

Te Wao Nui o Toi – Te Waha o Tāne





Te Waha o Tāne
Workforce Development Plan for
Above-the-Line Screen Industry Workforce 2024

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SYSTEMS AT HARVARD COMING



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Te ata hāpara ki te tōnga Executive summary

TE ATA HĀPARA KI TE TŌNGA

Te ata hāpara ki te tōnga

Executive summary

There are many opportunities to study and learn about screen in Aotearoa. Most public funding goes into qualifications and programmes across the tertiary system that provide opportunities to develop skills to write, produce and direct screen productions.

Despite this, industry places higher value on worked-based experience on actual productions over formal qualifications. The formal education sector has little influence on people's ability to work in the screen sector. Instead, entry to and progression through the screen sector is based on relationships and hands-on production experience. Opportunities to develop skills, with mentorship and support from sector experts, depends on a healthy pipeline of production work, from small to large scale.

If the sector has a need for more public funding support, it is in industry-led, work-based learning on domestic productions. Unfortunately, the domestic production pipeline is currently constrained by squeezed public development funding. Most investment in screen production, particularly for television, is steered towards those with a proven track record of delivering stories,

making it difficult for people to enter the industry, or if making feature films, to stay there. Production credits and the associated credibility critical to participating and succeeding in the screen industry are confined to established screen workers and, in the game development sector, the bigger studios. This limits the ability for new storytellers to enter the industry and gain useful experience, and also for people with transferable skills to bring their expertise to the sector.

The sector is also constrained by a deficit in entrepreneurial, industry-specific business skills in its workforce. While the sector has begun to address this through industry-led, informal opportunities, lack of resource means such training is limited to a few. Optimally, these would be delivered in a scaled way via opportunities for diverse types and sizes of production projects, equipping the above-the-line workforce with the skills for well-planned success, leading to an ultimately more sustainable industry.

The biggest transformation for the development of the above-the-line workforce would be shifting poorly targeted public investment in tertiary screen education and training from the formal education system to a more informal, industry-led, work-based model. This would represent a major disruption to current vocational education and training (VET) settings. However, a major disruption is required to realise our ambition of a thriving Toi Pāho sector by 2035.



This sequel to our first workforce development plan “[Te Wao Nui o Toi \(toimai.nz\)](https://toimai.nz)” identifies two principal challenges for the screen industry’s above-the-line workforce:

1. Formal training, qualifications and funding do not currently meet above-the-line screen industry needs.
2. Government funding for vocational education and training is not directed to where it best meets industry need.

Toi Mai wants to support all our Peka o Toi to be thriving, healthy and abundant ecosystems – to ‘thrive by ’35’. For Toi Pāho this involves shifting funding from formal training to industry-led training structures. It would also include supporting domestic productions to provide clearer pathways and training opportunities for the above-the-line workforce, which will better support screen workers to confidently navigate the business aspects of the industry.

This plan includes two additional actions for Toi Mai that will ensure the above-the-line sector has fit-for-purpose training and workforce capability:

1.

Toi Mai to develop industry-specific micro-credentials in business development for screen producers.

2.

Toi Mai to explore the funding flows of tertiary screen programmes and advise the Tertiary Education Commission on alternative funding models for more industry-delivered training.

This workforce development plan focuses on screen-based media only and more specifically on the above-the-line workforce (script writing/narrative voice, directing and producing). It uses metaphoric language and refers to this subsector as Te Waha o Tāne – the voice of the forest.

Ka koekoe
te tūī, ka
ketekete te
kākā, ka kūkū
te kererū.

The tūī cries,
the kākā
cackles and
the kererū
COOS.

This whakataukī (proverb) celebrates the different bird song of the tūī, the kākā and the kererū. Different as they may be, they are all beautiful, and collectively, along with all the other manu o te wao (birds of the forest), they make up Te Waha o Tāne. This acknowledges the diversity within the above-the-line workforce and values each of their voices as being a critical part of Te Waha o Tāne.

Photo by Renee Thyne on Pexels

Te Wāhanga Te Wāhanga Te Wāhanga

Te Waha o Tāne Context

Te urupuia

The first plan: below-the-line workforce of the screen industry

Te Wao Nui o Toi was the inaugural WDP published in 2023 for the screen industry of Aotearoa New Zealand. It explored the workforce and training needs for below-the-line roles in screen, including production and post-production crew across TV, film, interactive media and game development.

The sector identified the most acute workforce capability needs in *Te Wao Nui o Toi*. It highlighted the need for better alignment between below-the-line workforce capability and vocational training provision, and the desire for a more cohesive partnership across education, government and industry.

After sector feedback on its ten recommendations, *Te Wao Nui o Toi* identified the following four priority areas:

1.

Industry-aligned, short-form training that is designed, funded and delivered to meet industry standards.

2.

Clearer networks between providers and industry, and to facilitate a more diverse workforce through work-based upskilling.

3.

Improved coordination of training with production workflow for more sustainable careers.

4.

Improved visibility of the variety of roles in screen throughout our schooling systems for all learners.



Te Wao Nui o Toi actions by Toi Mai to date include:

1.

The review of the New Zealand Diplomas in Screen Production (levels 5 and 6) is complete. The Entertainment and Event Technology qualification and unit standard (level 3) review is also complete, with level 4 now under review.

2.

The design of a new Introduction to Screen micro-credential is complete and now on the NZQA framework ready for development by providers.

3.

Working with screen industry training specialist Share the Knowledge (STK), Toi Mai has designed a suite of skills standards (levels 4–6) for below-the-line roles, leading to a NZ Certificate in Screen Craft. These will be piloted with a production in a work-based opportunity, Kahurangi Toi Ātea, a partnership with STK, Firefly Films, Te Wānanga Whare Tapere o Takitimu and a range of stakeholders in Hawke's Bay. These standards will go to NZQA for approval and are pending course planning with the provider.

There is ongoing conversation with industry bodies and funders to promote collaboration and enhance sustainable development across the screen sector.

Te Waha o Tāne Context

'Above-the-line' is a film industry term that covers roles that guide and influence the creation or direction, process and voice of a given narrative in a film and related expenditures. In the game development sector this applies to those involved in developing and producing a game, although the business model differs. These are the storytellers of the screen industry and therefore the choir of Te Wao Nui o Toi Pāho, giving the forest a voice.

Being above or below the 'line' refers to the budget and separates creative direction from production roles. The division does not distinguish a hierarchy of importance, and these roles are not necessarily discrete. Workers move between these roles depending on the project and often begin their skills training in the below-the-line roles.

There are also overlaps with Toi Puaki (the performing arts sector), where producing, directing and acting roles provide transferable skill sets. For this plan, above-the-line

occupations in screen include script writers (narrative voice), directors and producers. While lead cast are sometimes included in the above-the-line subsector, they have not been included directly in this plan.

Further engagement with the publishing and broadcast sector (including authors, creative writers and journalists) is scheduled for a later date.

Given the permeability between above- and below-the-line workforces and their interdependence for success, many of the insights gained through *Te Wao Nui o Toi* in 2023 are still relevant. This most recent investigation has therefore been more compact, informed by data and a subset of interviews with above-the-line screen industry experts and game development specialists, to highlight themes specific to producers, directors and writers.



The Justice of Bunny King ©Bunny Productions Ltd

Te pūaotanga Vision

TE PŪAOTANGA

Te pūaotanga: kia rōreka te waha o Tāne hei te tau 2035

Vision: the above-the-line screen
workforce is thriving in 2035

It is 2035 and the above-the-line workforce of the screen industry is thriving. The constant chorus of birdsong reverberates from Te Wao Nui o Toi. Our native manu (birds) and Aotearoa-trained storytellers are the envy of the world. They are sought after for their skills, creativity and ability to turn an idea into an entertaining and compelling story enjoyed by many.

The forest is abundant with sustenance for all manu, creating an industry that is self-sufficient, producing creative products unique to Aotearoa New Zealand that are globally engaging and generating funds that feed into the growth of the forest.

Birdsong rings across the forest and there is a steady stream of production activity across the motu, from independent and experimental projects to international blockbusters. Storytellers in screen (producers, directors, writers) are welcomed into new and varied projects as they hone their singing voices, skills and craft.

Manu work with pīpī (chicks), mentoring them at all stages of their careers and benefit from having a nest of talented protégés waiting to take flight and support their creative vision. People are confident operating as a business and are supported to get production credits under their belt as they develop the skills to tell our stories to the world.

Te Wao Nui o Toi Pāho is a healthy ecosystem, plentiful with all types of native manu, each with their own special characteristics and unique voices. From the first voice of the korimako at dawn to the hoot of the ruru in the silent night, the melody of Te Waha o Tāne is heard, admired and adored globally.

Te Wānanga Whare Tāpere o Takitimu by Makea Pokere



He korimako kō i te ata
Introduction to the
above-the-line workforce

HE KORIMAKO KŌ I TE ATA



© After The Party Productions Ltd

Kua korara ngā manu o te wao

The above-the-line workforce is dispersed and largely project driven

The above-the-line workforce is predominantly comprised of project-led individuals or companies, where only a few employ workers on salaries with standard eight-hour days. The sector is funded and supported in its production of content by Te Tumu Whakaata Taonga New Zealand Film Commission (NZFC), Irirangi Te Motu NZonAir and Te Mangai Pāho.

The New Zealand Screen Production Rebate (NZSPR/the rebate) provides financial incentives to attract international productions to Aotearoa New Zealand and support the development of local stories (intellectual property – IP) through domestic production. Both domestic and international productions provide essential opportunities for skill development.

Advocacy, training and professional development for the above-the-line workforce are currently provided outside the formal training system through a range of industry bodies, including the Screen Producers NZ (SPADA), Script to Screen, Directors and Editors Guild (DEGANZ), Writers Guild NZ, Actors Equity, Women in Film and Television (WIFT), Ngā Aho Whakaari (NAW), Pacific Islanders in Film and Television (PIFT), Pan Asian Screen Collective (PASC), Screen Industry Guild (SIGNZ) and Share the Knowledge (STK).



Producer Tainui Stephens in his studio, photo by Jeannette Troon

Kei te wao whānui kē ngā hua

Most training valued by the sector occurs outside the formal system

Te Wao Nui o Toi (2023) reported significant interest by the sector in the proposal for a skills levy or a skills development plan. This could form part of the Screen Production Rebate administered by the Ministry of Business, Innovation & Employment and the Ministry of Culture & Heritage. For productions to be eligible for the rebate they would need to provide a skills plan that supports work-based training opportunities, including a diversity and equity commitment. In Australia, a skills development fund is working successfully.

In New Zealand, policy decisions on a skills levy are still to be resolved.

In the game development sector, the Game Development Rebate, funded by MBIE, provides scaled funding for game developers to build a sustainable game development ecosystem in Aotearoa New Zealand, nurturing studios and people, improving skills and pathways, and supporting diversity and equity.

WAO

WĀNĀKĪ

HE TĪROHANGA

He tirohanga whānui
ki te wao
Industry snapshot

He tirohanga whānui ki te wao

Industry snapshot

Screen is a highly productive industry:

Estimated Toi Pāho GDP 2023¹

\$3.3 billion

GDP per FTE

\$210k

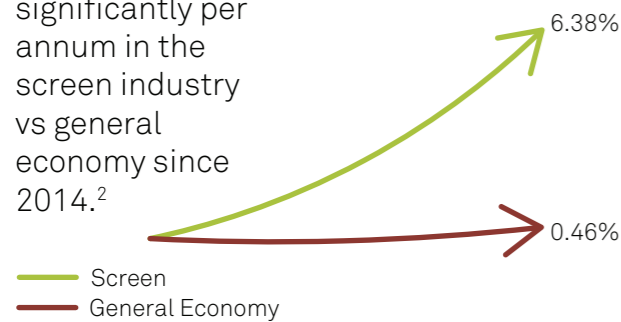
Screen Industry

vs

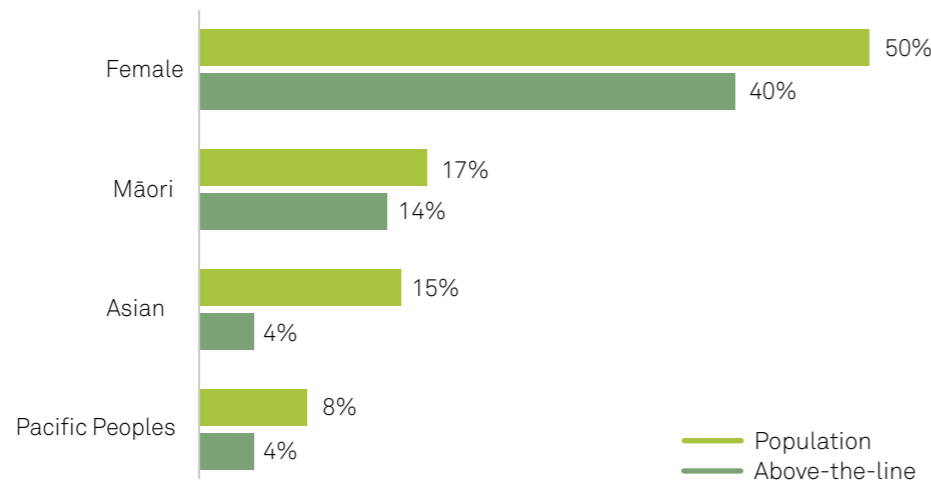
\$152k

General Economy

GDP per FTE has grown significantly per annum in the screen industry vs general economy since 2014.²

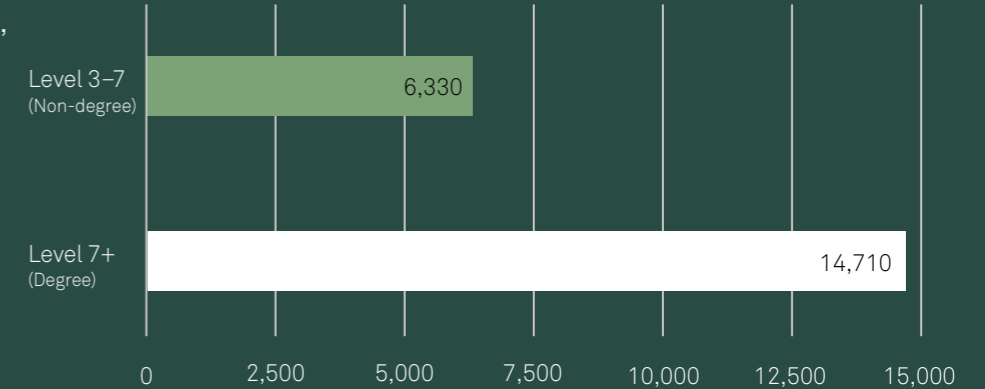


Demographically, the above-the-line workforce for **Māori, Pacific peoples, Asian** and **female** are all below population parity.³



¹ Infometrics
² Infometrics
³ Stats New Zealand

Over the past six years, for qualifications that pathway towards screen roles, there were: **6000 enrolments** at NZQA levels 3–7 and **15000 enrolments** at NZQA level 7+.⁴



In the 2023 year, we estimate approximately **\$36 million** of public funds went through the TEC to education providers delivering screen-aligned qualifications.⁵

\$36 million

In 2018 the screen workforce (including ancillary workers) was 21,000.

21,000

500 of these were employed in the above-the-line workforce subsector.⁶

500



3 in 4 (72%) respondents feel there are **gaps in their current skill base or knowledge**. Producers and writers are more likely than others to indicate skill gaps in terms of business skills.⁷

⁴ Ngā Kete
⁵ Ngā Kete
⁶ Stats New Zealand
⁷ Toi Mai Screen Survey 2022

Ngā kīrearea me ngā kahikatea Challenges and opportunities

NGĀ KĪREAREA ME NGĀ KAHIKATEA

Ngā kīrearea me ngā kahikatea

Challenges and opportunities

Engagement with the above-the-line screen industry found two key challenges faced by the workforce:

1.

Formal training, qualifications and funding do not currently meet above-the-line screen industry needs.

2.

Government funding for vocational education and training is not directed to where it best meets industry need.

Kāore te manu e whai huruhuru i te ara ōkawa

Formal training and qualifications are not meeting workforce needs

There are no specific formal qualifications that enable entry into the above-the-line workforce (writing, directing, producing).

In the absence of such qualifications, many have undertaken degrees in related areas, for example, the postgraduate programme offered by the International Institute of Modern Letters (IIML) for script writers, but such qualifications are ancillary rather than directly related to screen industry need, and manu are not being adorned with the feathers they need to fly.

It is characteristic for screen workers to move between above- and below-the-line roles, and from below- to above-the-line roles, based on experience gained in the sector. This is both a reflection of the value

placed on cumulative, work-based learning, and often, the budget-driven necessity for workers to play more than one role in content production.

“What we’re seeing is that on-set training is happening out of necessity rather than strategically because of low production budget and sector uncertainty.”

– Director and producer, Auckland

“And while you learn a lot of helpful things in your training – I’m not saying that that training was a waste of time. It wasn’t. But it’s not the thing that ultimately will deliver your success. The same is true with writing and directing. I never did any training for either of those two jobs.”

– Director, writer and actor, Auckland

Toi Mai heard from the industry that the common elements for success in the above-the-line workforce include:

- building relationships
- attitude and passion (doing a lot for the love of it)
- stickability (last person standing, survival of the fittest)
- honing skills/aptitudes on the job through doing
- having a clear kaupapa (and the mandate to tell those stories)
- the need for better business acumen, particularly for those in producing roles.

“

Growing creative thinkers who are proactive problem solvers and have a strong work ethic and good people skills will find their place in the industry and will, you know, find specialisation that they love in terms of the above-the-line stuff. But that feels really a bit Darwinian rather than anything else. So, it’s a little bit like, you know, if you can stay in there long enough and grind for long enough and then you’ll get a show maybe, yeah.

”

– Writer and director, Bay of Plenty

He huruhuru te manu ka tau Industry business skills are needed

Business or enterprise skills for the media production world (film, TV and games) are context specific. These are not covered well in current training programmes and are not accessible when needed by the workforce.

“

None of the current training teaches about Industrial Business, i.e. an understanding of funding and managing a multi-layered project. This does not require a degree – an essential asset is knowing how to identify what you don't know.

”

– Director and producer, Wellington

The Screen Sector Survey⁸ clearly identified the desire for business skills for screen content makers, with producers and writers more likely than others to identify these as skill gaps. During recent engagement with the industry, Toi Mai heard a consistent call for more industry-specific business training to enable the above-the-line workforce to develop more sustainable practices through better knowledge of:

- market opportunities/risks in both domestic and global settings
- audience development (including streaming platforms like YouTube)
- pitching
- IP development and protection
- marketing, sales and distribution
- scaled business growth planning
- investor networks.

⁸Toi Mai Screen Sector Survey 2022

“

The biggest gap is the business skills, which are not developed when people are on the tools. The ability for people to sell what they're making. Sales and marketing, distribution agreements, insurance, IP, applying for grants, having a business plan. There is no shortage of creativity/creatives. Business skills for Game Development need to be bespoke and taught by someone who is from the sector

”

– Game development executive, Dunedin



We heard that the lack of targeted screen business skills training inhibits growth in the sector. There are a range of informal skills training courses that have been developed by the sector, and Toi Mai acknowledges the high-quality training delivered by guilds and industry experts, for example:

- Share the Knowledge Practical Producers course 2019–2023, with funding support from NZFC
- DEGANZ Female Directors Incubator
- Screen Capability Business Innovation Program 2024 led by Creative HQ and NZFC
- Script to Screen’s Strength in Numbers Business Development programme (2017, 2020, 2022)
- Floating Rock Pitchfest for emerging content creators
- The SPADA Producer Business Essentials Programme 2023, plus numerous resources for emerging producers and writers.

Toi Mai believes it would bring value to work with the sector on developing sector-specific business skills training, such as a series of micro-credential for producers in business development. There is clearly some expertise out there, and coordinating this in a more strategic way will help with sector sustainability and bring significant benefit to the workforce and wider economy.

He huruhuru te manu ka tau

This kōrero (saying) talks about the plumage of a bird. We need to ensure that we are not weighing our manu down with unnecessary qualifications,

but instead adorning them with feathers that enable them to explore all that Te Wao Nui o Toi Pāho has to offer them.

Toi Pāho careers, in general, need to be more visible, accessible and sustainable to attract and retain their workforce. This is fundamental to the future success of this valuable industry. Training opportunities (for example, work-based apprenticeships and mentoring) are needed to support diverse voices to write their own stories/IP, bring them to life on screen (through funding and mentoring) and share them with worldwide audiences (through distribution and business skills). Working collaboratively to build and maintain a healthier Toi Pāho needs to be a goal shared by policy makers, funding agents, commissioners, producers, educators and contractors.

“There are so many creatives out there with stories to tell, but you need to get past the gatekeepers – funders, broadcasters, co-producers. You have to ‘sell the dream’ or visualise it for those who can’t.”

– Creative director and filmmaker, Wellington

The absence of formal screen business skills training is symptomatic of a deeper problem, however.

Tē whiu te manu i ngā hua VET

Public Vocational Education Training funding is not going to where it is most needed in the screen sector

The 'traditional' education system assumes that the 'best' vocational training is provided by public or private registered training providers delivering formal qualifications that sit on the New Zealand Qualifications Framework and are delivered in a standard academic year, with linear pathways into employment. Public funding, through the Tertiary Education Commission (TEC), is provided to forms of delivery that meet a range of criteria established to ensure standardised consistency and quality assurance across the formal education system.

The screen sector is a good example of a sector where the best vocational education, skills and training are not delivered in this way. Instead, they are:

- delivered on discrete, short-term projects
- learned by doing or practising
- delivered alongside and in the care of technical experts rather than tutors/lecturers or employers
- learned on set or in studio
- credentialed through production credits rather than formal qualifications
- nonlinear pathways in and through the industry.

57%

of the screen work force have some kind of tertiary qualification. However, having an academic qualification⁹ is not seen as a significant factor in becoming a successful writer, director or producer, and only 13% of companies surveyed considered undergraduate degrees as suitable training for employers and contractors in film and TV.

80%

Tertiary courses are seen as useful for making connections, but experience is valued more for career progression, with 80% believing that informal, industry-led training is beneficial to the industry.¹⁰

Overall, the sector lacks trust in a tertiary education system that has failed to keep up with the needs of industry, resulting in poor outcomes for graduates seeking careers in screen and unrealistic expectations from the sector about what new graduates should be capable of.

"We have not entered into trying to gain NZQA accreditation as the bureaucracy and additional workload here has been outside of our resources – our time has been better spent actually getting on with the work"

– Director and producer, Auckland

⁹ Toi Mai Screen Sector Survey 2022
¹⁰ Toi Mai Screen Sector Survey 2022



The above-the-line workforce benefits from the informal training delivered by industry bodies. While this training is highly valued, lack of money/funding and lack of time have been identified as the main barriers to undertaking training.¹¹ Funding is often precarious and vulnerable to policy shifts and changing criteria.

"Learning is doing, doing is learning. I don't want to devalue the academic part of that, but there's only so many panels and events you can go to before you reach a plateau, and your learning goes way up when you're on set and then postproduction and to witness those things and see and observe. And then finally to participate in it, be given the opportunity to make mistakes and then learn from those mistakes."

– Writer and director, Auckland

"Script to Screen produces great results but has to constantly 'seek the scraps' of funding for ongoing programmes. It's exhausting and vulnerable – one policy change and it would be gone. New Zealand is innovative but it's the survival of the fittest, on the smell of an oily rag. Funders are not nimble or consistent enough to enable the sector to grow or take advantage of the changing environment like with streamers (like in Aussie). Policy shifts and variable funding criteria mean it is a constant game of chess."

– Writer and director, Rotorua

¹¹ Toi Mai Screen Sector Survey 2022

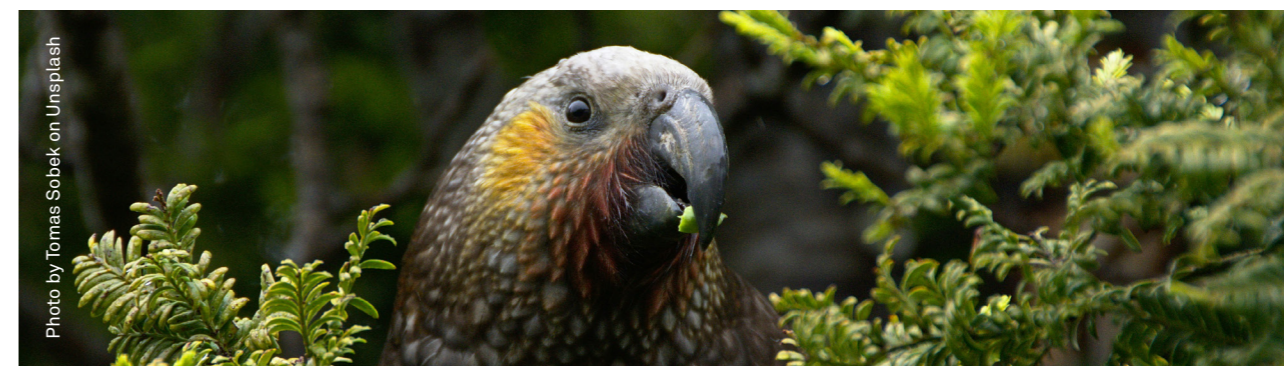
The screen industry prefers informal training models to the formal training on offer because it is more industry relevant. However, the current public funding system incentivises a public delivery model. This leads to many unintended or perverse consequences that no one really wants, including:

- high levels of public investment in formal education provision that lead to skills that are out of date or out of step with industry need
- an absence of public funding going into industry training that is genuinely needed to support a thriving screen sector
- high student debt for students enrolled in university, ITP or private

provision that does not directly lead to employment in the screen sector

- funding inequities when comparing the screen sector to other industries that receive funding for more established models of ‘work-based learning’ delivered through ‘employers’, such as building apprenticeships.

Te Wao Nui o Toi recommended more collaboration between screen funding bodies, and this is a live discussion in the sector at present. The sector may also decide that training, both formal and informal, needs more coordination to manage consistency of delivery and outcomes.



He mea whāngai tonu e NZFC ahakoa he tau nihoroa New Zealand Film Commission supports skill development for above-the-line workforce but are constrained by funding

Like below-the-line occupations, opportunities to work and build skills, alongside relationships and networks, are the main drivers of career development and success for the above-the-line workforce. Personal reputation plays a huge part – ‘you are as good as your last job’. Creativity is about experimentation and innovation, sometimes to the detriment of developing the skills needed to sustain and grow a creative business. For those who have earned that vital ‘badge’ of trust that results in more funding or support, it’s about feeding this into the next production opportunity, and long-term, giving back some of that knowledge and experience to those just starting their journey.

“I would not be the director and screenwriter that I am now if the Film Commission hadn’t funded my first short films and kept on giving me strategic and industry training opportunities and subsidising those opportunities. So that’s how I entered.”

– Writer and director, Auckland

There are global and local economic challenges that come from uncertain funding of the screen industry. For domestic productions, this means reduced opportunity for new and different voices to be developed, and for their stories to be shared with wider audiences. For a sector already driven by passion (people prepared to tell their stories for little or no remuneration), there is additional pressure for those communities whose stories are not being told to continue to subsist while trying to ‘break in’ to the sector. The limited opportunity for training through making/doing has significant impact on the workforce pipeline.

“NZFC are actively inclusive, developing strategies that lift underrepresented groups, but all with the massive caveat, especially for emerging and mid-level, short film funding programmes in which 90, 95% of people get rejected. So, if you can squeeze through that first door, then things start to open up more for you. Every step of the way, this industry, especially above the line, is super hard, it’s tough and it’s competitive.”

– Writer and director, Rotorua

“
 My personal hope is to give back to the industry and make sure that the cycle continues. Because I’m benefiting from the talent that was developed during Lord of the Rings 20 years ago. The stunt people and the camera people and the talent that I’m working with now, production design, make-up, costume, all of that. They were trained up back in when I was coming through.
 ”

–Writer and director, Auckland

“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.”¹²

– Māori creative entrepreneur, business owner, film and television

¹² Quote from page 170 of TWoT 2023

Some emerging filmmakers are already utilising the nimbleness of online platforms to create shorter, lower budget ‘calling cards’ of proof-of-concept stories, which are used to garner support for higher budget and larger projects. A successful example of this is the series *Creamerie*, which found a ‘work around’¹³ to address the frustration of funders often commissioning filmmakers with a proven track record. This success shows what can happen when someone gives great new talent the opportunity to be at the table and the potential for the New Zealand screen industry to flourish.

“Opportunities are chances to get work made. And the big challenge is who’s going to put money in. Because where we are now, everybody, all the creative people want to get their work on the streamers because the streamers can reach the worldwide audience that we’ve all dreamed of. You know, the access to as large an audience as possible, and the streamers can give it to you, but it’s still that thing of breaking in. It’s when you’re not known and not particularly famous. How do you get money people to take a punt on you? And the answer is usually that you make something by hook or by crook as cheaply as you can, ‘cause you probably won’t have any other option.”

– Writer and director, Auckland

The screen industry is in a precarious financial situation. The decline of advertising revenue for broadcasters will impact the commissioning of local content. While the funding for industry’s key funders largely kept up with inflation between 2015 and 2020, the recent reduction of funding from Lottery Grants Board (\$2.1m in 2024/25) will adversely impact the NZFC. Recently announced funding cuts at TVNZ and Warner Bros. Discovery NZ have also taken a further \$50m out of the domestic funding ecosystem.¹⁴

“There are increasing limits on NZFC and NZ on Air funding – not just less money but eligibility is complex and always changing. Once you are established you need to seek funds from other investors (local or international). Multi millions at the box office does not mean money for the producer. They might be wandering around with \$323 in their bank account because the flow of money – it goes first to the box office/ exhibitors, then distributors then the investors and funders – very little comes back to them. Though it’s very different for TV, where there is a better chance of a good return.”

– Writer and producer, Wellington

¹³ Showtools, May 2024

¹⁴ New Zealand Film Commission

Me ranea ngā hua o te wao e korihi ai te waha o Tāne

Funding for domestic production is key to developing the above-the-line workforce

Domestic production remains essential for developing and growing the above-the-line workforce. Without it, our ability to tell local stories or export our talent/products will be affected.

A key funding mechanism for domestic productions is from broadcasters. TV broadcasting revenue in Aotearoa has fallen by approximately 40% since 2013 to \$1.2bn in 2023.¹⁵

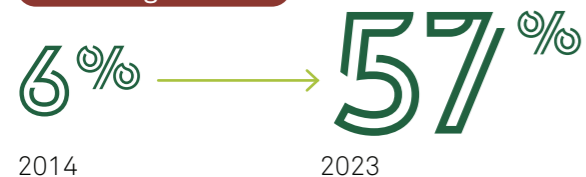
Broadcasting Revenue



Broadcasters are facing fierce competition from streaming platforms with changes in how audiences view content.

Since 2014, viewing via subscription video on demand (SVOD) has grown significantly from 6% to 57% in 2023.

Streaming Audience



In the same period, those watching TV have fallen from 83% to 50%.¹⁶

TV Audience



¹⁵ IbisWorld

¹⁶ Where Are The Audiences - NZ on Air (2023)

This is important, as declining local TV broadcasters' revenue reduces the opportunities for commission of local stories and creation of local intellectual property.

By comparison, Australia has become more competitive with increased tax incentives, additional government funding for the development of high quality and culturally important local content, and pathways to audiences that will ensure good commercial returns.

In Aotearoa the focus has been on attracting international and co-productions, but we still need the domestic sector for emerging workers to learn (and make mistakes) and to provide continuity in times of boom/bust. The industry feedback has been consistent that without domestic funding assistance, Aotearoa stories will not get made. An opportunity exists for New Zealand's longest running TV Series *Shortland Street* to become a vehicle for domestic work-based training, as it provides stable, sustainable and high-quality production environment for industry-led learning. Long-running series are the best training ground for industry-led, work-based learning, alongside a more consistent flow of medium-sized NZ productions to provide consistent work and make screen industry careers more sustainable long term. The Netflix production *Power Rangers* filmed in West Auckland for over 20 years and had a trainee scheme running for most of these years, producing talented New Zealand screen workers, from the screenwriters through to the cast and crew.

“

The seeds need to be sown and then watered and tended to over decades to bear fruit and I think that's what the Film Commission was supposed to be for. For a moment there, the Film Commission was tending a garden that was bearing fruit. Now, with the market forces and capitalism and the emergence of streaming giants, which are kind of cultural imperialists, that garden is under threat.

”

–Writer and director, Auckland

Photo by Eli Prater on Unsplash

“

So, we have this imbalance between the everyone flocking to the international productions and training up and learning things and then our local industry gets smaller and smaller and we keep on cutting post production and cutting costs, no one can see a pathway there. And that’s a very fast way to make sure that New Zealanders don’t get to tell their own stories anymore. But that loop between domestic and international productions isn’t working because not enough has been pumped into the local sector and the local sector is just being gutted, the budgets are going down and down and producers have to scramble.

”

– Writer and director, Auckland



Tukuna ngā hua ki te wao whānui, kei reira kē te pitomata

The biggest transformation lies in shifting public investment from the formal to the informal training sector

Despite NZFC funding and support being extremely important to the film sector, the NZFC will only receive \$5.196M for the FY24/25–FY 25/26 in Crown revenue. Lottery Grants Board funding will be \$22.875M for the FY24/25.¹⁷

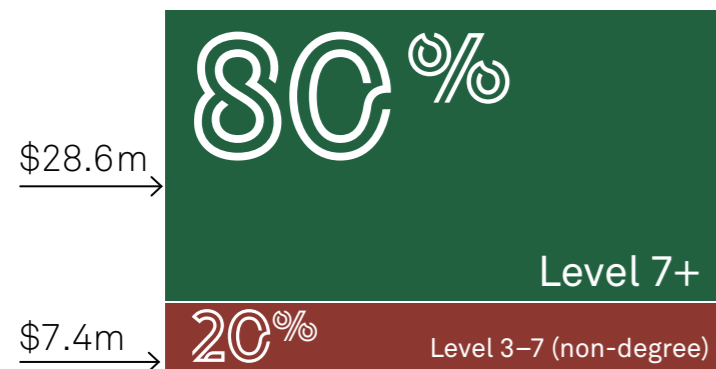
In 2023 \$1M of NZFC’s funding went to above-the-line training.

This contrasts with the estimated

\$36M
in public funds

that went through the TEC in 2023 to education providers delivering screen-aligned qualifications that the industry tells us are not needed.

Of this, we estimate 80% relates to qualifications at level 7+, with the remaining 20% below level 7.¹⁸



¹⁷ NZFC Annual Report 2022–2023

¹⁸ Ngā Kete

This represents a very distorted investment and distribution of public funds.

Under section 366 (1) (a) of the Education and Training Act 2020, Toi Mai is charged with providing skills and workforce leadership for our specified industries, which includes identifying their current and future needs and advocating for those needs to be met through its work with the industries, schools, providers, regional bodies and Government.

Our assessment is that current funding settings are placing downward pressure on the screen sector’s ability to develop a steady and stable pipeline of workers with the skills to tell our stories on screen.

Toi Mai has identified the biggest transformation for the development of the Toi Pāho workforce would be shifting poorly targeted public investment in tertiary screen education and training from the formal education and training system to the industry-delivered, informal training sector.

This would represent a major disruption to current VET settings. However, a major disruption is required to realise our ambition of a thriving Toi Pāho by 2035.



On set with 'Tappy': photo supplied by Tim Worrall

E tangi nei te māpu Recommendations and actions

Toi Mai stands by its recommendations from *Te Wao Nui o Toi 2023*, which are unchanged:

1.

Industry-aligned, short-form training that is designed, funded and delivered to meet industry standards.

2.

Clearer networks between providers and industry, and to facilitate a more diverse workforce through work-based upskilling.

3.

Improved coordination of training with production workflow for more sustainable careers.

4.

Improved visibility of the variety of roles in screen throughout our schooling systems for all learners.

In relation to the above-the-line screen sector, Toi Mai proposes the following targeted actions:

1.

Toi Mai to develop industry-specific micro-credentials in business development for screen producers.

2.

Toi Mai to explore the funding flows of tertiary screen programmes and advise the Tertiary Education Commission on alternative funding models for more industry-delivered training.

MĀTAU TĀU

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Toi Mai would like to acknowledge the time and contribution of the following people:

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Special thanks to the speakers and the many conversations with delegates attending SPADA and New Zealand Game Developers Association conferences and the Big Screen Symposium in 2023/24, enabling us to gain a wider understanding of the current challenges and opportunities facing the Toi Pāho sector.

Huge shout out to the extraordinary talents of the Toi Mai team in bringing this narrative together, making it beautiful and launching it into the world!

About the statistics used in this plan

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.

Te Wao Nui o Toi – Te Waha o Tāne