

Long-Term Insights Briefing

Acknowledgments

Manatū Taonga Ministry for Culture and Heritage would like to acknowledge all those who have been so generous with their time, experiences and insights in helping us to develop this first Long-Term Insights Briefing. In particular, we acknowledge those who were involved in our consultation rounds through survey responses, submissions or participating in workshops. Our approach to this Long-Term Insights Briefing was to do it in partnership with our cultural and creative system partners, to ensure this work represented the insights of the participants in our sector. More detail on the consultation process is provided in the Appendices.

Presented to the House of Representatives pursuant to section 8, schedule 6 of the Public Service Act 2020

Ngā Ihirangi

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Kōrero Mātauranga Pae Tawhiti

Foreword

Tikina atu ko te pūtake o ngā kōrero
i waiho mai hei oranga mō tātou katoa.
Tiakina ngā mātauranga i runga i te tika,
te pono me te mārama o tētahi ki tētahi.
Kia ngākau titikaha, kia mau ki te
hononga tangata hei tikanga mā tātou
Koia rā ko te puāwaitanga o te ahurea,
te tohu e ora ana te iwi!

Tēnā tātou, talofa lava, greetings

What does the future hold for our treasured arts, culture and heritage sectors? What are the factors that will shape them, transform them, even supercharge them? These are the key questions Manatū Taonga the Ministry for Culture and Heritage is exploring in our first Long-term Insights Briefing. On behalf of Manatū Taonga Ministry for Culture and Heritage, I'm delighted to share these insights with you.

Over 150 organisations and individuals connected to, or with an interest in, the arts, culture and heritage sectors provided valuable insights into the development of our inaugural briefing, through two rounds of engagement.

It's clear from the feedback we received there are numerous hopes for the cultural sector. I'd like to thank everyone who generously gave their time, and shared their perspectives with us, as we explored the important question: into the future, what are some of the key areas that will influence the vibrancy and resilience of the cultural sector ecosystem?

Five priorities for the sector emerged as the focus for this briefing: Te Ao Māori; funding, investment and value; population change; digital technologies; and climate change. Within the briefing you'll find critical analysis of each of these topics, developed following in-depth consultation with people living throughout Aotearoa.

Long-term Insights Briefings provide a dedicated space for public reflection and reimagining of our future development as a modern Pacific nation – and I'm excited to see arts, culture and heritage continue to play a fundamental role in positively shaping our sense of identity and place in the world.

The purpose of this briefing is to signal areas where future cultural sector policy making may focus, and it is my expectation that policy development under each of the five priorities must be progressed. The priorities align closely with the goals in Te Rautaki, the overarching strategic framework for Manatū Taonga, and we are committed to working in partnership with Aotearoa's vibrant, diverse and talented cultural sectors and communities to help ensure this happens.

Nāku noa, soifua



Lulu Mac Leauanae
Tumu Whakarae
Secretary for Culture and Heritage and Chief Executive



Kupu Whakataki

Introduction

Long-Term Insights Briefings provide opportunities to enhance public debate on long-term issues and contribute to future decision making.

Long-Term Insights Briefings help us identify and explore the long-term issues that matter for the future wellbeing of people in New Zealand.

The Public Service Act 2020 ([Schedule 6, clauses 8 and 9](#)) introduces a new requirement on departmental chief executives to publish a Long-Term Insights Briefing (a Briefing) at least once every three years. The purpose of the Briefings is to make available into the public domain:

- information about medium and long-term trends, risks and opportunities that affect or may affect New Zealand and New Zealand society
- information and impartial analysis, including policy options for responding to these matters.

The Briefings are think pieces on the future, not government policy. The requirement to publish a Briefing is a statutory duty on departmental chief executives, independent of ministers. They differ from the advice that the public service provides ministers, or the accountability and planning documents prepared for Parliament.

The value of the Briefings is the opportunity to identify and explore the issues that matter for the future wellbeing of the people of New Zealand. They provide an opportunity to enhance public debate on long-term issues and usefully contribute to future decision making – not only by government but also by Māori, business, academia, not-for-profit organisations, and the wider public.

[Long-term Insights Briefings – Department of the Prime Minister and Cabinet](#)

He raraunga, he taunakitanga ā Manatū Taonga e pā ana ki te rāngai ahurea whānui

Manatū Taonga has data and evidence on the characteristics of the general cultural sector

What is the cultural sector?

The cultural sector comprises many elements – it is living, dynamic, and evolving. It is also complex, with many stakeholders and several sub-systems. It can encompass a multitude of elements – language, whakapapa, history, heritage stories, pastimes, values, beliefs, rituals, cuisine, knowledge, taonga, arts, sports and media. Because of this evolving and subjective nature, Manatū Taonga has not defined the cultural sector for the purposes of this work, but has approached it with a broad view in order to engage with a wide range of participants within this vast ecosystem.

Economic value

- The arts and creative sector¹ represents about 3.3 percent of New Zealand's economy and this contribution has grown by about one-third since 2000.
- In the year to March 2021, the sector generated \$10.851 billion.
- Between 2000 and 2021, the economic contribution of the arts and creative sector more than doubled (+121 percent) in real terms, outstripping the economy as a whole (+70 percent).
- The boundaries of the sector are hard to define, but using Stats NZ Employment Classifications, there were 94,689 arts and creative sector jobs as at March 2021.
- There were 30,986 arts and creative businesses in New Zealand in March 2021, mostly clustered in the main centres: 44.3 percent in Auckland and 25.7 percent in Wellington and Canterbury combined.
- There is a very high rate of self-employment in the creative professions: 35.9 percent versus 16.7 percent in the New Zealand workforce.
- Attaining career sustainability and reward is challenging for many creative professionals. The research A Profile of Creative Professionals 2019 found considerable variation in career sustainability by artform, and 55 percent of all creative professionals did paid work outside of the creative sector.

¹ This model of the arts and creative sector is derived by combining specific business and occupation codes that fit most closely with arts and creative professions versus other parts of the New Zealand economy. Occupations conform to the categories used in the Australian New Zealand Standard Classification of Occupations (ANZSCO). The industry categories are from the 2006 Australia New Zealand Standard Industrial Classification (ANZSIC).

Social value

- The sector creates substantial social and cultural value. The 2016 General Social Survey in New Zealand found that New Zealanders who took part in cultural or recreational activities were more likely to be satisfied with their lives compared with those who didn't.
- New Zealanders are most likely to report health and wellbeing benefits as the main reason why the arts are important to their wellbeing:

Main reason why arts are important to personal wellbeing (top coded responses)	Average rating
Makes me happy	16%
Allow people to express themselves	8%
It's relaxing/ therapeutic	8%
Good for mental health and wellbeing	7%

Table 1: For adults, the main reasons why the arts are important to personal wellbeing. New Zealanders and the Arts 2021.

- For Māori the reasons were similar and affirmed the health and wellbeing benefits of participation.

Main reason why arts are important to personal wellbeing for Māori (top coded responses)	Average rating
Is enjoyable	14%
Good for mental health and wellbeing	12%
Relaxing	9%
Allows people to express themselves	9%

Table 2: For Māori aged 15+, the main reasons why the arts are important to personal wellbeing. New Zealanders and the Arts 2021.

- Arts, culture and heritage contribute strongly to New Zealander's, sense of nationhood and responses are higher for Māori as the following table shows.

Characteristic	Average rating all New Zealanders	Average rating Māori
New Zealand history	8	8.9
Sports	7.8	8.2
New Zealand symbols and icons	7.7	8.1
Art and artistic achievement	6.9	7.5

Table 3: Average rating of 1-10, with 10 being extremely important, when defining New Zealand (aged 15+ New Zealanders) – General Social Survey 2016

Cultural participation

New Zealanders participate in diverse cultural activities in large numbers. Results for Māori show some differences.

Cultural activity	% all New Zealanders participating	% Māori participating
Musical, dance or theatre performance	34%	29%
Live music performance	40%	48%
Movies	46%	47%
Art gallery or museum	42%	34%
New Zealand site or building of historical importance	33%	30%
Been to a marae	22%	60%
Kapa haka	5%	17%

Table 4: Percentage of aged 15+ New Zealanders participating in various cultural activities in the past 12 months (2021) – General Social Survey 2021

Manatū Taonga engaged with the sector² about the topic

When Manatū Taonga began this work in 2021, we set out to explore ‘**what are the components of an impactful and sustainable cultural sector into the future?**’ (the methodology by which we arrived at this topic is provided in Appendix 1). Our starting point was, ‘what do we already know about the cultural sector?’.

The first round of consultation, between September and November 2021, resulted in contributions from across the breadth of the cultural sector (we received feedback from over 150 sector stakeholders and organisations). Based on the insights and feedback from this first round of consultation, Manatū Taonga reconsidered its approach to the development of the briefing, including redefining the topic, and the second round of engagement.

Analysis of the submissions and input from the first round of consultation took place in early 2022. The focus on trends and themes from this consultation had shifted away from how the initial topic was framed, and the topic was revised to better align with what we were hearing from the sector. The topic for this work is now: **Into the future, what are some of the key areas that will influence the vibrancy and resilience of the cultural sector ecosystem?**

This revised topic was reflected in the key themes that came through from the submissions³ and which became the focus of the second round of consultation.

The main recurring themes from this first round of engagement are:

Putting te ao Māori at the heart of our mahi

Because we are Aotearoa New Zealand, te ao Māori should be at the centre of our thinking, rather than a separate component, and there should be a stronger focus on thriving/innovation/leadership. Capacity and capability building is important to ensure iwi/Māori and the sector can adequately respond.

² Following the first stage of consultation, which included a hui focused on agencies funded by Manatū Taonga, it was decided not to include sport in this first Long-Term Insights Briefing, given that Sport NZ has dedicated research and insights programmes: [Research and insights – Ihi Aotearoa Sport NZ](#)

³ A summary of the submissions, survey responses and workshop input from the first round of consultation is available on the Manatū Taonga website: [Long-Term Insights Briefing Summary of Feedback Consultation Round 1 – Manatū Taonga](#)

New Zealand’s unique place in the world

Our unique bicultural identity is valuable and needs to be encouraged. This identity is what provides us with a unique selling point to the rest of the world, and we should continue to focus on telling quality New Zealand stories. While we are sharing our culture, we also need to be careful to protect it. Cultural democracy – an approach to arts and culture that actively engages everyone in deciding what counts as culture, where it happens, who makes it, and who experiences it⁴, will be an important driver for the future as our nation becomes more diverse.

Diversity and communities’ role in culture

The focus should be on a ‘people-centred approach’, or on the community. How is government empowering our communities to take a greater role in the cultural sector – as they are the ones who make the whole sector thrive.

Greater recognition of diversity is needed across the cultural sector. A variety of ethnicities, people with disabilities and youth are currently underrepresented/underserved. Diversity can be a driver of change, but the system needs to have appropriate support in place to enable the change to happen. Structural inequity and bias need to be addressed when driving change. We should aim for equity in knowledge, access and funding.

The sector

The sector is diverse and siloed in its structure, and a challenge to define, including in terms of roles and responsibilities. More attention needs to be paid to how different aspects of the sector are interrelated, and there is a need for a more joined-up approach to address issues with competition and segmentation.

Respondents suggested Manatū Taonga should focus on the ecosystem and growing collaborative, holistic approaches, rather than its infrastructure and components, to help resolve issues with siloes and competition. An overarching cultural strategy/vision, with associated policy, would help with ecosystem thinking.

Within sector operations, Manatū Taonga should consider how to change the current models and structures. The COVID-19 pandemic has brought in new ways of working, or a return to traditional and indigenous ways of working, across the sector that are challenging current frameworks.

Funding and investment

Because of the way the sector has grown, the current funding system is fragmented, resulting in competition for limited resources. Further investment is needed, and Manatū Taonga needs to consider what that investment could look like. For example, investments in technology are needed to keep up with digital changes. Focusing on collaboration and leadership could help with the financial resilience of the sector. A key question is what role central and local government should play in funding the sector.

⁴ [Cultural Democracy in Practice – PDF](#)

The changing digital world

The shift towards digital content and platforms has led to changes in audience behaviour. People are increasing their online engagement and this shift is creating challenges for smaller organisations and art/cultural forms that require in-person experience. Innovation is one of the key drivers to ensuring the future of the arts and creative sector and needs to be better supported.

There are emerging issues around monetising digital content, increasing competition in the global market, and the creation of a 'digital divide'. Regulatory intervention for digital platforms may be needed both to protect New Zealanders from dis/misinformation and to ensure our content creators are protected and paid fairly. Innovation is one of the key drivers to ensuring the future of the arts and creative sector, and this needs to be better supported.

Freedom of expression is a vital concept within the cultural sector. The public benefit of expression, to inform, entertain, and embody culture, is worth protecting and nurturing. The harms of expression have become more prominent recently and this is something the sector will need to grapple with.

Value and wellbeing

The way we measure value of the cultural sector has historically been fraught with difficulty, and the sector has traditionally been undervalued by any measure. In order to promote the value the cultural sector adds to New Zealand as a whole, we need robust data and measurements, rather than ad hoc collection. This will be vital in building the case for increased investment. In addition to the economic value added by the cultural sector, the importance of the sector's contribution to wellbeing needs to be highlighted.

Education and workforce development

Education needs to be a driver of change and cultural activity should be embedded throughout the education system. Participation in arts and cultural activities, understanding our history and whakapapa, words, creativity as a skill set, language and expression through lifelong learning is vital to ensuring a sustainable sector in the future.

People need to be able to see a creative career as a sustainable and rewarding option. To do this, more work needs to be undertaken to ensure that people are receiving the right training and support to enable sustainability and growth.

Gaps in the LTIB components and the consultation process

Among the feedback we received during the August–November 2021 engagement was that heritage could be better represented, and that climate change requires more attention as it will be a considerable driver of change. Submissions received on the draft LTIB in December 2022 sought better representation of libraries, galleries, and regional museums and heritage organisations. The media sector may have different drivers that are not well represented in the briefing document.⁵

5 For example, see the recently released Strategic Framework for a Sustainable Media System: [Strategic Framework for a Sustainable Media System – Manatū Taonga](#)

Feedback led to clear focus areas for further futures-focused discussions

Following the engagement, Manatū Taonga undertook further analysis around how the emerging themes outlined above could be focused for a more in-depth discussion on futures, including key outcomes, barriers and levers for Manatū Taonga and the wider sector to consider.⁶

The focus areas (detailed further in pages 19–51) were identified as:

- **Te ao Māori** – considering the future of the sector with te ao Māori is woven throughout the cultural sector while supporting mana motuhake, including implications of co-governance
- **Funding, investment and value** – shifting how investment is made in the sector and how value and wellbeing is understood and realised
- **Population change** – understanding the impacts of projected demographic changes as Aotearoa New Zealand becomes more diverse, including shifts in specific population groups and Aotearoa New Zealand’s sense of identity and place in the world
- **Digital technologies** – realising the opportunities created by rapidly changing digital tools and platforms, and considering the broader economic and legal implications, including in relation to the global marketplace
- **Climate change** – fostering a more sustainable sector and opportunities to mitigate climate change.

These themes were the basis for a series of workshops, held as part of the second round of consultation (between July and October 2022), to further discuss opportunities for the future of the cultural and creative sector.

⁶ This analysis is outlined in Appendix 1.

Whakarāpopotonga Executive Summary

The intent of the Long-Term Insights Briefing work is to help the public and decision-makers consider some of the pathways and key areas that will influence the vibrancy and resilience of the cultural sector ecosystem. It has been clear from the feedback received during this work that there are a number of hopes for the creative and cultural sector looking to the future – but in some cases, it has been hard to see how these can become a reality because of the current roadblocks.

Manatū Taonga hosted a series of workshops in the latter part of 2022 to discuss some of these pathways in more detail and identify opportunities to get us on these pathways. Each workshop centred on one of the different focus areas, which are discussed in more detail in the next sections. The workshops provided Manatū Taonga with opportunities to hear directly from participants in our sectors, and how their experiences and insights can pave the way towards the future.

Some key opportunities were raised a number of times across different stakeholder groups. These are:

- Position te ao Māori and Te Tiriti o Waitangi at the centre of the cultural and creative ecosystem
- Recognise and tell the value story of arts, culture and heritage across other sectors (for example, health, education, justice, environment) and in relation to societal wellbeing
- Develop diverse ways to measure impact beyond traditional metrics such as numbers and monetary returns
- Celebrate and leverage our diverse society to connect people with arts, culture and heritage
- Use digital technologies to make information available and connect people across diverse communities with arts, culture and heritage
- Use arts and culture in the response to climate change, which requires action from people across all levels of society. Arts and culture can be used as a communication tool and appeal to people’s emotions and lead to change in a way that scientific facts cannot.

When thinking about the pathways to the future, Manatū Taonga has also considered how this relates to its own strategic framework, Te Rautaki o Manatū Taonga, which outlines the direction for Manatū Taonga to 2040: **Ki te puāwai te ahurea, Ka ora te iwi | Culture is thriving, the people are well.**

Te Rautaki sets out a long-term vision for te whāinga tāhuhu | where we want to get to:

- Culture is inclusive and reflective, supporting people to connect and engage with each other, their community and society
- Iwi and Māori are supported to achieve their cultural aspirations and Māori culture is recognised, valued and embraced
- People can access and are participating in cultural activities and experiences
- Cultural activity is valued, supported and nurtured, and
- The cultural system is resilient and sustainable.

The key opportunities within the focus areas that have been identified are a pathway to get to this vision of **Ki te puāwai te ahurea, Ka ora te iwi | Culture is thriving, the people are well.**

What is the role of Manatū Taonga as steward of the cultural and creative ecosystem?

The different sectors within the cultural and creative ecosystem – including organisations, participants, communities, business, and wider government – can contribute to these pathways in different ways. For this Long-Term Insights Briefing we have concentrated on what Manatū Taonga can do, in its role as system steward, to lead us towards these pathways, remove barriers, and realise opportunities.

Manatū Taonga can:

- ensure it **lives by Te Rautaki**, in particular putting Te Arataki, our Māori strategy, at the heart of what we do
- **support Māori to reach leadership positions** across the sector, including through appointments to arts, culture and heritage boards and entities monitored by Manatū Taonga
- **support capacity and capability building across iwi/Māori**, acknowledging that there is currently unequal capacity and capability to engage and participate across iwi/Māori
- **collate and share evidence, data and insights that demonstrate the far-reaching impact of arts, culture and heritage**, including influencing further development of the Living Standards Framework and introducing He Ara Waiora, and the connection with the Social Cohesion Framework
- **consider innovative ways of rapidly delivering funding** where it's needed, while still retaining accountability for public funds, and continue to **design funding and investment strategies that support regional and local arts, culture and heritage**
- use its influence to **champion the sector** across traditional agency, sectoral and disciplinary boundaries and **look beyond traditional engagement partners and models** to bring in a greater range of diverse perspectives from different groups and communities
- **support the sector to consider ways of delivering arts and culture that minimise their impact on the climate**, including learning from ways of engaging with arts and culture that were adopted during the COVID-19 pandemic and lessons from the Carbon Neutral Government Programme
- **support New Zealand's diverse communities to tell their stories through arts and culture**, helping to connect more people with their own stories, and those of others who call Aotearoa home
- **promote digital connections and experiences**, while supporting other government agencies to mitigate unequal access across some groups (for example, older people, people with disabilities, people from lower socio-economic backgrounds)

- work to **design principles-based policy and legislative settings that are fit for the future**, and support the protection of Māori data, content and stories as taonga
- **support New Zealand digital content creation** and discoverability
- **leverage arts and culture to appeal to Aotearoa to act against climate change** as well as support iwi/Māori and communities to self-determine the future of their cultural taonga and make better-informed risk-based decisions to reduce the vulnerability of cultural assets to climate change.

What are the pathways for a vibrant and resilient cultural sector ecosystem?

- ▶ **The Crown is working in partnership with Māori, and there is greater consideration of the cultural impacts of ngā toi Māori, with self determining funding models.**

Te Rautaki connection: Iwi and Māori are supported to achieve their cultural aspirations and Māori culture is recognised, valued and embraced.

- ▶ **New Zealand content is seen, heard, and read all over the world, connecting diverse New Zealand culture to the world.**

Te Rautaki connection: Culture is inclusive and reflective, supporting people to engage with each other, their community and society.

Ki te puāwai te ahurea, Ka ora te iwi
Culture is thriving, The people are well

2040



Pae Tawhiti

2040

- ▶ **There is a shared strategic direction, with sustainable investment models and innovative and flexible ways to respond to rapid changes in technology.**

Te Rautaki connection: The cultural system is resilient and sustainable.

- ▶ **We can clearly articulate the cultural and creative sector's economic and wellbeing contribution, and government investment is evidence based.**

Te Rautaki connection: Cultural activity is valued, supported and nurtured.

- ▶ **The arts are embedded in education pathways at all levels and creative work is seen as viable career option, supported by sustainable investment.**

Te Rautaki connection: People can access and are participating in cultural activities and experiences.

Takiwā Arotahi: Te Ao Māori

Focus area: Te ao Māori

Considering the future when te ao Māori is woven throughout the cultural sector while supporting mana motuhake, including the implications of co-governance

What do we already know?

There are some data gaps around how the cultural sector incorporates/ invests in te ao Māori, toi Māori and mātauranga Māori and how Māori engage with sector governance across arts, media, sports and heritage.

There is up to date information about the Māori cultural sector workforce and engagement with Māori cultural activities and te reo Māori, discussed below.

Māori workforce in the cultural sector

- In the year to March 2021, Māori held 9601 (10.1 percent) of the 94,689 filled jobs in the arts and creative sector, a decline of 0.6 percent from 2020. (Infometrics Arts and Creative Sector Profile 2021)
- Between March 2020 and March 2021, Māori businesses as defined by Stats NZ made up 2982 (9.6 percent) of the 30,986 business units in the arts and creative sector.
- Between March 2020 and March 2021, the Māori arts and creative sector contributed over \$1.05 billion to New Zealand's GDP.

Participation in Māori cultural activities and te reo Māori (General Social Survey 2021)

- 1 in 4 people (aged 15+) had sung a Māori song, performed a haka, given a mihi or speech, or taken part in Māori arts and crafts in the previous 12 months.
- 11.3 percent of people aged between 15 and 24 had participated in kapa haka in the last 12 months, the highest percentage by age group.
- For those (aged 15+) who had visited a marae in the last 12 months, the frequency of visits had increased, with 8.0 percent visiting at least once every two weeks in 2021, up from 4.3 percent in 2016.

Te reo Māori proficiency and support for te reo Māori

- The proportion of people (aged 15+) able to speak more than a few words or phrases of te reo Māori increased from 23.6 percent in 2018 to 30.0 percent in 2021. The proportion of people able to speak te reo Māori at least fairly well also rose. (General Social Survey 2021)
- Over half of the people (aged 15+) surveyed agreed or strongly agreed that te reo Māori should be a core subject in primary schools, that the government should encourage and support the use of te reo Māori in everyday situations, and that signage should be in both te reo Māori and English. (General Social Survey 2021)

What we heard from our engagement

According to respondents ...

Te ao Māori should be at the centre of the sector, with mātauranga Māori given equal weight to other knowledge systems

Participants wanted Te Tiriti o Waitangi, te ao Māori and mātauranga Māori to be at the centre of our thinking and the heart of our arts and cultural sector, with care taken to ensure te ao Māori and Te Tiriti o Waitangi are not 'in one box' but integrated across all aspects of the ecosystem. Te Tiriti o Waitangi provides a unique place for all New Zealanders to stand and belong but needs to be underpinned by a recognition of the rights of Māori as tangata whenua, to have tūrangawaewae, a place to stand, and mana motuhake to make decisions as Māori, for Māori. It offers a foundation for new and inclusive conversations about our national identity. Participants identified the need to recognise differences among Māori, noting that disparities exist between iwi in terms of power, resources and capability. In addition, they identified a need to leverage the voices of groups within Māori, such as kuia, who are often custodians of cultural knowledge.

Questions were raised about how to protect toi Māori, mātauranga and taonga, and who has the cultural and intellectual right to do so, including in areas such as copyright and data sovereignty, repatriation, collections, and the use of future technology for cultural engagement. A key consideration was how institutions such as museums and other government agencies can work with Māori to protect taonga while empowering communities and upholding mana motuhake.

There are specific considerations for Māori when it comes to sector funding

Feedback suggested existing inequities within the cultural sector ecosystem that negatively impact Māori must be surfaced to ensure future actions achieve equity. These include low numbers of practitioners with the necessary mātauranga and technical proficiency across a range of areas; investment that has historically favoured European arts, culture and heritage; and limited access to Māori learning and development pathways.

Participants raised questions about co-governance and decision-making around fund allocation, such as how the government can ensure funding is guided by Māori values and principles. The current indicators and measures of success used by the Crown and the sector were considered not to be well aligned with tikanga Māori in areas such as collaboration, relationship building and reciprocity. There was a desire for Māori communities to drive their own cultural projects and to be involved at the design stage for broader projects and systems. Empowering and actively assisting iwi and hapū in their own initiatives were seen as ways to help change the Crown's relationship with Māori.

An increased Māori presence in cultural agencies is important in avoiding unconscious bias and keeping te ao Māori at the forefront

Some participants called for te ao Māori to be integral in cultural institutions, with a need to improve understanding of what a Treaty-based approach means in practice. There was also discussion around the fundamental change needed to break down structural inequity and bias. Greater Māori representation in leadership positions in key cultural institutions was seen as crucial. The museums sector was mentioned as a potential model for engaging with taonga and the people connected with taonga, and for working with iwi on a vision for a decentralised, collaborative future. However, others noted the need for repatriation of taonga to be defined by Māori, not the chief executives or directors of galleries and museums.

Feedback noted that a collective sector approach to attract and develop Māori leaders and creatives and support them throughout their careers could progress these aspirations more quickly and on a larger scale than each agency could achieve on its own. Agencies could collectively grow the pool of Māori in the sector rather than competing with each other for those that are already there. Ensuring that content made by these creatives is accessible to everyone and preserved for future generations will also support these creatives and provide benefits for all New Zealanders.

Our bicultural identity brings unique opportunities

Feedback acknowledged that our bicultural identity gives us a unique place in the world and provides a selling point overseas. Of special interest to workshop participants was the idea of cultural identity on a global stage, with a tension identified between Māori cultural identity outside of and within New Zealand, and a need for Māori to show who they are, rather than being showcased by the Crown. It was noted that internationally Māori are seen as positive examples of how indigenous people can work with colonisers and systems, and that people want to collaborate with Māori and be a part of what is being developed here in New Zealand.

Participants also noted a need to protect te reo and mātauranga Māori as unique cultural property. Initiatives such as the Matariki public holiday were considered important ways to unite New Zealanders behind mātauranga Māori. The difficulty for practitioners of surviving within a market model led to the question of how to invest in a resilient future for mātauranga Māori.

There are issues around the relationship between Māori and government institutions

Participants emphasised the importance of genuine collaboration with iwi and a Tiriti-based approach that is 'more than just a label'. Feedback noted pressure on Māori, especially iwi, to respond to government, and a need to build capacity and capability for engagement, but there was also a sense that advice is sometimes sought and then ignored. It was suggested that Manatū Taonga should be working with Māori strategists and knowledge holders to develop the conceptual framework and process design for the Long-Term Insights Briefing work.

There was also a call from some workshop participants for kaupapa Māori data collection, rather than Crown agencies dictating definitions and determining what is valuable information to collect. Distrust about how data collected would be used was seen as an obstacle to people sharing their data.



What are the key opportunities and roadblocks, and levers for responding?

There are opportunities to ...

Position te ao Māori and Te Tiriti o Waitangi at the centre of the arts, culture and heritage sector.

Manatū Taonga can ensure it lives by Te Rautaki, in particular putting Te Arataki, our Māori strategy, at the heart of what we do.

And roadblocks to overcome ...

- Without Māori filling leadership positions across the sector, there is a risk that partnership is tokenistic and our obligations as Tiriti partners are not fulfilled.

Manatū Taonga can support Māori to reach leadership positions across the sector, including through appointments to arts, culture and heritage entities monitored by Manatū Taonga.

- There is unequal capacity and capability to engage and participate across iwi/Māori.

Manatū Taonga can acknowledge this through its work, and support capacity and capability building across iwi/Māori.

Takiwā Arotahi: Tuku pūtea, haumitanga me te uara

Focus area: Funding, investment and value

Shifting how investment in the sector is undertaken and how value is understood and realised

How the cultural sector is currently funded

Currently in New Zealand the cultural sector is funded through a range of sources, reflecting the broad scope of the sector. Support for arts and culture (including government funding but excluding consumer payments for cultural goods and services) is difficult to quantify as there are multiple funding streams, and arts and culture activities may be funded alongside a broader range of activities. Key funding sources include:

- Government investment in the sector in 2021/22 was approximately \$430 million (excluding sport entities) most of which was distributed to Crown-funded entities and monitored by Manatū Taonga. The government also funds Manatū Taonga to create and administer policy and other deliverables in order to support the sector (e.g., establishing the Artist Resale Royalty Scheme).
- Lottery Grants Board funds are distributed to some organisations (Creative New Zealand, Sport New Zealand, New Zealand Film Commission, Ngā Taonga Sound & Vision).
- The response to the COVID-19 pandemic saw additional funding made available to the arts, culture, heritage sector (\$374 million through the Cultural Recovery Programme, \$121 million through the Delta and Omicron response packages, \$50 million for the Media Support Package, and \$55 million for the Public Interest Journalism Fund). This funding was administered by Manatū Taonga through a variety of funds and initiatives (including the Creative Arts Recovery and Employment (CARE) Fund, the Cultural Sector Capability Fund, the Innovation Fund and the Arts and Culture Event Support Scheme).
- The sector is also supported by arts and culture trusts (e.g., Te Taumata Toi-a-Iwi), funds, grants and awards – funded by local authorities, private philanthropy, and charity/not-for-profit organisations.
- Crowdfunding, donations, and paying audiences.

The COVID-19 pandemic highlighted the vulnerability of the arts and culture sector. As with hospitality and tourism, cultural events and activities in New Zealand often depend on in-person attendance and were affected by social distancing, lockdown restrictions and cautious potential audiences. In addition, many practitioners are part-time, freelancers or work in the gig economy. These practitioners were vulnerable to the effects of restrictions and cancellations. To mitigate these impacts, the government provided targeted investment in Budget 2020: the COVID Cultural Recovery Programme.

Investment

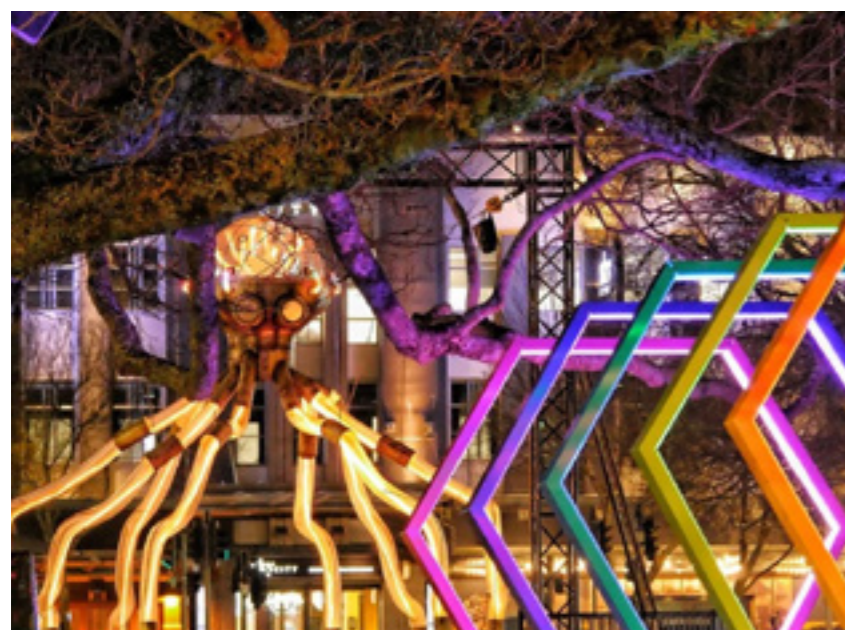
- In 2021, the arts and creative sector contributed 3.3 percent (\$10.85 billion) of New Zealand's GDP (Infometrics, 2021). Employment in the arts and creative sector is forecast to grow by 1.5 percent per annum between 2021 and 2027, in line with the overall economy. By 2027, it is forecast that there will be approximately 31,000 job openings in the sector (28 per cent of them new jobs). Most of these job openings will be for highly skilled professionals (e.g., architects).

- Insufficiency of funding and income is a reported concern for creatives. In the State of the Arts 2022 survey, creatives were asked what they would advocate for in the sector. Nearly half (43 percent) focused on changes to funding: increasing amount of funding overall, funding a greater range of roles, improving application processes for funding, improved creative input into decision-making and funding allocation. In addition, 18 percent of respondents reported a need for investment that will improve the sustainability of artists and creatives, such as a universal basic income.

Current value of the cultural sector (to the sector, and to participants and audiences):

- The sector creates significant economic, social, cultural, educational, and emotional benefits. Some of these benefits are not easily conceptualised within simple metrics but this value is significant
- Within an economic framing of this value, total value includes the direct benefits of participation and employment, but also the amenity value or vibrancy created in communities, and the inter-generational value of these assets. (Manatū Taonga Value of Culture Framework⁷)
- These multiple levels of value are highly contextual to the content and experiences shared between creatives and diverse participants and communities. So there is no simple formula to determine value. Frameworks and tools have been developed as guides and proxies.
- Most New Zealanders aged 15+ (94 percent; General Social Survey 2016) participate in some form of cultural activity, be it going to the cinema or live music events, doing creative writing, visiting marae or visiting historic sites. This participation creates immense personal and social value.

⁷ [Value and Culture: An economic framework – PDF](#)



Boon After Dark Street Art Festival in Kirikiriroa Hamilton, 2021, which was supported by the Cultural Installations and Events Fund.

What we heard from our engagement

According to respondents ...

The sector should be thought of as an ‘ecology’ – interdependent, interconnected and growing from the ground up.

Some participants expressed concern about a lack of understanding of how the different parts of the sector interrelate with each other. There was also a view that an ‘ecology’ or ‘ecosystem’ approach is at odds with the current competitive funding methods, although no alternative to competition was suggested. There was a widespread call for the development of a cohesive sector strategy or policy – with the proviso that any such policy should not be setting directions or trying to drive the sector. Feedback suggested a unified strategy could deliver greater wellbeing both within the sector, and to Aotearoa by connecting the sector better within itself, and with central and local government to influence policy especially in relation to the economic aspects of wellbeing. No further detail emerged about what the purpose of such a strategy would be, how it could describe or give appropriate weight to the various components of a sector of such scope and diversity, or how it would connect with the existing strategies of agencies such as Creative New Zealand.

The current funding system needs to adapt and change.

Participants questioned the role of government and Manatū Taonga in the sector, and suggested that the current funding/investment system is too slow, too ‘old school’, and too inflexible to keep up with change and innovation. Government institutions were seen as overly bureaucratic, acting as gatekeepers but moving too slowly in making funding decisions. Participants also noted a lack of joined-up thinking from central and local government, with different agencies operating under different mandates. Participants agreed that the current systems for funding do not work for everyone, that certain groups fall through the cracks, and that better representation and consideration of diverse worldviews is needed.

The funding system was also described as ‘fragmented’ and ‘breeding competition’, which was seen as detrimental to collaboration. Some participants advocated a more aligned approach to funding. However, others favoured a more ‘dispersed’ or ‘devolved’ approach, with government entities tailoring funding support to the industries they represent.

Participants agreed across the board that the system we have now is not the best option and needs to change. However, no clear view emerged about what specific changes should be made, or what concrete results system transformation would yield. Capturing the learnings and impacts associated with COVID-19 funding interventions, and using them to inform new ways of working might help shape the strategy for supporting the New Zealand cultural sector.

Further investment and succession planning are needed.

There was concern about a lack of funds and resources, especially in light of ageing cultural infrastructure. Some participants expressed frustration with the investment opportunities and commercial revenue streams currently available. The problem of declining levels of philanthropy was raised, along with the need to develop new and young philanthropists and encourage local investment. Another issue was the trend towards hiring staff on a project basis rather than as long-term professionals, creating gaps in knowledge and reducing wellbeing. There is a need for succession planning to maintain a skilled and specialised workforce.

We need to consider what investment could look like.

Supporting New Zealand artists to build international relationships and help grow the NZ Inc brand were seen as key roles for central government. Other suggestions included wage subsidies for employers, rebates to encourage reinvestment in the industry, and strategic conversations with other sectors such as tourism. One participant cited Scandinavia as a model for partnership between the sector and the government, with sustainability ensured through long-term funding. Another noted a need for support to focus not just on new endeavours but also on helping existing endeavours become sustainable. Feedback noted that conversation about fair remuneration and general support to enable creatives to survive and thrive should incorporate the total cultural and social value that these cultural workers facilitate. This would enable better conversations about options such as basic income models.

A key question is what role central and local government should play in the funding of the sector.

A number of participants emphasised the importance of local authorities in arts funding, given their community connections and responsiveness to local needs. However, museums, galleries and libraries were seen as vulnerable because of their reliance on ratepayers, given the cost pressures councils are under, and the economic inequalities between different regions. Concern was also expressed about the need to strengthen local government infrastructure around arts and culture, to enable local authorities to step in when COVID-19 recovery funding runs out.

Participants noted that large organisations need to be more in touch with the realities facing smaller groups and individuals, so they can play a stronger role in supporting them. Those in leadership positions should develop greater knowledge of arts, culture and heritage issues.

A concern was raised about the role of gambling in funding arts and culture. Many respondents would prefer a full funding commitment from government, like other sectors, rather than having to rely on gambling revenue, particularly when the communities typically giving that money are not the ones benefiting from the funding.

It was also suggested that, as big spenders in the arts, government institutions should set an example by buying local and paying artists (such as writers) fairly.

We need to improve how we measure the value of the cultural sector in order to promote the value it adds to New Zealand as a whole.

Participants affirmed that the arts and culture are both ubiquitous and precious, and agreed that the government should recognise and leverage the value of the cultural sector, as seen both through and outside an economic lens. There was a call for more investment in the arts. To encourage investment and public support, participants stressed the need to better advocate the value of arts and culture, both to the economy and as a public good in areas such as health and wellbeing. It was suggested that by 2040 culture and creativity should be measured and tracked as a pillar in the Living Standards Framework. Participants also argued for greater investment in and prioritisation of the arts in schools, viewing this as key to fostering a society that values the arts.

While arguing that there is sufficient evidence of the benefits of arts and culture to society, communities and individuals, participants noted that it is difficult to demonstrate arts and culture as assets that can be leveraged for better outcomes.

There was a call for more robust data and measurement, rather than ad hoc collection, with more weight given to 'intangible' values such as wellbeing. It was also noted that the approach should explore culturally appropriate ways of collecting data, beyond a Pākehā framework. One suggestion was for the development of a sector-wide measurement framework to evidence agency and sector wide value. This would be aligned to the Living Standards Framework and Ha Ara Waiora.

How we value arts and culture needs to reflect the breadth of the sector.

The 2022 research Wellbeing and the Arts, Culture and Creativity in the Waikato found an association between Engagement with arts, culture and creativity and higher overall wellbeing and explores wellbeing in detail including connection to community, connection to culture, connection to place, connection to self, mental wellness, physical wellness, resilience and resources.

Participants noted the wide range of activity in arts, culture and heritage, from world-class professionals to community participation, and also the ability of some creative industries to attract private capital while others struggle to do so. Concern was expressed that the emphasis is too much on the functional value of the arts, with ‘excellence’ missing from the conversation. An interesting analogy was made with high-performance sport: excellence at the professional end of the arts spectrum is vital in leading and developing art forms, drawing international audiences and inspiring arts participation within communities, while investment in community art, like community sport, is more about participation and wider societal benefits.

Other feedback noted the need to find the balance between funding excellence or ‘high performance art’ and resourcing community-engaged art opportunities to support community outcomes and grow cultural literacy. It was also noted that calculating value and return on investment for new and existing digital cultural content and services requires specific examination of the costs and participant expectations for digital.

What are the key opportunities and roadblocks, and levers for responding?

There are opportunities to ...

- Recognise and tell the value story of arts, culture and heritage across other sectors (e.g., health, education, justice, environment) and to societal wellbeing.

Manatū Taonga can use its influence to champion the sector across traditional agency, sectoral and disciplinary boundaries.

- Develop diverse ways to measure impact beyond traditional metrics, looking beyond numbers and monetary returns.

Manatū Taonga can collate and share evidence, data and insights that demonstrate the far-reaching impact of arts, culture and heritage, including by influencing further development of the Living Standards Framework and introducing He Ara Waiora and the connection with the Social Cohesion Framework.

And roadblocks to overcome ...

- The government acts as a gatekeeper for funding and investment, and moves too slowly and rigidly.

Manatū Taonga can consider innovative ways of rapidly delivering funding where it’s needed, while retaining accountability for public funds.

- Concentration of funding in main centres means arts, culture and heritage in the regions often misses out.

Manatū Taonga can continue to design funding and investment strategies that support regional and local arts, culture and heritage.

Takiwā Arotahi: Panonitanga taupori

Focus area: Population change

Understanding the impacts of projected demographic changes as Aotearoa New Zealand becomes more diverse, including shifts in specific population groups and Aotearoa New Zealand's sense of identity/place in the world.

What do we already know?

The ethnic composition of the arts and creative sector under-represents Māori, Pacific, and Asian New Zealanders, although these gaps have decreased since 2013.

Ethnicity	Arts & creative sector workforce 2018 %	Arts & creative sector workforce 2013 %	Total NZ workforce	Total NZ population 2018%
European	79.1%	83.5%	71.4%	70.2%
Māori	10.0%	8.5%	13.5%	16.5%
Pacific peoples	4.5%	3.5%	6.5%	8.1%
Asian	12.7%	8.8%	15.1%	15.1%
MELAA	1.6%	0.9%	1.4%	1.5%
Other	1.3%	1.9%	1.4%	N/A

Table 3: Ethnic composition of arts and creative sector workforce (Sources: Infometrics, Stats NZ)

- Over the next 40 to 50 years, it is forecast the New Zealand population will continue to grow slowly, depending on fertility, migration flows and life expectancy. The population will age; by 2073, the median age of New Zealanders will be 47, up from the current estimate of 37 (Stats NZ National Population Projections 2020). While it is not possible to predict with certainty the consequences of these changes, several potential implications of an aging population may need to be considered, including labour shortages and the level of investment required for innovation.
- The Māori proportion of the population, as well as that of other ethnic groups (except Europeans) will continue to grow, leading to greater ethnic diversity across New Zealand in the next 20 years (Stats NZ National Population Projections 2018).⁸ Greater population diversity is associated with economic and social benefits, such as increased productivity, innovation and cultural vibrancy. These changes may also have an impact on our national cultural identity and create an appetite for more diverse creative and cultural participation.
- For the cultural sector workforce and for a vibrant, inclusive and diverse cultural sector more broadly, it will become even more important that cultural creators represent the ethnic diversity of New Zealand's population.

⁸ [Subnational population projections: 2018\(base\)-2048 - Stats NZ](#)

What we heard from our engagement

According to respondents ...

Aotearoa New Zealand is a highly diverse society founded on bicultural roots.

New Zealand's growing diversity was a recurring theme. Alongside the important place of te ao Māori, it was recognised that there are many voices that deserve representation in the cultural sector, and that under-represented groups are often the best custodians of knowledge as well as being those most vulnerable to the consequences if that knowledge is ignored. One participant described three strands which make us unique in the world: Māori heritage, Western heritage, and what has been created since Māori, Pākehā and other ethnic communities came together. It was also observed that, because diversity is not embedded in our structures, we lose different worldviews when particular individuals leave cultural sector institutions.

Communities are important in making the sector thrive.

Another common theme was the need to empower communities as the grassroots of arts and culture and kaitiaki of local collections, with experts on the ground leading and building our cultural sector systems. Many participants wanted broader discussion with the sector, with one suggesting that Manatū Taonga hold a biennial sector hui. Rather than a top-down approach, it was suggested that experts on the ground 'lead' and 'build' together, with communities involved in the planning phase of initiatives. Participants noted the difference between government support and government control, and the importance of transitioning collections back to the communities in which they belong, with local people empowered to take the lead in defining their own outcomes.

One size doesn't fit all in a diverse society.

Diversity is broader than ethnicity only. Many communities in Aotearoa New Zealand (e.g., Deaf and Disability, LGBTQIA+) have relatively low visibility and support across the cultural sector. The cultural sector is increasingly being identified as playing an important role in fostering social cohesion. This reflects a growing body of research that demonstrates the importance of arts, culture and creativity in relation to wellbeing, and its critical role in helping to establish a sense of identity and belonging.

Rather than a 'one-size-fits-all' approach, participants wanted flexibility for the various political and social needs of different cultural, demographic, gender identity and other groups. Participants emphasised the need for Manatū Taonga to engage with multiple voices rather than repeatedly going back to the same people. The issue of how to invest more equitably was raised, with the concept of 'gatekeeping' challenged as an impediment to getting funding to different communities.

We need to think about the accessibility of the system to increase youth engagement.

Many rangatahi are engaging in the system in different ways – such as freelance work. Many respondents noted the issue (within creative careers) of new practitioners coming up against gatekeeping or uncertainty around accessing suitable sustainable mentorship, networks, and expertise, or even hearing about creative career opportunities while still in secondary school. There is concern about how young people can continue to create without a clear career pathway, and about the wellbeing impacts of having to think about multiple jobs to cover the costs of being a creative without assured funding.

It is important to ensure that there are practices in place, removal of barriers and a review of existing systems to ensure diverse and underrepresented communities are experiencing cultural safety in the cultural sector.

Population change presents an opportunity to build up the cultural capability of smaller players in the sector so that people have 'the language, knowledge, connection and sense of belonging necessary to participate fully in one's culture or cultures, and helping others grow their cultural capability and feel a sense of belonging'. (footnote reference to The Treasury Living Standards Framework)

Diversity enriches our arts, culture and heritage.

Celebrating diversity was seen as important in achieving more representative content and better participation in our democracy. Some participants wanted a stronger narrative about the richness of New Zealand's cultural sector, with the opportunity to better engage New Zealanders in their culture and stories. The issue of access for diverse audiences was also raised; in particular, the difference between equity and equality of access, and the need to ensure that collections of Māori art and taonga are accessible to people in lower socio-economic communities.

Diversity is also about how we see ourselves in the world, and how the world sees us.

Diversity was also seen in an international context, with an influx of people and ideas from elsewhere in the world. Participants noted the need to think about how New Zealand stories are being told internationally, and how our stories remain authentic when presented on the global stage. The notion of cultural cringe was mentioned as an impediment to telling our many diverse New Zealand stories.

Ensuring that there are pathways to enable diverse creatives to learn their craft and to earn a living from telling the stories of their communities is an important aspect of giving diverse communities an authentic voice. These stories must be accessible on a range of platforms that audiences engage with.

What are the key opportunities and roadblocks, and levers for responding?

There are opportunities to ...

Celebrate and encourage our diverse society to connect people with arts, culture and heritage.

Manatū Taonga can support New Zealand's diverse communities to tell their stories through arts and culture, helping to connect more people with their own stories, and those of others calling Aotearoa home.

And roadblocks to overcome ...

As our society becomes increasingly diverse, a 'one size fit all' approach becomes less helpful.

Manatū Taonga could look beyond traditional engagement partners and models to bring in a greater range of perspectives from different groups and communities.

Takiwā Arotahi: Hangarau Matihiko

Focus area: Digital technologies

Realising the opportunities created by rapidly changing digital tools and platforms, and considering the broader economic and legal implications, including in the global marketplace

What do we know about digital issues for the cultural sector in New Zealand?

Digital technology has changed the way people consume arts, culture and heritage. There are significant generational differences, so digital is likely to significantly influence future consumption patterns. Digital technology has also changed employment and revenue patterns in the cultural and creative sectors. Digital has altered how content is mediated between producers and consumers, and the entities that do this. It has allowed us to connect the world to our living rooms in ways that we hitherto could not. Digital also continues to provide new tools and efficiencies for creative professionals in business development, administration, marketing, funding and investment.

No part of the cultural and creative sector is untouched by digital technology. However, its impacts have been unevenly felt, with parts of our sector experiencing significant digital disruption, including economic decline, and others resurgence and recovery.

Cultural Participation

Digital technology has provided new ways to consume cultural goods and services and, in some areas, digital and new technologies have flipped consumption entirely. It is an open question about how this will evolve. Recent cultural participation research in New Zealand suggests that in areas that in cultural sector areas that bring people together into a collective experience such as live shows and galleries, preference for in-person experiences remains very strong. But for some groups including disabled peoples, digital options are very important.

For example, the digitisation of media content and the use of new technology to access this content has diversified the ways in which New Zealanders receive news and other cultural content. Digital access differs strongly by age, as the following table shows.

Age group	Online video	Streamed video	Music streaming	Radio	TV
15-39	82%	72%	68%	36%	35%
40-59	58%	48%	34%	48%	61%
60+	26%	22%	10%	65%	83%

Table 4: Media use in New Zealand 2021 ([NZ On Air Where Are the Audiences? 2021](#))

Another example of major digital disruption is music.

In 2001, you could carry about 12 songs in your pocket on a Sony Walkman cassette player. In that year Steve Jobs brought 1,000 songs to your pocket on his new iPod. In 2022, consumers can access vast amounts of digitised recorded music through streaming subscription services.

In 2001, almost all legal recorded music sales were of a physical product – usually a compact disc. Digital disruption and piracy saw a collapse in CD sales. From 2010–11, digital streaming gradually resurrected revenues; streaming subscriptions now account for 83 percent of retail music revenue.

Recorded Music Revenues in New Zealand 2001–2021

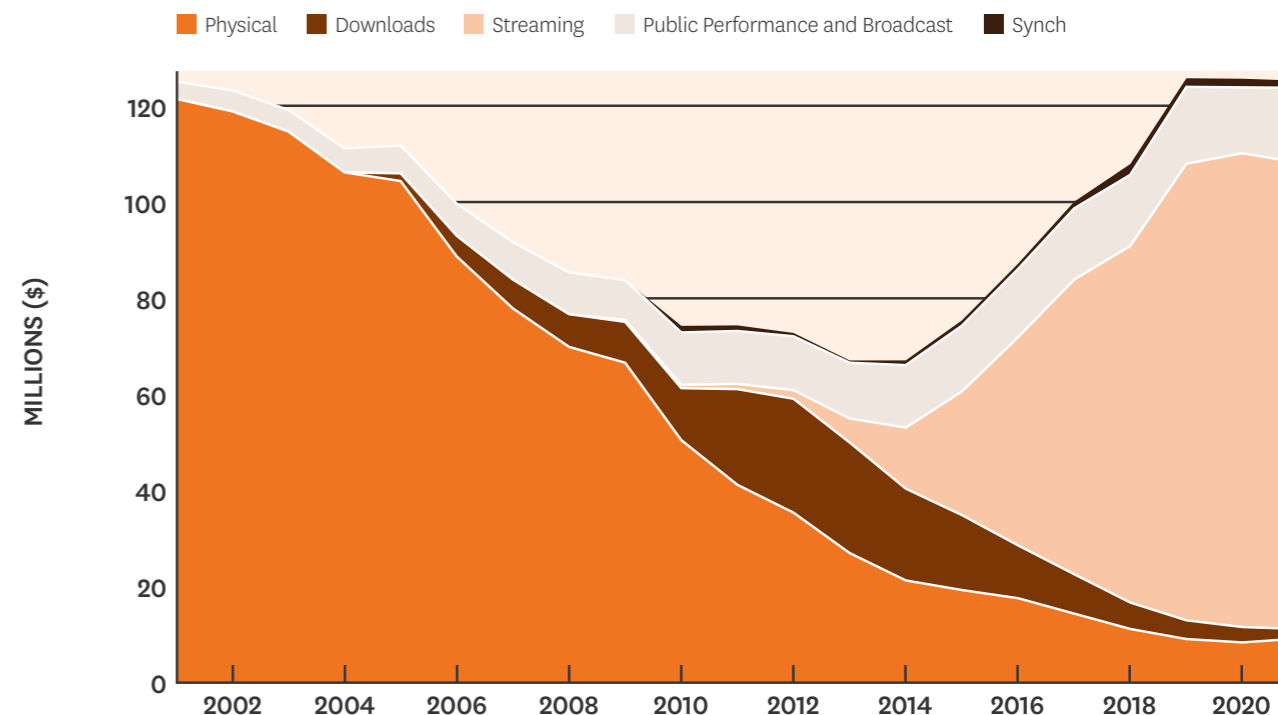


Figure 1: Recorded Music Revenues in New Zealand 2001–2021
(Source: [Recorded Music NZ 2022](#)).

Sector Employment and Incomes

Digital disruption and the new business models that this facilitates have fundamentally changed some sector employment and income patterns.

For example, in 2000, if you were a journalist you were probably employed by a newspaper: 88 percent of all journalists were print journalists. In 2021, the number of print journalists has declined by 75 percent and they now make up just 34 percent of all journalists.

Journalist employment in New Zealand 2000–2021

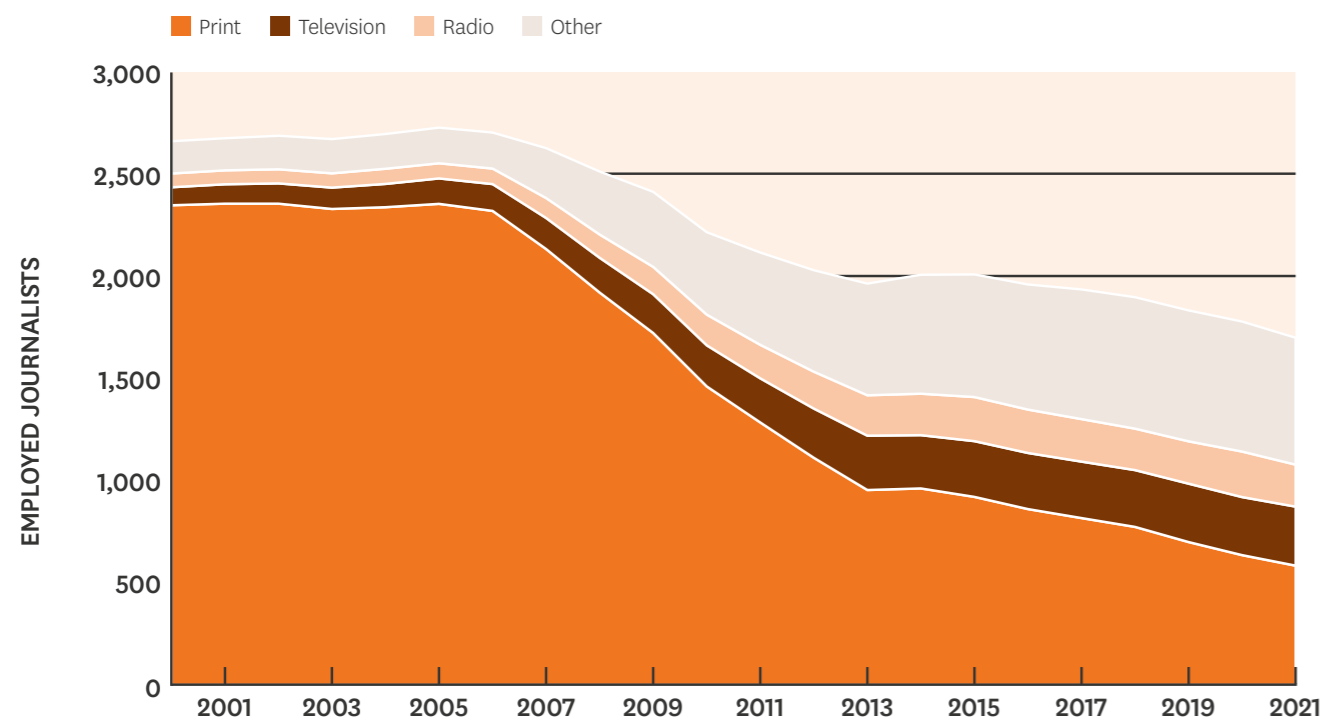


Figure 2: Journalist employment in New Zealand 2000–2021
(Source: Infometrics Arts and Creative Sector Profile 2000–2021)

Digital technology has also changed the ways creatives create and sell their goods and services. Digital technologies have changed the rules of the game for being successful in this area of cultural production.

In September 2022, the New Zealand artist ranked highest by global music database Chartmetric was Lorde. The second highest-ranked New Zealand artist was Jawsh 685, a 20-year-old of Cook Island and Samoan descent who produces music from his bedroom in Auckland. Jawsh 685 blew up in 2020 as a 17-year-old Manurewa High School student collaborating virtually with Jason Derulo on the song 'Savage Love', which went to number one in 15 countries. The two had not physically met.

Digital Divide

While digital shapes opportunities to create and consume cultural goods and services, digital access is not equitable in New Zealand. Digital inclusion for individuals is evident when:

- They are motivated to use the internet / be online.
- They have access to the internet.
- They have core digital skills.
- They trust online services.

Groups in New Zealand at greatest risk of digital exclusion include:

- Families with children in low socio-economic communities
- People living in rural communities
- People with disabilities
- Refugees and migrants with English as a second language
- Māori and Pasifika youth
- Seniors.⁹

If we are to lift cultural participation for these groups, and encourage more New Zealanders into creative careers to support an inclusive and reflective cultural system, supporting other government agencies that have responsibilities to address digital exclusion will be important.

⁹ Sourced from 'Digital New Zealanders: The Pulse of our Nation'.
A report to MBIE and DIA May 2017

What we heard from our engagement

According to respondents ...

The shift towards digital content and platforms has led to challenges for local arts, culture and heritage.

Participants described an increasingly fragmented and global environment, with international content crowding out local content and major global platforms dominating audiences, using customer profiles to target advertising and increasingly claiming the virtual reality space. Global platforms were seen as both opportunity and threat, functioning as gatekeepers for content with the power to control customer data and capture the most valuable parts of the value chain. These developments emphasize the need for strong education to support information and digital literacies enabling navigation and discrimination of content.

There are challenges in responding to fast-changing technologies.

Participants saw our regulatory systems as no longer fit for purpose, with the future bringing unexpected technologies, systems, opportunities and challenges. It was noted that the current 'new' technologies will continue to be superseded in an unpredictable future. Participants questioned whether the government can build this mindset into regulatory systems and digital infrastructure, and there was disagreement about how the government could best support the sector through rapid technological change. However, participants agreed that understanding the past and current context and making good decisions now will influence the future.

Participants also discussed the use of technology as a tool rather than the end goal, keeping the audience and creators as the focus. Participants asked how organisations can upskill creators to make the most of digital technologies, while also informing audiences about them (and avoiding misinformation). The real challenge is not technology itself, but how it affects content creation and delivery, and has an impact on audiences.

How do we create a sense of community and ensure local stories reach local audiences?

With increasing choice of content and platforms, audiences were seen as fragmented and mobile, with family members each watching individual screens, leading to the demise of 'appointment viewing' and 'water-cooler moments'. This raised questions about what brings us together as a nation and as communities, and what the broader social effects of these developments may be, with participants noting the importance of a 'people focus' rather than a digital focus.

A recurring concern was how to ensure New Zealand stories continue to be told to New Zealanders, with a need to support local content in screen production and ensure accessibility for domestic audiences. Participants also cited challenges for art forms that rely on in-person experiences, and challenged the assumption (during the COVID-19 restrictions) that online experiences can be an acceptable substitute.

Another recurring idea was that of a shared platform or hub for trusted New Zealand content – a 'public service internet' or a 'Netflix of local content'. A central, trusted source or local curator was also seen as crucial in countering mis/disinformation. A further possibility raised was a mechanism to 'push New Zealand content to the forefront' on existing global platforms.

There are challenges and opportunities in monetising digital content.

Museums were cited as an example of the burden going online can impose – the need to maintain physical infrastructure while also developing digital products and services to target online audiences. One participant noted that digital models (such as virtual reality, augmented reality, cultural apps and cultural video games) are currently ineligible for public investment.

Others saw opportunities such as targeting global audiences, expanding publishing into the digital space, the audio book market, scope for more creativity in digital and animated books, and the potential for content to be better targeted to diverse audiences and interests. The virtual experience was seen as a possible gateway, creating demand for a live experience.

We need to think about equity in a global digital environment that favours the well-resourced and digital-savvy.

A concern was raised about the impact of competition for international funding on inequality in the sector. Massive international competitors such as Amazon were seen as undermining local industries, reducing the discoverability of New Zealand books and publishers' ability to use local writers and illustrators. One participant noted the risk of systemic bias on international platforms.

With large sections of the population now exclusively engaging with new platforms and an expected continuing decline in traditional media, segments of society unable to afford, access or use technology would potentially be left behind, creating significant inequities as well as a risk of reduced trust in public institutions. Participants were concerned with protecting vulnerable New Zealanders (such as young people, the elderly, people with low incomes and people with disabilities) from isolation and exploitation, and providing them equal opportunities to access digital platforms and technology and safely participate in the future.

The digital divide was also seen on a macro level, for example in the inequity in resources between large platforms and small cinemas. Participants cited a need for capability building to develop the skills and infrastructure to reach audiences and monetise their products. The notion of a 'digital commons' was seen as a possible way to reclaim space for the common interest, with free software having the potential to create new public utilities, though possibly undermined by private interests controlling 'choke points'.

More regulation may be needed in a global digital environment.

The need for a regulatory framework in areas such as intellectual property, taxing platforms, fair rewards for creators, the movement of advertising revenue to big international players, and the growth of mis/disinformation, was a recurring theme. Participants agreed that the government must work faster to create legislation to deal with these issues, and that it needs to be able to respond quickly to future changes in order to moderate impacts on vulnerable New Zealanders. One participant also commented on the tension between efforts to regulate harms or mitigate the power of big commercial players, and the need to protect civil rights against the power of the state.

For some workshop participants, data sovereignty was a key topic, both in terms of personal data and also for indigenous communities, both internationally and in New Zealand. Participants noted the importance of personal data as taonga representing identity and history, and expressed concern that it can be extracted, de-identified and commodified, as well as used to target misinformation. Regulation was seen as necessary to protect data sovereignty.



What are the key opportunities and roadblocks, and levers for responding?

There are opportunities to ...

- Use digital technologies to make information available and connect people with arts, culture and heritage across diverse communities.

Manatū Taonga can promote digital connections and experiences, while supporting other government agencies to mitigate unequal access for some groups (for example, older people, people with disabilities, people from lower socio-economic backgrounds).

And roadblocks to overcome ...

- The digital space is largely unregulated. It evolves and changes rapidly, making it difficult for regulators to keep up.

Manatū Taonga can work to design principles-based policy and legislative settings that are fit for the future and support the protection of Māori data, content and stories.

- International content and platforms dominate our market. There is a need to ensure Aotearoa New Zealand content is created and discoverable.

Manatū Taonga can support New Zealand digital content creation and discoverability.

Takiwā Arotahi: Huringa Āhuarangi

Focus area: Climate change

Fostering a more sustainable sector with opportunities to have a positive impact on climate change

How will climate change affect New Zealanders' cultural heritage and taonga and their participation in cultural experiences?

Climate change is the most pressing long-term challenge to Aotearoa New Zealand, including our cultural heritage, traditional knowledge, and ways of life. Communities will face challenges in caring for the places they value and continuing the activities they enjoy as the climate changes. Climate change threatens the unique cultural and spiritual connection iwi/Māori have to whenua. Many places of significance to iwi/Māori located on coastlines or beside flood-prone rivers are at risk of being lost.¹⁰

In 2020, the government undertook the first national climate change risk assessment (NCCRA). Its purpose was to help the government identify where it needed to prioritise action for adaptation. It identified 43 priority risks, a number of which will have a disproportionate effect on Māori or are of particular significance to Māori.

Two of the risks identified in the NCCRA have particular relevance for the cultural sector:

- **H5** Risks to Māori social, cultural, spiritual and economic wellbeing from loss and degradation of lands and waters, as well as cultural assets such as marae, due to ongoing sea-level rise, changes in rainfall and drought
- **H8** Risks to Māori and European cultural heritage sites due to ongoing sea-level rise, extreme weather events and increasing fire weather.

In 2022, Aotearoa New Zealand's first National Adaptation Plan (NAP) set out the foundational actions the government is making to reduce our vulnerability to these risks, strengthen our resilience and enhance our ability to adapt. Over the next six years, Manatū Taonga will lead four actions in the Plan that address the risks to cultural heritage and traditional knowledge. They are:

Critical actions:

Support kaitiaki communities to adapt and conserve taonga/ cultural assets

¹⁰ [How climate change affects Māori – Ministry for the Environment](#)
[Our atmosphere and climate 2020 – PDF](#)

Future actions:

- produce guidance for disaster risk management for cultural heritage
- develop a framework for assessing exposure and vulnerability of cultural assets/taonga to climate change
- research how cultural heritage contributes to community wellbeing and climate change adaptation.¹¹

In addition to meeting the challenges of climate change outlined above, the cultural sector will also need to understand the impact of reducing carbon emissions and waste, and transition to a sustainable way of working. Parts of the sector are likely to have high emissions due to the energy needs of running large capital assets, travel (including freight) and the use of materials. For example, in 2021 Screen Auckland commissioned Arup to estimate the carbon emissions of the New Zealand screen sector. 'Using aggregate spending data, coupled with a representative emissions intensity value, a high-level carbon footprint of 307k tCO₂e was calculated. This is 0.4% of New Zealand's 2018 gross greenhouse gas emissions reported by Stats NZ of 78.9M tCO₂e. However if a consumption based emission approach is adopted across New Zealand, the Screen Sectors contribution results in 0.5% of New Zealand 2017 consumption based emissions of 60.0M tCO₂e reported by Stats NZ'.¹²

¹¹ [Adapt and thrive: Building a climate-resilient New Zealand – New Zealand's first national adaptation plan – Ministry for the Environment](#)

¹² [Screen Auckland: New Zealand Screen Sector Emissions Study – PDF](#)



What we heard from our engagement

According to respondents ...

Arts, culture and heritage will be impacted by climate change.

The need to learn to operate in a more climate-sustainable manner was identified as a significant driver of change. Participants expressed concern about a lack of resilience to climate change and pandemics, and noted the importance of building a strong and resilient infrastructure to navigate these challenges through broad cross-sector and government buy-in. Building maintenance, supply chains and community travel were cited as examples of areas in which there will be an increased focus on sustainability, with travel and exporting becoming less viable. The impact of climate change was also seen as potentially making it harder to advocate for funding for arts, culture and heritage.

Arts, culture and heritage could take a leading role in transformation.

Participants recognised the potential of the artistic and creative community to envisage a different future, as well as the importance of a strong culture and heritage sector in coping with climate change. Participants noted the intersection between culture and innovation, describing the sector as an under-resourced fount of new ideas that could help New Zealand recontextualise many of its future challenges. The notion of 'impact investment' based on empathy, connection, nurture and care was used to describe a new way of looking at environmental and social outcomes.

However, it was also noted that we are not seeing strong messaging around climate change from the cultural sector, with the implication that the sector could take more of a leadership role, given its special ability to support innovative responses, encourage community engagement and lead impactful storytelling.

There is a lack of clarity about the respective roles of government and the sector in addressing climate change.

Participants identified a need for capacity development to respond to climate change, as well as clarification of how the sector can support government efforts. There was discussion about the respective roles of government, sector and grassroots in sector sustainability and innovation to address climate change. A greater leadership role for Manatū Taonga was suggested in order to drive progress across the cultural sector. Questions were raised around the potential roles of Manatū Taonga as thought leader and funder, how the government and Ministry can support and empower the sector to innovate, and whether the government should be a regulator, managing the sector and organisations to ensure an aligned approach to responses to climate change.

What are the key opportunities and roadblocks, and levers for responding?

There are opportunities to ...

Utilise arts and culture in the response to climate change, which requires action from people in all parts of society. Arts and culture can be used as a communication tool that appeals to people's emotions and can lead to change in a way that the recitation of scientific facts cannot.

Manatū Taonga can leverage arts and culture to appeal to the people of Aotearoa to act against climate change.

And roadblocks to overcome ...

Some elements of arts, culture and heritage activities are at odds with sustainability goals – air travel to attend international festivals, waste creation and management, and inefficient infrastructure.

Manatū Taonga can support the sector to consider ways of delivering arts and culture that minimise the impact on the climate, including learning from ways of engaging with arts and culture that were adopted during the COVID-19 pandemic, and lessons from the Carbon Neutral Government Programme.¹³

¹³ [Carbon Neutral Government Programme – Ministry for the Environment](#)

Appendices

Āpitianga 1: Tikanga Mahi

Appendix 1: Methodology

Choosing the topic

In early 2021 Te Rangahau me te Arotake | Research and Evaluation did a brief survey of the available evidence to identify gaps in information Manatū Taonga holds about insights. Following this, Te Kāhui Arataki (the Manatū Taonga third-tier leadership team) held a workshop to identify emerging issues, risks and opportunities which came up with a set of possible themes. This workshop identified a gap around understanding of the ‘system’, which led us to choose a broad topic to investigate in a series of Long-Term Insights Briefings: **What are the components of an impactful and sustainable cultural sector into the future?**

What are some of the components of an impactful and sustainable cultural sector into the future?

- Funding models
 - Access and participation
 - Culture and national identity
 - Frameworks
 - Māori / Crown partnerships
 - Trends
 - Climate change
 - Manatū Taonga presence
 - ‘other’
-

Table 5: Results from Manatū Taonga workshop to identify emerging opportunities, issues and risks

When considering the approach to choosing a broad topic, we were mindful of our stewardship role in advancing longer-term planning and aspirations for the cultural sector, and the sector’s role in supporting New Zealanders’ wellbeing. The Long-Term Insights Briefing provides an opportunity to do this, potentially over several years, by choosing a broad topic which will continue to be relevant and important for a decade or more.

To help focus the overarching topic, we grouped the system components into three broad areas: cultural system infrastructure, cultural sector delivery, and impacts and outcomes for New Zealanders. For this first Long-Term Insights Briefing, Manatū Taonga chose to focus on cultural system infrastructure – the physical, social and dynamic components of the cultural sector that enable delivery and outcomes.

Manatū Taonga does not have a robust evidence base around the value of arts, culture and heritage across the cultural sector system which is New Zealand-relevant and future-focused. This compromises the prioritisation and development of policy, investment decision-making and delivery.

This topic will establish a future-focused taxonomy about the components of value across New Zealand’s cultural sector system, and synthesise the current evidence about what works for diverse components. This, and the identification of gaps and priorities, will enable Manatū Taonga to make strategic decisions on future areas of focus.

Consultation approach: engagement on the topic

Consultation on the topic began in August 2021, when the [consultation document](#) was published on Manatū Taonga's website. Submissions were accepted via a survey link on the website or by mail to Manatū Taonga.

While Manatū Taonga wanted engagement on the Long-Term Insights Briefing to be broad and inclusive, this needed to be balanced against time constraints and the need to carry out all engagement online, given the COVID environment and restrictions on travel and gatherings.

Manatū Taonga also hosted a series of online hui with a range of stakeholders between September and December 2021, to hear their thoughts about the changes they have seen in their sector and the trends they are noticing; what they consider to be most fundamental in fostering a sustainable and impactful cultural sector in the next 10 to 20 years; what they think will be the most significant drivers of change; and what they see as the key risks, opportunities and challenges for the sector.

Workshop participants in the first round of consultation represented organisations from across the sector, including:

- | | |
|--------------------------------------|-------------------------------------|
| - Artspace Aotearoa | - NZ On Air |
| - Auckland University of Technology | - Radio Broadcasters Association |
| - Broadcasting Standards Authority | - Radio New Zealand |
| - Creative New Zealand | - Royal New Zealand Ballet |
| - Department of Internal Affairs | - Sport New Zealand |
| - HAIMONA | - Te Matatini |
| - Heritage New Zealand | - Te Papa |
| - Museum of Transport and Technology | - Te Rōpū Mana Toi |
| - Museums Aotearoa | - Te Taumata Toi-a-Iwi |
| - National Pacific Radio Trust | - Toi Māori Aotearoa |
| - New Zealand Film Commission | - Toi Venues |
| - New Zealand Music Commission | - Victoria University of Wellington |
| - New Zealand Symphony Orchestra | - WeCreate |
| - News Publishers' Association | - Whoa Studios |
| - Ngā Taonga Sound & Vision | - Youth Arts Aotearoa |
| - NZ Fashion Council | |
-

The focus on trends and themes arising from this consultation had shifted away from the initial framing of the topic, which was revised to better align with what we were hearing from the sector. The topic for this work is now **Into the future, what are some of the key areas that will influence the vibrancy and resilience of the cultural sector ecosystem?** A summary of the consultation is available here: [What we heard](#)

Analysis of insights and submissions

In early 2022 the Long-Term Insights Briefing team analysed the submissions, using a PESTLE analysis to identify key themes and potential gaps from the first consultation.

Key themes

Political

E.g. change in government policy, regulatory environment

Economic

E.g. employment value, funding models, sustainability

Social

E.g. changing demographics, population growth, wellbeing, access and participation

Technological

E.g. innovation, changes in technology, investment in technology, platforms, digital awareness

Legal

E.g. legislative change, copyright laws, intellectual property, trade agreements

Environmental

E.g. climate, environmental policies, changing travel habits

These themes were mapped to identify the key trends that might feature over the next 20 years. These were categorised as:

- **Strengthening** – becoming more common or acute
- **Weakening** – becoming more unusual
- **Weak signal** – an emerging issue that may or may not develop into a trend
- **Wildcard** – a trend or event that is low probability but would have high impact

A scanning exercise further explored emerging themes and identified mega trends (trends with a major impact at a global level and/or a long duration).¹⁴

¹⁴ [A framework for foresight intelligence – PDF](#)

The themes arising from this work, and the trends identified, are outlined below

Political

New Zealand's place in the world

Our bicultural identity is valuable and needs to be encouraged. This identity provides us with a unique selling point overseas, and we should continue to focus on telling quality New Zealand stories. While sharing our culture, we also need to protect it. Cultural democracy should be considered an important driver for the future as our nation becomes more diverse.

Short-term trends <2030

- Increasing geopolitical focus on the Asia-Pacific region
- Increasing influence of international social justice movements driving diversity and new demands on the sector
- Increasing focus on the regions
- Increasing interest in local place (staying home). People will want to be able to access arts, culture, heritage and media that are relevant to where they live
- Globalisation – is this still the right term? New Zealand artists and creators competing with easily accessible and cheap international content for New Zealand audience attention. New Zealand government signing up to international arrangements.

Medium-term trends >2030

- **WILDCARD** New Zealand becomes a republic – this could mean a re-exploring New Zealand identity and what it means to be a New Zealander. Would impact everyone.

Economic

Funding and investment

- Due to the way the sector has grown, the current funding system is fragmented and breeds competition. Further investment is needed, and we need to consider what that investment could look like. For example, investments in technology are needed to keep up with digital changes. Focusing on collaboration and leadership could help improve the resilience of the sector. A key issue is the of role central and local government in the funding of the sector.

Value and wellbeing

- The economic contribution of the cultural sector has traditionally been undervalued. In order to promote the value of the cultural sector for New Zealand as a whole, we need robust rather than ad hoc data. This will be vital in building the case for increased investment. In addition to the economic value added by the cultural sector, the importance of the sector's contribution to wellbeing needs to be highlighted.

Short-term trends <2030

- Changes in the way people work, and where – flexible working
- Economic value – Wellbeing economics – massive increase in sophistication in this framework and its measurement
- Production – Entrepreneurs creating/controlling platforms denied to traditional players and the public domain (strengthening, short term)
- Rise of the digital economy – and the Māori digital economy – gamification and the need to see representation of diversity in games. Inequalities may arise if people are unable to access existing and emerging digital platforms
- Production – Individualised patronage – more platforms for direct resourcing of arts, culture and heritage practices, and more uptake of these. More ways to sponsor/ become a patron of creatives
- Consumption – Metaverse audience experiences; high-end virtual experiences of in-person environments, e.g., museums, live performance; consumption of news in a virtual environment
- Rise of the circular economy influencing funding and other activities across the cultural sector
- Production – Iwi/Māori post-treaty settlement investment pivots towards arts, culture and heritage; revitalisation of mātauranga and Māori arts, culture and heritage generally.

Medium-term trends >2030

- Production – New business models; ongoing transformation of business practices and commercial opportunities. The life cycle of 'sustainable business models' becomes shorter and shorter
- Consumption – Hyper-personalised arts/culture/heritage consumption practices. Digitally mediated tailoring of goods, services, experiences. Personal libraries/platforms for a variety of cultural products
- **WILDCARD** Economic value – Increase in soft-power relevance of culture. Perception/reality of New Zealand as a culturally rich nation becomes a global competitive advantage in terms of immigration policy, trade, global labour, investment, etc.
- **WILDCARD** Macro-economics – Collapse of cities as commercial centres and therefore cultural centres. Creatives disperse to diverse parts of the country and globe. Or they may move into decaying cities that have become affordable.
- **WILDCARD** Massive financial endowments in select areas (potentially global). E.g., tech entrepreneur invests in revitalization of performing arts/ indigenous languages/ media sector. Deceased baby boomers bequeath huge wealth transfers to the cultural and creative sectors.

Long-term trends >2040

- Macro-economic forces – New Zealand a climate winner/ significant influx of international investment and people. Cultural investment category visas. Both ends of the spectrum – New Zealand becomes a safe place for both climate refugees and high-net-worth safe-haven seekers. Pacific population increase sees strengthening of Pacific arts, culture and heritage here.

Macro-economic forces – Global regions/ weakening of nation state/ New Zealand part of an Asia-Pacific collective, the make-up of which is dependent on US/China competition in the region.

Social

Iwi/Māori, community, and other diverse voices

- Importance of Te Tiriti and its implementation. If co-governance was achieved by 2040, how would that shape the sector?
- Te ao Māori should be at the centre of our thinking, rather than a separate component. Iwi/Māori components need more nuance, and there should be a greater focus on thriving/innovation/leadership. Capacity and capability building are important to ensure the ability to adequately respond.
- The focus should be on a ‘people-centred approach’, or on the community. How are we empowering our communities to take a greater role in the cultural sector – it is they who make the whole sector thrive. Other groups also deserve a more prominent place in the cultural sector: minority ethnicities, people with disabilities, youth. Diversity is a good driver of change; we need to have support in place to enable the change to happen. Structural inequity and bias need to be addressed when driving change. We need to aim for equitable access to knowledge and funding.

Education and workforce development

- Education needs to be a driver of change, and cultural and creative learnings should be embedded throughout the education pipeline. Participation in arts and cultural activities through schooling is vital to ensuring a sustainable sector in the future.
- People need to be able to see a creative career as a sustainable and rewarding option. More work needs to be done to ensure that people are receiving the right training and support to enable sustainability and growth.

Short-term trends <2030

- By 2025, increased role of the cultural sector in education
- Towards the end of the decade, more New Zealand cultural content in education
- Te reo language revitalization will become more pronounced
- We may also see an increased loss of skills and knowledge.

Medium-term trends >2030

- Increasing need for accessibility – due to both technological and social change
- Emergence of a bilingual cultural industry
- **WILDCARD** emergence of a need for new skills/training within the cultural sector to address needs that do not currently exist

Long-term trends >2040

- Development of a multi-lingual cultural industry
- Increasingly older population

Technological

The changing digital world

- The shift towards digital content and platforms has led to changes in audience behaviour. People are increasing their online engagement and this shift is creating challenges for smaller organisations and art/cultural forms that require in-person experience.
- There are emerging issues around monetising digital content, increasing competition in the global market, and the creation of a ‘digital divide’. Regulatory intervention with digital platforms may be needed to shield New Zealanders from dis/misinformation and ensure our content creators are protected and paid fairly [connect with legal]. Innovation is one of the key drivers ensuring the future of the arts and creative sector and needs to be better supported.

Short-term trends <2030

- Failure of cybersecurity measures (Global Risks Report 2022)
- Increased intervention (regulation?) in digital platforms to protect New Zealanders
- Development of 5G technology changing the way art is made and accessed
- Development of crypto currency technology, blockchain and non-fungible tokens (NFTs) – altering how transactions work, creating contracts, providing new opportunities to measure value, influencing the music industry and other sectors, and influencing the way we value art.¹⁵

Medium-term trends >2030

WILDCARD arrival of 6G – faster networks, greater automation and connectivity

¹⁵ [Why Creatives Need to Know About NFTs – The Big Idea](#)

Legal

Short-term trends <2030

- More online platforms – more likelihood of rights being breached – creators have greater awareness of their rights through advocacy – potential for government-funded legal service for artists
- Changes to copyright. Short-term strengthening, as this review is likely to occur soon and is considered a very important issue by the sector. Increasingly important as we go more digital and opportunities for copyright breaches increase. Opportunities for arts sector to be involved in reform
- New types of intellectual property – such as NFTs and AI – will present further copyright challenges, e.g., IP re code and locked-down ownership by big tech players
- Increased intervention (regulation?) in digital platforms to protect New Zealanders
- Artist resale royalty work strengthening, as we are currently working on this legislation and will need to review its effectiveness in coming decades. The sector may look for other legislative tools to protect resale royalty rights – e.g., a stand-alone leg for matauranga Māori?
- Ensure content creators are protected and paid. Risk that due to ability to pirate works, there may be disincentivisation to create – government will need to intervene to protect rights and incentivise creation – public good/ welfare arguments
- Reform of environmental planning law (Natural and Built Environments Act, Spatial Planning Act, Climate Change Response Act)
- Major reform of the media sector?

Medium-term trends >2030

- Strengthening as already a concerning/ prevalent trend that will only increase as poverty and disenfranchisement increase, causing declining trust in state
- **WILDCARD** changing international law/ free trade – Going to become more and more of an issue as we become more globalised and New Zealand's creative/cultural sector becomes more prominent on the world stage. Issue to consider: will New Zealand become more prominent?

Environmental

Short-term trends <2030

- Increased intervention (regulation?) in digital platforms to protect New Zealanders
- Travel and export potentially less viable as we seek to decarbonise air travel – this is already happening and will continue strengthening as the cost of fuel and transport increases due to climate change pressures. Many cultural experiences have already moved online due to the pandemic. However, many people now really value in-person and tangible experiences and products.
- Emissions Plan and Adaptation Plan
- Carbon-neutral government by 2025
- The pandemic is having a major impact on everything, including the cultural sector, and we all agree that things will not go back to pre-pandemic times (nor should they).
- Carbon emissions, changing technology, transitional issues: this is already starting to happen, e.g., technology is changing through EVs, induction cooktops, etc. This will also have an impact on the cultural sector. The impact of climate change may be more pronounced for more vulnerable/ lower-paid workers in the cultural sector.

Medium-term trends >2030

- Impact on physical infrastructure due to climate change: this will have major impacts on the cultural sector, as much of New Zealand's heritage and cultural sector infrastructure is located near the coast.
- **WILDCARD** Significant natural hazard event (e.g. earthquake, tsunami, volcanic eruption)

Consultation approach: futures-focused workshops

From the analysis explained above, five focus areas were identified: Te ao Māori; funding, investment and value; population change; digital technologies; and climate change. During August and September 2022 Manatū Taonga ran a series of workshops with different groups from across the sector to further engage on these five focus areas.

The goal of these workshops was to hear again from participants in our sector to take examine was heard in the first round of consultation with a future-focused lens. We wanted these workshops to think about what the sector could look like in 20 years time – what opportunities there were, and what pathways we might need to take now to get us to that future.

To support these workshops, we produced an overview for each theme which comprised a snapshot of what we heard during the first round of consultation, a picture of what else is happening in that area (both domestically and internationally), and some prompts for future-focused scenarios. These are linked on the website: mch.govt.nz/long-term-insights-briefing-cultural-sector#nextsteps.

Workshop one focused on the theme of funding, investment and value, and was held with **Regional Arts Network Aotearoa**, with representatives from Creative Waikato, Arts Wellington, Creative Northland, Arts Council Nelson, West Coast Arts, Ngā Toi Hawke's Bay, Creative Taranaki, Creative Bay of Plenty, Christchurch City Council and Te Taumata Toi-a-Iwi.

Workshop two focused on the themes of funding, investment and value; and digital technologies. It was held with **WeCreate**, with representatives from WeCreate, Screen Guild, Screenrights, SPADA, Auckland Unlimited, Māori Music Industry Coalition, New Zealand Writers Guild, Directors and Editors Guild of Aotearoa New Zealand and Copyright Licensing New Zealand.

Workshop three focused on the theme of digital technologies, and was held with the **media sector**, with representatives from Victoria University of Wellington, Pacific Media Network, NZ On Air, Radio Broadcasters' Association, Broadcasting Standards Authority and Crux News.

Workshop four focused on the theme of funding, investment and value, and was held with **Te Taumata Toi-a-Iwi**, with representatives from Te Taumata Toi-a-Iwi, Creative New Zealand, Auckland Live, Auckland Council, Equity for Artists, Auckland University of Technology and Lagi Maama.

Workshop five focused on the theme of te ao Māori, and was held with **Museums Aotearoa**, with representatives from Te Papa, Marlborough Museum, and Southland Museum and Art Gallery, Invercargill City Council.

Workshop six focused on the theme of Te Ao Māori, and was held with representatives from Creative New Zealand, Te Matatini, Te Papa, Toi Māori Aotearoa, New Zealand Film Commission, Heritage New Zealand and Te Māngai Pāho.

Workshops seven and eight focused on the theme of population change, and were held with **Youth Arts Aotearoa** and representatives from their networks.

An **informal discussion** was held with **Track Zero** on the theme of climate change and arts & culture, with artists, art directors and producers, and a climate scientist.

Consultation approach: finalising the briefing

In November 2022 a draft briefing was published for public feedback. Manatū Taonga received a range of submissions providing feedback on the draft briefing, many of which have been incorporated into the final document. The feedback was focused on the main themes, and provided further thought and insight to what was already captured. A summary of the feedback received, as well as the response to the specific feedback, will be published on the Manatū Taonga website in early 2023.

Manatū Taonga thanks all those who have taken the time to engage and respond to this work – Manatū Taonga will continue to engage on this work, including how to work collaboratively to get our cultural and creatives sectors on the pathway towards the opportunities identified. Manatū Taonga will also seek to engage with the sector in late 2023 to begin the development and planning for the next Long-Term Insights Briefing.

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