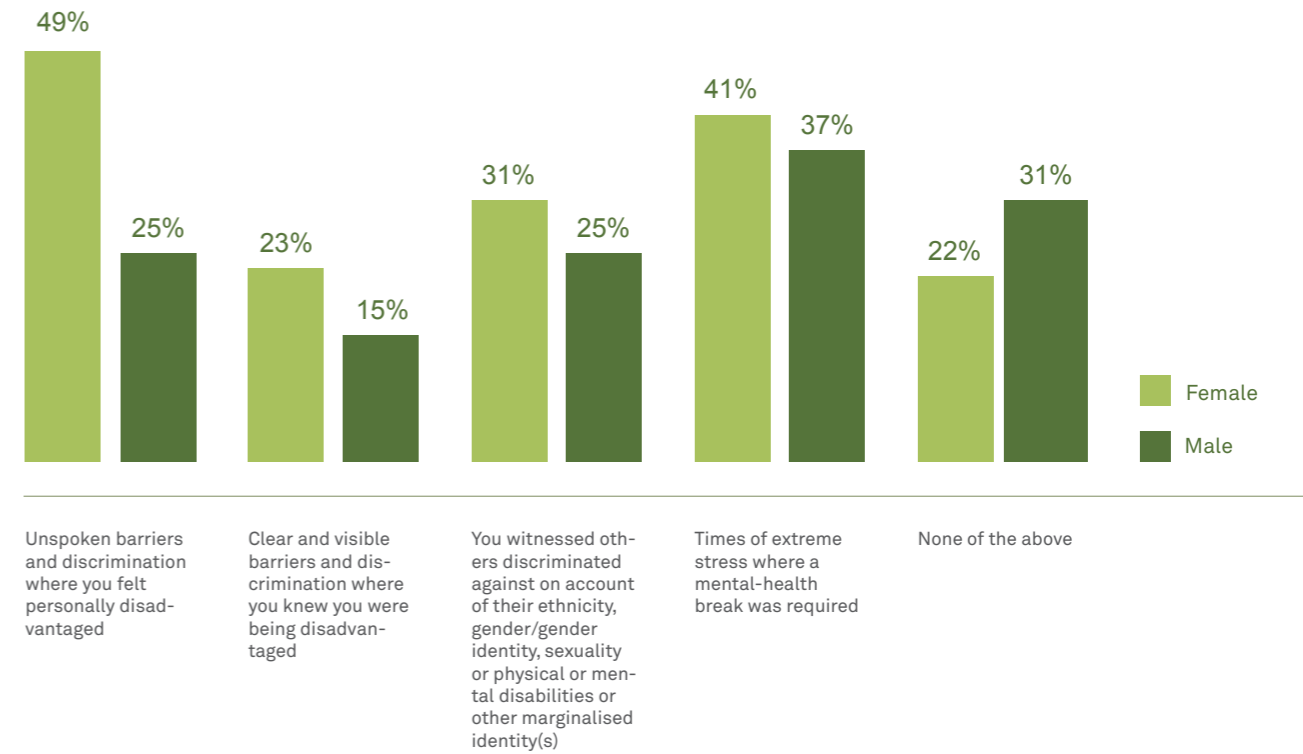


Photo supplied by Screen Marlborough. Short film 'Undertow' by Aaron Falvey, Director/producer





# Hei ngahere herenga kore

## Optimism and opportunity

Optimism exists about a future-state sector that is better connected and works collaboratively towards building and maintaining a healthy and diverse workforce. There is a desire to articulate the aspirations for a more sustainable, high-value Toi Pāho through a collective, long-term strategy that celebrates our expertise, character and unique kete of products and services.

It is in the spaces where the film and television industries converge with the newer interactive media industries that many new business and employment opportunities will open. There is a need to capitalise on this potential through a joined-up 'NZ Inc.' way of thinking about the nation's combined screen offerings, the value proposition we are presenting to the rest of the world, and the promise of Toi Pāho to new entrants.



## Te putanga o te rau How we produced this report

This report has been informed by a wider workforce strategy initiative where Assurity and Toi Mai undertook foundational research into below-the-line Toi Pāho roles and the people working within this sector. This research was undertaken between July and December 2022.

The hybrid approach of both qualitative and quantitative methods included more than 75 in-depth empathy interviews with industry experts, students, academics, training providers, employees, contractors, industry advocates and studio executives across the motu.

**ASSURITY**



22

22 production studio owners/employers/executives (across film, television and game development, a high proportion with over 20 years' experience in the industry)

19

19 individual industry workers — from junior to senior roles, contractors/freelancers and employees

09

9 education and industry training representatives

08

8 Māori business/studio owners/advocates

75

75 in-depth interviews with industry experts, students, academics, training providers, employees, contractors, industry advocates and studio executives across the motu

42

42 data reports, surveys, strategy reports and articles, a survey of 60 employers and 337 individual workers

03

3 regional/economic development agency representatives

3+

Industry association leaders





Photo from one of our in-depth empathy interviews

The report aims to reflect the open and honest kōrero conducted throughout the project duration. It represents the unfiltered views, feedback and direction received from those spoken with: both the positives and where there is room for improvement.

This is a diverse rather than statistically representative sample, utilising qualitative methodology to gain deeper insight and understanding of the industry. The interviewees were selected for their different experiences, insights and observations to help us develop a deep understanding of the problems, opportunities and realities faced by people and employers working in Toi Pāho.

A comprehensive industry scan included the review of 42 data reports, surveys, strategy reports and articles, and incorporated a survey of 60 employers and 337 individual workers. This 2022 survey was conducted by Toi Mai in partnership with New Zealand Film Commission Te Tumu Whakaata Taonga (NZFC).

An industry reference group of influential members of Toi Pāho was created to consult with as the project progressed. A Māori-led engagement stream was undertaken in parallel, with a view to directing a Māori-specific screen workforce strategy and committing to a bicultural approach to the wider initiative.

The themes and recommendations in this report were collectively refined in collaboration with Toi Mai and the above groups, and further consultation with the wider industry is planned following publication of this report.

The report aims to reflect the open and honest kōrero conducted throughout the project duration. It represents the unfiltered views, feedback and direction received from those spoken with: both the positives and where there is room for improvement. While we acknowledge that some experiences may not be universal or representative of the majority, they are shared in this document with the intent of highlighting challenges so that these may be constructively addressed in the future.



Storytelling enlivens our past and helps forge the future. The film, television and interactive media industries are inherently a storytelling medium. To accentuate the story of Toi Pāho, a visual identity and bespoke typeface that embodies the whakaaro of Te Wao Nui o Toi was created.



“As part of the creative process, we always go back to the reo and let the reo guide us to the right outcomes.”

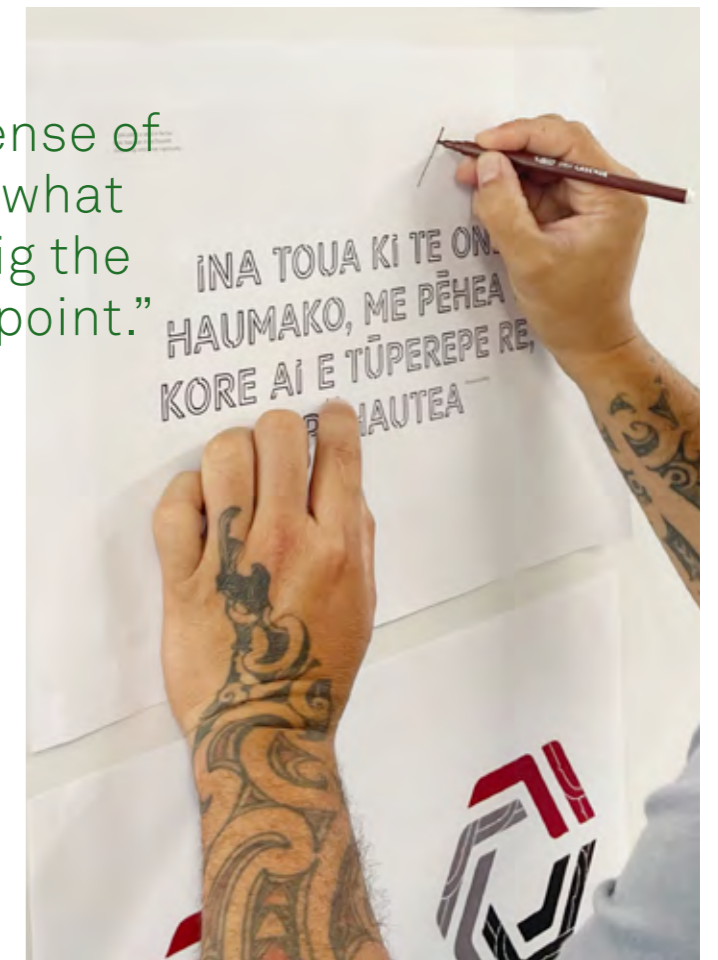
— Graham Tipene

Developed by Tāmaki Makaurau-based artist Graham Tipene (Ngāti Whātua, Ngāti Kahu, Ngāti Hine, Ngāti Haua, Ngāti Manu), the visual identity for this report explores themes of growth, circularity, evolution and interrelationship.



“I want people to have a sense of wonder about it: ‘I wonder what the korero was, and how big the process was to get to this point.’”

— Graham Tipene





Ngā kaupeka matua  
o te rangahau  
Themes emerging from  
the research

# INGĀ KAUPERKA MATUA O TE RANGAHAU





## Ngā kaupeka matua o te rangahau

Themes emerging from  
the research

This section reflects the experiences and views of people in relation to the screen industries. Industry workers (from new entrants to veterans), executives, studio managers, industry leavers, diversity and equity advocates, career changers, course directors, screen students and rangatahi are some of the groups represented here. Where appropriate and available, the themes are supported (or challenged) by quantitative data about the sector.

Themes from the research are organised into four categories:

- 1. Hei wao mārama**  
Making Toi Pāho roles visible, coherent and accessible
- 2. Hei wao taunga manu rere**  
Supporting people to enter and grow within Toi Pāho
- 3. Hei rākau whai hua**  
Delivering training that meets Toi Pāho needs
- 4. Hei aka here tahi, ka pū orange rau**  
Working collaboratively to build and maintain a healthier Toi Pāho

Photo supplied by Screen Marlborough. Feature film 'Northspur' by Aaron Falvey, Director/producer



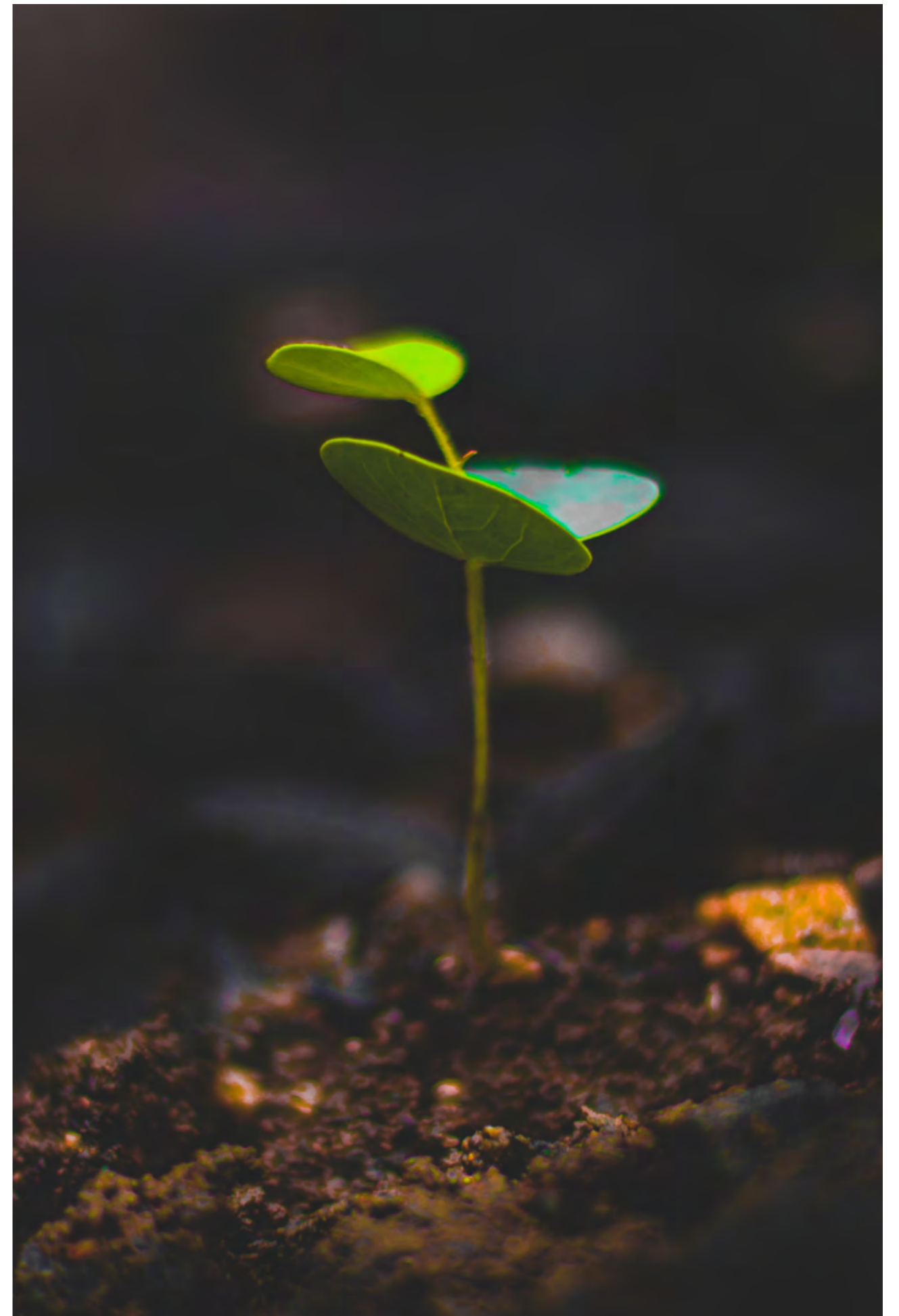
## 1. Hei wao mārama

Making Toi Pāho roles visible, coherent and accessible

Ka tīmata tā mātou whanaketanga i Te Wao Nui o Toi ki te kākano. Ko ēnei kākano ā tātou tamariki, me ngā rangatahi e tīmata ana te kite i te ara kia mahi ki ngā rāngai whanake i ngā kēmu, ngā kiriata, me te whakaata. E mārō ana ngā kākano, ka mutu, he nui te pito mata. Haere ake nā, ka tinaku ngā kākano, ka tupu hei pihinga - he tupu rangatahi e whanake ana i ōna pakiaka tuatahi, e kite ana hoki i te pito mata o te whaiora. Kua ako ēnei pihinga i ētahi pūkenga, me te aha e whiwhita mai ana tērā ahi ōna mō te ahumahi. Kua pānekeneke pai ēnei, nā whai anō, e matea nei te manaakitanga.

We begin our Te Wao Nui o Toi journey with kākano. These kākano, or seeds, are our tamariki and rangatahi who are being introduced to the idea of working within the game development, film and television industries. Kākano are hardy and absolutely full of potential. From here, our kākano develop into pihinga – rangatahi seedlings that are beginning to develop their very first shoots, and are starting to see their potential come to life. These pihinga have learnt some skills and are beginning to build a passion for the industry. They are extremely vulnerable and require a high level of care.

Photo by Saurabh Narwade on Pexels





“The sector needs to tell its story better. There is agreement that roles and career pathways are invisible, non-linear and inaccessible for many, which hinders the desire for a more diverse workforce. Better marketing, managed by a pan-sector body, is perhaps needed to develop this narrative and provide PR for the sector.”

— Screen training hui participant

In recent decades the way screen content is consumed and produced has transformed significantly. Content production and dissemination has been widened through platforms such as YouTube, and multinational streaming providers have greatly increased the variety and availability of professionally produced content. In spite of this, there remains a lack of knowledge among people outside Toi Pāho about how productions are made, and what roles and career options exist.

Film, television and game development are all about storytelling, and the industry could do more to leverage this ability to tell their own story. A recurrent sentiment throughout the research was the need to celebrate the sector’s successes, and to profile the people who bring projects from concept to reality. This is particularly true for below-the-line roles, which are all but invisible to people outside the industry.

“There is a real shortage of below-the-line people in New Zealand, that’s just a fact. For the amount of offshore and local productions, we could definitely do with more skilled staff in that area. However, in the ‘above the line’ there’s actually probably too much competition.”

— Senior lecturer and director, film

“We need to celebrate success, because the more that people are encouraged to prosper [and be supported] to succeed with their businesses, the more people they will hire, the more stories they can tell. I feel like that focus has always been missing.”

— Screen agency executive



Photo supplied by South Pacific Pictures



Photo supplied by South Pacific Pictures



Film, television and game development are all about storytelling, and the industry could do more to leverage this ability to tell their own story. This is particularly true for below-the-line roles, which are all but invisible to people outside the industry.





## Whakatō kore, hua kore No story, no dream

We heard that exposure to the value of creativity and the potential of screen, technical and digital production roles – from whānau, nursery to high school – is critical to building the standing of screen careers and securing an inclusive and diverse workforce in the medium to long term. However, we were also told that a wealth of talent is lost to Toi Pāho even before rangatahi leave school.

41%

41% of school leavers desire careers in the creative, cultural and recreation and technology industries

“If you asked me at eight [years old] what I wanted to do, I wanted to be a writer. It kind of just got squeezed out of me, I suppose.”

— Career changer into film

19%

19% of school leavers pursue careers in these industries

In August 2022 the Tertiary Education Commission (TEC) published research on how school leavers decide what to do when they leave school. That research found that 41% of school leavers, the highest by a long way, dreamed of careers covered by the creative, cultural, recreation and technology Workforce Development Council (Toi Mai), though only 19% were planning to pursue those dreams. In contrast, sectors with perceived higher demand/stability (i.e. health, education, construction) featured more highly in planned careers than in dream careers.

Source: [www.tec.govt.nz/assets/Publications-and-others/Transitions-from-Secondary-School.pdf](http://www.tec.govt.nz/assets/Publications-and-others/Transitions-from-Secondary-School.pdf)



PASC members, Julie Zhu & Steven Chow, working on their documentary Meng





Photo supplied by South Pacific Pictures

Before whānau can jump on the waka with rangatahi and embrace a digital journey towards below-the-line screen careers, a story needs to be told. Presently there is no mythology around digital technologies, making it difficult for te ao Māori to engage with rangatahi who are curious about technology-based careers. There is no medium through which to facilitate a discussion or enable iwi, kura and whānau to engage and support their tamariki. There is a consensus view among Māori industry leaders that a pūrākau around technology told through a te ao Māori lens needs to be created.

The Electricity Supply Industry (ESI), for example, has adapted to this challenge to incorporate a modern industry into mātauranga Māori. The 'Waihiko' pūrākau was created to connect Māori to digital technology and support rangatahi into digital and creative careers. It acknowledges the rapid propulsion of society into technology and seeks to create guidance for Māori to connect with and belong in this industry. This pūrākau can be expanded into other areas of digital technology to further diversify potential available for rangatahi.

With each pūrākau told, a connection to the roles and opportunities available needs to be made for pathway activation. An advantage of a new pūrākau is that pathway activation can start with tamariki as they begin to imagine their role in the world.

“It’s about mapping out what’s currently available for our people and how they can get on their digital tech journeys. It’s also about identifying where the gaps are. And today, primary school is the blatant gap; it’s so very clear. We know already that we need to be doing some Māori activations and events much earlier. We target high school and that’s really just where you end up. But it’s almost too late by the time they’re in high school. You’re actually preaching to deaf ears because they’re already on their pathway.”

— CEO, Māori storyteller and tech entrepreneur, content and technology

“We need our iwi experts to create an industry narrative on how technology applies to iwi. We need a story that wraps technology into te ao Māori or puts the te ao Māori view around technology. We need it to feel familiar so we can connect to it. Even if the story is made up... stories are how we understand our world. We need to revitalise that aspect of it and that it’s our journey to own.”

— Māori partnerships and pathways advocate, game development





PASC members, Julie Zhu & Steven Chow, working on their documentary Mieng

“Vocational pathways for Māori into tech are fraught with many challenges. We need to take a few steps back and look at the education system itself and vocational pathways as well, not just the technology sector. Typically, our kids aren’t guided into pathways for STEM. Technology, Engineering, Mathematics – we want to steer them into those subject pathways so hopefully they’ll end up in high-paying, high-value roles that they can benefit from.”

— CEO, Māori storyteller and tech entrepreneur, content and technology

## He takahi pihipihī, he uru kore A wealth of talent is already lost at a young age

Under the prerequisite NCEA system, students are often having to identify potential career pathways before Year 10, with creative and screen careers, particularly in below-the-line careers, going under the radar for most. We heard that pathways for secondary school students into the industry are ill defined and not presented as viable choices during the career selection process, resulting in poor subject selection by students looking to pursue screen careers.

“We go and talk to schools and say, do you like playing video games? And this is super easy for me. Almost every student puts their hand up. But it might be the first time they’ve ever thought of that as a career pathway. So you’re left as lone wolves carrying that message from an educational perspective.”

— Learning experience developer, game development

A recurring view among educators and industry practitioners is that wider schooling practices are contributing to under-representation by diverse groups in the sector. Deeply ingrained assumptions and unconscious bias within the education system is thought to be steering underserved groups away from maintaining a creative mindset and entering screen pathways.

“If you look at kids, they are so creative and open but the further they go along in their schooling, the system seems to take those options away.”

— Industry leaver, television

“I am being deadly serious when I say creativity stops at high school. It truly does.”

— Learning experience developer, game development

“Television is not very well understood by the Asian community because it’s not seen as a valid career path. So my family said you need to get a real job. And it didn’t matter that I was earning more than my eldest sister, who had a double degree in business and hospitality.”

— Screen diversity advocate group general manager, film and television

Academic streaming (banding students of similar academic aptitude together) is seen as a critical barrier to overcome, as it too often prevents Māori and Pacific rangatahi from exposure to the Science, Technology, Engineering and Mathematics (STEM) subjects required to progress into technology-based screen careers. Instead, they are too often and too early being directed towards the manual and service careers their parents and grandparents have worked in.

“School streaming is a massive challenge. It’s systemic and it’s not going to take five years to solve. It might take a generation, maybe two, to remove streaming. There’s research to prove that streaming is a terrible thing for rangatahi. When streaming is excluding and preventing our kids from considering a pathway into a particular subject field, like technology for example, then I feel that’s not OK. You’re removing an option and opportunity from not being able to access these pathways.”

— CEO, Māori storyteller and tech entrepreneur, content and technology



“We go and talk to schools and say, do you like playing video games? Almost every student puts their hand up. But it might be the first time they’ve ever thought of that as a career pathway. So you’re left as lone wolves carrying that message from an educational perspective.”

— Learning experience developer, game development



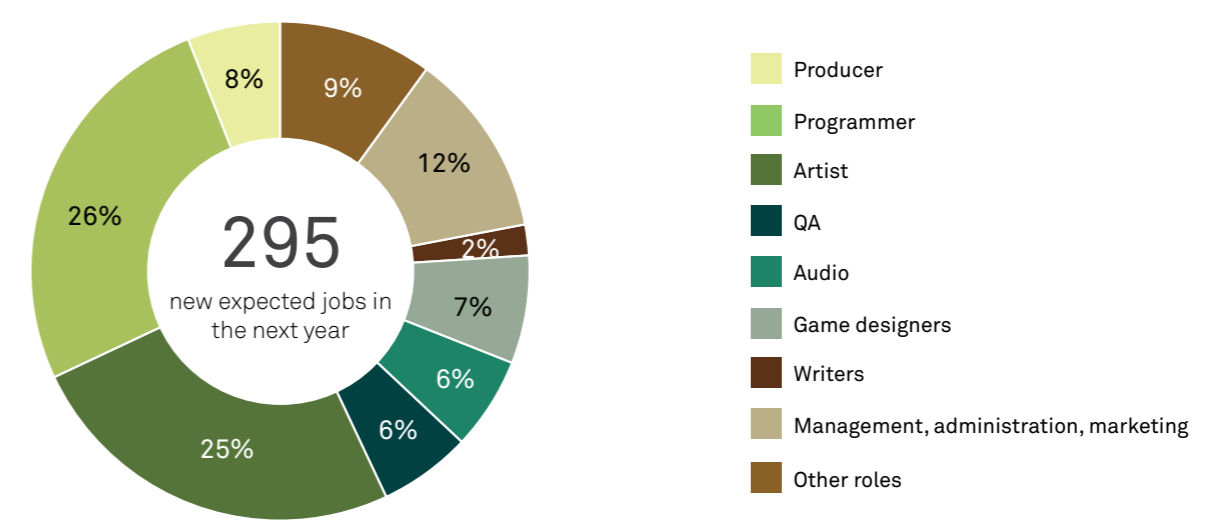




Toi Pāho: Capability and Development Plan: March 2023

Icarus | The Future of Survival, created by Rocketwerkz

### Additional skills required by game development studios in 2022-2023



Of the 295 new expected jobs in the next year, 25% will be for artists and 26% for programmers, 12% for management roles, 8% for producers and 7% for game designers.

Source: NZ Interactive Media Industry Survey, NZGDA (2021)

“There is a streaming issue and no creative pathways from school. Māori get pushed into construction, orchards, et cetera. We need inductions that allow rangatahi to continue a creative mindset within industry.”

— Educator and rangatahi advocate

There are also misconceptions about the nature of Toi Pāho roles: for example, we heard a general perception that the game development industry requires an ability to code; however, coding itself is central to only 26 per cent of new jobs expected over the next year (NZ Interactive Media Industry Survey, NZGDA (2022)).

“I would like to know more [about the game development industry] but I don’t know enough to even think about it. I assume you need to know how to code.”

— Year 11 student

To avoid young people and their whānau ruling themselves out of screen careers too early, there is a need to connect them with industry to build an understanding of the wide range of roles available and make the requisite skills for each clear. There is an opportunity for industry to work more closely with schools in hands-on, screen-based activities and initiatives that engage students and allow them to understand the breadth of Toi Pāho roles by experiencing them first-hand.

“We worked with all Wellington schools and talked to them about making a short film as part of a competition. We would work with these kids with mentoring and workshops from some amazing directors and cinematographers, and so they get really good practical skills. We really pushed home the transferable hard skills, working together as a team, working with a budget, and with limited resources. We designed it to sit within NZQA requirements for English and Drama so busy teachers didn’t have any extra work.”

— Production studio executive



## He kaupeka takatupu ā matihiko Digital inequity is a barrier

Difficulties in accessing computers and the internet at home is still a challenge for many young people, particularly in regional communities and for Māori and Pacific rangatahi. We heard that engaging communities and whānau with initiatives that improve access to computers, the internet and basic computer skills is essential to uplifting diverse representation in game development and other computer-aided screen roles like animation and VFX.

Existing funding structures and mechanisms towards digital uplift are not necessarily designed to provide the tools needed to activate an interest in screen roles. Also, many initiatives have been described as short term and not able to create lasting change, or properly allow rangatahi to take advantage of the tools and equipment provided. Upfront investment is required to address digital inequity, and to grow long-term diversity into computer-aided technical and creative screen roles.

“Schools may decide to give every student a Chromebook. So that’s the equality. Anybody can call it equitable, but I don’t think it’s equitable. If you’d ever checked that everyone has an internet connection, then they can afford to do that. Or even understand how to use the tools effectively.”

— Independent producer and director, television

“We found our kids get given Chromebooks to do their mahi in school. But they couldn’t access any of the tools online at home purely because they don’t have internet to engage in their own education, which is their right. How do we deal with that? Our money is not set up to fund initiatives like that. Who can we work with to find real solutions for these problems and issues?”

“It’s a hard industry to just get into because there’s an upfront cost to being in it. Whānau can’t afford a \$1,500 PC to jump in and just start creating. Part of this is ensuring they even have the tools. We’re in labouring jobs and doing this mahi where there’s money upfront. That’s partly the reason why we can’t get Māori in the industry. It’s just the reality of it. We can’t see our kids here because of the expense and investment.”

— Māori partnerships and pathways advocate, game development







## He kākano i ruia mai i Rangiātea

### Realising the potential of kura kaupapa seedlings

Māori industry leaders view kura kaupapa as growing rangatahi with a strong advantage towards screen pathways when compared with youth who are engaged with traditional schooling systems. This is due to the innate gifts of te reo and te ao Māori, built on principles of environment, science, cultural values and the importance of storytelling. Similarly, manaakitanga and kaitiakitanga are viewed as being well aligned with industry needs, encouraging Māori to act towards others with empathy, care and respect.

Despite these natural skills and gifts, there are presently no courses or programmes taught in kura kaupapa that provide a bridge to connect these strengths with pathway opportunities into industry. Rangatahi are currently viewed as being ‘thrown in the deep end’ with their pathways to screen industries, with no direct funding available for workforce development and little pastoral support offered to enable them to succeed in non-Māori businesses.

“Te reo gives you heaps of benefits. For me, with media, it’s a problem-solving language. What do I mean by that? Te reo has a whole lot that goes with it. It’s scientific, it’s environmental, you learn all the values that come with it – kaitiakitanga, well that’s media-aligned values, right?”

You know, you operate in a certain way. You have empathy for people. You have a respect for your talent. Now people will say, well, that that can happen with every language. But I don’t think it’s true. I think it’s inherently a part of te reo and tikanga, which I see going together. So that’s the competitive advantage that we look for and, you know, I’m quite specific around kura kaupapa because it teaches you how to perform, oratory skills – you get used to working in front of people as well with people.

“The Western kind of approach is to be objective and don’t be clear on your positionality. Don’t put yourself in the story. That’s the stuff we were told. My view is completely different, because the closer you are to your community and whānau and hapū the more advantages there are. And that’s why I say ‘you should be really upfront about your positionality because everyone understands where you’re coming from’. And it’s time to balance the media perspective on things Māori – kaupapa Māori theory; Māori media should be kaupapa Māori in action.”

— Māori broadcaster and director, television



# Hei taunga takatupu

## Welcoming people from underserved communities

There is general consensus that enabling Māori, Pacific, Asian and new migrant communities to have a stronger voice and presence will be mutually beneficial for the sector. It became evident, however, that these underserved groups are far less likely to be included within the few existing pathways from school to screen careers.

“Many young immigrant kids and women don’t see themselves in the famous film-makers of our country, so they don’t think that they can do it and that’s not my place. Taika [Waititi] has done amazing work to get the young Māori boys in the country to look up to him and [believe] that they can do it [too].”

— Emerging talent, film

“There is nowhere rangatahi can go while they’re at school to experience some industry professionalism that can freshly water the seed that might be already blossoming within them. It’s about capturing them before they leave school, so when they leave school there’s already a direct pathway for them. We’re already ready for them, as opposed to when they’ve left school, they’re doing nothing, and then we have to go find them and get them ourselves.”

— Independent producer, television

We learnt that existing initiatives by sector organisations to encourage young people from diverse communities to enter the industry are facing sustainability issues due to a lack of funding. These initiatives are often provided by membership bodies or Small- and Medium-sized Enterprise (SME) employers that are too small to absorb the cost of training or access training funding through the Government. These organisations spoke of difficulties offering permanent roles outside of light internship experiences, with the current nature of contestable funding and a feast-or-famine work pipeline tempering confidence to establish permanent pathway options.

“I want to bring a set number of [rangatahi] in for three to six months per year so they can learn, then they can stay or go. It’s a big commitment that will not be possible without funding.”

— Studio director, game development

Within game development, we learnt about successful bespoke initiatives – for example, Dunedin’s Centre Of Digital Excellence (CODE) – to provide rangatahi with exposure to game communities, and opportunities to re-engage disenfranchised rangatahi Māori with education, technical and creative pathways by using gamification to rethink current primary and secondary education methods.



“We engage with schools to subsidise and support game dev clubs. We send a bus out to collect rangatahi Māori from their school and get everyone in a room together making games.”

— Workforce development hub executive, game development

“Rangatahi love playing games, but don’t know they are made here. We need to capture them at primary – by high school they sort of already know what they want to do.”

— Studio director, game development

# 75%

Of households surveyed, 75% called for more diversity in video games, starting with accessibility and inclusion.

Source: Digital New Zealand Report, Interactive Games and Entertainment Association (IGEA) (2022)



## CODE – Te tautohu, te tautoko i te māhuri

### CODE – Identifying and supporting māhuri

The Centre Of Digital Excellence (CODE) is a positive working example of what might be achieved when collaborative pathways are developed in tandem with the communities they serve.

Based in Ōtepoti Dunedin, CODE is a regional economic development initiative designed to encourage and nurture a thriving game development ecosystem. It offers a launchpad for aspirant game development entrepreneurs, working with them from start-up through to business maturation. It is intended that successful partnerships then look to drive further regional employment themselves, creating a sustainable circular model of prosperity.

Of equal importance for CODE is the founding drive to create pathways for rangatahi into industry. This involves working holistically with the wider industry ecosystem to remedy many issues identified in this report. Specifically, CODE works directly with Otago Polytechnic and the University of Otago to design relevant curriculum and industry-ready courses to streamline pathways from education to the workforce. Targeted mentorships, industry workshops, meet-ups and other auxiliary services are provided to strengthen pathways for rangatahi and provide places and spaces for whānau to engage within this journey.

‘Ānō me he whare pūngāwerewere’, ‘as though it were a spiderweb’, speaks to CODE’s ethos of linking the raw skills developed within traditional Māori arts and crafts to new skills needed for game development. This is seen as an opportunity to imbue te ao Māori into the craft of creating authentic Māori games.

“What I really love about CODE is that from the very beginning they wanted partnership and Māori involvement. They wanted to work with local iwi to achieve those outcomes. That needs to be the approach taken. We need to find and recognise those businesses with industry mahi available for Māori and [that] are receptive to pushing that kaupapa. We’re set up for purpose. We’re not here for the long term. CODE’s been established to create a sustainable games industry in Aotearoa.”

— Māori partnerships and pathways advocate, game development





## Kia kite ai te matarau o Toi Pāho

### Enabling early experience of a variety of Toi Pāho roles

A recurring theme was the need to provide early-stage pathways that enable candidates to experience a wide variety of screen roles first-hand. This was seen as essential to building a foundational understanding of the wider mechanics of production pipelines and ensuring the best possible match for career specialisation.

“Most kids have no idea what the hell they want to do. So, the ‘smorgasbord’ works well for them because they get to try all the different things and discover what they love most.”

— Emerging talent, film

“I was looking at careers pages about what production assistants, coordinators, production managers and even producing roles do. There were overseas articles about how it’s different in America or in the UK but there wasn’t a ton of stuff about what it’s like to be a person in the industry here.”

— Final-year student and career changer

For Māori media and production companies, exposing rangatahi to the diversity of roles and opportunities available is hindered by short-term funding contracts. A flow-on effect of narrow funding windows is a general hesitancy to induct or onboard rangatahi, with a latent fear of not being able to provide ongoing employment and stability.

“Most rangatahi say they want to be on TV. But when you show them all the options available – directing, producing, editing etc. – they love the diversity of opportunities available. Exposure is the main issue. How do you get the exposure?”

You don’t necessarily need money for that, but you do need a kind of a set production house. But the problem with production houses is there’s an overhead capacity issue. You might only be able to contract ten people if you are a small to medium production company and have that on your books. So it becomes an added issue.”

— Māori broadcaster and director, television

There is also a desire to ensure an entrepreneurial capability is unlocked within rangatahi during their voyage into screen careers. For example, by linking a love of video games with the business of game production it may be possible to turn a passion into a pathway. Nurturing an entrepreneurial ability is also perceived as creating a fall-back option should the promise of screen pathways not eventuate into their initial career choice.

“I think there’s a lot of hype about jobs and roles in the industry by the training providers. It’s important that our young people are also taught to be entrepreneurial, to have a crack at making a couple of games and putting them in the App Store in case the job they’re aiming for doesn’t exist in the market.”

— Learning experience developer, game development

Industry expressed concern that talent tends to ‘go missing’ after the school years, where it becomes difficult to regather rangatahi and guide them to the potential on offer. The missing steps from secondary to tertiary education, or into employment, are seen as a critical breakdown in current industry pathways.



## Kia whānui ake te tororanga o te aka

### Expanding whānau perceptions

Stats NZ Tatauranga Aotearoa states that in 2022 the median weekly income was \$55,796 for Māori and \$55,276 for Pacific Peoples, which is less than the median weekly income for all ethnic groups in Aotearoa (\$60,320). It is suggested by Māori that realistic game development salaries of over \$90,000 for people new to the industry may be incomprehensible to many. One salary alone at this level of remuneration is seen as an opportunity to redefine the financial potential of whānau, placing them into a more virtuous cycle of prosperity. With iwi and whānau unable to kōrero with rangatahi around their dreams of game development or other screen production careers, scarce support exists for exploration of these pathways.

Embracing Toi Pāho occupations comes with some trepidation for Māori and Pacific whānau. Many negative connotations exist today, such as the perceived necessity for solitary rather than communal activities, and fears around online bullying and the inevitable parental concerns of rangatahi engaging with social media. Stories of online abuse appear to present themselves more boldly to whānau than the success stories of new businesses founded in a digital medium. In these instances, caring for the safety of tamariki is inhibiting early support in pursuit of many Toi Pāho careers.

We heard a stern caution from those already in the industry, however, about any further delay to Māori fully embracing the digital medium:

“For whānau who are unsure about venturing into this digital space, we can liken it back to our tūpuna coming to Aotearoa. They jumped on a waka, not knowing if there was going to be some place at the end of the journey. For the digital space, we know other people have traversed it. We can learn from their examples and find our own way of navigating this space. We’ve already done the ‘eke panuku, eke Tangaroa’; we’ve just got to do ‘eke hangarau’ now. We’re just jumping into the digital space, and whether iwi like it or not, the waka is going to leave.”

— Māori partnerships and pathways advocate, game development

Other cultural norms influence pathways to game development in particular, with a person working on a PC perceived as being antisocial in nature: a relationship of person and machine at the expense of others. In comparison, gaming consoles are viewed as being more social, where ‘multi-player’ allows for people to interact in a more socially acceptable format.

South Seas Film School, Yoobee College of Creative Innovation



“There is a stigma that you’re going to be wasting your time by yourself working on a computer. Because computers are seen as quite isolating, it’s a one-on-one thing with your machine. That’s why whānau tend to opt in for things like PlayStations and Xboxes. It’s more what we call ‘couch-play’ where we watch TV and lounge together, whereas computers are like one-on-one tunnel vision.”

— Māori partnerships and pathways advocate, game development

When Māori look to the game development and other screen industries the view is obscured by not seeing roles occupied by other Māori. Few leadership positions in these industries are held by Māori, diluting the pool of role models or ‘allies’ to follow. In the absence of Māori leaders, the businesses that comprise the industry may present an unwelcoming and foreign environment for new industry entrants. Current sector cultures are therefore reducing the confidence of rangatahi to perform to their potential.





“There has to be an education process around informing our families. What does our pathway to technology look like? What do you get at the end of that road? And how are our kids going to be supported when they get there? There are challenges even on that journey itself. We need an awareness process where our whānau are being educated in parallel with rangatahi. Show me what technology looks like – the potential, the opportunities and pathways to potentially get there. Maybe it requires an activation workshop in your local community, your region to address this.”

— Founder, designer, Māori design studio, creative and digital media

“Self-belief? This industry looks unobtainable until they see someone that looks like them in leadership roles. In the game development industry, it’s always important to talk about the value that Māori bring to the industry rather than the value of the industry itself. The industry really needs Māori because we’re awesome storytellers. It’s part of our culture. Our cultural narratives and oral traditions are just way better than Game of Thrones, you know! We need to show them that our kōrero is the best and put value to what’s already part of our culture. It’s about showing rangatahi that you can do this. It’s not about the coding and crunching numbers – that’s only 20 per cent of it all. We bring so much to the other 80 per cent that’s required.”

“There’s no ‘right way’ or ‘right time’ to engage rangatahi, just whenever they’re ready. And ready can look like being unready and just wanting to know more. We need to focus on helping any family feel confident about this space, about what value it has for us and what value we can bring to it. Those conversations need to be had and if it can be done with people that are Māori, cool. If not, they need to be Māori allies. We need to do it in their space and in a fun environment, not welcoming them into your corporate entity and sitting them down to make them feel out of place. These conversations need to happen in environments where people feel comfortable and where they have mana. Get them to feel confident that it’s under their control.”

— Māori partnerships and pathways advocate, game development



Photo by Robo Wunderkind



## Te Rangiāteatanga o te kākano Self-belief, skills and recognition



“We find out what their values are and match the best suited task to them. I hired the bro and taught him so he didn’t need to do a degree. Now he has bought his first house. I find more satisfaction in honing people’s skills. We don’t mind losing good talent because we can only pay so much, and we are transparent about that. I was never the most talented but grinded away. I went through the traditional education route to prove my value... But found it was all bullshit.”

— Founder, designer, Māori design studio, creative and digital media

An issue highlighted in research was that many Māori don’t know, or don’t believe, that their raw talent can get them in the door of industry, let alone lead them towards advanced careers in screen, tech or game development. Māori are not told, for example, that ‘if you can tune a guitar by ear, then you have the necessary skills to create the sound of water in a game’ or if they are told, those messages are not reinforced enough. We heard that the best way to attract more Māori into these industries is by showing them how valuable their raw talent is and how much demand there is for people with their natural abilities – show them gaps in the industry workforce that they can fill and celebrate how valuable it is to be Māori.

“We find out what their values are and match the best suited task to them. I hired the bro and taught him so he didn’t need to do a degree. Now he has bought his first house. I find more satisfaction in honing people’s skills. We don’t mind losing good talent because we can only pay so much, and we are transparent about that. I was never the most talented but grinded away. I went through the traditional education route to prove my value... But found it was all bullshit.”

— Founder, designer, Māori design studio, creative and digital media

“So, it’s like: here’s an awesome business. It doesn’t need to be Māori to be awesome. They just need to be awesome in the first place. For Māori and game dev, it’s about being recognised for the value of their technical skills rather than being ‘the Māori’ there. They have the skills to do it and are the best person for the job. So, it’s like being Māori is cool; we already know that, but it doesn’t have to define you as an individual – unless you just want to be Māori, then that’s cool too. There’s a lack of us in the industry right now, with less than three per cent of the games industry being Māori. My purpose really for Māori is to grow that, to match our population percentage. I’m not going to solve it overnight, but I’m working on it.”

— Māori partnerships and pathways advocate, game development



## 2. Hei wao taunga manu rere Supporting people to enter and grow within Toi Pāho

I tēnei piko o tō mātou ara, kua tomo atu ngā pihinga ki te rāngai ahumahi, ā, kua tupu haere hei māhuri. Heoti, kāore e taea e te pūnaha hauropi o Te Wao Nui o Toi te tiaki pai i ngā pihinga i tēnei wā tonu, nā konā kua kaha te pāpātanga ngokoretanga ki a rātou kua tomo mai. Kua tīmata ēra pihinga ruarua e ora tonu ana ki te tū hei māhuri, engari e ngohengohe tonu ana, e pānekeneke ana hoki. Ka pā mai ana tētahi āwhā, tētahi kinotanga nui rānei ki te māhuri, ka roa pea a ngākau e marū ana, nā reira e waiwai ana tā mātou kauawhi i a rātou e tupu ana hei rākau matomato - e rapu haere ana i tōna anō wāhi i Te Wao Nui o Toi.

Ka whanake ā mātou rākau rangatahi, atu i te māhuri ki te puāwaitanga, e whai hua ai, e manahua ai. Nāna ngā hua rākau, ngā pua hoki o Te Wao Nui o Toi, ka mutu, e pērā ana tōna kaha, e taea nei te tū tonu ahakoa ngā pānga kino. Inā te mōrearea o te ara i te pihinga ki te puāwaitanga: ka hia ngā rākau rangatahi ka hinga rā i te ara nei?

At this point in our journey our pihinga are entering the workforce and are on their way to growing into māhuri, or saplings. The ecosystem of Te Wao Nui o Toi as it stands is not able to nurture pihinga well, however, which results in a high rate of attrition for those who enter. The few pihinga who do survive are now beginning to stand on their own as māhuri, but their trunks are soft and vulnerable. As one big storm or major incident can have long-lasting negative effects on māhuri, it is vital that we wrap around and support them as they grow into strong rākau – finding their place as trees within Te Wao Nui o Toi.

From māhuri, our young rākau move into the puāwaitanga phase, which means to bloom and blossom. These established rākau bear the fruit and flowers of Te Wao Nui o Toi, and are now strong enough to withstand reasonably harsh conditions. The journey from pihinga to puāwaitanga is a perilous one: how many talented young rākau will be lost along the way?

Photo by Suriya Nathan on Pexels







Photo by Jakob Owens on Unsplash

The barriers to entering the screen industries are significant and many. Tertiary graduates spoke of being put in direct competition with each other to secure one of the few available industry placements, where (particularly in film) trainees are often expected to gain years of further 'on-the-tools' experience before being considered for fully paid production roles. The conviction that the sector exists as a passion industry sets a dangerous precedent and leaves entrants vulnerable to exploitation. Indeed, we heard that working your way into the sector by undertaking long hours of low-paid or unpaid work is par for the course.

“You have to do whatever you can to try and keep moving up. If you're not working at least a 12-hour day, feeling burnt out, or feeling bad, then you're not doing your job properly.”

— Recent entrant and editor, film and television

Financial difficulties are seen as a major contributor to entrants dropping out of the screen industries, with a need to 'put food on the table' rather than carrying the financial burden of an incomplete and narrow degree into low-paying work opportunities. We heard that the fickle nature of employment, particularly early on in screen careers, necessitates many workers to supplement their income through other casual employment. These external commitments can limit workers' ability to take screen contracts when they come up, with contracts instead going to candidates with the financial runway to grow towards a self-sustaining career. We heard that talented workers from diverse backgrounds are being lost to the screen industries in this way.

“It's such a fast-paced industry. We need environments where they can break eggs to learn how to make omelettes.”

— Screen guild executive

“A lot of people coming out of tertiary education get part-time jobs. Then it becomes hard for them to be flexible with their work to get the experience. So, it becomes about people who can afford to be in the industry and monotonous in terms of the kind of people in it.”

— Producer, film

“It's such a fast-paced industry. We need environments where they can break eggs to learn how to make omelettes.”

— Screen guild executive

Significant workforce pressure is not limited to entry-level roles. Established workers spoke of the need to protect their role and their services, leaving little possibility to take leave, have a family or engage in other 'life' activities. Home ownership, too, remains out of reach for many industry participants, with property finance all but inaccessible due to the variable income of contracting.

“I definitely plan on having a family but it's just not feasible because my partner is also in the industry. We're both lucky that we have full-time work but in order to get ahead, freelance is the only way because you're working your arse off and get paid accordingly.”

— Recent entrant and editor, film and television



# He kaupeka whakatiki, e takatupu te tupu

## The sector needs talent, but people are struggling to get a foot in the door

Entering Toi Pāho careers can be a daunting task for new entrants. Gaining experience can depend on an ability to navigate social and hierarchical structures, or to leverage existing connections to the industries through friends or whānau. We heard the view that this situation creates an inward-looking recruitment model – fuelling inequity and causing unique talent that might have otherwise greatly enriched the sector to miss out.

“This industry is hyper social: you need to be able to know people, connect with people and socialise with people in order to get jobs. I know a lot of people in the trans community are very introverted and hyper aware of what people think of them. So it’s also [about] being incredibly vulnerable to be able to put yourself out there as your true self to the world, and it’s something that is terrifying to do.”

— Aspiring writer, director and videographer

“We often know of others because we’re a bit of a village, and if someone doesn’t endorse someone, you probably won’t take them on unless you’re desperate. We’re really hesitant to endorse it because it’s our reputation, not theirs.”

— Independent writer and director, television

“I always found it to be a boys’ club. If you knew the right people and if you got along with someone higher up, you go up the ranks. Otherwise, it doesn’t matter how good you are, you’ll stay where you are.”

— Industry leaver, television

We heard that reliance of the industry on networks for recruitment can mean that those in positions of power will hire and promote people who are similar to them.

“I always found it to be a boys’ club. If you knew the right people and if you got along with someone higher up, you go up the ranks. Otherwise, it doesn’t matter how good you are, you’ll stay where you are.”

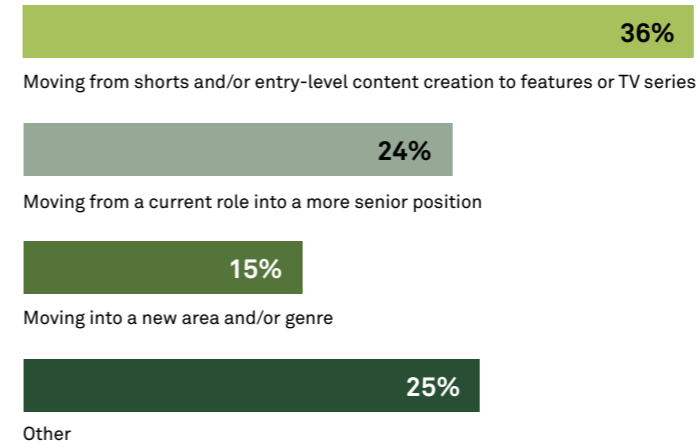
— Industry leaver, television

For many starting out in Toi Pāho, missing life skills such as the ability to legally drive or communicate by phone effectively were seen as a barrier to entry.

“Inability to make a phone call – that’s a real young person thing. If you want a production assistant role or a runner and can’t pick up the phone and make a call, you’re not particularly hireable because you’re probably going to cost me.”

— Veteran editor, film

### Stage of career



When individual screen workers were asked about their stage of career progression, female and Pacific workers were significantly more likely to be working their way forward from entry-level roles.

Source: Screen Workforce Survey (Individual), Toi Mai (2022)

### Stage of career by demographics

	Male	Female	Māori	Pacific peoples
Moving from shorts and/or entry-level content creation to features or TV series	33%	42%	34%	46%
Moving from a current role into a more senior position	22%	21%	20%	23%
Moving into a new area and/or genre	17%	13%	21%	10%
Other	28%	23%	24%	20%

Photo supplied by South Pacific Pictures





# Ngā here takahi

## Cycle of exploitation

The first steps into the sector (film and television, in particular) following formal study often come in the form of low-paid or unpaid internships,<sup>8</sup> which are seen as exceptional opportunities to develop a portfolio of work and gain invaluable production experience. Often viewed as a ‘rite of passage’ for new entrants, the flip side of many internships is less than desirable, however, with a general view across industry and all demographics that internship experiences can be exploited by some in the industry as a source of cheap labour.

“I was a production assistant but I was also doing the art department, the logging, the camera and the unit, which is the catering. We were contracted for 50 hours a week but we’d do 60 to 70 hours a week and that’s unpaid. Any job when you first start out in the industry is often unpaid.”

— Director and producer, television and digital media

“There is this facade of being a family at [media company], but really that just allows – especially young people – to be exploited.”

— Aspiring writer, director and videographer

“Because it is a passion industry, I know of people who spend five years in a game dev company to get their ‘creative fix’ and then five years in corporate to get paid.”

— Studio executive, game development

Young screen workers described the need to be able to demonstrate up to three years of practical experience before being viewed as a suitable candidate. This fuels unhealthy workplace practices where people essentially work for free or reduced rates, undercutting experienced workers to try to gain a foothold in the industry.

<sup>8</sup> Not to be confused with internships offered for credit as part of course-work offered by tertiary providers, which are considered one of the benefits of tertiary training provision.

“[Internships are] marketed as a good opportunity and experience but that causes an issue down the line because it starts undercutting other people as well. People can’t then charge the correct rate because all these people are willing to do things for free.”

— Recent entrant and editor, film and television

A general reluctance was observed within Māori to ‘misuse’ passion-driven creatives in an internship capacity as observed in other dimensions of the screen industry. In fact, the term ‘internship’ was not well thought of, with ‘induction’ preferred by many as it signals a genuine intent to provide a permanent career pathway for the individual:

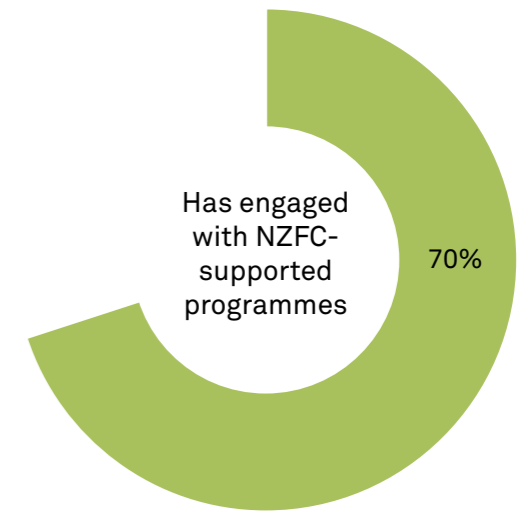
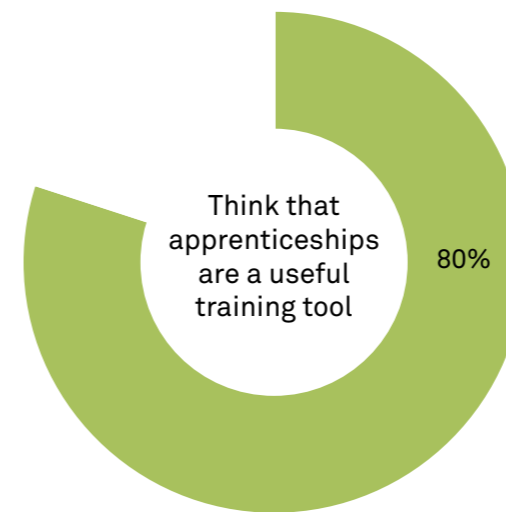
“We don’t like the idea of a temporary internship. The induction we do now is really different. We try to do a month without people having to pick up any tools. They just sit and watch how it goes, go out on stories, watch the camera, watch it all. The goal is to try and understand the whole process first. And that’s not a long shadow process because there’s so many constituent parts to even learning the very basics of production. Ideally a year would expose rangatahi to the diversity of roles available. If there was a more permanent solution like a set production house, we could do so much more.”

— Māori broadcaster and director, television



Photo by Alex Simpson on Unsplash

### Company views on apprenticeships and professional development



Most screen companies see value in apprenticeships as a skills training tool, with seven in ten firms engaged with NZFC-supported professional development programmes and opportunities. Internships, mentorships and attachment are the most common types of professional development screen employees were supported to undertake.

Source: Screen Workforce Survey (Company), Toi Mai (2022)





Photo by João Marinho on Unsplash

A challenge faced by the sector in relation to skills development is the way it is treated differently by the New Zealand Government from other parts of the nation's innovation ecosystem. For example, the Government (via Callaghan Innovation's R&D Experience Grants programme) is currently funding 1,200 tertiary-level students to take up full-time paid internships across 560 businesses. The programme gives the students an opportunity to gain valuable commercial experience, while at the same time supporting innovative businesses to 'turbocharge' their research and development projects. A similar initiative applied to Toi Pāho would see marked improvement on the current situation.

Although there is awareness of the pitfalls created within a heavily contracted sector, we heard a perception of indifference among some established Toi Pāho professionals to the challenges faced by young people entering the workforce. We heard that an unspoken and unapologetic expectation exists that new industry participants should accept the industry as it is and cope with it or seek work elsewhere. The attitude 'If I did the hard yards and survived, so can you' is prevalent.

"I worked bloody hard to get my first job in television and I also worked really hard throughout my career."

— Screen agency executive

"There's a weird expectation from the industry that other people have had to struggle, so everyone should have to struggle – 'I had it really tough, then you should have it really tough too'. And that's a really toxic thing that's been filtered down through generations."

— Recent entrant and editor, film and television

"There's a weird expectation from the industry that other people have had to struggle, so everyone should have to struggle – 'I had it really tough, then you should have it really tough too'. And that's a really toxic thing that's been filtered down through generations."

— Recent entrant and editor, film and television

This unappealing industry narrative may act as a deterrent to newcomers wanting to enter the screen workforce; filtering out a diversity of talent with limited means outside of Toi Pāho to maintain a financial, social and cultural 'runway' on which to launch their career.

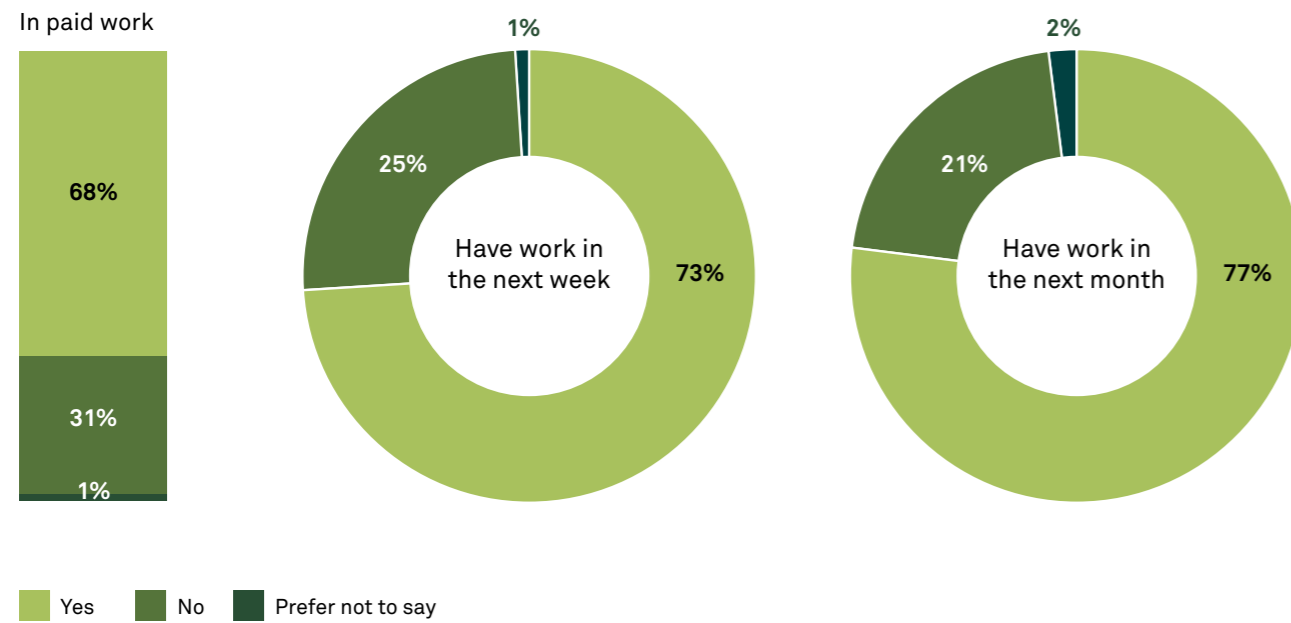
"The absolute top one that bothers me is the idea that young people coming into our industry tend to be runners and tend to be overused. I, as an employer, have a huge obligation to my team's right to health and wellbeing under the Government's wellbeing approach."

— Media company founder and trainer

We heard that some production studios in Aotearoa are replicating overseas models of recruitment and employee management that are often not well aligned with general expectations of, and laws detailing, what compromises fair and equitable employment in Aotearoa. There is a desire from many in the industry to slow down and build a sustainable workforce plan tailored to local circumstances.



Work status for individuals within Toi Pāho



31%

Of the respondents, 31% indicated they currently do not have paid work. A quarter of respondents indicated they did not have work in the next week and 21% did not have work in the next month.

Source: Screen Workforce Survey (Individual), Toi Mai (2022)

“Some production companies take advantage of interns with mass labour of young people, which is not so great for those young people because they get stuck in a big company where they think that’s the only way the industry works. They won’t leave because they get told that the company they are working for is the best and that’s the way the industry works. Two years later, they are just ghosts of humans. They’ve been worked so hard that there’s no passion left.”

— Post-production company director, film and television



Photo by Alex Simpson on Unsplash

“The big productions come in, they take out half [the] industry or three-quarters [of the] industry, nothing else can happen and then they leave.”

— Post-production company director, film and television

“[We need to] pull back the lens and really look at where we are going wrong with this. It’s just not a pretty situation.”

— Screen guild executive

“I think we need to support each other more. I think we need to look at ways that we can collaborate domestically better. [We need to get over the] New Zealand ‘tall poppy syndrome.’”

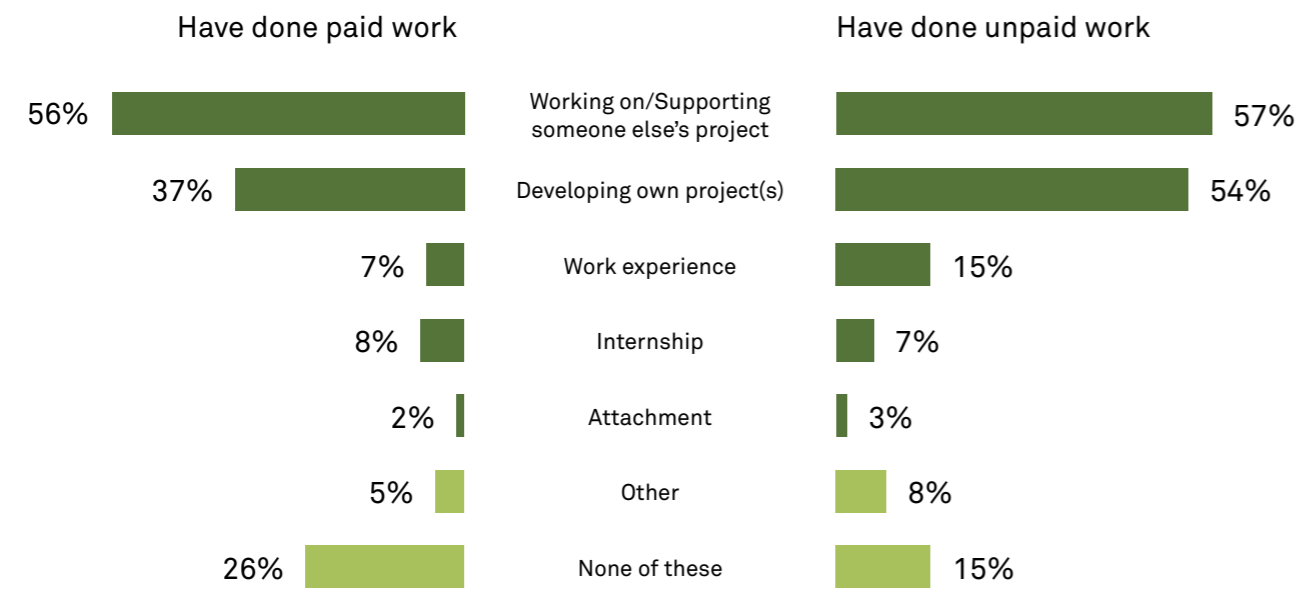
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“Some production companies take advantage of interns with mass labour of young people, which is not so great for those young people because they get stuck in a big company where they think that’s the only way the industry works. They won’t leave because they get told that the company they are working for is the best and that’s the way the industry works. Two years later, they are just ghosts of humans. They’ve been worked so hard that there’s no passion left.”

— Post-production company director, film and television



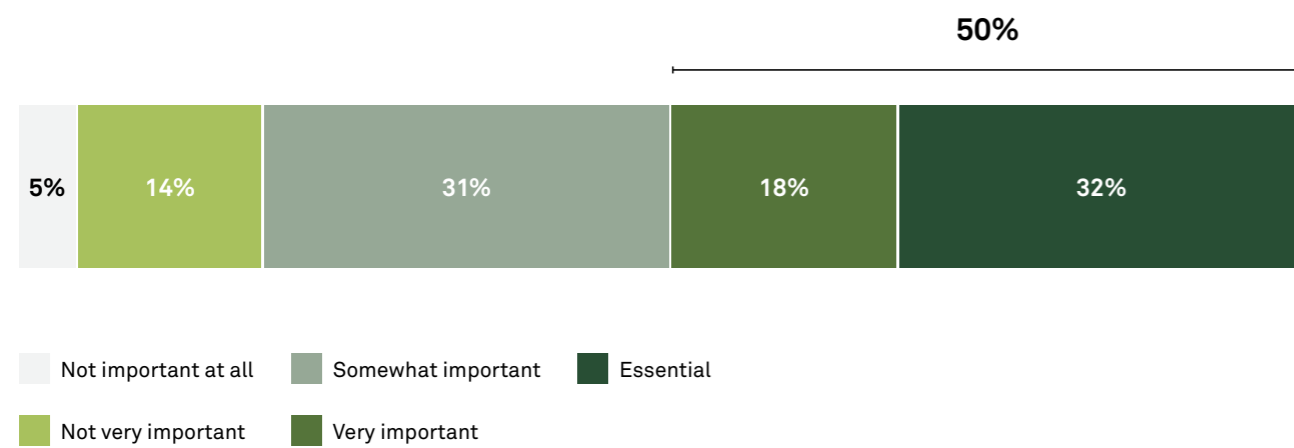
## Paid and unpaid work



Working on/supporting someone else's project and developing their own project are common among respondents who have done any paid or unpaid work in the last six years. The percentage of female respondents who have worked on someone else's project without pay is relatively higher than that of male respondents (62% vs 55%). Māori respondents were over-represented in this group, with 70% of Māori respondents having done unpaid work on someone else's project.

Source: Screen Workforce Survey (Individual), Toi Mai (2022)

## Importance of unpaid work to career progression



Source: Screen Workforce Survey (Individual), Toi Mai (2022)

Fifty per cent of individual screen workers (60% of women) believe unpaid work is very important or essential to career progression in the industry, with many believing it to be a way to break into the industry, gain experience and build relationships.

Source: Screen Workforce Survey (Individual), Toi Mai (2022)





# Te tūturutanga o te taiao e kore e kite

## Realities of the gig economy can hit new entrants hard

New entrants to the screen industries can experience a violent jolt from the relative safety-net of tertiary study. The high level of pastoral care support available within tertiary study is not continued into Toi Pāho itself, which we heard generally underestimates the level of care required for new entrants. To compound their situation, it is apparent that early employees can face constant pressure to perform without ‘rocking the boat’. We heard from recent entrants who have been placed within high-stress environments and were expected to learn rapidly on the job, with mistakes and second chances seldom afforded.

“The biggest problem with the industry is that it’s contract based and you’re only as good as your last job. Anything that you say can affect the job that you have at the moment and any future work.”

— Director and producer, television and digital media

“You can’t say anything because word gets around and it affects whether you can come back next week and do your job. There’s no HR department like in a normal company, which is a big problem.”

— Recent entrant and editor, film and television

“Producers tend to be, because of trying to get the job done, a bit ruthless, which comes at the expense of people’s mental health.”

— Independent screen producer

The very nature of a contractor-based sector diminishes the industry’s ability to offer pastoral care and mental-health services, in effect creating a challenging environment for vulnerable workers. We heard that an absence of typical industry HR services within some screen productions and small firms is leading to a lack of awareness on how to maintain healthy and inclusive work environments, and is contributing to a ‘cycle of unrepresentative monocultures’.

Pastoral care, diversity and inclusion must be intentional, planned for and embedded into routine operations if Toi Pāho is to build a healthier and more representative workforce.

“Cultural safety is something that we really need to work hard on. We are a bicultural country, and the more diverse workplaces become, the more awareness that needs to be about holding each other’s mana. This doesn’t have to be an ethnic group talking about cultural safety because it applies to everybody.”

— Film-maker and screen diversity advocate

“It’s the woman picking up the childcare, not working. So many women hit a real block there in the industry because of the hours. So, there’s so much in the industry that’s not conducive.”

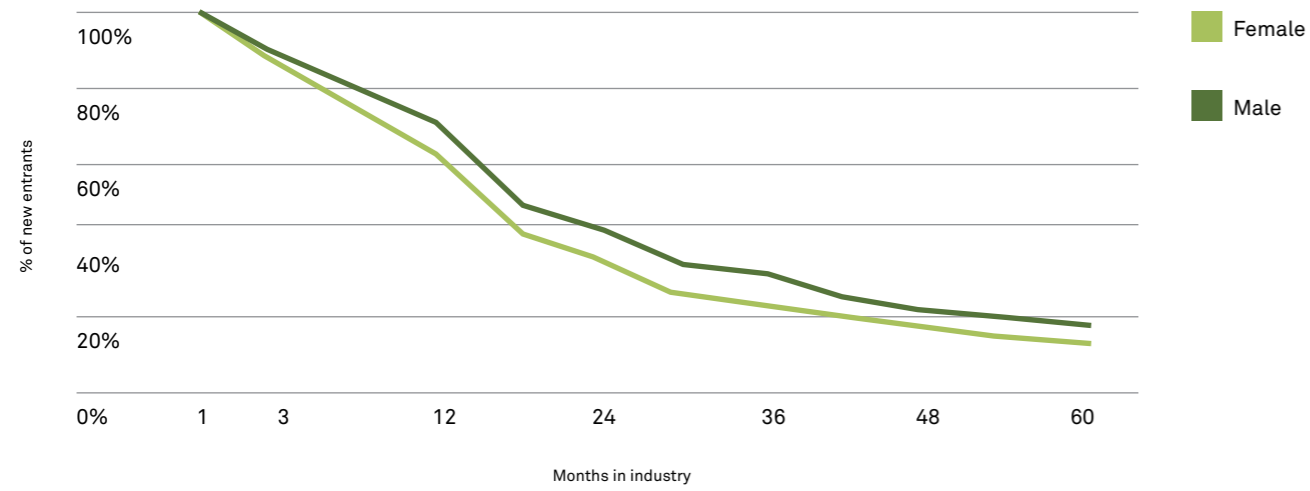
— Gender equity advocate, film and television



Photo by Lana Mattice on Unsplash



Retention of new workers in the screen and broadcasting industries (2015 year of entry)



Sixty per cent of female and 50% of male new workers had dropped out of the screen and broadcasting workforce after 18 months in the industry.

Source: COVID-19 Recovery Baseline Engagement and Data Project, Toi Mai (2022)

60%

Over one-third of survey respondents experienced the effects of mental illness.

Source: Screen Workforce Survey (Individual), Toi Mai (2022)

33%



Photo by KAL VISUALS on Unsplash

We heard that due (in part) to a lack of industry collaboration with the education sector, graduates are often unprepared for entering a gig economy and lack the fundamental business skills necessary to successfully enter as a sole trader. There is a consequent need to improve business skills training as part of any qualification or skills training programme.

“The students come out of training not realising that they are going to be a contractor. To me this needs to be part of that main set-up: fully understanding the pathway to say you are going to be running your own little business. Don’t be scared of that – here are all the tools.”

— Screen guild executive

“I don’t think the film schools or high schools are equipping them with practical things. They’re not learning how to survive in this industry; they’re not learning how to find the work and keep getting more work.”

— Emerging talent, film

Business skills are not just essential for those operating as sole contractors; an additional challenge is providing contractors the business skills to move out of self-employment and into growing viable production companies at a commercial scale.



## He tauhou ki te wao e kore te rākau e tupu Competent workers are also struggling to achieve work-life balance

Our research found that the sector is losing senior staff due to inflexible schedules, insufficient remuneration and a prevailing sense that working long hours is just part of the job. The high proportion of contractors in this group also means that benefits such as parental leave are often not an option. All this can make it impossible to maintain work deliverables alongside bringing up a family and other life commitments.

“There’s no consistency with work – no one works Monday to Friday, nine to five. Particularly in screen, you can be on set 14 hours at a time. Often this is evenings and weekend work and that makes it really tricky for young ones with families and it’s particularly inaccessible for young women. There are a whole lot of gnarly issues with how our industries work.”

— Screen education campus director

“The industry is very good at weeding itself because [you have to be] willing to be committed and understand that this is not an eight-hour-a-day gig with very structured, formal work hours and work settings.”

— Major studio managing director, television

# 69%

Of survey respondents from the film and television industries, 69% said they had experienced times of extreme stress where a mental-health break was required.

Source: Being Heard report – survey results on gender, diversity and inclusion in [film and television industries in Aotearoa], NZFC (2019)



Photo by KAL VISUALS on Unsplash



# He kōhauhou māuiui e kore e tupu

## Short-term funding pressures prevent long-term workforce development

While Te Māngai Pāho – the New Zealand Crown Entity responsible for the promotion of the Māori language and Māori culture – has done much to build a Māori screen sector, there is an emerging challenge to review the very funding structures that have created successful Māori organisations to date. Many interviewees involved in Toi Pāho, particularly Māori, articulated the pressures of operating within short-term funding constraints. One of the immediate challenges this presents is an unstable platform on which to offer and grow pathways for rangatahi that are sustainable and adequately remunerated.

Māori industry participants felt that more stable funding and longer-term funding opportunities will allow a growing range of stable businesses to hire and nurture the next generation of rangatahi into these sectors with more confidence and security.

“Six-month contracts make it hard. It’s gotten to the point where people think a six-month contract is normal. We’re all on six-month contracts. Our reporters are on six-month contracts. We’re hoping to get to a two-year contract by the end of this year. One problem is Te Māngai Pāho is not being funded to train. Yes, they’ll have to train ‘journos’. They’ll have to train camera editors and all that kind of stuff. The problem is the easiest way to do it is to get people who are already doing it. Because, once funded, you have to meet your output rather than drive a positive social outcome of getting more people developed. Our ultimate strategy should be the internship is just an entrée into industry.”

— Māori broadcaster and director, television

“The luxury of having longitudinal contracts is that we can plan for the medium term. It’s not even long term – it’s medium, to give our iwi the security that they need. We are talking about creating opportunities to keep our talent in our region. So, they don’t have to go to Christchurch, Auckland and Wellington to work in broadcasting. There’s not enough investment in that. Who’s going to be my reporter in two months’ time? How are we going to be able to meet the contractual obligations that are already tough in terms of resources? We can’t offer them the real full-time employment. It comes back to equity and funding. The Crown allocates \$300 million for one week (Te Wiki o te Reo Māori) and then \$14 million for the rest of the year.”

— Māori media and communications specialist/  
Independent producer, television

“Lots of our kōrero is around security. But it’s so hard. It’s the uncertainty of, like, what is tomorrow? What is next month? What is next year? And it’s putting a lot of pressure on stopping you from employing people.”

— Producer and studio founder, television and digital media

“Other Māori businesses are not my competitors, but we do struggle with the ability to offer young Māori-speaking talents, the cream of the crop, with pathways – everyone wants them. We struggle to offer them real salaries and long-term employment. Then Discovery will come along and offer a \$70,000 salary for a junior and it seems more compelling for them.”

— Māori media and communications specialist/  
Independent producer, television

We heard a view from many smaller film and television companies that short-term competitive funding models are collapsing industry pathways. Despite the best intentions to grow their workforce and achieve long-term succession planning, the nature of short-term funding limits the appetite to take on interns for fear of bringing them to a point of competency but not being able to offer subsequent employment. This was particularly apparent within Māori organisations, which struggle to attract mainstream levels of content funding.

“Lots of our kōrero is around security. But it’s so hard. It’s the uncertainty of, like, what is tomorrow? What is next month? What is next year? And it’s putting a lot of pressure on stopping you from employing people... [despite knowing] that you’ve got a busy interview coming up. So it’s like you’re anticipating we’re gonna have to get some bodies in here, but they’re not here today because there’s no security.”

— Producer and studio founder, television and digital media

“We are very piecemeal. So we react to what we haven’t got right now. As an example, we haven’t got supervisors. Let’s go and get that. So we’re very short term because our projects are short term. So, trying to get a handle on ebbs and flows, making them a bit more sustainable, would be good.”

— Major studio managing director, television

We heard that even funding distribution throughout the motu could create parity for smaller regional businesses so they might offer localised employment opportunities. In addition, there is the potential to provide consistency to funding cycles, for example by expanding funding outside of Te Wiki o te Reo Māori so content can be consistently created beyond this time





Fifty seven per cent of those entering Toi Pāho (broadcast and screen), 57% are career changers.

Source: COVID-19 Recovery Baseline Engagement and Data Project, Toi Mai (2022)

## He one haumako e tupu tika ai New entrants from other industries are welcomed

A large proportion of new entrants to film, television, and game development come across from other industries. These ‘career changers’ are valued because they bring transferable skills, maturity, a variety of knowledge and experience, as well as fresh and diverse perspectives. Conversely, the sector is attractive to people in other industries, with the allure of working within a creative environment appealing to people from both ‘creative’ and ‘non-creative’ careers. As with young candidates coming in from education pathways, there is a need with this demographic to overcome the misconception that technical aptitude is a prerequisite for entry into Toi Pāho occupations.

“Some of the most interesting people coming into game dev are people coming in from other careers.”

— Workforce development hub executive, game development

“There are great opportunities to move laterally into the game industry; for example, children’s illustrators.”

— Community manager, game development

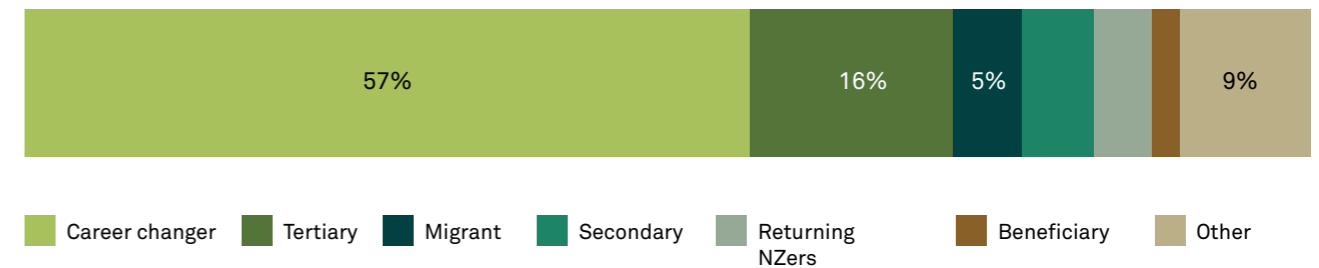
“We have certainly tried to look for people in places that aren’t necessarily traditional. It’s not just about the film and TV schools – we’re just as happy to hire someone with a graphic design background, as we are to hire someone who’s done a full custom course because you can learn all this stuff.”

— Major studio executive, television

“I went into recruitment. I did that for three years but it was during the lockdown where I thought ‘I don’t want to do this for the rest of my life, I want to do something that I enjoy and that makes me happy’.”

— Career changer and student, television

Sources of new entrants to the broadcast and screen sectors (2020)



Source: COVID-19 Recovery Baseline Engagement and Data Project, Toi Mai (2022)



# He rau tāhuhu, he tupu tau

## Supporting youth to find safety and security

A highly varied employee experience is seen across Toi Pāho and its industries. Within game development, for example, we heard about a welcoming environment for underserved groups even as it lags in diversity:

“Game dev is a space where a [transgender] person like me can hold a senior position without having to look over their shoulder every five minutes.”

— Workforce development hub executive, game development

Conversely, some in this industry shared stories of workplace cultures that normalise aggressive, disrespectful behaviour and harassment – in some cases, to the point where people have left the sector altogether:

“The industry can be quite toxic, and as I got older, I just got kind of less interested. You get a thick skin but it would be nice if you didn’t have to – I never want to work in a studio environment again.”

— Industry leaver, game development

“I know with [an independent Aotearoa film production] they had a Kindness Officer on set, which honestly I think is fantastic. He was available to talk to you and could take any issues up with producers. He was a kind of listening voice and also had the power to make that change.”

— Recent entrant and editor, film and television

“You’ve got many old-school blokes who can be quite aggressive and disrespectful. And it could be easily deemed to be bullying.”

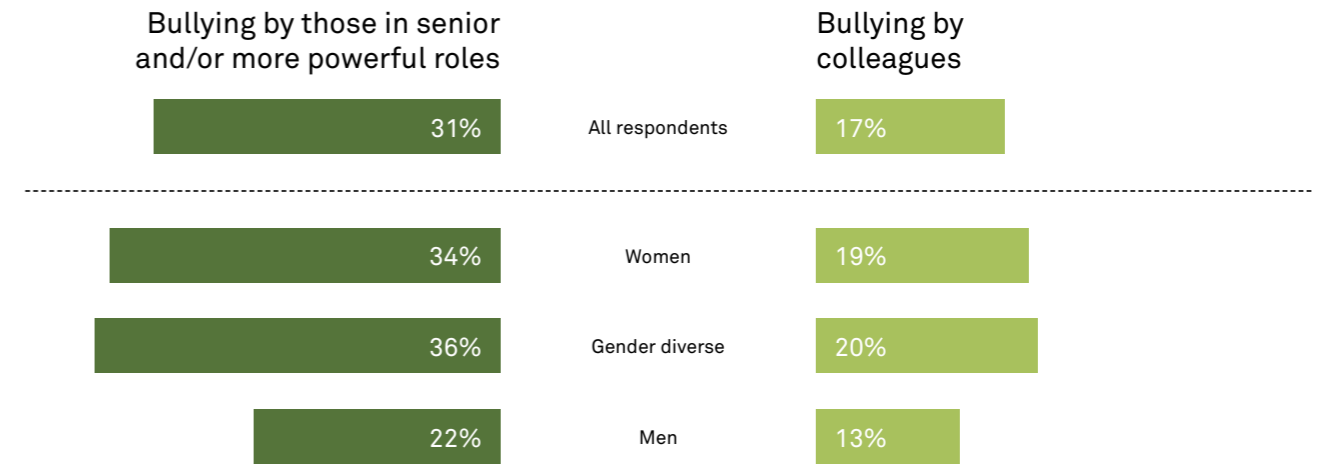
— Gender equity advocate, film and television

There is an opportunity to seed and build on initiatives within Toi Pāho that provide stewardship, mentorship and pastoral care within junior production roles.

“I know with [an independent Aotearoa film production] they had a Kindness Officer on set, which honestly I think is fantastic. He was available to talk to you and could take any issues up with producers. He was a kind of listening voice and also had the power to make that change.”

— Aspiring writer, director and videographer

### Bullying in film and television classified by gender



Bullying in the film and television industries is most likely to be perpetrated by those in more senior and powerful roles. Women respondents are far more likely to say they have been bullied than men.

Source: Being Heard report – survey results on gender, diversity and inclusion in [film and television industries in Aotearoa], NZFC (2019)



Photo by Barcelos Fotos on Pexels



# Kia mōmona te papa, e whāngai ai te takatupu

## Creating the right environment for underserved communities to succeed

A universal desire to celebrate the individuality and diversity of Aotearoa notwithstanding, we heard that workplaces are often ill-equipped to put in place the lasting cultural change required to manifest an inclusive and diverse Toi Pāho. There is a widespread absence of understanding of the need for protocols and tikanga to support culturally safe working practices and environments on film sets and in studios.

Underserved workers describe ‘hitting a ceiling’ in the screen industry. For example, this group often finds it more difficult to engage in a challenging and extroverted operating environment, where socialisation and the ability to network are pivotal to career progression:

“You do have to be prepared to get out and network and meet people, talk to producers, directors, whoever’s around to potentially be able to work with them. That’s not something that we as Pacific people are terribly strong [at]. We are generally shy and retiring. When you see a Pacific [person], especially a young person who is very confident and able to go and meet and talk to any person, that’s quite unusual. You speak when you’re spoken to – you know, that sort of environment.”

— Independent producer and director, television

“To be able to show that diversity needs to come through you will need Māori and Pasifika storytellers, but that obviously also applies to women, disabled [people] – the whole New Zealand population – to be able to reflect the different experiences and perspectives of people.”

— Independent producer and director, television

“In three years one in five people will be of Asian descent in this country. These are important eyeballs. So even if you don’t care about social cohesion, think about the missed economic opportunity.”

— Film-maker and screen diversity advocate

“It’s pure networking, and there is no centralised database to show you’ve done all this amazing stuff. It’s all about who you know and it’s almost decentralised to the point of being detrimental. You tend to bring in people that are similar to you, as opposed to whether they fit the project and they have merit.”

— Industry leaver, television

While underserved communities are under-represented at all levels of the Toi Pāho workforce, senior levels of screen industry organisations are particularly lacking. There is a sense that employers could do more to enable under-represented communities to rise through the ranks into senior positions:

“You don’t see the same diversity at a senior leadership level that you see at a front-line level. Representation of Māori, Pasifika or Asian at the senior leadership level is not as visible as it should be. Certainly at the moment, those people who make it into senior leadership levels typically come from privileged backgrounds. I think this industry has an opportunity to lead the way from the diversity and inclusion perspective.”

— People and culture manager, television

### Ethnicity of screen workforce survey respondents



Sixty-four per cent of screen workers identified as New Zealand European/Pākehā; 17% Māori; 10% Asian; 6% Pacific Peoples; 3% Middle Eastern, Latin American and African.

Source: Screen Workforce Survey (Individual), Toi Mai (2022)

“They would have an opinion on what my demographic (Pasifika) would find funny; it was a little bit patronising. You know, like they wanted the slapstick humour and I thought, ‘Oh, come on, man. That’s like ‘80s material.’”

— Writer, director and camera operator, film

“I went freelance because I kept getting overlooked for progression. I thought, ‘this is ridiculous. I’m not going to move up here’; there’s an overwhelming unconscious bias.”

— Industry leaver, television

There is an appetite among industry organisations to roll out new (and build on existing) legislation that provides incentives to Toi Pāho employees who work towards a workforce that is more representative of population demographics in Aotearoa.

“The statistics on female directors on feature films from 2014 were either 22 per cent of projects. They’re now at over half because the Film Commission made 45 per cent their target. For a few years, almost every young female film-maker felt they only got their project across because of the targets, but real change has been made.”

— Independent writer and director, television

“There’s a grey area when it comes to funding teams telling a story that’s not theirs to tell. Historically, only trusted production companies would get funding. So it’s just all white men making everything on behalf of everybody... How do we bridge that generation where we’ve got these amazing [diverse] talents, but they’re not trusted, or they haven’t proven themselves?”

— Diversity advocacy founder, film, television and digital media

There are notable challenges to designing legislation that focuses on underserved communities. For example, in order to quantify the uplift of underserved people you first need to identify them, which may raise ethical concerns:

“It’s not ethical to ask someone if they’re part of the rainbow community if they haven’t told you they are. It’s a whole different set of barriers to owning your identity publicly. So, it’s tough for them to make rules about funding because you have the public scrutinising people’s identities.”

— Diversity advocacy founder, film, television and digital media



### 3. Hei rākau whai hua Delivering training that meets the needs of Toi Pāho

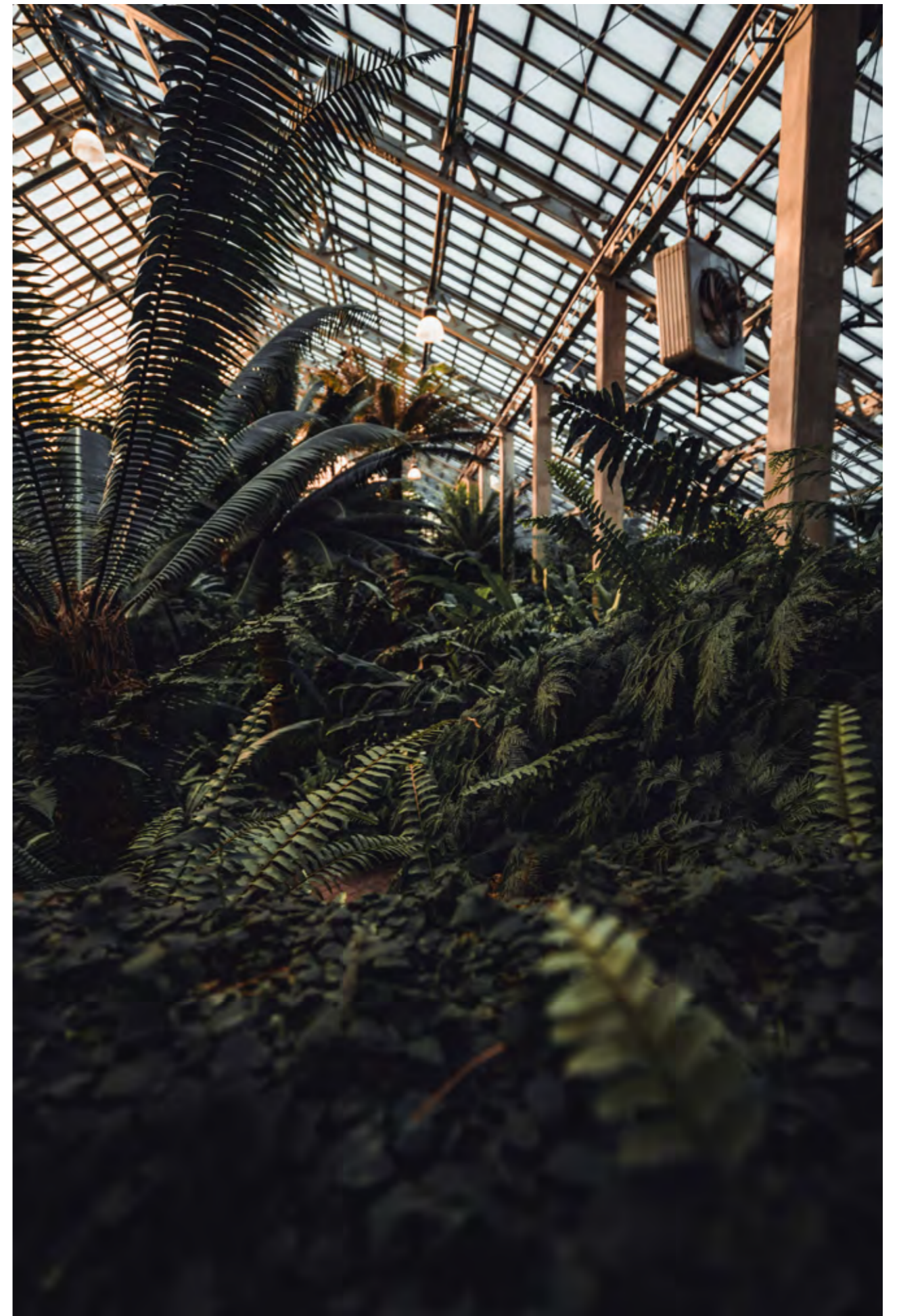
I tēnei upoko o te pūrongo, e kitea nei e mātou te motunga o tā te mātauranga ahumahi whakarato, me te ao tūturu o ngā hiahiatanga ā-ahumahi. E poipoi ana ngā kaiwhakarato whakangungu i ngā taiao haumarū, engia he whare tupu, e tinaku pai nei ngā kākano, e tupu pai ai ngā pihinga. Heoti, ka kawea atu ana ēnā pihinga i te whare tupu, ka whakatōngia ai i Te Wao Nui o Toi, kāore e rawaka te takatū e kauparetia ai ngā pānga kinotanga e tātari nei ki a rātou.

E kitea ana e te ahumahi tēnei motunga, ā, e kōwhiria kētia ana ngā parapara kua whakatōngia, kua tupuria i ngā āhuatanga taumaha o te ngahere. E aumangea ake ana ngā pihinga kua tupu i Te Wao Nui o Toi, kua maha ake hoki ngā rangaranga pakiaka e hāngai ana ki te oneone o te ngahere, tērā i ngā tūāhuatanga haumarū, hāneanea hoki o te rāngai whakangungu.

In this section of the report, we see that there is a disconnection between vocational education provision and industry need. Training providers are creating safe, greenhouse-like environments that do a great job of germinating kākano and growing pihinga. However, once those pihinga are taken from the greenhouse and planted out in Te Wao Nui o Toi, they are not sufficiently prepared to withstand the harsh conditions that await them.

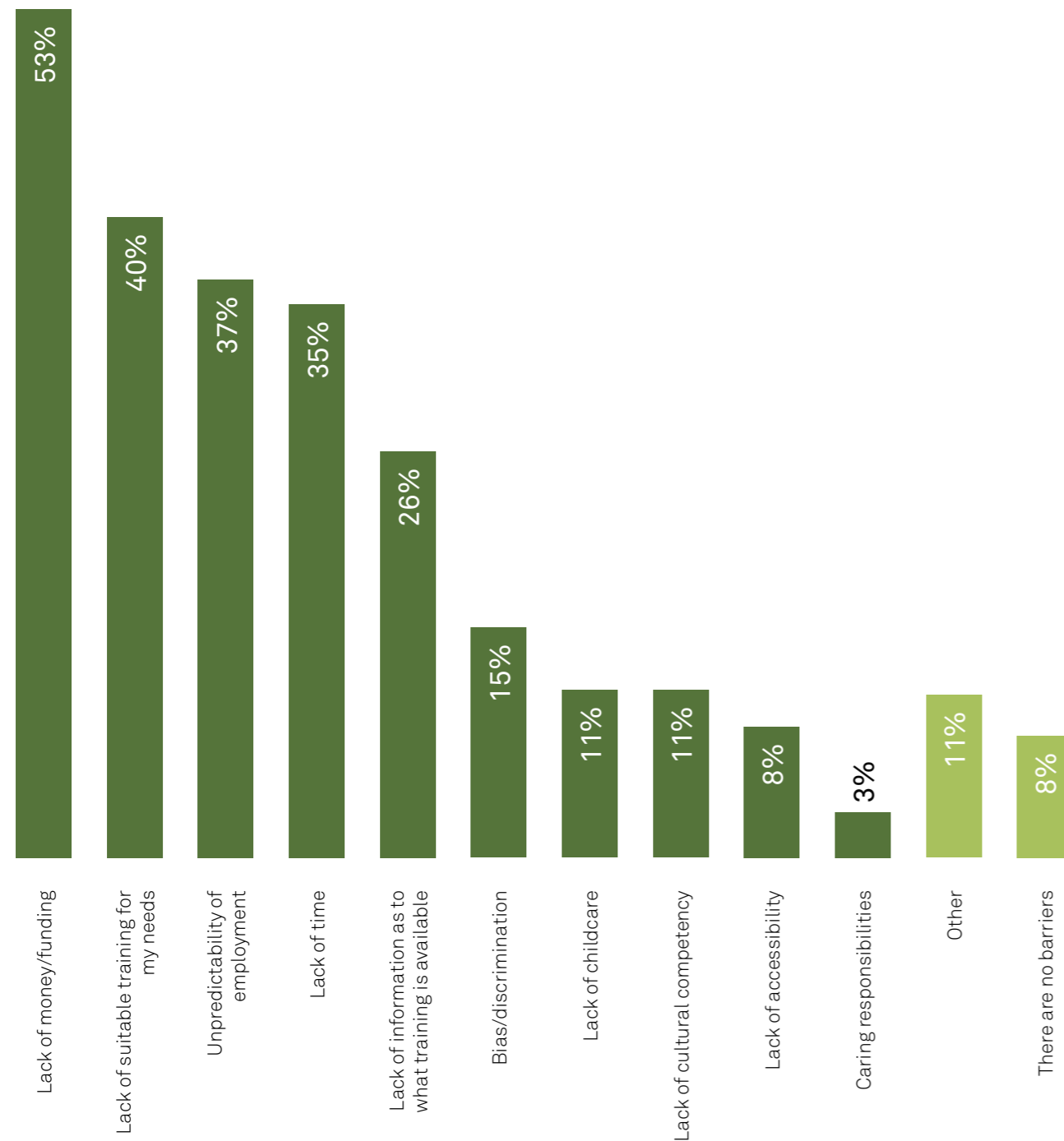
The industry recognises this discrepancy and opts instead for talent that is planted and grown within the harsher conditions of the ngahere. Pihinga grown within Te Wao Nui o Toi have more resilience and root structures more suited for the soil of the forest, rather than the safe, comfortable greenhouses of the training sector.

Photo by Cameron Casey on Pexels





## Barriers to screen professionals undertaking training



The main barriers to screen professionals undertaking training relate to lack of money/funding, lack of suitable training, unpredictability of employment, and lack of time. Only a few indicated that there are no barriers.

Source: Screen Workforce Survey (Individual), Toi Mai (2022)

“Where’s the dialogue between the industry and the training grounds about where the ebbs and flows of production requirements are and where the skill sets are short? I’ve never been involved in a conversation.”

— Major studio managing director, television

Understanding how to meet industry need is critical to developing and maintaining an effective vocational education and training plan for Toi Pāho. Throughout our research, industry presented a picture of an ever-evolving sector, with workforce needs constantly changing due to project pipeline and technological factors. We heard that there’s a desire to set up continuous quantification of workforce requirements (current and future) and map vocational training sets accordingly.

The recent establishment of the Toi Mai Workforce Development Council will contribute towards collecting aggregate industry data that quantifies workforce skills gaps. However, more detailed knowledge about screen project pipelines is harder to capture due to the commercially sensitive nature of most commercial production contracts.

Understanding how to meet industry need is critical to developing and maintaining an effective vocational education and training plan for Toi Pāho. Throughout our research, industry presented a picture of an ever-evolving sector, with workforce needs constantly changing due to project pipeline and technological factors.

“You need the industry to tell you specifically where they see the gaps. If they’ve got incoming production and need 300 people, that data needs to be captured so we can start doing something with it.”

— Production studio executive

“The industry is changing all of the time, and the technology is changing all of the time, and there’s a need to be nimble to fit the needs of the industry. The institutes working with TEC are very slow and quite laborious. By the time we have agreed to something the industry has moved on. We just need courses that are short, sharp, to the point.”

— Veteran producer and ‘set-ready’ trainer, film

“Our [game development] industry has a 90 per cent export focus. This means we are collaborative. We have an opportunity to have a regular hui with studios [on workforce requirements], potentially involving Toi Mai.”

— Game development studio executive

There is an urgent need to put mechanisms in place that both align education with workforce requirements and provide prospective new entrants to the industry with realistic expectations and opportunities.



# He wao akoranga, he wao tūturu e kore e rite ai

## Misalignment of training and industry needs

Across all training modes, we observed a disjunction between where education takes trainees and where industry wants them.

“Education doesn’t teach you how to start and game studios can’t afford to take you on.”

— New industry entrant, game development

A tension exists between a generation of trained candidates, who often struggle to find work, and the industries themselves, which are struggling to find the experienced workers needed to upscale their operations. We universally heard that senior talent is already over-stretched and lacking the capacity to bridge this gap and bring newcomers up to speed.

“We take students to a certain point, but there is a gap to where studios need them.”

— Course director, game development

“We feel like a film school at times, which is not a negative comment but we are teaching most of the people we employ. So you have this double influx, where you’re trying to train people that are new, which takes away resources while you’re trying to add resources, which is one of the trickiest things.”

— Post-production company director, film and television

This is a key barrier to development within Toi Pāho. There was a universal desire to find ways to align education, training and industry towards more seamless, learn-on-the-job, transitional pathways in order to bridge the apparent capability gap at scale:

“What’s lacking is the ability to apply [training] to a practical environment. [Providers need to] partner with the sector to have a decent and robust connection. The industry needs to come forward and meet in the middle – it’s just absolutely pivotal.”

— Production studio executive, film and television

“I think there’s only so much you can teach until you get out onto the productions. You have to learn on the job, it’s just getting those opportunities to learn. And unfortunately, that pressure is put on productions or companies to teach people.”

— Post-production company director, film and television

When talking with educators and graduating students, we heard that what graduates expect and where they start in the industry are often poles apart. There is a need to better prepare trainees by emphasising the practicalities of joining the screen workforce, and carefully setting and managing their expectations. Industry participants saw exposure and awareness of the realities of working within a gig economy as a prerequisite for success for any screen graduate.

“In the school, they do a 15-minute documentary. They are given all the time in the world to make it. They have no concept of the production budget.”

— Media company founder and trainer

Of identified film and television contractor shortages, 48% were in production, camera, location, lighting/grip and costume departments.

Source: Screen Workforce Survey (Individual), Toi Mai (2022)





# Ngā hua o te wao akoranga

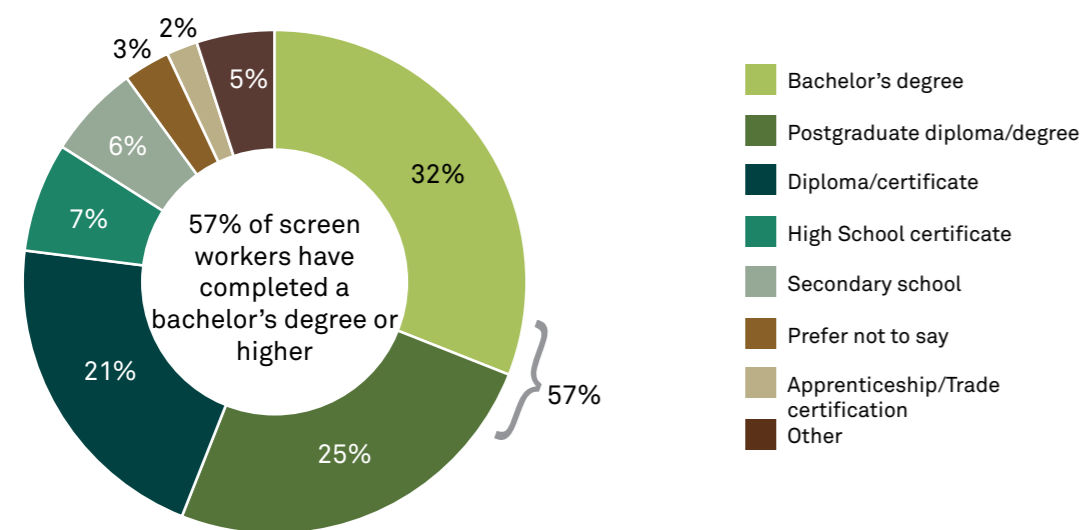
## Benefits to and support within institutional training

Long-duration theoretical and practical degrees and medium-duration, practically focused diplomas comprise the dominant form of formalised Toi Pāho training in Aotearoa. These courses and programmes offer qualifications that are listed on the New Zealand Qualifications and Credentials Framework (NZQCF) and are delivered by university, Te Pūkenga or accredited private providers.

More than half of the Toi Pāho workers (57 per cent) surveyed in the 2022 Screen Workforce Survey have a qualification of bachelor's degree or greater, with a further 21 per cent having attained a diploma or certificate.

There are numerous benefits to the long-form degree courses offered by tertiary providers. They provide students with access to industry-standard facilities, equipment and technical assistance in safe and supportive environments in which they are encouraged to experiment and take creative chances; they introduce students to networking and relationship-building moments with other creatives; they provide access to supervised internships, masterclasses, talks and feedback from a range of industry experts; they expose students to important histories and theories so they can understand the 'why', as well as the 'how' of making things for the screen; and they provide students the time and opportunities to build their all-important portfolios of work to take into 'the real world'.

### Highest level of education completed by screen workers



Of the screen workers surveyed, 57% have completed a bachelor's degree or higher.

Source: Screen Workforce Survey (Individual), Toi Mai (2022)



Student at YooBee South Seas Film School, 2022



“Nobody wants a person who can talk about film. They want someone to be useful on set, especially the below-the-line stuff. The only way you can do that is with practical film-making and doing it again and again. That’s why we run a production crew model and emulate the industry.”

— Training faculty lead, film and television

Degree study also enables students to widen their skill and knowledge spheres so they have back-up careers and options should it be difficult to immediately progress work with a first-choice career path in the screen industries. Industry leaders support students balancing tertiary studies in screen with another major that either creates a fall-back option post-study or allows them to bring adjacent skills with them into their primary career pathway.

Despite these benefits, interviewees hold the view that the ubiquity of long-form screen-related degrees is out of touch with the realities of the sector and its needs. By their very nature, long-form degree programmes are targeted at professional rather than crew roles, which skews the number of graduates coming out of these programmes towards above-the-line roles rather than below-the-line ones.

A consistent perception held by tertiary providers and graduates is one of ‘this [film] course will set me up to be a director when I graduate’, and this false expectation can start even before the course begins.

“We find most people want to be a producer or director. There’s nothing wrong with that – it’s a great dream to have but you’re not going to start there. Most people coming out of film school say they want to be directing or producing – that’s great but you’re 15 years away from that.”

— Post-production company director, film and television

“There is a real shortage of below-the-line people in New Zealand, that’s just a fact. For the amount of offshore and local productions, we could definitely do with more skilled staff in that area; however, in the ‘above-the-line’ there’s probably too much competition.”

— Senior lecturer and director, film

“Nobody wants a person who can talk about film. They want someone to be useful on set, especially the below-the-line stuff. The only way you can do that is with practical film-making and doing it again and again. That’s why we run a production crew model and emulate the industry.”

— Training faculty lead, film and television

### Toi Pāho graduate numbers by year

#### Graduate numbers: Level 3-6

Year	Graduate numbers
2011	—
2012	—
2013	—
2014	—
2015	—
2016	—
2017	36
2018	414
2019	456
2020	493
2021	372
<b>Grand total</b>	<b>1,771</b>

#### Graduate numbers: Level 7+

Year	Graduate numbers
2011	542
2012	608
2013	637
2014	679
2015	724
2016	752
2017	800
2018	879
2019	787
2020	1,089
2021	963
<b>Grand total</b>	<b>8,460</b>

Most formalised training for screen takes the form of long form (3-4 year) degree courses offered by tertiary providers (universities and Te Pūkenga). Screen graduates at levels 3 to 6 have shown a marked drop since 2020 (noting that data is likely affected due to the impact of COVID-19).

Source: Graduate data, NZQA



Students at Yoobee South Seas Film School, 2022



## He rite tonu te nui ake tō te wheako whai hua, tērā i ō te tohu

Experience is often  
valued more than a  
qualification

Unlike many industries where formal education is officially required, a great portfolio or prior experience on a project can often be enough to get a foot in a screen-business door. We heard from industry that candidates with evidence of prior content creation are much more likely to be considered for Toi Pāho positions than those with a bachelor's degree or diploma. This is despite the fact that those portfolios are often created within tertiary screen programmes.

“The education aspect isn't enough. People who have worked on projects are much more useful and helpful.”

— Independent screen producer

“[Demonstrating you have created] content is crucial because it shows that a person has grown and can finish something.”

— Learning experience developer, game development

Game development, in particular, places high value on self-starting candidates who have taken the initiative to build and release a game. While formal training is valued, it is by no means a prerequisite:

“As long as you have access to a computer and the internet you can make a game.”

— Industry association executive, game development

“No matter what the position is, everyone has to do a ‘test’ specific to the role. So somebody who is not tertiary trained can still get the job.”

— Game development studio director



Photo by KAL VISUALS on Unsplash



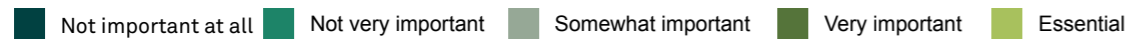
# He whati herenga, he ngahere whati

## Addressing gaps in training currently available in Aotearoa

### Perceptions on the value of a qualification for entry



#### Entry to the screen sector



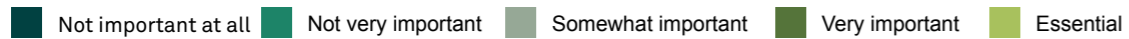
Almost half of the screen workers surveyed believe that having a qualification to enter the sector is 'not important at all' to 'not very important'. Just 15% of respondents perceive qualifications as 'very important' or 'essential' for entry to the sector.

Source: Screen Workforce Survey (Individual), Toi Mai (2022)

### Perceptions on the value of a qualification for career progression



#### Progression of career



Over half of the screen workers surveyed believe that having a qualification to progress screen careers is 'not important at all' to 'not very important'. Just 11% of respondents perceive qualifications as 'very important' or 'essential' as a means to progress in one's career.

Source: Screen Workforce Survey (Individual), Toi Mai (2022)

“People coming out of the traditional education and training pathways are not industry ready. There are some skills gaps, and it is often around soft skills, how to behave on set and what the hierarchy is on set. Hence there is a call from industry to look at more learning at pace on the jobs, micro-credentials rather than more formal, longer-term courses.”

— Regional film office manager

Only 13 percent of companies surveyed in the 2022 Screen Workforce Survey considered undergraduate degrees or diplomas the types of training best suited for employers/contractors in the film and television industries. There was much stronger support for shorter-form courses and a desire expressed for more micro-credentialled courses based in the workplace.

“People coming out of the traditional education and training pathways are not industry ready. There are some skills gaps, and it is often around soft skills, how to behave on set and what the hierarchy is on set. Hence there is a call from industry to look at more learning at pace on the jobs, micro-credentials rather than more formal, longer-term courses.”

— Regional film office manager

“There is not enough scaffolding to get juniors up to seniors, so they need to learn overseas.”

— Community manager, game development

Shorter-form courses are popular within international screen circles as they enable people to quickly come up to speed or upskill on certain aspects of screen production as they progress their careers. In Aotearoa, trainees may opt to undertake expensive offshore micro-credentials/short courses – for example Australian Film, Television and Radio School (AFTRS) in Australia – to learn new skills or gain an edge within the competitive contractor market.

A number of 'informal' training providers have sprung up in New Zealand over recent years to fill the gap in formal provision. From the NZFC to screen guilds and individuals, studios and not-for-profit firms, these organisations have added their own bespoke training offerings on, or as sidelines to, their core businesses. In this way they are able to meet industry needs as and where required, and ensure training is delivered by experts.





Around two in five companies use external training organisations. Guilds/industry organisations are the most common external training organisations screen companies use.

Source: Screen Workforce Survey (Company), Toi Mai (2022)

### Most common in-house training areas offered by Toi Pāho companies

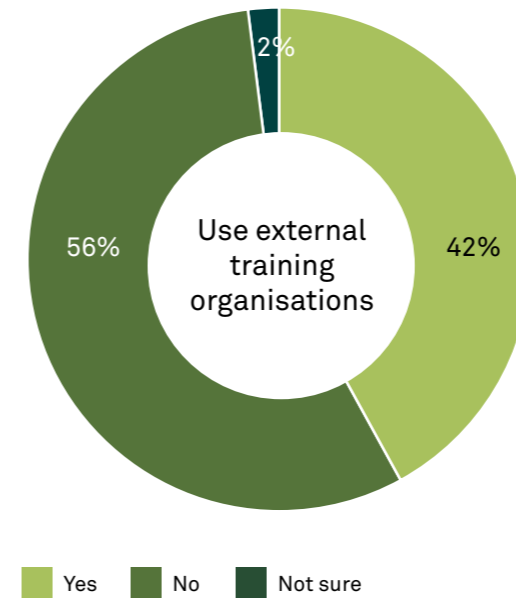
- Diversity and inclusion training
- Budgeting
- Developing IP
- Proposal writing
- Cultural advisors
- Succession planning
- Scheduling (pre-production)
- On set (production)
- Sustainability
- Crewing
- Script/content development
- Production department

Diversity and inclusion training, budgeting and developing IP are the top three most common training areas run or offered in-house by screen firms.

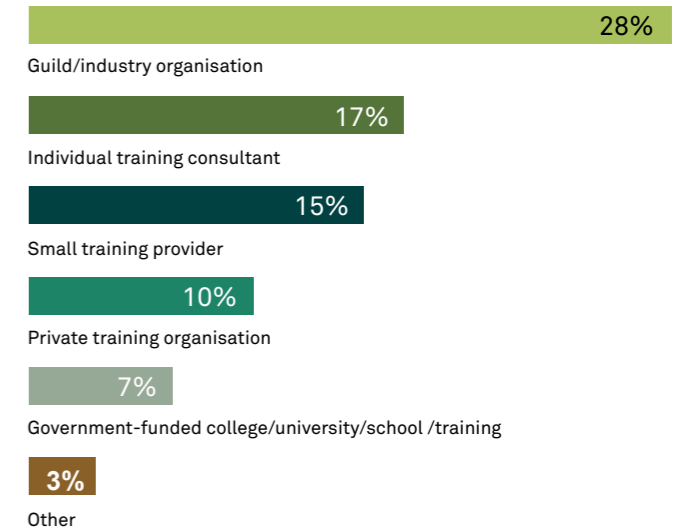
Source: Screen Workforce Survey (Company), Toi Mai (2022)

### Use of external training organisations by Toi Pāho companies

#### Use external training organisations



#### External training organisations

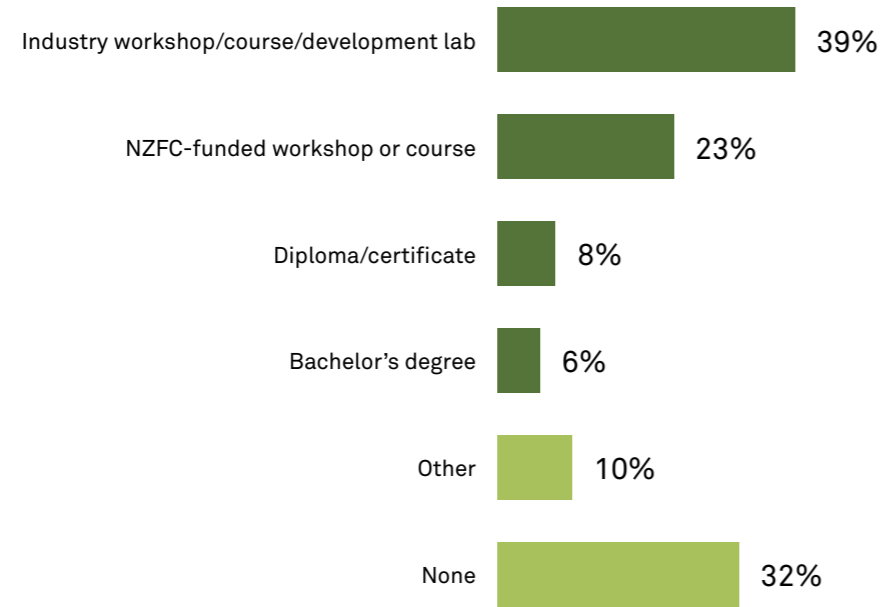


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Source: Screen Workforce Survey (Company), Toi Mai (2022)



## Types of education recently undertaken that are relevant to screen workers' current role

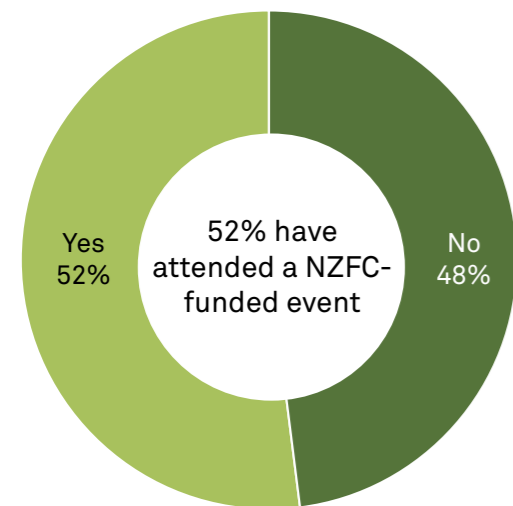


In the previous six years, 62% of screen workers had undertaken industry or NZFC-funded training, while 32% had received no training at all.

Source: Screen Workforce Survey (Individual), Toi Mai (2022)

## Professional learning among screen workers

Have attended a NZFC-funded event, training and/or talent development programme



Events most attended by respondents

- Big Screen Symposium
- Script to Screen Talks
- Script to Screen Workshop
- Fresh Shorts
- SPADA Conference
- Directing Actors
- Directing Toolkit
- Rehearsal and Performance Series
- ScreenSafe - Professional Respect Training
- Doc Edge Forum
- ScreenSafe/SWAG Professional Respect Training
- Workshop

Fewer than half of the screen professionals surveyed have attended a NZFC-funded event or training in the past six years.

Source: Screen Workforce Survey (Individual), Toi Mai (2022)



Photo supplied by Unitec Te Pūkenga: Big Screen Symposium

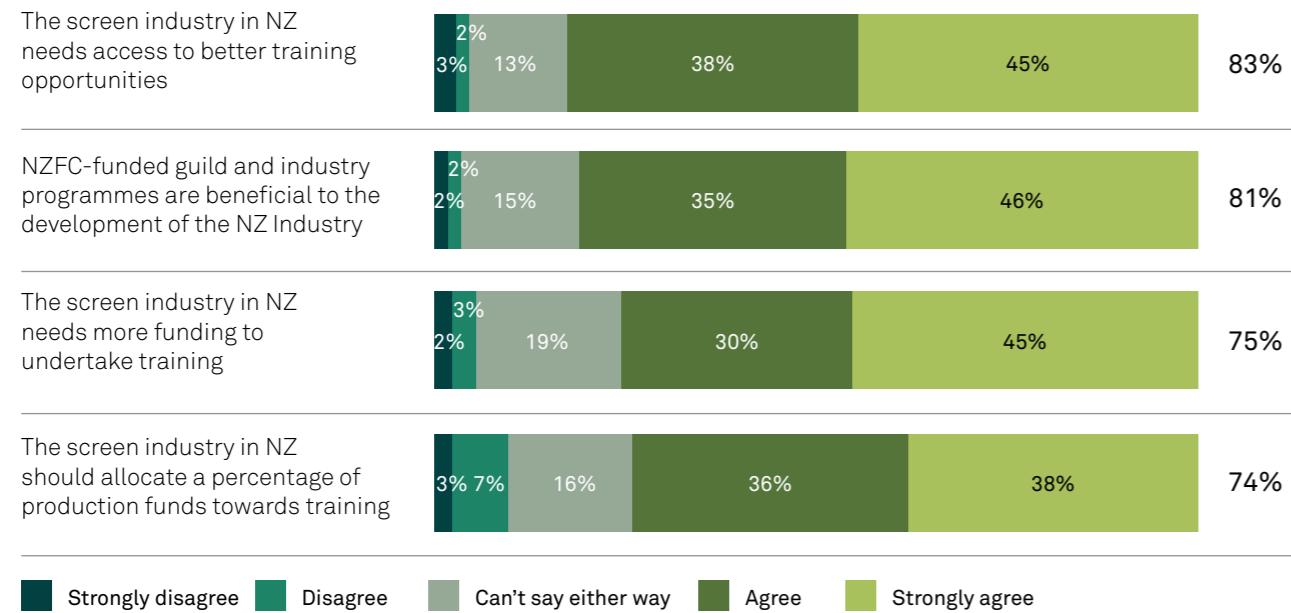
“People [who have completed shorter-term courses] are quite hands-on and practical, and they come out of it understanding that they’re going to start at the bottom, whereas a lot of those longer degrees, people are like, ‘I’ve graduated, and now I’m a director.’”

— Film producer



### Individual screen professional responses to statements about sector training

(%4-5)



Most respondents agree, or strongly agree, with the above statements about approaches to film industry training. Data also showed that female screen professionals were more likely to agree with these statements than male screen workers.

Source: Screen Workforce Survey (Individual), Toi Mai (2022)

Production companies that provide mentorship or other on-the-job training for new entrants also suffer from the law of diminishing returns. For each junior added to a crew, the available time of a supervising senior for production deliverables is effectively halved. This makes it difficult for screen businesses to scale, even when there is an abundance of work available.

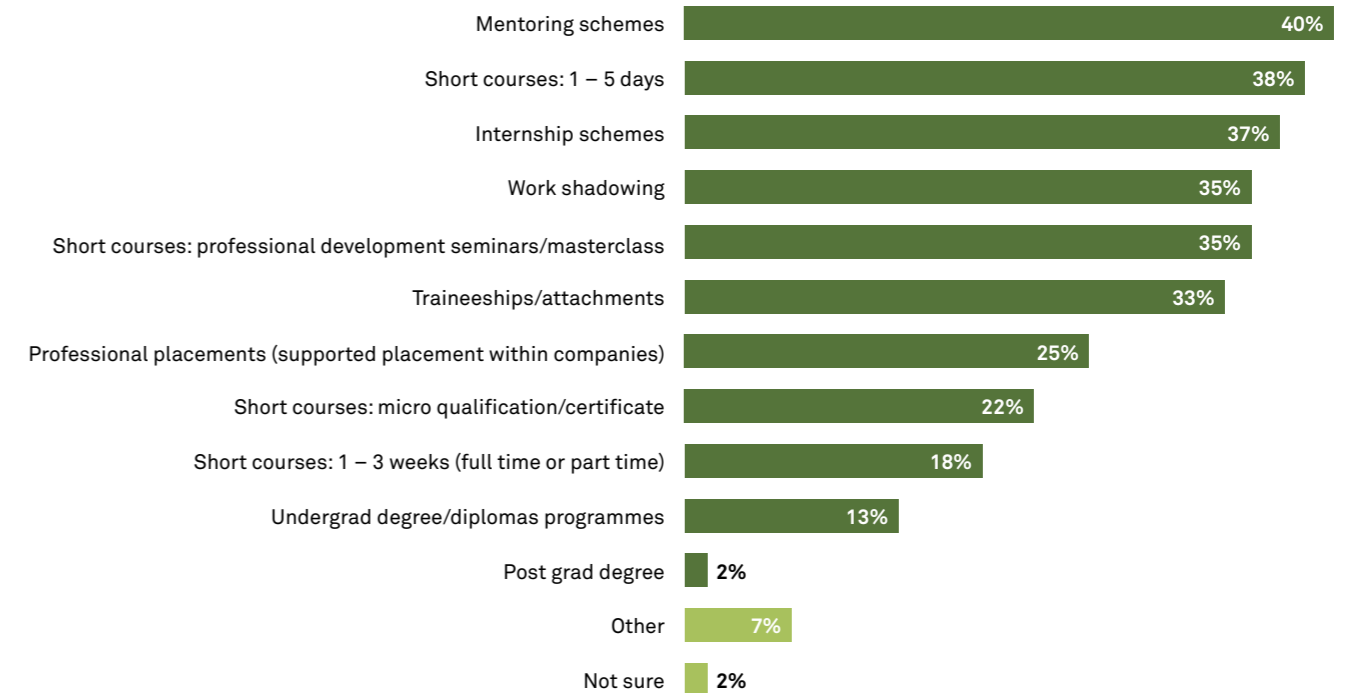
The highly practical and intensive, short-form training offered by informal providers is where much screen crew training currently takes place. This type of training is perceived by many in the industry as the best way to provide candidates with the skills to take on entry-level roles. For new entrants, industry leads suggest these courses are ideal in the way they expose students to a variety of roles above and below the line, and provide visibility and access to screen pathways and opportunities without the weight of large student debt. Short-form courses are also perceived to provide a keener awareness of the realities of contracting/self-employment and are more likely to equip students with the necessary knowledge and skills involved in being self-employed in the sector.

Short courses also recognise the needs of the many people who join Toi Pāho later in life. Often these career changers cannot afford to retrain by returning to long-form tertiary courses.

Learners on these courses do not receive formal credentials, however, and other than small amounts of funding channelled through the NZFC and in some cases the Ministries of Social Development (MSD) and Business, Innovation and Employment (MBIE), neither course providers or learners are able to access the vocational training funds from the Government that other more established industries receive.

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### Company view on best training suited for screen employees and contractors



Mentoring, short courses and internships were viewed by screen companies as best suited for their employees and contractors.

Source: Screen Workforce Survey (Company), Toi Mai (2022)



The top barriers preventing screen firms from supporting their employees to complete workforce development, training or on-the-job placement are:

- lack of funds
- training not relevant to industry needs
- lack of time.

Source: Screen Workforce Survey (Company), Toi Mai (2022)

The top barriers to training among Māori screen professionals are:

- lack of suitable training
- lack of money/funding
- unpredictability of employment.

The top barriers to training among Pacific screen professionals are:

- lack of money/funding
- lack of cultural competency
- lack of time.

Source: Screen Workforce Survey (Individual), Toi Mai (2022)

The sector is caught in a bind. The vocational education system will not fund the informal providers delivering short courses unless they offer qualifications on the NZQCF as accredited training providers. Most informal training providers do not want to become accredited providers as this is not their core business, and the perceived time and costs to become accredited providers is too high. At the same time, existing accredited vocational education providers do not see sustainable revenue streams in short-form courses:

“On paper, micro-credentials are great, particularly in film where there is a real need as technology develops, to pop back in, do a micro-credential in a particular area to upskill and then get back into industry. But the funding behind it does not make it viable. And that is one of the main reasons you don’t see institutions like ours picking up micro-credentials – even though we would love to, it’s just not financially worthwhile.”

— Screen education campus director

Funding models for Te Pūkenga and universities in particular require high staff-to-student ratios to finance the high operating costs and technology needed to operate modern tertiary institutions. The screen industry expressed concern that these educational funding models are setting students up to fail by incentivising providers to push through large numbers of long-form graduates, rather than focusing on smaller groups who have already demonstrated an aptitude for screen production roles.

“I’m still a big proponent of schools doing some things very well. And we are getting some industry entrants who are thriving. [The course I used to teach] has gone from taking 24 people to 40 people, which was about the money, which is why I left because I couldn’t keep having that fight.”

— Independent writer and director, television

Toi Mai has commenced working with industry to develop micro-credentials and skill standards that will help introduce and induct people into the screen industry. These will include recognition for the essential and practical skills required to be ‘set-ready’ in an entry-level position and the business skills required to be a freelance contractor. While this may address some current skills gaps, micro-credentials are not a panacea for the wider skills/industry needs/informal provision misalignment. Micro-credentials developed by Toi Mai can only be delivered by accredited tertiary education providers, and learners will not be able to access funding or student loans for these micro-credentials unless they are part of a larger qualification.

“I need an experienced assistant to take care of that training. Otherwise, I have to stop editing to give them the training they need to be on an actual production.”

— Highly experienced editor, film

“There is a shortage of senior devs to train newcomers.”

— Industry association executive, game development

“Telling you bluntly, tertiary organisations take too many students. And this goes back to the Government. In every other part of the world, production programmes are funded differently. We have kept our programme really small, but every year the university threatens to close you down because you’re only graduating ten people.”

— Film-maker and screen diversity advocate

If anything, the current tertiary trend is towards even longer courses, as some providers expand their three-year bachelor degrees to four-year honours courses:

“We are preparing [to expand our degree to] a four-year honours degree where, in a similar way to engineering, students work on a year-long project for the digital screen industries.”

— Game development course director



# He akoranga hou ki te wao Industry Training Body (ITO)

Without an ITO historically focused on Toi Pāho, many argue the sector has missed out on the benefits of work-based learning and diverse modes of training delivery that are regularly accessed by other critical sectors of the economy (for example construction, agriculture and professional services).

Industry representatives drew our attention to ScreenSkills UK as an example of an industry-led skills body for the screen industries. ScreenSkills ([www.screenskills.com](http://www.screenskills.com)) provides insight, career development and other opportunities to help people get into the industry and progress within it. Among its many functions, it offers a trainee-finder service which places workers on film and television productions across the UK.

“We don’t need to reinvent the wheel. A good example exists in the form of ScreenSkills in the UK. A similar agency in Aotearoa could be industry funded (from a levy on international large-budget grant recipients). Its role is not to be a provider, though it might run some very targeted courses. Its job is to be a conduit for information and the vehicle that enables consensus across the needs of the sector, the providers, the government and the funding organisations. It can make recommendations but is not involved in NZQA recommendations or anything like that. Its role is to say what’s needed.”

— Regional film office head

“Something I’ve been talking about is having a portal all the institutions can feed into and the industry can come and find people. Crew lists exist and they might be able to be adapted to operate in the free or low-cost space. There’s a model that they talk about in England that is a website ([www.screenskills.com](http://www.screenskills.com)) and they have all of the graduate portal information. I don’t know if it has pastoral care but it will certainly have some support.”

— Education provider

Strong support was expressed for the establishment and ongoing maintenance of a centralised industry training body which, if it were also established as a Private Training establishment (PTE), could also fulfil a wide range of training, assessment and credentialisation functions in response to industry training need. It could oversee the all-important work-based learning, where learning pathways are integrated within real commercial productions.

Such a centralised body would reduce risks and improve efficiencies for employers and production companies. If this is seen as a feasible solution going forward, there would be benefit in researching the successes and challenges faced by international initiatives (such as Screenskills UK) in order to not reinvent the wheel. The training body could potentially be funded by an NZ Screen Production Grant training levy.

“We’re trying to get Year 11s and Year 10s to come in and be a part of live panel shows. We wanted them to come in and be trained across various stations. So, one week they’d be the floor manager and we train them to do this. They’d be a cameraman one week, and then managing talent another, we’d move them around to expose them to all of the jobs and real opportunities available. The idea was to do that for a year and we couldn’t get funding for it. It costs money and we need to have facilities to do this permanently. Our own efforts in comparison are really ‘raw’, but there’s not a lot of ways you can expose rangatahi to this environment at the moment. If you don’t have resources, you have got to find another way.”

— Māori broadcaster and director, television

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## 4. Hei aka here tahi, ka pū oranga rau

Working collaboratively  
to build and maintain a  
healthier Toi Pāho

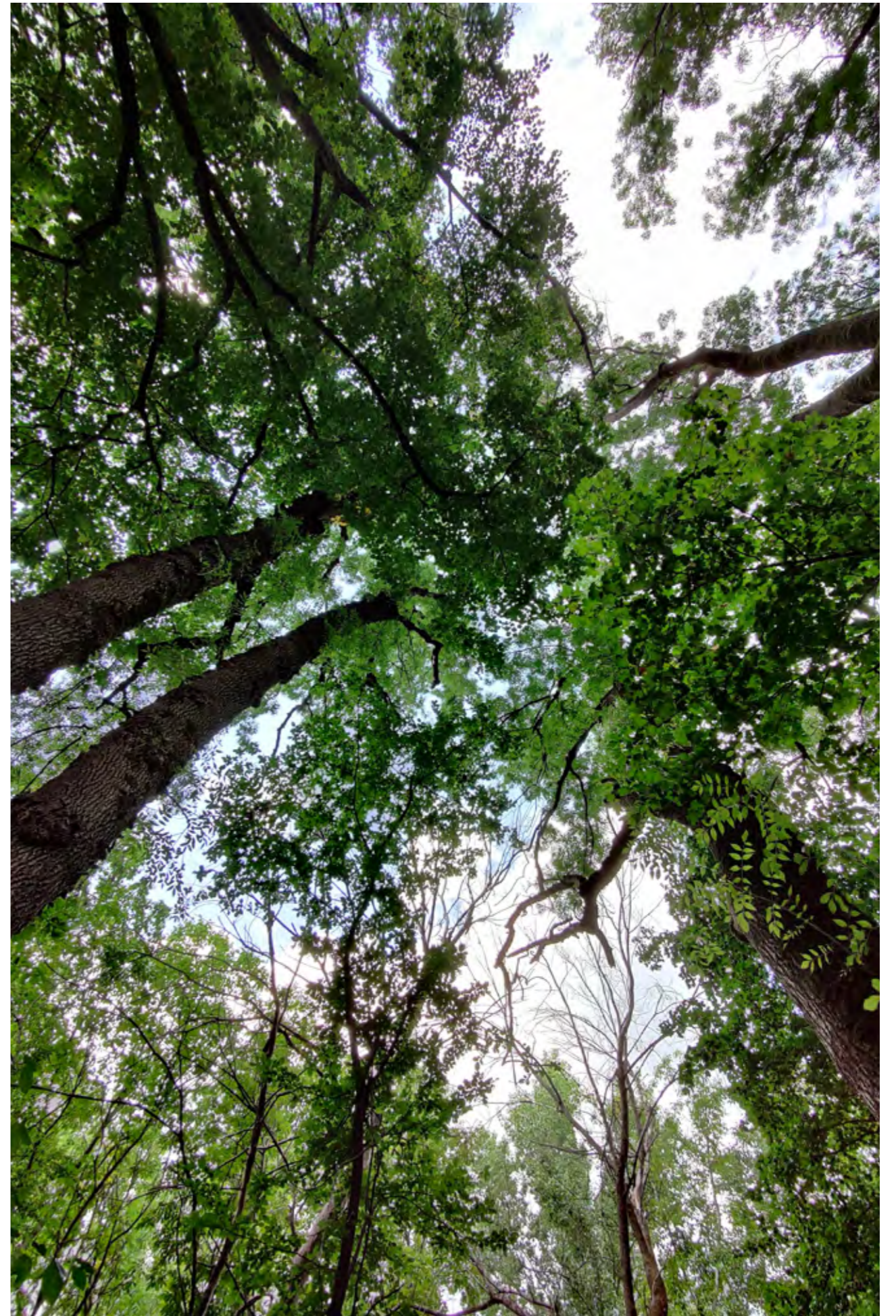
Ko tā te whakataukī ‘me uru kahikatea tātou’ he ākina mātou kia pēnā i te ngahere e kī pai ana i te kahikatea. E kōrero ana mō te rangaranga pakiaka o ngā kahikatea e tū kaha ai hei uru. Ahakoa i te āhua nei, kua tū takitahi ngā kahikatea i te ngahere, ki raro i te mata o te whenua kitea ai te herenga o ngā kahikatea, me te tūhononga mā ngā pūnaha pakiaka whānui, nā konā e kaha rawa atu ana te pūnaha tautoko hei uru kotahi.

Nā reira, he kupu whakarite pai te ‘uru kahikatea’ mō te mahinga tahitanga, me te tapatahitanga. Ka kotahi ana ngā mahi a ngā ahumahi pēnei i tā te uru kahikatea tū, ka kaha ake te katoa. Mā tēnei upoko pūrongo tēnei ohia e tōmene.

The whakataukī ‘me uru kahikatea tātou’ encourages us to be like the kahikatea ngahere. It talks about the tightly woven root structure of the kahikatea, which grow together in bunches. Although each kahikatea appears to be standing alone in the forest, beneath the whenua kahikatea bind together and connect through their wide root systems, which in turn creates a very strong support system for the collective.

Therefore, the ‘uru kahikatea’ becomes an excellent metaphor for collaboration, mahi tahi and unity. When industries work together as the uru kahikatea does, they are much stronger. This section of the report explores that idea.

Photo by Andrew on Pexels





We heard an overwhelming willingness among industry to collaborate, with many participants describing the need to form a sector-wide (not just the film industry) aligned vision and strategy to grow a sustainable and uniquely Aotearoa Toi Pāho sector.

We heard an overwhelming willingness among industry to collaborate, with many participants describing the need to form a sector-wide (not just the film industry) aligned vision and strategy to grow a sustainable and uniquely Aotearoa Toi Pāho sector.<sup>9</sup> There is a desire to look both outward and inward to establish a clear vision of the sector's promise: one that articulates its unique competitive advantage on the world stage, and writes the story – together with the next generation of artists and workers – that will both inspire the future of the sector and its people, and present a comprehensive national screen offering to international customers.

At present the film, television and game development industries in Aotearoa compete against each other for talent, with limited skill resources. This results in undercutting and a 'race to the bottom' that leads to workforce exploitation and unhealthy workplace practices in some parts of the sector. This, along with the current state of sporadic, ad-hoc industry collaboration, may be interfering with the natural ability of organisations to grow together and provide nurturing and sustainable pathways for new entrants. There is a challenge to find consistency within a sector that is split between two distinct production paradigms: local content, which provides a training space but is heavily reliant (particularly within film and television) on government funding; and highly visible overseas 'A-list' content, which is normally associated with private-sector funding.

Today, the lines that separate the interactive media sector and traditional film and television industries are increasingly indistinguishable. Not only is convergence an inevitable part of the future of storytelling and entertainment, but the sector industries coming together might also generate new products and services that will give more opportunities to creators and more career options for the people of Aotearoa. Government policy and funding settings should support the entire Toi Pāho to grow and compete globally rather than against itself. If the Government can support all Toi Pāho industries/workforces to grow concurrently and collaborate with each other there is potential to leverage massive new opportunities.

“New Zealanders are amazing in our ability to think creatively and sustainably. Our geographic isolation has meant we've had to think differently. We've got to find clever ways of doing things, which translates into our creative capacity.”

— Production studio executive

“It's New Zealand against the world – not New Zealand against New Zealand. We need to work out a [game development-centric] strategy for the next three to five years.”

— Workforce development hub executive, game development

<sup>9</sup> The recently published Aotearoa New Zealand Screen Sector Strategy 2030 is limited to film and television only.

Photo by Rendy Novantino on Pexels



# Me uru kahikatea tātou Mahi tahi and ‘on the kaupapa’

Kahikatea often grow in groups. With their deep roots into the ground, they become intertwined with each other and thus form a strong bond beneath the forest floor. Although above ground they appear to be many individual trees, they are indeed connected below the surface.

This whakataukī speaks about the strength of whanaungatanga, unity and mahi tahi.

Being a business dedicated to Māori is different from other businesses within the film, television and game development industries. Te ao Māori is a way of life and there is an unspoken commitment to uphold the principles of Māoridom and preserve the quality of language and mahi tahi with other Māori businesses – even within competitive market situations. Traditional businesses operate without these cultural constraints within the same levels of funding.

In effect, Māori companies are trying to do more than other Aotearoa businesses with fewer opportunities for sustainable funding. Some of this is attributed to the narrower viewing interest in te reo Māori content, reducing the quantum of funding available for Māori production. Furthermore, for businesses receiving Te Māngai Pāho funding, there are strict criteria and standards that need to be upheld around te reo Māori on top of the need to create engaging and high-quality content. There is no additional funding for this: it is just an expectation.

Many businesses operate with a degree of passion and goodwill to ensure quality te reo Māori resources are created. Other businesses rely on volunteer hours and a drive to give back and grow rangatahi careers, affording others opportunities which were absent in their own career progression. The sustainability of this is questionable over time, however, as short-term funding contracts compress the financial viability of these businesses.

“What I found is we all have our own sort of micro-needs, and, sure, we can all mahi tahi – but how do we mahi tahi effectively? What are the rules around mahi tahi and who pays for this? It comes down to just fundamental things like who pays for this and what do I get out of it? For small businesses, the cash that we can apply to a dream idea of mahi tahi is finite. There’s only so many dollars and passion hours and tūmanako available. We still believe that tūmanako can be fulfilled, but it’s hard and the system’s already against us. In our industry, we pitch for contestable funding. We are constantly competing against other Māori production companies who we want to collaborate with to create te reo Māori resources. That’s why we have to try and create the Māori system ourselves because everything around us says that it can’t happen.

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— Māori creative entrepreneurs, business owners, film and television

“The beautiful thing about the Māori money is that it’s there and it’s accessible and you can make a quick show and move on to the next one. Mainstream companies might bring in a Māori producer or a Māori reo expert and generalise the outcomes when they pitch, whereas now Te Māngai Pāho is saying ‘Right, well, let’s have a look at your company. What are your company strategies? Who is there to look at, from top down? Who are the people?’ which is awesome. I think it always should have been like that for years. It’s happening now because there are more and more people from our generation going into Te Māngai Pāho and working there.”

— Māori creative entrepreneurs, business owners, film and television

“There’s this thing called ‘on the kaupapa’. We are lucky that we’ve got guys who are really on the kaupapa for us. We have a camera editor based in Otago, another based in Wigram, and they’re really keen to do long-term training for rangatahi Māori. People say there is a talent shortage; however, he had five rangatahi alone wanting to train, and those were only the ones who were really interested. There’s a scrap over the talent pool. There’s a massive amount of talent. There’s lots of people who are interested in a career in this industry.”

— Māori broadcaster and director, television



# He aronga hautupu hei whāngai hua Helping the regions to grow

Any national Toi Pāho strategy needs to include the enormous potential of the regions to grow workforce training and development. To this end, regional film office representatives expressed their frustration that there has not been more recognition of Toi Pāho as a stimulant for regional growth.

“The regions do not function like the main centres. They seek regional solutions to regional capability issues, and need greater support from local providers.”

— Regional creative sector economic development champion

Fifteen Regional Skills Leadership Groups (RSLGs) were established as part of the reform of vocational education. Their remit is to identify and support better ways to meet current and future skills and workforce needs in their regions. Despite the enormous growth potential of the screen sector in Aotearoa, Tāmaki Makaurau is the only RSLG to date to publish a workforce plan that includes a focus on the screen and creative sectors.

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While half of all regions identify the need to upskill their regional workforce’s digital capability, only the Otago regional workforce plan infers a specified interest in game development in its recognition of the Dunedin CODE initiative. Despite being the seventh-most populous region in Aotearoa, Otago is now second only to Auckland by number of game development studios.

There is evidence of regional initiatives underway to generate local economic growth by developing productive and regenerative vocational pathways for the creative industry. These include collaborative partnerships between artists, employers, training providers, secondary and tertiary educators, and other stakeholders to offer experiences, project-based learning and qualifications.

There is an opportunity to better integrate screen training and local screen initiatives, with a view to increasing the range of training options available in the regions. This can be achieved through closer alignment between regional education and training providers, regional film offices, economic development agencies and local screen businesses.



More than a third (36%) of game development studios are based in Auckland, 26% in Otago, 18% in the Wellington region, 7% in Canterbury, 4% in Waikato, 3% in Bay of Plenty, 1% in Hawke’s Bay and 1% elsewhere.

Source: NZ Interactive Media Industry Survey, New Zealand Game Developers Association (NZGDA) (2022)



# Ngā piki me ngā heke o te wao

## Challenges maintaining a healthy workforce while balancing local and international markets

There was a sense among many interviewees that competing in the international market without policy in place to incentivise worker conditions and skills development can mean a race to the bottom, with the workforce hit the hardest. It became apparent that while subsidised global productions are necessary for Toi Pāho to survive in its current form, there is little in the way of legislative incentive for them to play a part in sustainably building the screen workforce.

“You can’t do a tax offset and have no growth grant programme and no skills development – we need a toolbox that all works together.”

— Workforce development hub executive, game development

A recurring theme throughout the research was a desire to seed true collaboration within Toi Pāho that sets standards for workforce skills and conditions; however, industry voices are concerned that such initiatives may be perceived by overseas productions as ‘friction’ and lead immediately to lost economic opportunity. There is a tension to negotiate as ‘business as usual’ addresses immediate economic realities, but it defers developing the foundational support systems needed to build and maintain a sustainable workforce.

There is a need to find a common vision on how to balance the benefits and demands of large offshore production companies, while taking the time to develop what is right for Toi Pāho and its workforce within a global context.

“American streamers come over, pulling our best and brightest into those productions, leaving our domestics exposed. But we can’t have one without the other. It is an ecosystem that needs to exist.”

— Independent writer and director, television

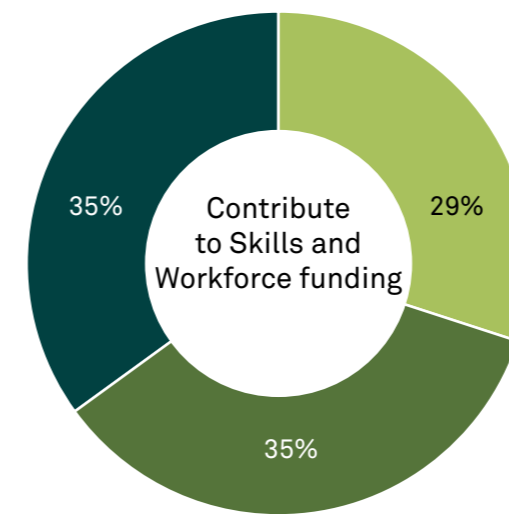
“There will be 28 high-end production series features, including Avatar, happening in the next 12 months, not including New Zealand short films and other smaller web series. Within that time frame, all of our experienced people will be on those high-end productions. Where will the crews come from for the rest of the New Zealand stories on our tiny budgets?”

— Highly experienced editor, film

MBIE is currently considering feedback on approaches to help develop skills and career pathways in Toi Pāho, through changes to the New Zealand Screen Production Grant settings. This could include a skills levy where productions would be required to pay a percentage of their rebate to a government-administered fund to support skills development, or a skills plan where an organisation would identify and regularly update on specific skill gaps in the sector. Productions would have to develop and implement a skills plan to address these gaps for New Zealanders as part of their production.

This initiative is supported by a high proportion of the screen industry.

### Screen company support for skills and workforce funding



■ Yes ■ No ■ Not sure

Close to three in ten screen companies indicated that their business would contribute to skills and workforce funding. A levy on the NZ Screen Production Grant for skills and workforce development is supported by industry, but preferred for international rather than local productions.

Source: Screen Workforce Survey (Company), Toi Mai (2022)

#### New Zealand productions

# 63%

#### International productions

# 84%

Support levy on productions accessing the NZ Screen Production Grant for skills and workforce development in the NZ screen industry



Photo by Brands People on Unsplash



## He one toiora kore Local content seeds local talent

Internationally funded IP content is the bread and butter of many Toi Pāho companies; however, we heard that work on offshore productions is not typically suited for industry entrants. This leads to a situation where many companies are not only short of senior staff to train new entrants, they also lack projects to assign them to. There is a desire to find ways for both international and local productions to work symbiotically to build a sustainable and consistent workforce and a uniquely Aotearoa Toi Pāho.

“It’s important to have an independent local industry here in New Zealand. There’s a symbiotic relationship because you need those smaller projects as a training ground for all our new people coming through. And then they can step up to the bigger projects. If you lose all that local stuff, then there isn’t that training round anymore.”

— Post-production company director,  
film and television

“We can’t take seniors off [international] IP projects and we can’t put juniors on [international] IP projects.”

— Studio director, game development

“An opportunity for all of us that came out of the pandemic is the industry is competing with the rest of the world and not with each other. So there was some really heartening dialogue, openness and transparency about what everyone was doing and that has helped everyone through.”

— Major studio executive, television

With greater support and funding for local IP projects, smaller local productions could have more capacity to support junior talent to grow in below-the-line roles. In this way it may be possible to build the cultural capital of the sector while also developing our capability for high-profile local and international productions.

“The industry, the Government and the Ministry need to be putting effort into New Zealand IP and how we encourage local productions, creating a sustainable industry. They only think of the service model. Train crew so when the foreigners come here, we can say we have a high number of people to work.”

— Film-maker and screen diversity advocate

“Our biggest opportunity for local stuff is to ensure we’re supporting IP creators.”

— Producer, film



Photo supplied by Screen Marlborough. Feature film 'Northspur' by Aaron Falvey, Director/producer

“The industry, the Government and the Ministry need to be putting effort into New Zealand IP and how we encourage local productions, creating a sustainable industry. They only think of the service model. Train crew so when the foreigners come here, we can say we have a high number of people to work.”

— Film-maker and screen diversity advocate



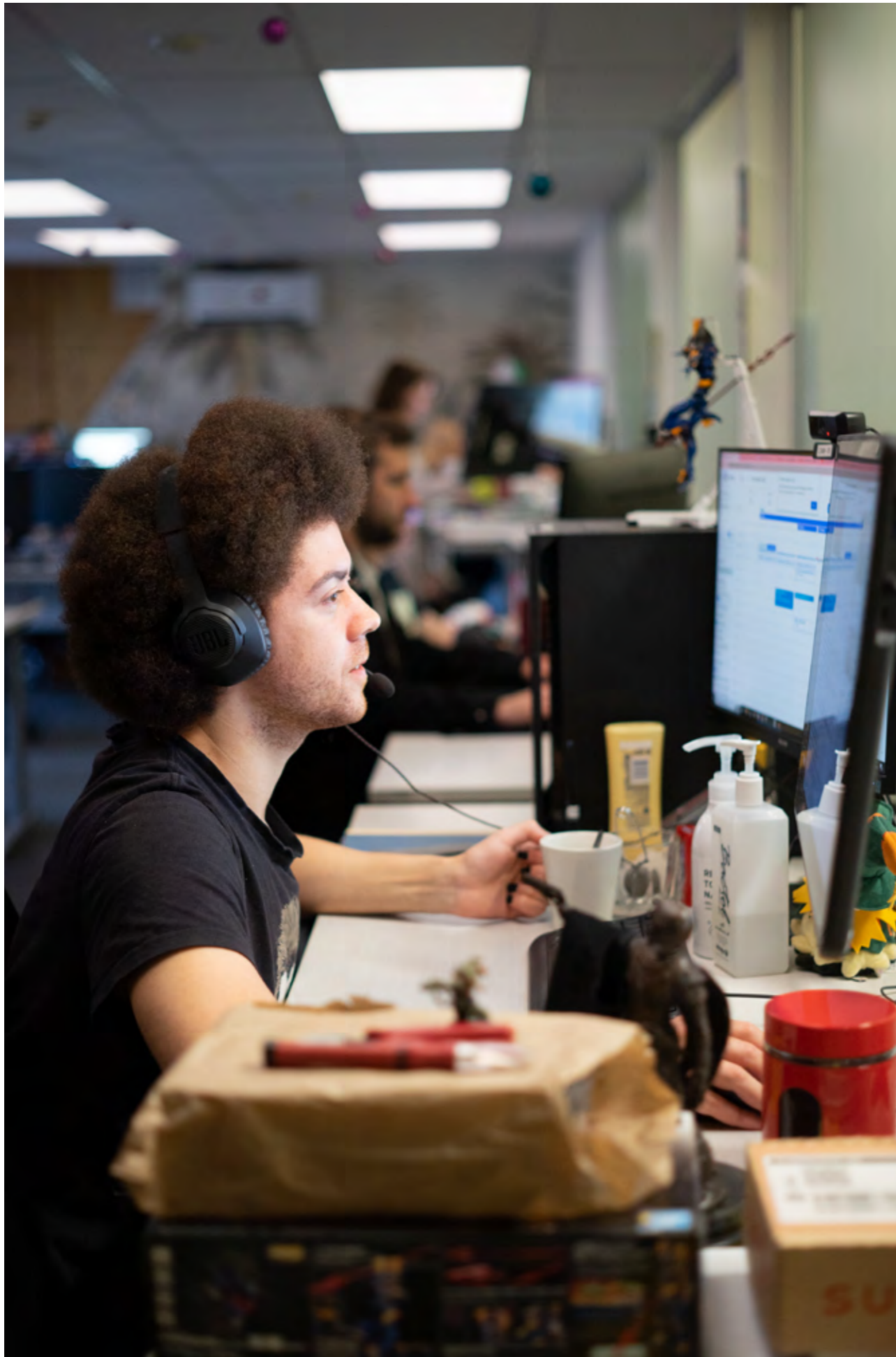


Image courtesy of CerebralFix

## He wao whakatupu An industry development programme for game development specifically for Aotearoa

Given recent and projected future growth, game development participants consistently spoke of the need for a comprehensive development programme for their industry. Without this, game development companies are struggling to find the funding and resources to grow their workforces and scale their capability to deliver on a substantial pipeline of work. They cautioned, however, that any initiative should be tailored to nurture and build an Aotearoa-specific game development industry, with skills development as a prerequisite for companies to qualify.

“Having access to funds to support industry and talent development would be game changing for game development in New Zealand. We are the only English-speaking country that doesn’t offer a game sector tax incentive.”

— Industry association executive, game development

“We are a hybrid industry, which is a strength; however, we fall through the cracks of the funding models, which is a problem. The industry has had to keep bootstrapping.”

— Studio executive, game development

“Animators and creatives get snapped up by film, who get a 20 per cent rebate. For ten years all we have been asking for is an industry development programme. It would be irresponsible of me to not investigate our options in Australia.”

— Studio executive, game development

As part of the Digital Technologies Industry Transformation Plan (ITP), MBIE is currently exploring options and advising Ministers on ways to support the game development industry, particularly in light of the competitive Australian regime for game development studios.

In November 2022 the Government announced that it will invest \$2.25 million a year until 2027 to expand Dunedin’s CODE programme to other regional centres.

# 73%

A total of 3.7 million people in Aotearoa play video games.

Source: Digital New Zealand Report, IGEA (2022)



# He pikinga uaua

## Struggling to scale

Long-term plans and creative dreams are tempered by short-term funding and a lack of the most valuable resource of all – time. We heard that contestable funding causes businesses to slash their margins in order to be competitive, fuelling unsustainable work practices and ultimately leading to companies having to work harder for less money. Many are realising the toll of sacrificing whānau time to work harder, and the modest financial rewards are not nearly enough to generate the motivation required to scale and do even more. Financial freedom remains a target, but beyond that the ultimate goal is freedom to spend time however one wishes to.

“You just have to work all the time. And you’re always saying ‘yes’ to different things. Mental health can manifest itself in many different ways... whether that’s non-stop working, alcohol abuse, or trying to say ‘yes’ to all of those sorts of things to stay afloat. Our accountant said we’re at the point now we’re working towards financial freedom. But, our goal is time-freedom. We still want to do all of this amazing mahi that we are doing in terms of creating real Māori spaces and places, and we get to bring our kids along too. That’s why we created a business and we are really privileged and grateful to have that. It’s not that we don’t enjoy it, but we need to be able to see the wood from the trees and not be stuck in the middle of the woods all the time.”

— Māori independent broadcast media professional, television





# Te tangi o Ngāti Hakaturi me Ngāti Pēpeke

## Protecting Māori IP; access to IP and content

As we develop into a digital society a new form of challenge is emerging for the protection of taonga Māori. Industry spoke of the misappropriation of cultural IP and considered the lost cultural and economic impacts of this.

The protection of IP with the emergence of new content platforms (for example ‘metaverses’) is a challenge for industry at large. Currently many large corporations are taking costly and proactive measures to protect their brands in the virtual realm, such as filing new trademark registrations or purchasing blockchain domains, in what seems to be a largely unregulated medium. How will iwi protect their cultural heritage in this domain? Who owns tā moko and mātauranga? These are complex questions to explore, which at face value would seem to require the collaboration of all iwi to preserve this heritage.

As content becomes digitised and monetised other problems emerge. Examples of this include footage of ancestors that now sits firmly behind paywall barriers, preventing future generations from learning the ways of their tūpuna should they not have the ability to pay to see it. The exploitation of this footage would never have been permitted by those tūpuna if they knew their mokopuna would have to pay to watch it, or that their voices would ultimately be commercialised.

“It stresses me out that people are taking our cultural IP and using it. And some of the things that are stopping us is our own cost of protection that we can’t have IP ownership over time. How do we battle that? There are no quick wins. So, you can’t have any IP at all now. Like in New Zealand you can own the IP for it, but it’s not stopping someone from overseas just taking it and using it. So now we’re seeing male characters in video games with moko kauae. They have no consideration that it’s someone else’s stuff; they’re using it because it’s cool. So that’s what we’re trying to establish – if we can get our own Māori creatives, to make this stock in games, then we can have ownership of that IP and know that it’s been approved by our people.”

— Māori partnerships and pathways advocate,  
game development





Te tiaki pai i te wao  
Celebrating and  
protecting the taonga  
of Aotearoa

# TE TIAKI PAI I TE WAO





Photo by Renee Thyme on Pexels

## Te tiaki pai i te wao Celebrating and protecting the taonga of Aotearoa

This report encourages change by presenting a collective Toi Pāho view of what is required for Aotearoa to attract and nurture the next generation of talent, and to become a world leader that celebrates diversity, equity and fairness.

Core to addressing the outlined challenges is a need to build, protect and leverage the unique intellectual property (IP) of Aotearoa – our taonga – for the benefit of future generations. By ensuring a diversity of local content is adequately funded, we have an opportunity to build two taonga side by side: our kōrero and our people. To serve those people better, the sector should draw inspiration from te ao Māori and implement a circular industry model inspired by nature. Within Te Wao Nui o Toi, all aspects of the toi industries are able to be represented and, importantly, given the right conditions so that all may live, grow and thrive.

By nurturing and growing talented pihinga, regional businesses will succeed and replenish the earth for the next generation to sustainably begin the path from kākano to puāwaitanga. Encouraging diversity and inclusion, and creating accessible pathways and work experiences for passion-driven rangatahi – as well as those coming in later in life – will open multiple pathways into below-the-line roles.

Like the most delicate pihinga, building our unique perspective and vision for Toi Pāho requires imagination, crafting, care and dedication. And like the uru kahikatea, we must boldly collaborate and open wider kōrero about our screen workforce and its future: What defines our screen industries? What makes us unique and strong?

We must harness the potential of our people and articulate our own identity to inspire and train the next generation of talent. We must establish ways to maintain and grow our international production revenue, while also ensuring the unique identity and taonga of Aotearoa are not compromised.

It is important to acknowledge the pockets of industry work already underway to address the workforce challenges faced by Toi Pāho. These initiatives are often carried out by resolute groups or individuals with limited access to funding and support – it is now the Government’s turn to step up and back the industry on its quest to build a thriving and sustainable Toi Pāho workforce.

The following strategic goals and recommendations provide direction towards a sustainable, inclusive, diverse and thriving screen workforce.



# HEI PUANGA PUANGA HEI PUANGA HEI PUANGA

Hei puanga hua tuatahi  
Te whakaawetanga  
hei pūhou

Strategic goal 1  
Inspiration for a  
new-generation Toi Pāho



## Marohitanga tuatahi Recommendation 1

Mā TEC e whāngai ā-putea, mā Toi Mai hoki e ruruku ngā kaupapa e kitea ai, e ngahau ai hoki ngā umanga whakaata i raro i te rārangi, ki ngā rangatahi Māori, ngā whānau, ngā hapū, ngā iwi, e kite hoki ai ngā hāpori tē rawaka te whakaroto, tae rā anō ki ngā iwi o Te Moana Nui a Kiwa, ngā iwi o Āhia, ngā tauīwi, ngā tāngata LBGTQIA+, ngā wāhine, ngā tāngata whaikaha me te hunga whakaaro kanorau.

TEC to fund, and Toi Mai to coordinate, initiatives that make below-the-line screen careers visible and attractive to rangatahi Māori, whānau, hapū and iwi, and reflect the diversity of underserved communities, including Māori, Pacific Peoples, Asian, migrant communities, LBGTQIA+, women, tangata whaikaha and neurodiverse people.

- Create welcoming and safe whānau-based education models that expose rangatahi (from primary age onwards) and their whānau to the potential of, and pathways towards, Toi Pāho careers. Show how Toi Pāho values creative and diverse perspectives, with a view to enabling rangatahi to continue an inherent creative mindset.
- Design and activate a communications campaign to inspire secondary school-aged rangatahi to pursue creative, technical and screen industry careers.
- Tailor these initiatives in ways that can attract other underserved communities into screen and tech roles.
- Design resources that clearly map and define the variety of positions and pathways available by:
  - A. designing and distributing resources that improve understanding and appreciation of below-the-line roles and career pathways while helping people connect to the right training and opportunities, and
  - B. leveraging the developing Toi Pāho industry training body initiative (see recommendation 9) to help inform resource development, and promote the roles available in Toi Pāho production.



## Marohitanga tuarua Recommendation 2

Mā TEC me MBIE ngā kaupapa arotahi e whāngai ā-pūtea hei whakanui i te angitu, hei whakatairanga i te whaihua o ngā kaupapa auaha me te hangarau, e kitea ai e te tangata ‘tōna anō āhua’ i ngā tūranga rāngai whakaata.

TEC and MBIE to fund targeted campaigns that celebrate success, promote the value of creative and technical initiative, and enable people to ‘see themselves’ in Toi Pāho roles.

- Clearly articulate the diversity of roles required by screen and tech industries.
- Profile real workers within Toi Pāho, across a wide variety of roles and locations.
- Highlight pathways into (and beyond) these roles.
- Fund a collaboration between the industry and existing government careers/pathways advisory services to tell the Toi Pāho story to a wider audience.

## Marohitanga tuatoru Recommendation 3

Mā TEC me MBIE e whāngai ā-pūtea, mā Toi Mai hoki e ruruku te whakahoahoa tangata i tētahi kaupapa e whakapoapoa ana i ngā parapara i ngā rāngai noho tata.

TEC and MBIE to fund and Toi Mai to coordinate the design of a campaign to attract talent from adjacent industries.

- Attract mid-career changers through targeted initiatives to engage workers from adjacent industries who can bring their transferable skills to the creative sector.
- Enable mid-career changers to see themselves in Toi Pāho roles, and provide access to entrants from non-traditional pathways via targeted training opportunities.



# HEI PUANGA HUA TUARUA

Hei puanga hua tuarua  
Hei taunga manu  
hāereere

Strategic goal 2  
Accessible and equitable  
Toi Pāho opportunities



## Marohitanga tuawhā Recommendation 4

Mā ngā umanga kāwanatanga e tautoko ngā kaupapa e tūhono ana i ngā rangatahi Māori, ngā whānau, ngā hapū, ngā iwi, me ngā hāpori tē rawaka te whakarato i ngā tūranga auaha, hangarau hoki ki te whakaata.

Government agencies to support initiatives that connect rangatahi Māori, whānau, hapū, iwi and underserved communities with creative and tech roles in screen.

- MBIE to seed initiatives to identify Māori-specific skills that can uplift Toi Pāho and its workforce, and link these to new and existing screen roles.
- MBIE to fund paid internships/ inductions that allow screen students to gain real-world industry experience.
- Ministry of Education (MoE) to address academic streaming and link Toi Pāho roles to curriculum-level courses and classroom activities that nurture the raw talents of rangatahi.
- MoE to work with kura kaupapa and wharekura to connect ākonga Māori with the skills they inherently have and show them how those skills could be applied within Toi Pāho careers.
- TEC and Toi Mai to identify and expand existing initiatives that successfully introduce rangatahi to tech and screen careers, and tailor these initiatives in ways that can bridge other underserved communities into screen careers.

## Marohitanga tuarima Recommendation 5

Mā Toi Mai e whakanui ngā kaupapa akoranga ā-mahi e poipoi ana i te taiao rāngai ngākaupai, e oti ai i ngā reo te taurikura.

Toi Mai to endorse work-based learning programmes that create positive industry environments where diverse voices can thrive.

Reduce attrition rates by endorsing work-based screen training programmes that:

- demonstrate effective pastoral care, cultural safety and professional respect as a part of an industry-standard skills uplift, and
- partner with Māori to respectfully embed tikanga with these programmes; for example, manaakitanga and kaitiakitanga approaches.

### Insights for government agencies to support strategic goal two

Funding mechanisms (and possibly legislation) that set sector diversity targets could help scaffold Māori and other under-represented communities into leadership positions.

- Equitable access to technology for Māori and Pasifika youth is urgently needed. Purposeful, sustainable and long-term initiatives are required to provide whānau with access to high-speed internet, personal computers and basic computer skills.
- Create an industry pūrākau to open pathways for Māori and create a medium for Māori to engage and support their tamariki and mokopuna. Open new narratives that unlock the hangarau and technology world for rangatahi so they can see themselves in the industry.



# HEI PUANGA HUA TUATORU TE WAO HEI AKOMANGA, TE MATARAU HEI AKORANGA

Hei puanga hua tuatoru  
Te wao hei akomanga, te  
matarau hei akoranga

### Strategic goal 3

Relevant training and  
support delivered by  
providers and industry



## Marohitanga tuaono Recommendation 6

Mā TEC e whāngai pū ā-pūtea ngā kaupapa e hāngai motika ana ki te ahumahi me ōna hiahiatanga.

TEC to direct funding to programmes that align closely with industry and industry requirements.

- Incentivise vocational education providers to align with existing studios and production company resources. This can reduce costly replication of industry production facilities.
- Incentivise vocational education providers to work closely with industry to provide work opportunities and integrated learning for trainees (and conversely, encourage industry to undertake in-work training), with a view to enabling the same opportunities regionally as in the main metropolitan areas.
- Toi Mai to design a suite of standardised, work-integrated qualifications that will enable trainees to learn on the tools, learn from industry experts and gain real-world experience of the screen production process.

## Marohitanga tuawhitu Recommendation 7

Mā Toi Mai e whakatairanga, mā TEC hoki e whāngai ā-pūtea ngā whakangungu tautuhi e toko ana ngā hapori tē rawaka te whakarato, e poipoia ai ngā umanga rāngai whakaata.

Toi Mai to endorse and TEC to fund targeted training that supports underserved communities to build Toi Pāho careers.

- Incentivise vocational education providers to demonstrate proven and accessible training pathways for underserved communities.
- Identify, fund and build on existing industry initiatives that provide proven and accessible pathways for underserved communities into Toi Pāho.

## Marohitanga tuawaru Recommendation 8

Mā TEC e whakawhānui ake āna paearu mō te whāingatangā pūtea e tae rā anō ai ki te pūtea paerata mā ngā kaupapa NZQCF-kore (Taura Here Tohu Mātauranga o Aotearoa), nā te rāngai, me ngā whakamanatanga-iti whakapaparanga e pīngore ana, e nanea ai ngā hiahiatanga o nāianeī a te ahumahi.

TEC to widen its criteria for provider funding to include pilot funding for non-NZQCF (New Zealand Qualifications and Credentials Framework) listed, industry-defined and delivered short-form courses and stackable micro-credentials that are flexible, nimble and meet immediate industry need.

- Focus on short courses that can upskill mid-career screen professionals and can provide entry points for people entering the sector from other sectors.
- Design and fund targeted training for storytellers to bring in diverse voices at all levels and increase the level of culturally diverse content being created/produced.
- Attract the right talent and provide a realistic view of Toi Pāho careers through short introductory courses that clearly communicate the ‘lived experience’ of available roles and the nature of a ‘gig-economy’ based industry.
- Increase screen-relevant business skills training through shared resources and micro-credentials that support contractors.
- Prototype training options before they become formal qualifications.

### Insights for government agencies to support strategic goal three

- Provide pathways to competence and build cultural capital by supporting local content. Support and fund local content that can demonstrate proven accessible training opportunities.
- Consider expanding the role of funding agencies such as the New Zealand Film Commission Te Tumu Whakaata Taonga (NZFC) and Creative New Zealand to include support for the game development and interactive media industries.



# HEI PUANGA HUA TUAWHĀ MAHI TAHI

Hei puanga hua tuawhā  
Mahi tahi

Strategic goal 4  
Mahi tahi

## Marohitanga tuaiwa Recommendation 9

Mā Te Ahumahi, Toi Mai, TEC me MBIE e whakatewhatewha ngā tūponotanga hua, e āta whakamārama hoki te take o te rāngai kaupapa hōu e anga atu ana ki tētahi Ope Whakangungu Ahumahi.

Industry, Toi Mai, TEC and MBIE to investigate the potential merits of, and help define the purpose of, the sector's nascent initiative to create an industry training body.

The purpose of this body would be to activate vocational training, attraction and pastoral care services that provide for the needs of the industry, trainees and the workforce. There is potential for it to:

- partner with Toi Mai and training providers to coordinate the development of relevant, industry-led/education-delivered vocational qualifications, screen workforce-based training and endorsement criteria,
- provide funds to the informal screen training sector for the provision of short-form, work-based courses,
- manage a group apprenticeship model, which may include centralised training and pastoral care and support,
- provide diversity programmes that target and support under-represented workers and learners in the sector (Māori, Pacific Peoples, Asian, migrant communities, LGBTQIA+, women, tangata whaikaha and neurodiverse),
- offer pastoral care and mental-health services to trainees and other vulnerable workers,
- advise workplaces and production companies about best practice in creating and maintaining healthy, inclusive, culturally safe work environments,
- promote the wide range of screen production roles and careers to underserved communities and their whānau,
- monitor and coordinate the future pipeline of work to help ensure that the pipeline of skilled workforce matches the pipeline of work, and
- provide business advice to the 70 per cent of screen workers classed as self-employed, and prepare new entrants for the realities of navigating a career within a contractor economy.



## Marohitanga tuatekau Recommendation 10

Mā Toi Mai e mahi tahi ki te ahumahi e whakaritea ai ngā āheinga ā-ahumahi o te tau tītoki me te pae tawhiti.

Toi Mai to work with industry towards establishing medium- and long-term workforce capability pipelines.

- Improve data collection on Toi Pāho, trainees and the people who make up its workforce.
- Increase the level of collaboration on survey design and the sharing of data insights throughout the sector.
- Leverage this data to ensure that training and attraction initiatives address specific industry needs.

### Insights for government agencies to support strategic goal four

- **Toi Mai supports and can help inform the industry's exploration towards a standard model that encourages productions to take responsibility for measurable and demonstrable standards on skills development.** This initiative should set targeted and measurable standards on sustainability, equity, skills development and workplace conditions that can uplift the workforce and the quality of screen productions in Aotearoa. Koha is a 'two-way street': consider making compliance with this model a prerequisite for uptake of any screen industry development programmes.
- **Require Regional Skills Leadership Groups (RSLGs) to work closely with industry, including the regional film offices.** Encourage more regions to highlight and invest in their screen industries' contribution to economic growth and wellbeing in their regional workforce plans.

- **Support the industry in the establishment of a pan-sector leadership body** with a remit to increase visibility and collaboration across Toi Pāho (not just film).

This body would:

- lead policy and advocacy for the sector (including the development of a long-term vision and global offering),
- provide a centralised, safe, online community to support workers and share knowledge, and
- activate ways for the whole sector to share assets, knowledge and creativity.

- **Support an industry development programme for game development.** Assist the industry to sustainably scale by designing any development programme to be Aotearoa-specific, with careful consideration given to skills development.

- **Design new funding structures that support capability development.**

Current funding within Toi Pāho is targeted at content creation and production delivery, making it difficult for production companies to employ and train rangatahi and career changers into Toi Pāho roles. There is a need to design funding structures that also support capability development. This could be addressed through an NZ Screen Production Grant training levy.

- **Create stability for regional and smaller-scale organisations by expanding commercial contracts.** Expanding commercial contracts from short term (three to six months) to medium term (24 months) will improve stability for smaller-scale organisations and provide employers with the confidence to recruit rangatahi and invest in on-the-job training. This is viewed as critical by the industry in order to create regional-level pathways that ensure talent has options for progression outside the main metropolitan areas.

## Haere ake nei Next steps

# HAERE AKE NEI

## Kia rangona ai tō reo Have your say

E akiaki ana mātou i te hapori Toi Pāho me ngā umanga whakaako, kia tukuna mai ai ō rātou whakaaro mō ngā marohitanga o tēnei pūrongo.

We encourage Toi Pāho members and education providers to give feedback on this report's recommendations.

Your feedback will inform the final recommendations and advice to the Tertiary Education Commission for investing in vocational education and training for Toi Pāho careers, and MBIE for its support of the sector. It will also influence the future work of Toi Mai in supporting the sector. An action plan and roadmap will be created to align industry and workforce training to 2032.

For details on the consultation process visit [toimai.nz](https://toimai.nz)

Consultation is open until 10 April 2023.

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We sincerely thank the Toi Mai team for their significant and positive contribution and collaboration — this report is a result of genuine mahi tahi and we are indebted to your generosity of time and spirit throughout.

We would also like to thank the many industry representatives across the motu from film, television and game development studios, training providers, employers, employees, contractors and industry advocates whose honest and open feedback enabled us to gain compelling insights so that together we can shape a better future for Toi Pāho and the people of Aotearoa.

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**Student, screen school - final year, career changer**  
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# Kuputaka

## Glossary of terms

### Above-the-line roles

Individuals who guide and influence the creative direction, process and voice of a given narrative in a film and related expenditures. These roles include but are not limited to the screenwriter, producer, director and actors.

### Academic streaming

Grouping students within a school into different classes for some or all subjects according to perceived ability. This is often done based on past achievement results but can be subject to bias. Other terms for streaming include between-class ability grouping, tracking or setting.

### Ākonga Māori

Māori student.

### Apprenticeship

Course-related and assessed work-based training provided by an employer who supports the trainee to learn on the job

### Atua

Ancestor with continuing influence, god, demon, supernatural being, deity, ghost, object of superstitious regard, strange being. Many Māori trace their ancestry from atua in their whakapapa and they are regarded as ancestors with influence over particular domains.

### Below-the-line roles

Technical crew workers who do not provide input, guidance, creative development, or leadership on a production project. Below-the-line workers typically make up the vast majority of production personnel.

### Bicultural

Māori and non-Māori, as based on the partnership established between Māori and the Crown by Te Tiriti o Waitangi.

### Blockchain

A decentralised, distributed, and often public, digital ledger consisting of records called blocks that are used to record transactions across many computers so that any involved block cannot be altered retroactively, without the alteration of all subsequent blocks.

### Empathy interview

A practical, conversational research technique to uncover the feelings and experience of others.

### Equity

Fairness and justice, as distinct from equality. While equality means providing the same to all, equity means recognising that we do not all start from the same place and must acknowledge and make adjustments to imbalances.

### Gig economy

An economic system in which many short periods of work are available rather than permanent jobs.

### Hangarau

Technology; technological.

### Hapū

Kinship group, clan, tribe, subtribe – section of a large kinship group and the primary political unit in traditional Māori society. It consisted of a number of whānau sharing descent from a common ancestor, usually being named after the ancestor, but sometimes from an important event in the group's history.

### Hui

Gathering, meeting, assembly, seminar, conference.

### Induction

As distinct from internship, 'induction' for the purposes of this report refers to the onboarding of new employees into paid, permanent roles.

### Internship

A period of paid or unpaid work experience. Internships can be compulsory or optional as part of a study programme, or simply a chance to gain relevant skills and experience in a particular field.

### Iwi

Extended kinship group, tribe, nation, people, nationality, race – often refers to a large group of people descended from a common ancestor and associated with a distinct territory.

### Kahikatea

White pine (*Dacrycarpus dacrydioides*) – a tall coniferous tree of mainly swampy ground; the leaves are scale-like and soft to touch.

### Kaitiakitanga

The exercise of guardianship by the tangata whenua of an area in accordance with tikanga Māori in relation to natural and physical resources; includes the ethic of stewardship.

### Kākano

Seed, kernel, pip, berry, grain.

### Koha

Gift, present, offering, donation, contribution, especially one maintaining social relationships and has connotations of reciprocity.

### Kōrero

Speech, narrative, story, news, account, discussion, conversation, discourse, statement, information.

### Kura

School, education, learning gathering.

### Kura kaupapa

Primary school operating under Māori custom and using Māori as the medium of instruction.

### LGBTQIA+

Acronym for lesbian, gay, bisexual, transgender, queer/questioning, intersex, asexual and many other terms (such as non-binary and pansexual).

### Mahi tahi

Work together, collaborate, cooperate, work as a team.

### Māhuri

Young tree, sapling.

### Manaakitanga

Hospitality, kindness, generosity, support – the process of showing respect, generosity and care for others.

### Manu

Bird - any winged creature including bats, cicadas, butterflies.

### Mātauranga

Knowledge, wisdom, understanding, skill – sometimes used in the plural.

### Mātauranga Māori

Māori knowledge – the body of knowledge originating from Māori ancestors, including the Māori world view and perspectives, Māori creativity and cultural practices.

### Metaverse

A concept for a decentralised iteration of the internet.

### Micro-credentials

Small, stand-alone formal awards that recognise the achievement of specific skills, experience or knowledge.

### Missing middle

The empirical observation that most employment in the Toi Pāho sector is located in either very small companies or large-sized firms.

### Moko kauae

A form of ta moko (Māori tattooing designs on the face or body done under traditional protocols) representing a woman's whānau and leadership within her community, recognising her whakapapa, status, and abilities.

### Mokopuna

(a) Grandchildren, grandchild - child or grandchild of a son, daughter, nephew, niece, etc; (b) descendent.

### Monoculture

A culture dominated by a single element : a prevailing culture marked by homogeneity.

### Motu

Island, country, land, nation, clump of trees, ship – anything separated or isolated.

### Neurodiverse

Displaying or characterised by autistic or other neurologically atypical patterns of thought or behaviour; not neurotypical.

### Ngahere

Bush, forest.

### Ngārara

(a) Insect, creepy-crawly, reptile; (b) bug, bacterium, bacteria, germ, bacillus, bacilli.

### Pihinga

Shoot, young plant, seedling.

### Puāwaitanga

To bloom, come to fruition, open out (of a flower).

### Pūrākau

Myth, ancient legend, story.

### Rākau

Tree, stick, timber, wood, spar, mast, plant.

### Rangatahi

(a) younger generation, youth (b) to be young.

### Stackable micro-credentials

The process of using small qualifications to build up to larger ones.

### Tā moko

Traditional tattooing – Māori tattooing designs on the face or body done under traditional protocols.

### Tamariki

Children – normally used only in the plural.

### Tangata whaikaha

People with disabilities.

### Taonga

Treasure, anything prized – applied to anything considered to be of value including socially or culturally valuable objects, resources, phenomenon, ideas and techniques.

### Te ao Māori

The Māori world view. At the heart of te ao Māori is the concept that people are closely connected to the land and everything on it. This connection is expressed through kaitiakitanga – guardianship and protection of the environment. As tangata whenua (people of the land), Māori see themselves as guardians of the earth, with the responsibility to care for, protect and maintain the environment for generations to come. In a business sense, this long-term, interconnected view of the world means considering the wider social, cultural and environmental impacts of every action.

### Te Māngai Pāho

New Zealand Crown entity responsible for the promotion of the Māori language and Māori culture by providing funding for Māori-language programming on radio and television.

### Tikanga

Correct procedure, custom, habit, lore, method, manner, rule, way, code, meaning, plan, practice, convention, protocol – the customary system of values and practices that have developed over time and are deeply embedded in the social context.

### Tūmanako

Desire, hope wish.

### Toi Pāho

The broadcast and screen industries that create and deliver engaging screen-based moving image and audio content for wide distribution, including (but not limited to): film, television, online interactive media, animation, visual effects (VFX) and game development.

### Tūpuna

Ancestors, grandparents – Western dialect variation of tipuna.

### Underserved communities

For the purposes of this report, 'underserved communities' refers to (but is not limited to) Māori, Pacific Peoples, Asian, migrant communities, LGBTQIA+, women, tangata whaikaha and neurodiverse.

### Waka

Canoe, vehicle, conveyance, spirit medium, medium (of an atua).

### Whakataukī

Proverb, significant saying, formulaic saying, cryptic saying, aphorism.

### Whakaaro

Thought, opinion, plan, understanding, idea, intention, gift, conscience.

### Whānau

Extended family, family group, a familiar term of address to a number of people – the primary economic unit of traditional Māori society. In the modern context the term is sometimes used to include friends who may not have any kinship ties to other members.

### Whanaungatanga

Relationship, kinship, sense of family connection – a relationship through shared experiences and working together which provides people with a sense of belonging. It develops as a result of kinship rights and obligations, which also serve to strengthen each member of the kin group. It also extends to others to whom one develops a close familial, friendship or reciprocal relationship.

### Wharekura

A secondary school that is run on kaupapa Māori principles – these schools use Māori language as the medium of instruction and incorporate Māori customary practices into the way they operate.



Photo by Tobias Tullius on Unsplash

# TOI PĀHO SYSTEMS AT RIVER CROSSING





