

# SCREEN INDUSTRY – SNAPSHOT

Note: The following data shows the screen industries that Toi Mai represents

## VALUE OF THE SCREEN INDUSTRY

# \$2.98bn

economic contribution or **0.84%** of NZ's GDP in 2022

## GROWTH OF THE SCREEN INDUSTRY

# 8.0%

Screen

VS

VS

# 3.2%

General Economy  
Average GDP growth, 2015–2022

## GDP PER FTE

# \$188k

NZ average  
**\$149k**

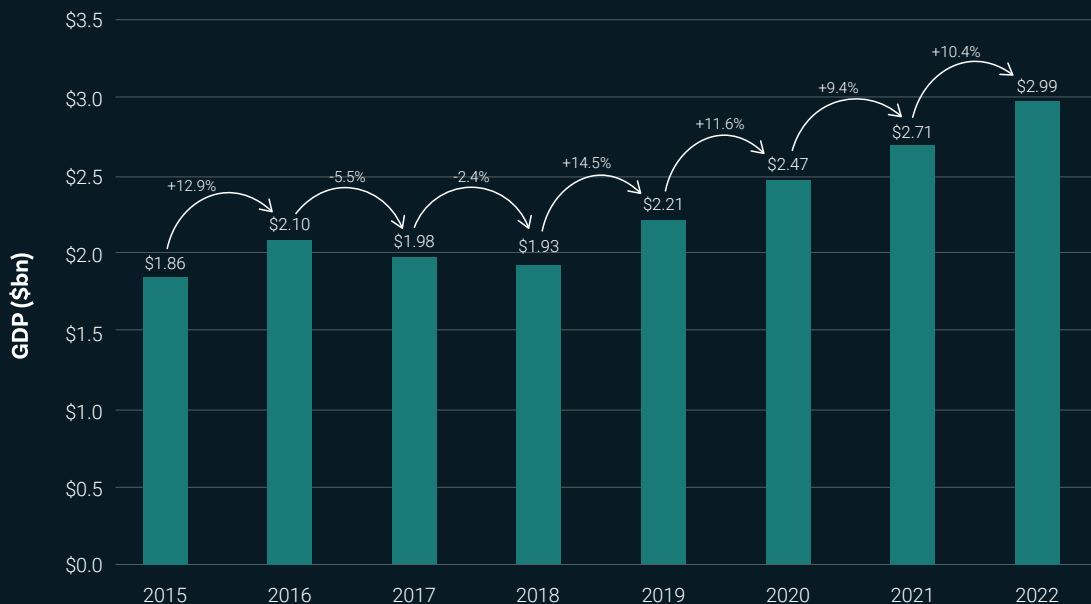
## TERTIARY EDUCATION INVESTMENT

Between 2018–2022, degree-level investment for screen-related qualifications was

# 2.9x more

than vocational education

### Screen GDP Contribution



#### Industries covered:

- Motion Picture and Video Production
- Motion Picture Exhibition
- Motion Picture and Video Distribution
- Post-production Services and Other Motion Picture

#### Data sources:

- Infometrics Toi Pāho – Broadcast and Screen Sector Profile 2022
- Te Mata Raraunga, Workforce Skills Data and Insights, 2023
- Ngā Kete, 2023

# SCREEN INDUSTRY – SNAPSHOT

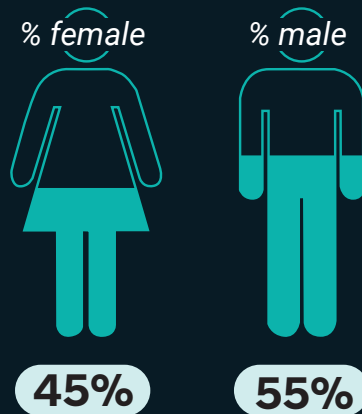
**Note:** The following data shows the screen industries that Toi Mai represents

## WORKFORCE SIZE IN 2022



Number of individuals

## GENDER BREAKDOWN



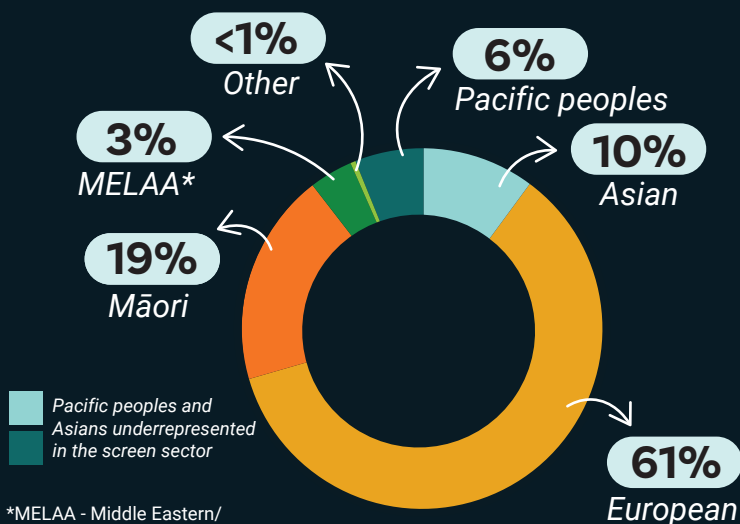
\*No data on gender diversity is available

## 1 YEAR RETENTION

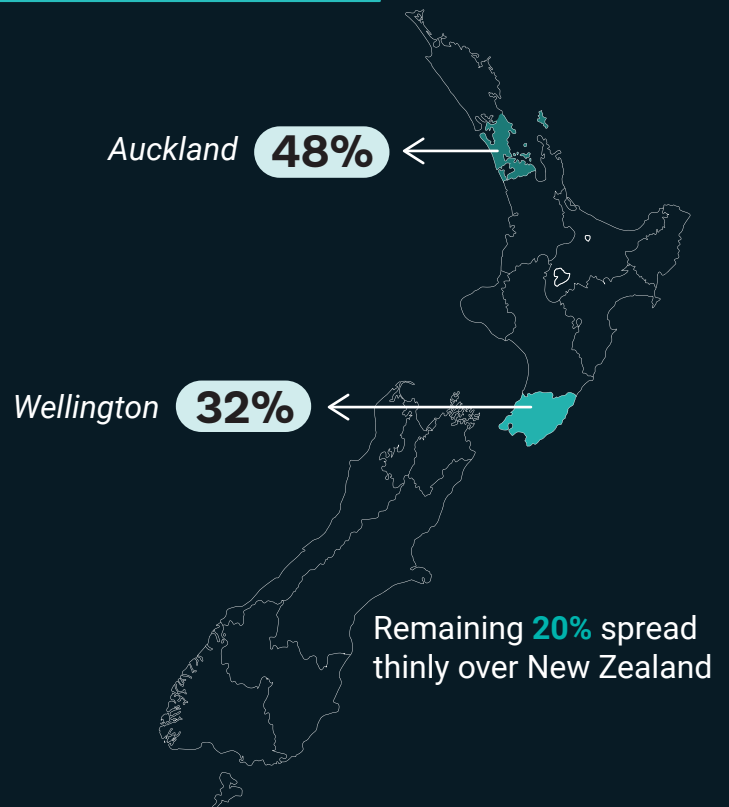


Low retention of new entrants. Of those who joined the screen industry in 2015, **50%** had left after 1 year

## ETHNICITY BREAKDOWN



## BUSINESSES BY REGION



## SELF-EMPLOYMENT



Self-employment rate (**64%**) is around 4 times the national average

## BUSINESS GROWTH



Since 2015, the number of businesses has grown by **66%**, totalling **5,520** in 2022. These predominately (88%) have zero employees.

### Data sources:

- Infometrics Toi Pāho – Broadcast and Screen Sector Profile 2022
- Te Mata Raraunga, Workforce Skills Data and Insights, 2023
- Ngā Kete, 2023

# The screen industry makes a significant contribution to the economy

## 1 SCREEN IS A FAST-GROWING INDUSTRY IN NEW ZEALAND

2020

**\$10bn**

Total related output from screen production expenditure between 2015–2020 was around **\$10bn**.<sup>1</sup>

2015

2020

**20%**

Production expenditure from the industry over the same period grew circa **20% p.a.**<sup>2</sup>

2015

## 2 HIGHLY PRODUCTIVE INDUSTRY WITH WIDER BENEFITS



**6%** of tourism earnings

**≡ \$198m**

Increased exposure of New Zealand culture to overseas audiences boosts tourism earnings. Research showed that six percent of tourists cited Lord of the Rings as one of the major reasons for visiting New Zealand (with **6% = \$198m**).<sup>3</sup>



## 3 RELIES HEAVILY ON INTERNATIONAL PRODUCTIONS



The screen production rebate supports to develop and attract productions to New Zealand. Ensuring both domestic and international productions continue to work concurrently is essential in supporting the growth and development of the workforce.



Screen activity reflects the international competition for attracting major overseas projects

**90%**



of screen production expenditure is derived from international productions.<sup>4</sup>

<sup>1</sup> Olsberg SPI, 2022

<sup>2</sup> Olsberg SPI, 2022

<sup>3</sup> Pinchefskey, 2012

<sup>4</sup> Olsberg SPI, 2022

# Our workforce development plan for below-the-line roles highlights several opportunities to improve productivity

## 1 IMPROVE AND ENABLE CAREER PROGRESSION

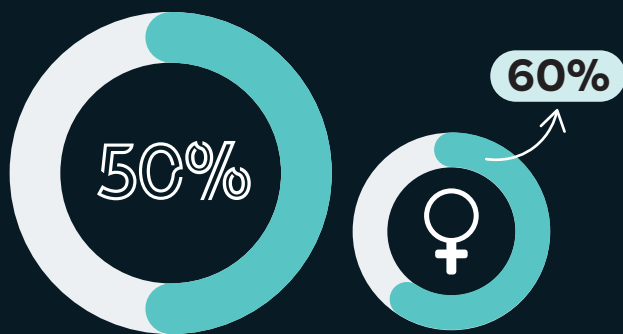
To progress careers both domestically and internationally, consistent and relevant professional development opportunities are needed.



## 3 MAKE ROLES AND PATHWAYS MORE VISIBLE AND ACCESSIBLE

People have little or no knowledge about the career pathways available for entry to many below-the-line roles.

The potential of screen careers are not well understood.<sup>5</sup>



50% of individual screen workers (60% women) rely on unpaid work as a means of accessing or progressing a career in screen.<sup>6</sup>

## 2 BETTER ALIGN TRAINING WITH INDUSTRY SKILL NEEDS

There is a need for training that is industry-led and enabled (work-based and short courses) to work with the parameters of a gig-based industry.<sup>7</sup> Toi Mai is supporting the industry in forecasting training needs through improved data collection and analysis.



The main barriers to undertaking training relate to lack of money/funding, lack of suitable training, unpredictability of employment, and lack of time.<sup>8</sup>

## 4 SUPPORT FOR CONTENT PRODUCERS FROM UNDERSERVED COMMUNITIES\*

\*Underserved communities refers to (but is not limited to) Māori, Pacific peoples, Asian, migrant communities, LGBTQIA+, women, tāngata whaikaha, and neurodiverse people



The NZ screen industry has a global reputation for its content production, based on both our unique storytellers and the technical excellence of the crew. There are opportunities for underserved communities including Māori and Pacific to contribute to and benefit from a variety of careers in screen.



<sup>5</sup> Te Wao Nui o Toi, 2023

<sup>6</sup> Screen Workforce Survey, 2022

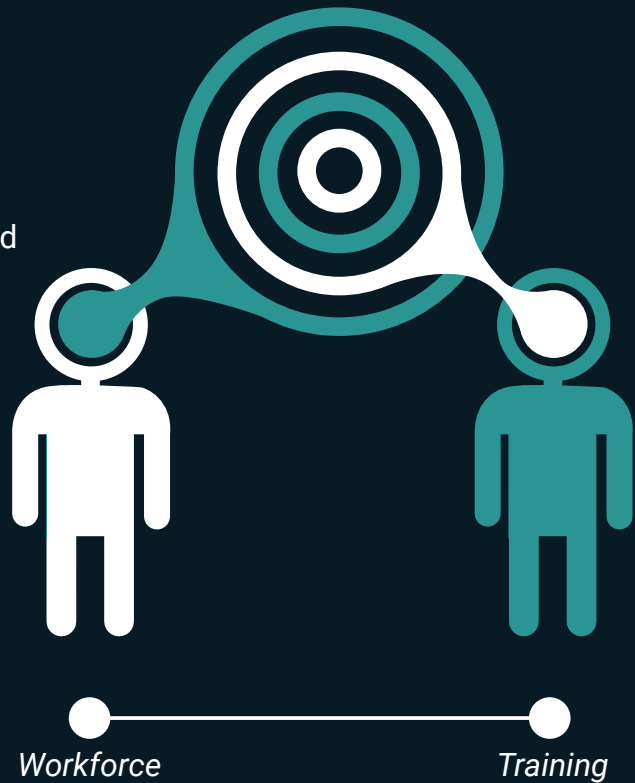
<sup>7</sup> Te Wao Nui o Toi, 2023

<sup>8</sup> Screen Workforce Survey, 2022

# Improved industry co-ordination on upcoming productions and the required skills would accelerate the industry and bring significant benefits to the economy

## 1 ALIGN INDUSTRY WORKFORCE AND TRAINING NEEDS

With improved industry coordination there can be better alignment between workforce and training to meet industry skill needs. Like many parts of the creative industries, the screen industry has never had an industry training organisation to coordinate its vocational training and workforce needs.



## 2 ENABLE SUSTAINED DOMESTIC AND INTERNATIONAL GROWTH

Improved coordination, including funding for training, would sustain international and domestic growth in a globally competitive market that reflects the diversity of Aotearoa.



# CREATIVE ARTS INDUSTRIES – SNAPSHOT

**Note:** The following data shows the creative arts industries that Toi Mai represents

## VALUE OF THE INDUSTRIES

# \$2.7bn

economic contribution or **0.80%** of NZ's GDP in 2022

## GROWTH OF THE INDUSTRIES

# 3.4%

VS

# 2.9%

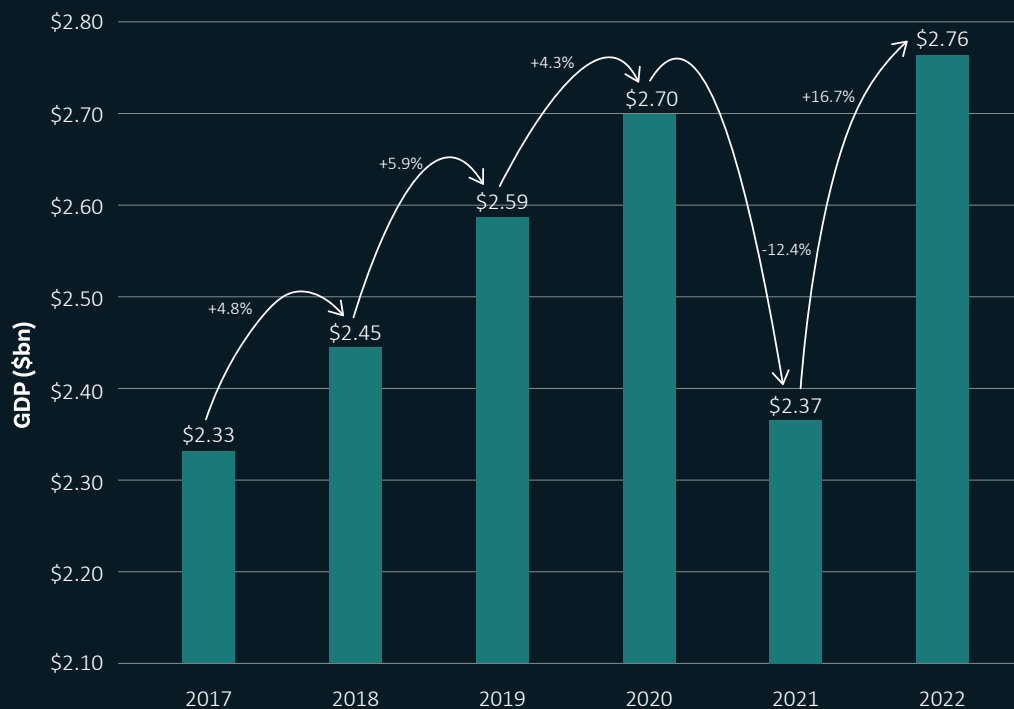
Creative Arts

VS

General Economy

Average GDP growth, 2017–2022

### Creative Arts Industries GDP Contribution



#### Industries covered:

- Book Publishing
- Music Publishing
- Music and Other Sound Recording Activities
- Performing Arts Operation
- Creative Artists, Musicians, Writers and Performers
- Performing Arts Venue Operation

#### Data sources:

- Infometrics Arts Sector Profile, 2022
- Te Mata Raraunga, Workforce Skills Data and Insights, 2023
- Creative New Zealand, Profile of Creative Professionals, 2023

# CREATIVE ARTS INDUSTRIES – SNAPSHOT

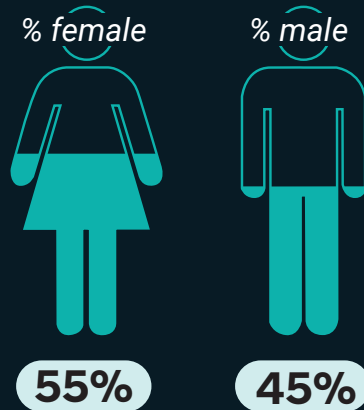
**Note:** The following data shows the creative arts industries that Toi Mai represents

## WORKFORCE SIZE IN 2022



Number of individuals

## GENDER BREAKDOWN



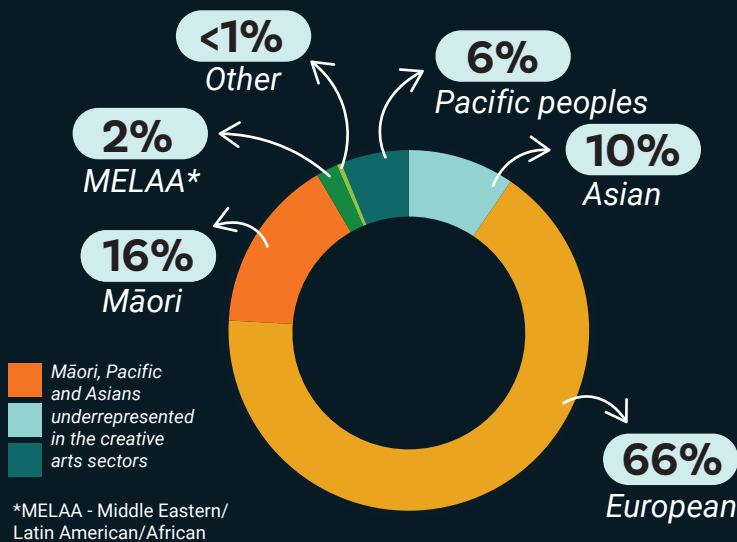
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## GIG ECONOMY

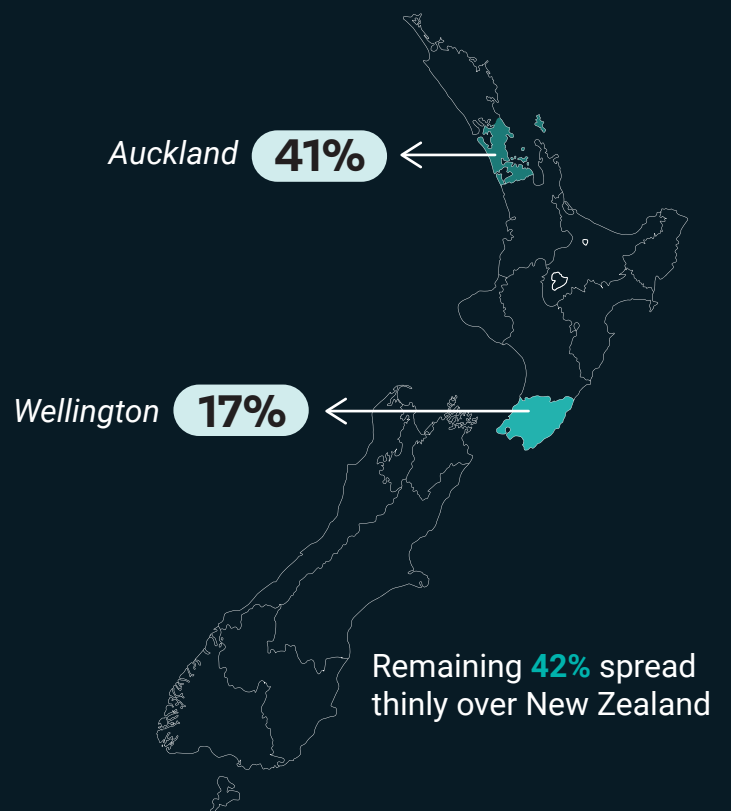


**44%** of creative professionals undertake paid work outside the creative industry

## ETHNICITY BREAKDOWN



## BUSINESSES BY REGION



## SELF-EMPLOYMENT



Self-employment rate (**65%**) is around 4 times the national average

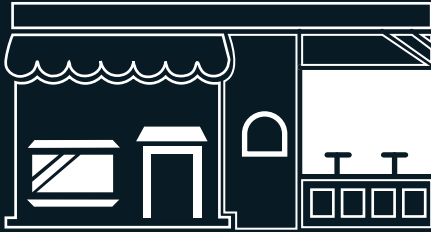
### Data sources:

- Infometrics Arts Sector Profile, 2022
- Te Mata Raraunga, Workforce Skills Data and Insights, 2023
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# High self-employment puts pressure on career sustainability

1

## DUPLICATION OF EFFORT FOR SELF-EMPLOYED



A significant amount of effort across the creative arts industries is spent learning how to run their own businesses, with vast duplication of effort.

Only one-third of creative professionals believe there are enough training and development opportunities in New Zealand, with business skills, such as marketing and business management key areas for development.<sup>9</sup>

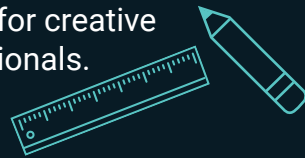


2

## DEVELOPING BUSINESS SUPPORT AND SKILLS



Some tools are starting to reduce the administrative burden for creative professionals.



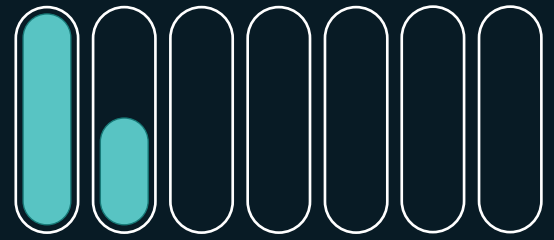
New apps including Hnry provide some support. Toi Mai has developed a Business Skills for Creatives Micro-credential to support the needs of creative businesses.



3

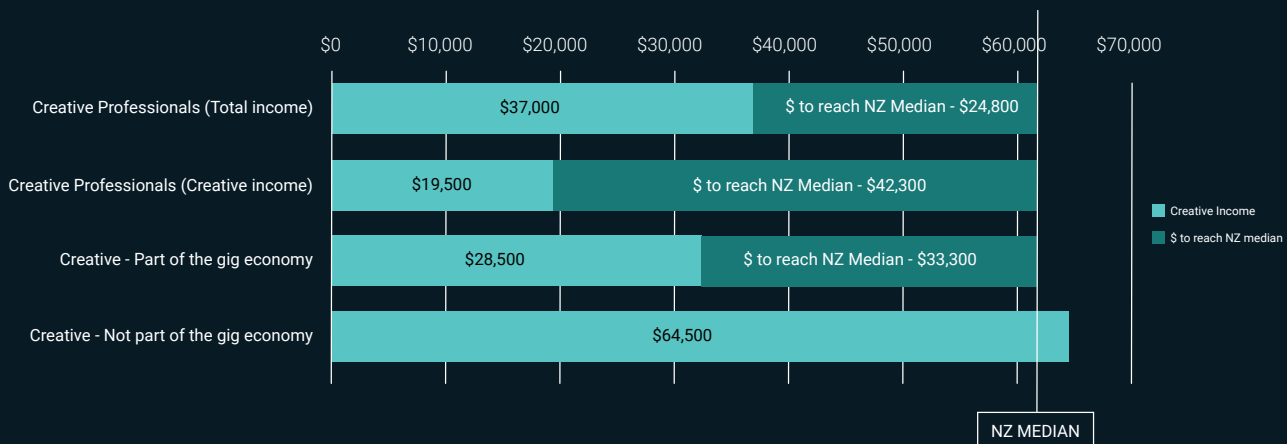
## MAJORITY OF ARTISTS HAVE LOWER THAN NZ MEDIAN INCOME

Our research using Statistics New Zealand's centralised database (IDI) finds that only **15%** of the workforce in performing arts industries earned more than **\$30,000** in 2022.<sup>10</sup>



**15%**  
earned more than  
**\$30,000**  
in 2022

Income to reach NZ median - Creatives<sup>11</sup>



<sup>9</sup> Creative New Zealand, 2023

<sup>10</sup> IDI, 2023

<sup>11</sup> Creative New Zealand, 2023



# Uncertain and inconsistent funding adds further pressure to sustain careers

## 1 NUMBER OF FUNDING ORGANISATIONS



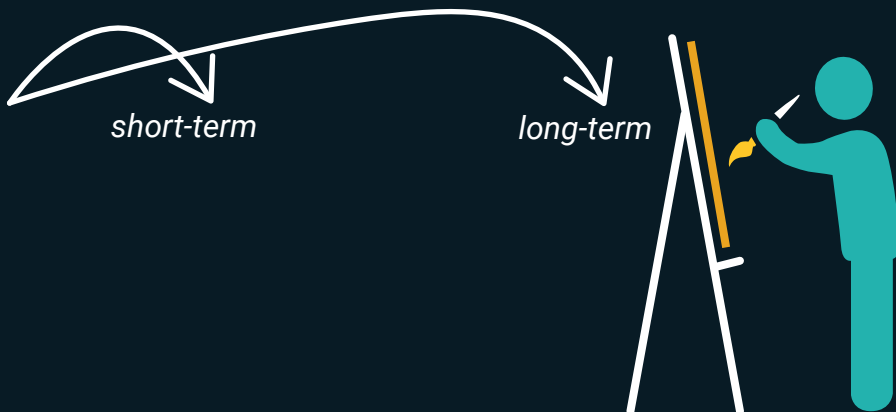
The number of arts funders creates confusion and duplication for applicants.



Grant-writing skills are essential for the application process. Feedback from artists found language used in the grant applications is too academic – acting as a barrier for many New Zealanders.<sup>13</sup>

## 2 PROJECT-BASED FUNDING

Heavy reliance on short-term, project-based funding which makes it hard for organisations to build and maintain long-term arts infrastructure, and for practitioners to develop their careers, audiences and work. These barriers then impact content quality and production.

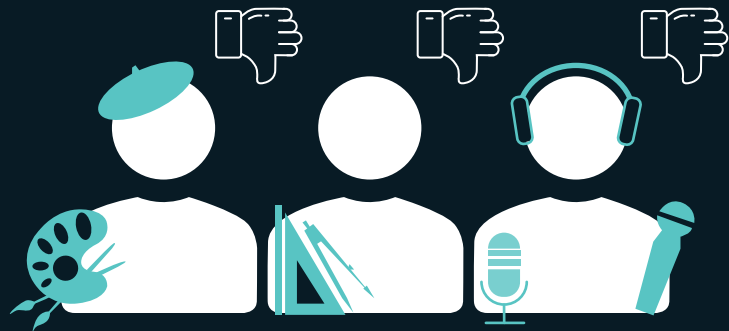


## 3 CHASING FUNDING



Creative artists and organisations spend significant time chasing funding, which limits the time to create and develop new work.

Difficulties in getting funding is a key reason why there was dissatisfaction with careers for creative professionals.<sup>12</sup>



Funding for the arts can come from a variety of sources but is not limited to:

**Creative New Zealand, local and regional councils, Ministry for Social Development, embassies, crowdfunding, philanthropy, and gaming trusts.**<sup>14</sup>

<sup>12</sup> Creative New Zealand, 2023  
<sup>13</sup> Creative New Zealand, 2023  
<sup>14</sup> Arts Access, 2023

# Investing in creative arts infrastructure would boost industry productivity and sustainability

## 1 INCREASE FUNDING CERTAINTY



More certain funding to enable and embed business support, which can allow practitioners and organisations to plan long-term, budget, and develop professionally.

## 2 STREAMLINE PROCESSES

Artists and organisations want streamlined funding processes to improve transparency and application – which will improve ease of applying for arts funding.



Research highlights current processes being complex and non-accessible, with the design of applications often not designed from the artists perspective.<sup>15</sup> Given the number of organisations that fund arts, this is an issue.

# 25<sup>th</sup> out of 35

in the OECD 2020<sup>16</sup>

Government expenditure towards 'recreation, culture and religion' as a percentage of GDP (2020), is lower than other small, advanced economies.

Arts, culture and heritage funding steadily declined between 2007 and 2020.



There is a need for a tool to navigate the funding process.

## 3 IMPROVE AUDIENCE AND ARTISTS ACCESSIBILITY

Integrating accessibility in the design of projects would create richer, more diverse and inclusive work. Aspects to improve accessibility include physical accessibility, audio descriptors, and accommodating for a range of disabilities that want to engage with the arts.



<sup>15</sup> Creative New Zealand, 2023

<sup>16</sup> Sohanpal, 2023

## OPPORTUNITIES TO BOOST SCREEN SECTOR PRODUCTIVITY

For a productive screen sector to meet its economic potential, improved industry co-ordination with government support for skills training and sustainable careers is required.

1.

### The screen sector makes a significant contribution to the economy

- Screen is a fast-growing sector in New Zealand
- It is a highly productive sector with wider economic benefits
- It relies heavily on international productions

2.

### Our workforce development plan for below-the-line roles highlights several opportunities to improve productivity

- Improve and enable career progression
- Better align training with industry needs
- Make roles and pathways more visible and accessible
- Support content producers from underserved communities

3.

### Improved industry co-ordination on upcoming productions and the required skills would accelerate the sector and bring significant benefits to the economy

- Align industry workforce and training needs
- Enable sustained domestic and international growth

## OPPORTUNITIES TO BOOST CREATIVE ARTS PRODUCTIVITY

For a productive creative arts sector to meet its potential, investment in arts infrastructure and an optimised (or simplified) funding scheme is required.

1.

### High self-employment puts pressure on career sustainability

- Duplication of effort for self-employed
- Need to develop business support and skills
- Majority of artists have lower than median income

2.

### Uncertain and inconsistent funding adds further pressure to sustain careers

- Number of funding organisations
- Project-based funding
- Constantly chasing funding

3.

### Investing in creative arts infrastructure would boost sector productivity and sustainability

- Increasing funding certainty
- Streamlining processes
- Improving audience and artists accessibility

## Vocational Education and Training Provision

The provision investment value for vocational education in creative subjects has significantly fallen between 2011 and 2022. The value has dropped **by 41% to \$36.3m** when adjusted for inflation. At the same time, degree-level investment in these areas has fallen approximately 10%.

# DISCLAIMER FOR STATS NZ DATA

Access to the data used in this study was provided by Stats NZ under conditions designed to give effect to the security and confidentiality provisions of the Data and Statistics Act 2022. The results presented in this study are the work of the author, not Stats NZ or individual data suppliers.

These results are not official statistics. They have been created for research purposes from the Integrated Data Infrastructure (IDI) and Longitudinal Business Database (LBD) which are carefully managed by Stats NZ. For more information about the IDI and LBD please visit <https://www.stats.govt.nz/integrated-data/>

The results are based in part on tax data supplied by Inland Revenue to Stats NZ under the Tax Administration Act 1994 for statistical purposes. Any discussion of data limitations or weaknesses is in the context of using the IDI for statistical purposes, and is not related to the data's ability to support Inland Revenue's core operational requirements.

## FULL REFERENCE LIST

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