Lights, camera, impact

The role of screen production in shaping New Zealand's economy and culture

NZIER and Verian report to New Zealand Film Commission, NZ On Air, and Te Māngai Pāho

December 2025

About NZIER

The New Zealand Institute of Economic Research (NZIER) is an independent, not-for-profit economic consultancy that has been informing and encouraging debate on issues affecting Aotearoa New Zealand, for more than 65 years.

Our core values of independence and promoting better outcomes for all New Zealanders are the driving force behind why we exist and how we work today. We aim to help our clients and members make better business and policy decisions and provide valuable insights and leadership on important public issues affecting our future.

We are unique in that we reinvest our returns into public good research for the betterment of Aotearoa New Zealand.

Our expert team is based in Auckland and Wellington and operates across all sectors of the New Zealand economy. They combine their sector knowledge with the application of robust economic logic, models and data and understanding of the linkages between government and business to help our clients and tackle complex issues.

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How to cite this document:

NZIER and Verian. 2025. Screen Production in New Zealand: Economic and cultural impacts. A report for New Zealand Film Commission, NZ On Air and Te Māngai Pāho.

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Foreword

The New Zealand screen production sector continues to be a dynamic and influential force in shaping both our economy and cultural identity. In recent years, the sector has demonstrated remarkable resilience and adaptability, navigating global disruptions while continuing to tell stories that reflect who we are, how we see ourselves, and how the world sees us.

The New Zealand Film Commission, NZ On Air, and Te Māngai Pāho commissioned NZIER and Verian to undertake research that provides a comprehensive analysis of the role of screen production in shaping New Zealand's economy and culture. This work forms part of Mahi Tahi, a collaborative effort between the three agencies to support and strengthen the screen sector in Aotearoa.

The research aligns with the priorities set out in Amplify: A Creative and Cultural Strategy for New Zealand 2025–2030. Amplify calls for targeted investment, talent development, and regulatory reform to strengthen the creative and cultural sectors. By providing a clear picture of the screen industry's economic and cultural contribution and its vulnerability to global cycles, the research will support the screen sector to focus on actions that matter most: building capability, fostering cultural distinctiveness, and enabling sustainable growth.

Interpreting the Findings

The findings reveal a sector that is both resilient and strategically significant. The screen industry contributed $1.1 billion to GDP and $3.0 billion in output in the year ending March 2025, placing it among the leading contributors to the wider creative economy. However, this figure reflects a peak year, a "bubble" driven by major international productions and favourable global conditions.

The sector has entered a downturn. Production volumes have contracted, international investment has slowed, and many screen sector businesses are facing significant challenges. This sharp contrast underscores the volatility inherent in screen production, where boom years can be followed by busts, shaped by global production cycles and policy settings.

This context is critical. While the research provides a robust and independent evidence base, its findings may feel out of step with the realities many in the sector are currently experiencing. The data should be interpreted with this in mind, not as a static snapshot, but as part of a longer-term story of fluctuation, resilience, and strategic opportunity.

The findings of this research highlight three critical outcomes for the future of the screen industry:

Persistent data gaps:

The research process has underscored significant data gaps in the screen industry. Since the disestablishment of the Stats NZ Screen Industry Survey, we no longer have access to the quality, up-to-date data needed to regularly monitor and understand the sector's performance. This lack of robust data limits our ability to track trends, measure impact, and make evidence-based decisions. Addressing these gaps is essential if we are to support the sector's ongoing development and resilience.

Dependence on Incentives and the need for sustainability:
The report reveals that the screen sector remains heavily reliant on incentives to attract and retain productions. While these incentives have delivered substantial economic benefits, this dependence exposes the industry to volatility and global competition. We recognise the need to work collectively to develop a more sustainable and resilient industry, one that can thrive by leveraging the current incentive-driven model to grow connections, investment and export, and better equip the sector to weather global shifts.

Cultural Value as Our Superpower:
Perhaps most powerfully, the research demonstrates that the cultural value of New Zealand's screen sector is our superpower. Locally made screen content not only contributes to national identity and belonging but also positions New Zealand as a leader in indigenous storytelling and cultural authenticity on the global stage. Māori screen content is seen as integral to this. This cultural impact is a source of pride, connection, and influence, and is fundamental to our international reputation and soft power.

Looking ahead, these outcomes provide a clear roadmap for action. We must invest in better data, work together to build a more sustainable industry, and continue to champion the unique cultural strengths that set New Zealand apart. By doing so, we can ensure that the screen sector continues to deliver economic, social, and cultural value for all New Zealanders, now and into the future.

Annie Murray
Chief Executive, New Zealand Film Commission | Te Tumu Whakaata Taonga

Cameron Harland

Chief Executive, NZ On Air | Irirangi Te Motu

Larry Parr
Chief Executive, Te Māngai Pāho

Key points

This report, commissioned by the New Zealand Film Commission, NZ On Air, and Te Māngai Pāho, and prepared by NZIER and Verian, evaluates the economic and cultural contribution of screen production in Aotearoa New Zealand.

The findings show that the screen industry is not only a strong contributor to New Zealand's economy but also plays a role in its cultural landscape. It helps connect New Zealand with global markets and audiences and contributes to how the country's identity and culture are seen internationally.

The report presents robust, multi-phase evidence of the cultural impact of screen content. Drawing on qualitative research, a national survey, and international comparisons, it explores how screen content:

- Contributes to national identity
- Fosters a sense of belonging
- Communicates New Zealand's values and stories to the world.

These insights underscore the importance of continued investment in local screen production as a means of both economic development and cultural expression.

For this report, *screen production* refers to content made for cinematic release, television broadcast, and streaming or on-demand platforms. Game development is not included.

Key findings on the economic contribution of the screen industry

The screen industry contributes $1 billion to the gross domestic product

- The screen industry contributed an estimated $1.1 billion to gross domestic product (GDP) for the year ending March 2025.
- Rising input costs since 2021 have constrained GDP growth, highlighting limited efficiency gains in a fragmented industry.
- Although the screen industry's GDP represents just 0.3% of national GDP, its broader impact includes exports, employment, tourism, and cultural influence, making it disproportionately significant compared to other creative sectors.

Workforce

The screen industry operates under a dual labour model, with approximately 8,000 employees and around 19,000 contractors providing flexibility for project-based work. This structure supports responsiveness but introduces volatility in income and career progression. The screen industry offers a range of workforce models. Permanent employment is more common in broadcasting and movie exhibition, while the project-based nature of production and post-production tends to favour contracting arrangements.

Employment has rebounded to pre-COVID levels, while business counts continue to grow, driven by micro and small enterprises that are agile but face challenges scaling and investing. Auckland and Wellington remain central hubs, supported by infrastructure and anchor firms. Queenstown is emerging. Screen industry jobs are reliant on a pipeline of local and international productions. Competing countries have increased the incentives offered, and there are signs that this is affecting the volume of productions choosing New Zealand.

Tourism

Products featuring New Zealand’s culture and landscapes help attract international tourists. Conservatively, $2.7 billion in international tourism expenditure is linked to screen industry output. This estimate would be much larger if landscapes were included as the key attractant. New Zealand landscapes are a factor in 43% of international visitors choosing New Zealand, and screen content is the main way people are exposed to our landscapes.

Global competitiveness

Competing jurisdictions have strengthened their incentives: Australia raised its Location Offset to 30% in 2023, and the United Kingdom introduced new credits for high-end TV, animation, and independent film. New Zealand maintains competitive advantages – unique locations, skilled crews, and policy stability, but risks losing major productions without responsive updates to its incentive framework.

COVID-19 legacy and structural shifts

The pandemic highlighted vulnerabilities in the contractor-heavy workforce and disrupted production pipelines. While core metrics have recovered, distribution and exhibition continue to face challenges due to changing consumer behaviour. The shift to streaming underscores the need for discoverability and visibility of New Zealand content on both local and global platforms. Without prominence, cultural and economic benefits may be diluted even when productions are acquired or commissioned. There are emerging opportunities for co-commissioning and shared distribution arrangements between international streamers and local platforms that could enhance both economic returns and cultural outcomes. Additionally, local platform revenue has been hit by advertisers leaving local platforms for Google/Meta, etc.

Key findings on cultural impact

In addition to its economic value, New Zealand-made screen content demonstrates significant cultural impact. Cultural impact research shows that this content reflects New Zealand’s identity, supports a sense of collective potential, and invites global audiences to engage with the country through its stories. Evidence indicates that investing in diverse, authentic, and locally grounded screen content generates meaningful cultural, social, and international benefits.

Screen content is foundational to national identity and belonging

Many New Zealanders consider locally made film and television to be an important part of national identity, with 73% agreeing that New Zealand-made content plays a key role in shaping how the country sees itself. This connection is particularly evident among Māori, Pacific peoples, and younger audiences. Statistical modelling indicates that a sense of belonging is the strongest contributor to cultural impact, reinforcing feelings of optimism, pride, and social cohesion.

Māori culture is central, not peripheral, to New Zealand’s screen identity

Māori-led storytelling is recognised by many as a distinctive national strength, contributing to deeper cultural understanding and a shared sense of belonging among New Zealanders.

On a global stage, Māori narratives help differentiate New Zealand, with up to 87% of international survey respondents agreeing that these stories help position New Zealand as a leader in Indigenous storytelling.

Diversity and authentic representation matter

While there has been progress reflecting Māori, Pacific, and broader 'Kiwi' experiences on screen, notable gaps remain in the representation of Asian, disabled, and LGBTQI+ communities. When stories reflect real experiences from diverse communities, they help people feel part of the bigger picture and deepen cultural understanding. International audiences acknowledge New Zealand content for its inclusivity.

Screen content builds social cohesion and wellbeing

Locally made content helps bring people together, encourages conversation, and strengthens community engagement. Around three-quarters of New Zealanders say that New Zealand-made content helps them feel part of the national story and fosters a sense of hope for the future. These effects are particularly evident among groups that have historically been underrepresented.

Storytelling challenges, inspires, and educates

New Zealand screen content can prompt reflection and learning by offering new perspectives and challenging assumptions. It encourages audiences to think differently by challenging stereotypes, broadening viewpoints, and deepening understanding of the country's history, values, and cultural diversity. Nearly 8 in 10 international viewers reported that New Zealand content increased their curiosity about the country, with many also indicating it prompted deeper reflection on topics such as identity, the environment, and community.

Screen content is an important asset for global engagement, soft power, and tourism

Internationally, New Zealand's screen content is strongly associated with its landscapes and Māori culture. Seventy-seven percent of global viewers say that watching New Zealand content made them consider visiting the country. These stories are valued for their authenticity and distinctiveness, contributing to New Zealand's international reputation and appeal.

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1 Introduction

The New Zealand Film Commission, New Zealand On Air, and Te Māngai Pāho jointly commissioned NZIER and Verian to assess the economic and cultural contribution of screen production in New Zealand.

This report provides a combined assessment of the screen industry's economic contribution and its cultural impact. The economic analysis, by NZIER, presented in sections 2 to 8, examines income, expenditure, and profitability across key subsectors. The cultural impact analysis, prepared by Verian and detailed in sections 9-11, explores how screen industry activities influence New Zealand's cultural identity and audience engagement.

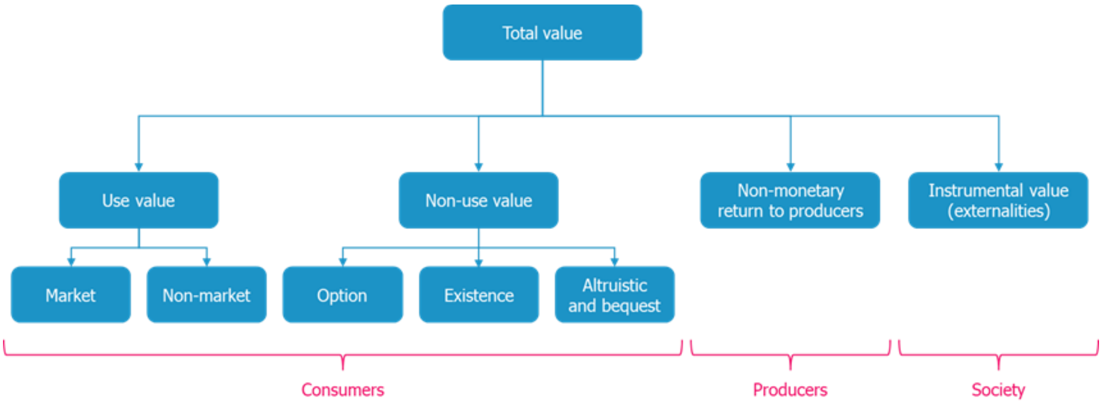
1.1 Total economic value of cultural production

In economics, the value of a good or service refers to the additional wellbeing or utility it provides through its use, extending beyond its market price or the economic activity it generates.

The screen industry contributes value in multiple ways. To explore this, we apply the framework developed by Allan, Grimes, and Kerr (2013) for Manatū Taonga Ministry for Culture and Heritage, which identifies sources of total economic value.

Figure 1 illustrates this framework. Generally, the values shown on the left side are more tangible, while those on the right are more intangible.

Figure 1 Sources of value from cultural production



Source: NZIER, adapted from Allan et al. (2013)

2 Introduction to the assessment of economic contribution

This report applies a market value-based approach to assess the economic contribution of screen production in Aotearoa New Zealand. This methodology is consistent with standard economic assessments used across other sectors – such as primary industries, manufacturing, and services – and reflects established practices in measuring sectoral performance and value-added contributions to the national economy.

The analysis draws on published statistics and industry data to evaluate the screen sector's role in New Zealand's economic landscape. It integrates a wide range of secondary data sources to distil the sector's multifaceted impact.

2.1 Scope of the economic analysis

The scope of the analysis focuses on four key areas:

- Gross domestic product (GDP): Estimating the total economic contribution of screen production to national output.
- Labour market trends: Providing insights into employment levels, wage structures, and workforce dynamics.
- Private investment: Exploring available data on capital flows and investment activity within the industry.
- Exports and tourism: Investigating how screen production supports export earnings and contributes to tourism-related economic activity.

The analysis excludes primary data collection, such as direct surveys of industry participants or consumers.

For this report, screen production is defined as content created for:

- Cinematic release
- Television broadcast
- Streaming and on-demand platforms.

Game development is excluded from this definition and analysis.

2.2 Framing the economic contribution

The screen industry is assessed through its direct and indirect contributions to New Zealand's GDP, employment, investment, and its influence on export earnings and tourism. These dimensions reflect the sector's role not only as a creative enterprise but also as a dynamic economic engine.

The analysis relies on secondary data sources, including official statistics and industry datasets, to quantify the sector's performance. While no primary data collection was undertaken, the breadth and reliability of existing data allow for a robust and meaningful evaluation. This approach enables policymakers, industry stakeholders, and cultural institutions to better understand the screen industry's value and potential. It also highlights areas where further data development could enhance future assessments—particularly in emerging formats such as digital and interactive media.

3 Screen production labour force dynamics

This section examines the dynamics of New Zealand's screen industry, focusing on its economic structure, employment patterns, productivity, and export performance. It considers the industry's contribution to the wider creative economy and its potential to drive innovation, skills development, and international competitiveness. The analysis also highlights the policy and investment settings that shape long-term growth prospects and resilience in a global market.

3.1 The labour force is a mix of employees and contractors

The screen industry in New Zealand is characterised by a distinctive labour market structure, in which the workforce comprises both employees and a significant share of contractors or self-employed practitioners. This hybrid model reflects the project-based and flexible nature of screen production, where short-term engagements, specialised skills, and fluctuating demand are common. Understanding this mix is critical for assessing employment dynamics, income stability, and the implications for training and career development.

3.1.1 Jobs in the screen industry

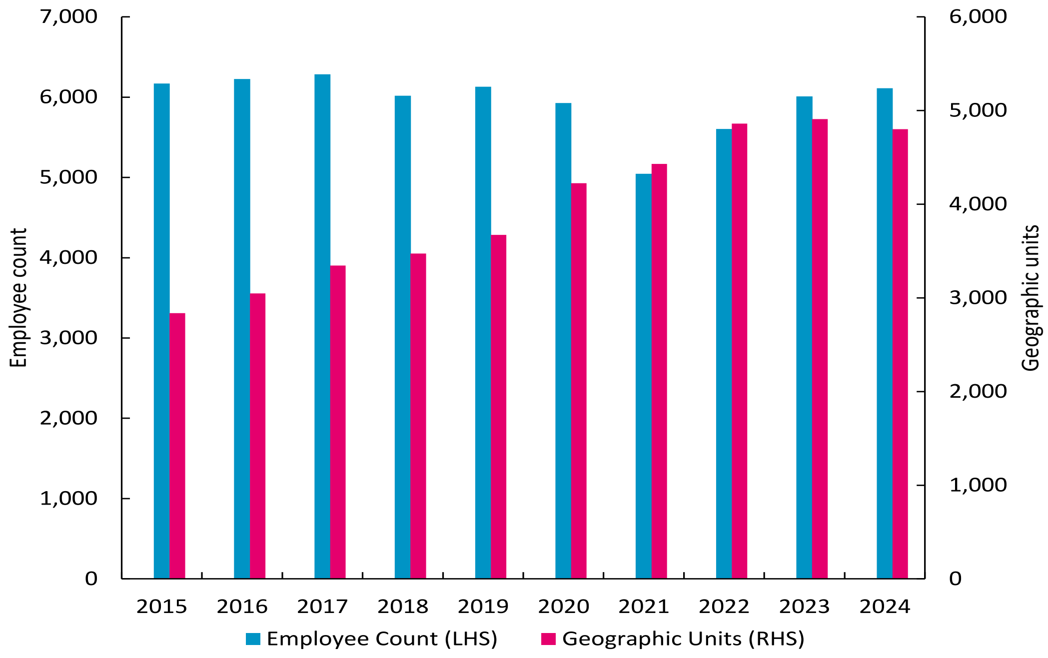
Employment in the screen industry is variable and heavily dependent on current screen production and activities. The data in Figure 2 reflect waged employment from Stats NZ's Business Demography Statistics as at February 2024 and do not capture self-employment, which is discussed later.

Figure 2 shows the count of waged employees and businesses in the screen industry from 2015 to 2024. While the number of employees has remained relatively stable over the longer term, the number of businesses has risen steadily.[1] This trend suggests that existing businesses have struggled to scale up in a production-driven market characterised by volatile project cycles and funding constraints. At the same time, the industry has enabled the emergence of new micro- and small-scale enterprises, which can respond more flexibly to shifts in demand and the short-term nature of screen production contracts.

Waged employment has shown signs of recovery since 2022, reflecting the rebound of production activity in the post-COVID environment. By 2024, overall employment in the screen industry had returned to pre-pandemic levels, signalling renewed stability in the labour market. However, the industry's structural reliance on a large number of small businesses and contractors continues to shape its resilience, with implications for productivity growth, skills development, and the sustainability of career pathways within the sector.

1 A definition for geographic unit can be found in Appendix A.

Figure 2 Employment count



Source: Stats NZ – Geographic units by area (TA and RC) and industry 2000–2024.

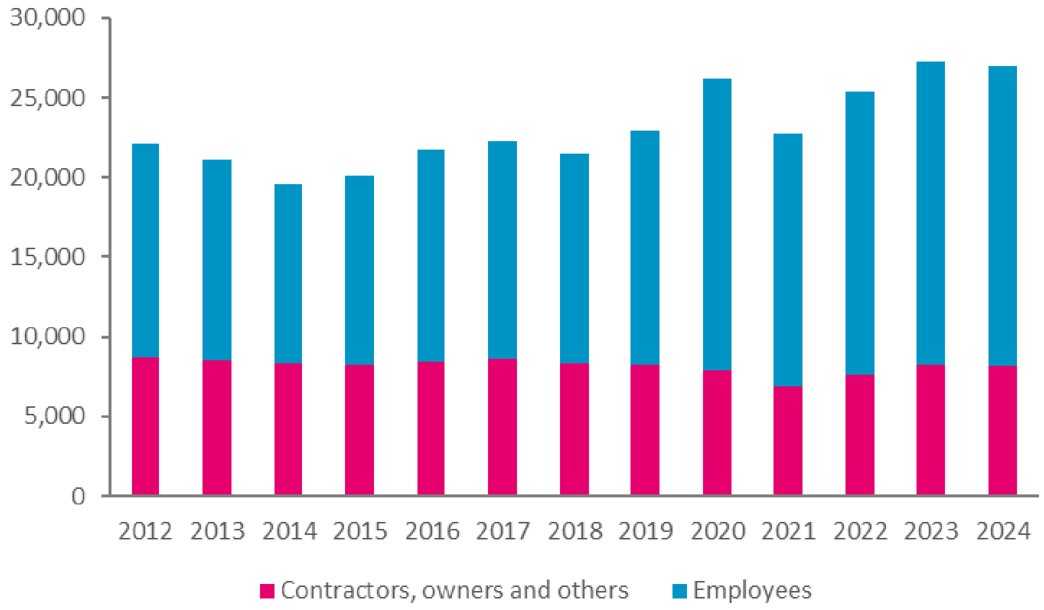
3.1.2 Including contracted employees

To estimate total employment, including contracted roles, we scale waged employment figures using historical ratios of wage employees to contractors, based on the Ministry of Business, Innovation & Employment's reports from 2012 to 2024. For 2022 to 2024, the average was taken from the previous periods (Ministry of Business, Innovation & Employment 2024).

Figure 3 shows the composition of the screen industry workforce from 2012 to 2024, distinguishing between employees and contractors, owners, and others. In 2024, there were an estimated 8,140 employees in the screen industry. These employees are a mix of full-time employees, such as those in broadcast, and temporary employees linked to the film subindustry. Employment in the screen industry has remained relatively stable at around 8,000 people over the period, providing a consistent core of waged work. There was a noticeable decline in the number of employees in the screen industry during COVID-19. In 2021, the number of employees decreased to 6,870, but the number has recovered in the following years.

The screen industry is influenced by production volume and the nature of the project – live action, visual effects, or a combination. Therefore, work in the screen industry is dominated by agile contractors who move from project to project. In 2024, there are an estimated 18,820 contractors or business owners in the screen industry, including sole traders. Since 2012, the number of contractors and numbers have fluctuated more strongly, rising to a peak in 2020 before declining during the COVID-19 disruption and recovering steadily since 2022. By 2024, overall workforce numbers had returned to pre-pandemic levels, with contractors continuing to account for the majority of employment. This pattern underscores the industry's reliance on flexible, project-based labour, while also highlighting the relative stability of waged roles.

Figure 3 Employee counts and contractors



Source: NZIER based on (Ministry of Business, Innovation & Employment 2024)

In 2024, the overall screen industry workforce, including employees and contractors, was estimated at 26,960 people. This workforce has a diverse range of skills and talents. Some work in the industry full-time, while others are engaged on a project-by-project basis in part-time employment or on fixed-term contracts.

Implications of employment and business trends in the screen industry

Recent trends in employment and business formation reveal key structural characteristics of the screen industry that affect productivity, workforce stability, and resilience. These insights have important implications for policy design and long-term sector development.

1. Productivity and firm growth
The rise in micro-businesses points to a highly fragmented industry. While this supports creative diversity, it limits productivity by reducing firms' ability to scale, invest in infrastructure, and capture efficiencies.

2. Labour market flexibility vs stability
Heavy reliance on contractors enables responsiveness to project-based demand but undermines job security and career progression. This increases the risk of losing skilled workers to more stable sectors or overseas markets.

3. Resilience to economic shocks
A large number of small firms enhances adaptability during recovery periods, as seen post-COVID. However, their limited financial reserves make them vulnerable to prolonged downturns or sudden disruptions.

3.2 Screen production capacity across New Zealand

Employment in the screen industry is centralised in the Auckland and Wellington regions. Figure 4 shows each region of New Zealand coloured by the employment density for 2024. This is similar to the distribution of businesses as seen in Figure 5.

New Zealand's screen industry has traditionally been centred in Auckland and Wellington, with both cities hosting the country's most extensive facilities, the majority of the workforce, and long-standing production companies. Over the past five years, however, capacity has started to spread beyond the main centres.

Auckland plays a leading role in the screen production economy

Auckland is a major contributor to New Zealand's screen production economy. Auckland is home to Auckland Film Studios, which underwent a significant expansion in 2022 with government and council investment, providing modern sound stages used by international productions. In 2022, a major upgrade of the studios was completed, which doubled the studio space, with $35 million invested by the central and local governments. The investment enabled the expansion of screen production at the Studios, facilitating the concurrent production of both large and small screen productions. The expansion is said to support the creation of 300 new jobs in the screen production economy (Auckland Unlimited 2021; The Beehive 2022).

Studio West also added two new sound stages in 2022, further strengthening Auckland's appeal for television and feature productions. Studio West was home to the period action drama *The Convert*, which starred Guy Pearce and was directed by New Zealand's own Lee Tamahori (Rajput 2022). Major companies such as South Pacific Pictures, Great Southern Television, General Film Corporation, Greenstone TV Tavake Limited, and Matewa Media are based in Auckland.

Wellington's contribution to New Zealand's screen production economy is profound and enduring

Wellington retains global significance through Stone Street Studios, the base for *The Lord of the Rings* and *Avatar*, and through its proximity to Wētā FX, one of the world's most advanced digital production and VFX companies. Avalon Studios remains a flexible space for television and film projects, supporting the capital's dual role as both a domestic broadcaster hub and an international service provider. Upper Hutt film production business Lane Street Studios was crowned Exporter of the Year at this year's 2024 ExportNZ ASB Wellington Export Awards.[2]

Recent growth has headed south

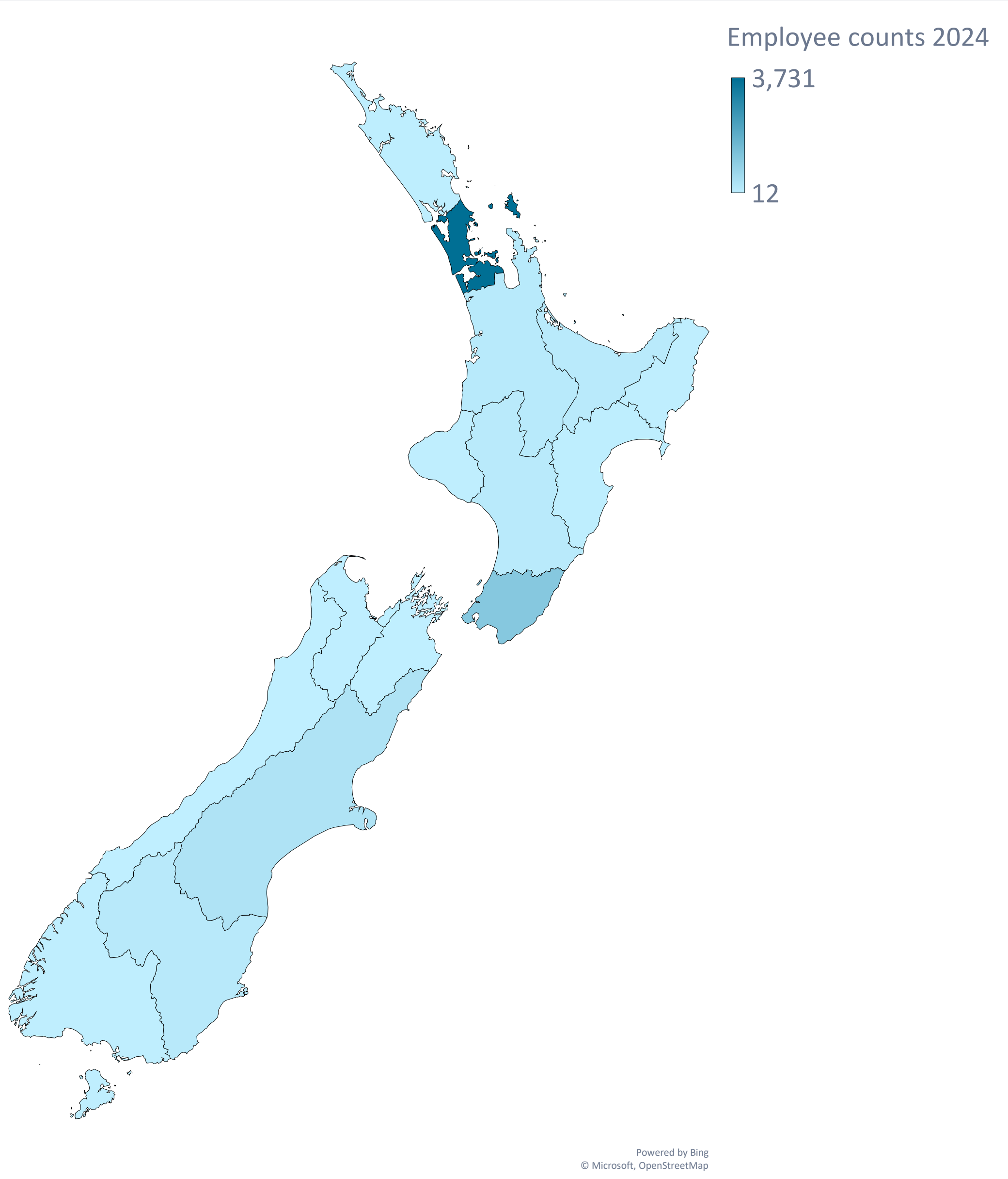
The most dynamic recent growth has been in Queenstown, where new players have established a permanent production base. In 2024, Remarkable Studios NZ opened a 2,300 m² facility – the first of its kind in the region – by repurposing a large retail space into a professional sound stage. At the same time, Howler, a new production company with operations in both Auckland and Queenstown, began offering film, branded content, and documentary services. These investments mark a step change for Queenstown, which has long been valued for its dramatic landscapes but previously lacked permanent infrastructure. Established local companies such as The Queenstown Camera Company,

[2] https://www.wecc.org.nz/news/lane-street-studios-named-wellington-exporter-year

Storyworks, and Double Barrel continue to provide strong location and production services, making Queenstown a rapidly developing production hub.

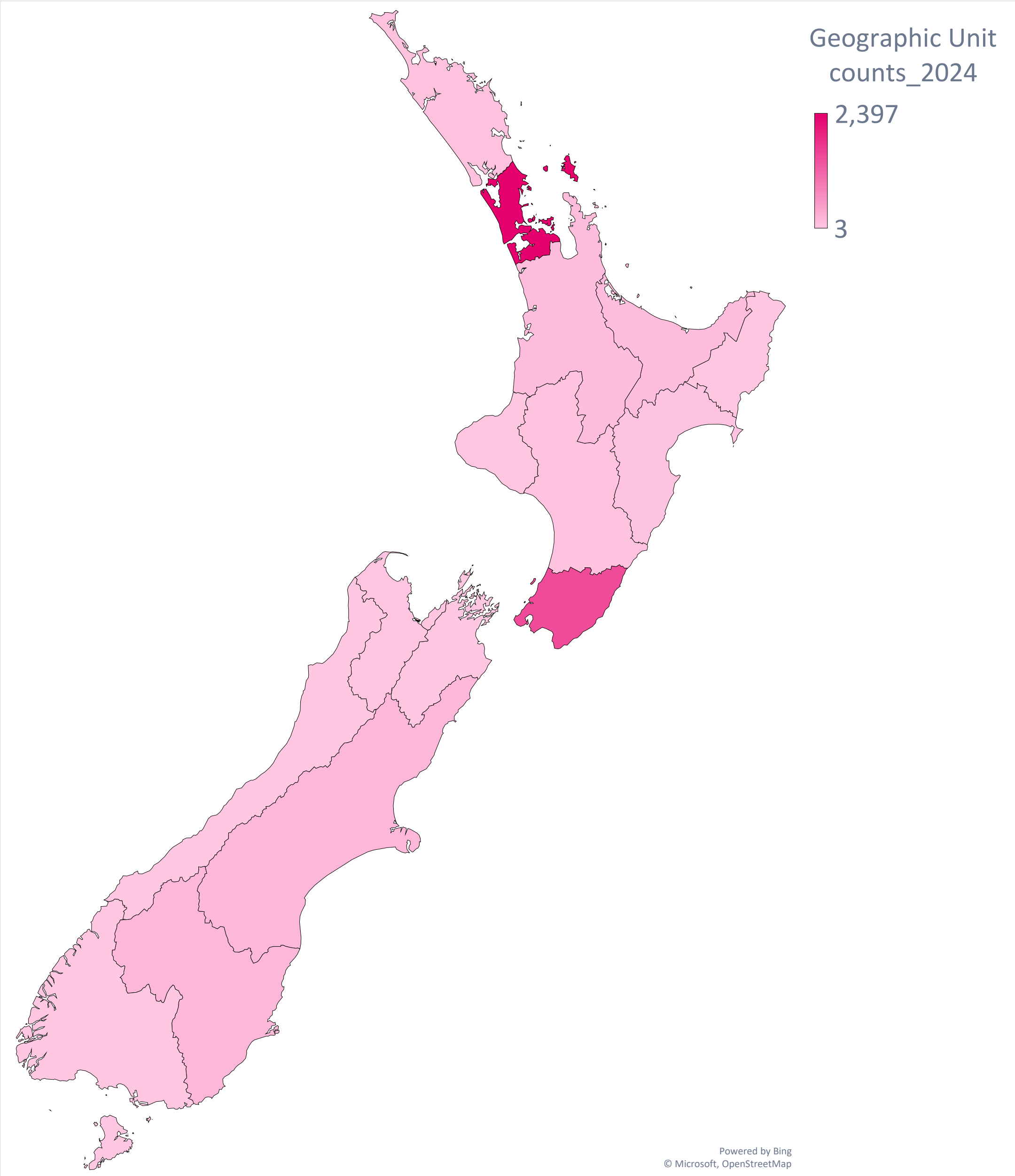
Overall, the geography of New Zealand screen production is evolving. Auckland and Wellington remain critical anchors, but the establishment of infrastructure and new companies in Queenstown shows how regional capacity can grow when backed by investment.

Figure 4 Employee counts by location



Source: NZIER

Figure 5 Business location



Source: NZIER

3.3 Incomes and earnings

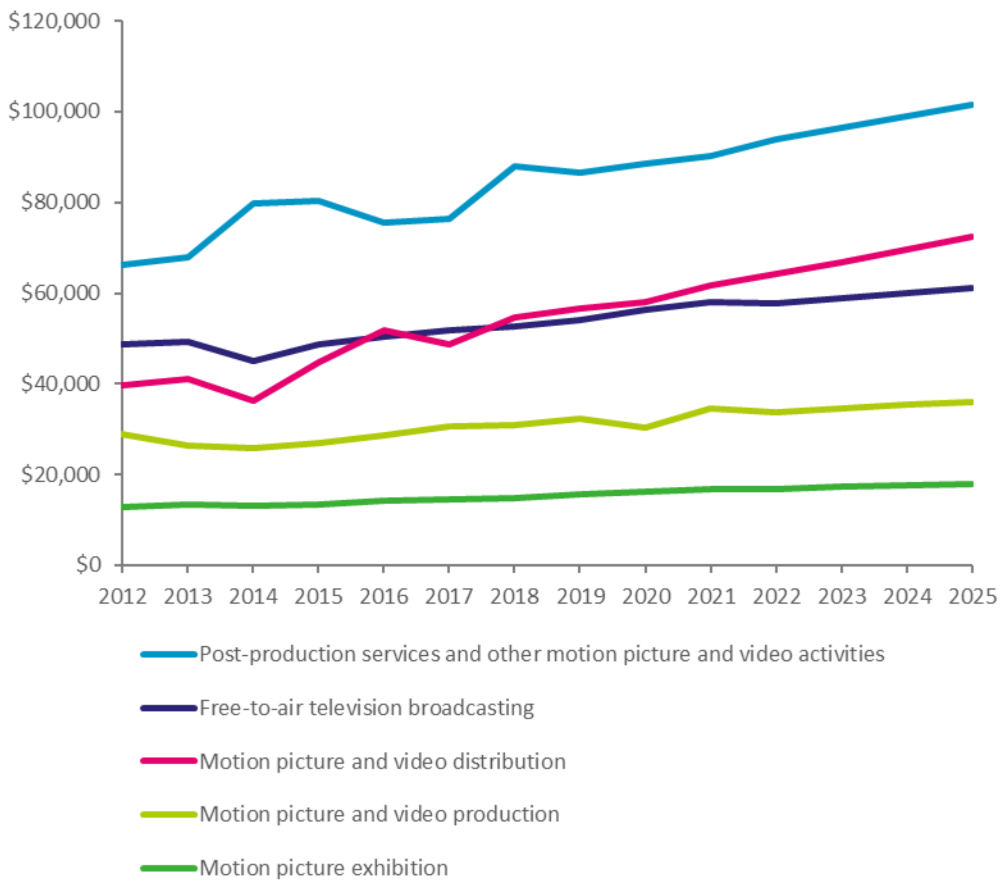
Senior specialists and those attached to major international productions can achieve high earnings, while many others face insecure and fluctuating incomes due to the dominance of contracting, project-based employment, and volatile production cycles. Policy interventions that support business scaling, stable employment pathways, and skills development could help stabilise incomes and broaden opportunities across the industry.

Annual statistics based on Linked Employer-Employee Data (LEED) allow examination of average wages in the industry between waged employees and the self-employed in information and media services.

Over the last several years, waged staff have been earning more on average than self-employed from their main earnings (Stats NZ, n.d.-b). Figure 6 shows trends in average annual earnings across key segments of New Zealand's screen industry. Post-production services and other motion picture activities record the highest and fastest-growing earnings, reflecting the industry's increasing focus on high-value, skills-intensive work. Motion picture and video distribution has also grown strongly, overtaking free-to-air broadcasting since 2016. In contrast, motion picture production and exhibition remain lower-earning segments, with gradual but steady increases over time. Overall, the data highlight a shift towards higher-value, post-production-driven employment within the screen sector.

Figure 6 Average earnings of self-employed versus waged staff by subindustry

Average earnings



Source: NZIER and Ministry of Business, Innovation & Employment (2024)

Those working in media and broadcasting[3] have a mix of skill levels according to Infometrics (2025). The percentage of highly-skilled people employed in media and broadcasting increased from 54% in 2004 to 63% in 2024. In comparison, 39% of employees in New Zealand were highly-skilled.

[3] The definition of media and broadcasting includes the screen industry and other area such as radio and newspapers.

4 Gross domestic product in the screen industry

This section examines the contribution of the screen production economy to New Zealand's overall GDP and output. Estimating the contribution requires drawing on statistics and trends from several sub-industries, as Stats NZ does not publish official statistics that are specific to the screen industry. Therefore, this section outlines the approach used to estimate value added and economic output in the absence of directly reported official statistics, drawing on national accounts data for information media services and applying proportional breakdowns from input–output tables. The results provide an indication of the screen industry's scale, trends over time, and role in the broader New Zealand economy.

4.1 Defining three macroeconomic terms

Three key terms are used in this section: output, intermediate consumption, and GDP. The definitions of these terms are provided below:

- Output is the total value of goods and services produced within an economy during a given period. It is usually measured at basic prices, excluding taxes on products and including subsidies. Output covers both market goods and services sold at significant prices and certain non-market services such as health, education, and defence provided by the government.
- Intermediate consumption is the value of goods and services used up as inputs in production, excluding fixed assets. It includes raw materials, energy, and business services, but not labour costs.
- GDP by the production approach equals output minus intermediate consumption, plus taxes on products less subsidies, which yields gross value added.

4.2 What the estimates indicate

To estimate the value of GDP in the screen industry, we use estimates of information media services GDP and pro rata them by their respective subindustries.[4] These are Broadcasting and internet publishing, Motion picture and sound recording activities, and Publishing (except internet and movie publishing).[5]

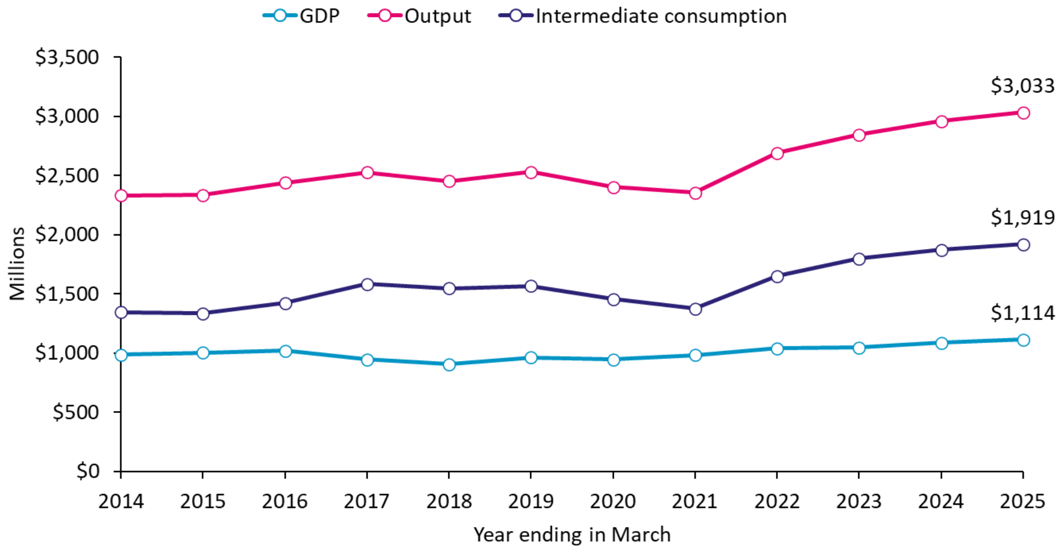
We use the percentage for each subindustry from the 2020 input-output tables and apply it to each year's GDP for information media services. Figure 7 shows the estimated value of the screen industry from 2014 to 2023. For the year ended March 2025, the industry's value-added GDP was $1.114 billion. The industry's estimated total economic output was $3,033 million. Intermediate consumption, which measures the industry's use of economic inputs, was $1,919 million.

4 This includes each group's respective ANZSIC codes can be found in Appendix B.

5 We include Motion picture and sound recording activities, and pro-rata Broadcasting and internet publishing by employment in Free-to-Air Television Broadcasting and Cable and Other Subscription Broadcasting employment as a percent of total broadcasting and internet publishing employment.

Figure 7 GDP of the screen industry

Prorated by the 2020 input-output table



Source: NZIER

Over the past decade, GDP in the screen industry has shown steady long-term growth, punctuated by periods of volatility, largely reflecting the timing of international productions. Output fell during the COVID-19 disruption, when production activity slowed sharply, but has since recovered to exceed pre-pandemic levels. This pattern highlights both the cyclical nature of the industry and its underlying resilience, with strong rebounds once production pipelines reopen and international demand resumes.

Since 2021, the growth trend in the screen industry's GDP has been more moderate than its output, as cost pressures and inflation in inputs or intermediate consumption have been persistent. The screen industry's GDP has grown more slowly than its overall output due to rising costs and a lack of efficiency gains. While the screen industry is full of innovation and creativity, the scope for industry-wide efficiency gains amid economic headwinds is likely to be constrained by the fragmented nature of projects. Investment in screen industry infrastructure, such as film studios, is one way to realise economies of scale.

In relative terms, the screen industry's GDP contribution is modest at around 0.3% of national GDP, but its influence extends far beyond these figures. Compared with other creative sectors, screen production has a much larger export orientation, and it plays a pivotal role in New Zealand's international brand. Its contribution is also labour-intensive: around 5,000 waged employees and many more contractors sustain an output of over $1 billion, indicating a relatively high value-added per worker compared with other service sectors.

Volatility in screen GDP is not a sign of weakness but a reflection of global production cycles. Peaks occur when major international projects are underway, while troughs coincide with project lulls or global disruptions such as the pandemic. These cycles create challenges for business growth and employment stability, yet they also demonstrate the industry's ability to bounce back quickly when conditions improve.

It is important to note that GDP measures capture only direct value added. They do not reflect wider spillover effects into related industries such as tourism, hospitality, and technology, nor do they capture the intangible cultural value of international visibility and soft power.

Finally, there are limitations in the data. The allocation method relies on prorating from input-output tables, which introduces some uncertainty. Nonetheless, it provides a robust and repeatable framework for tracking trends over time. Strengthening official data collection on the screen industry would enhance accuracy and enable policymakers to design more effective support.

Overall, these estimates confirm the significance of screen production as a contributor to GDP and as a foundation for broader economic and cultural impacts. The next section builds on this analysis by examining how the industry connects New Zealand to global markets and audiences, and how screen content reinforces the country's profile as a tourism and cultural destination.

5 Screen industry’s impact on trade and tourism

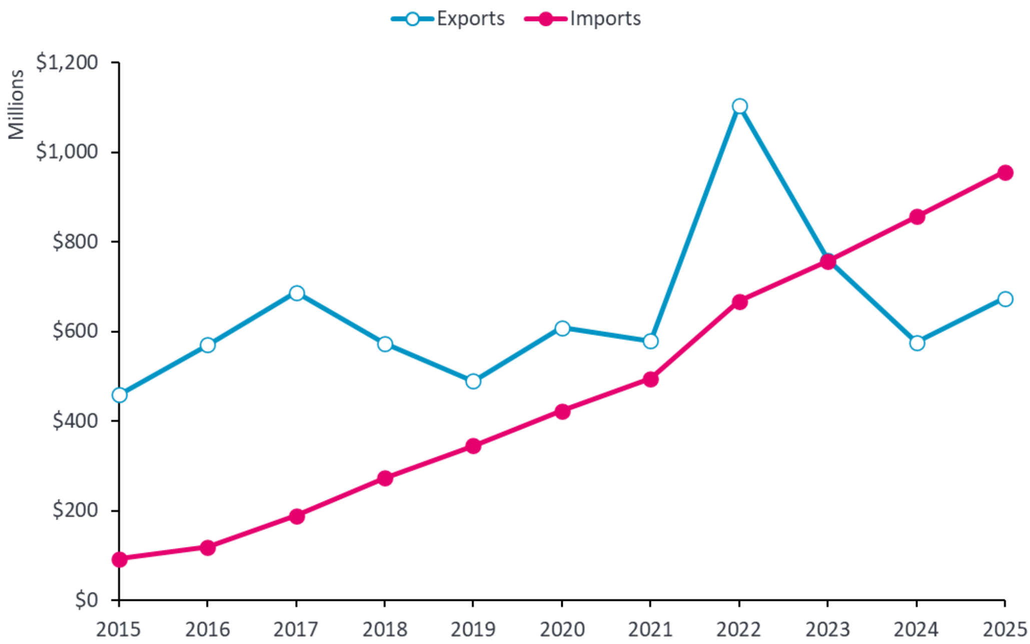
This section examines the screen industry’s trade and tourism effects on soft power.

5.1 Export and import of film services

The trade of film services also plays an important role. Imports of screen content have risen steadily, overtaking exports in 2023, while exports remain more volatile and closely tied to international production cycles, as seen in Figure 8 (Stats NZ 2025b). Consumer demand dynamics, screen production volatility, and global competition for incentives and a mobile labour force drive screen industry imports and exports.

Figure 8 International trade of audiovisual services

Export and imports of audiovisual services, in millions for the year ended March.



Source: Stats NZ

Global stories on New Zealand screens

The steady rise in imports reflects strong and growing consumer demand for screen content in New Zealand. Much of this demand is met through overseas productions, particularly via local and international streaming platforms that provide a wide range of international films and television at relatively low cost. The trend indicates that audiences value the diversity and scale of global content, while also underscoring the competitive environment in which domestic producers operate. Imports, therefore, serve as an indicator of both the depth of local audience engagement with screen content and the structural challenges facing New Zealand content in capturing audience share. A decline in domestic platforms' local content commissioning has led to increased consumption of imported screen content. Local platform revenues have declined as advertisers shift toward global platforms such as Google and Meta, reducing funding for New Zealand content.

New Zealand's screen production exports reflect global demand cycles

Exports of screen industry services have shown greater volatility, reflecting the project-based nature of international production and the influence of global demand cycles. Periods of strong export growth, such as the peak in 2022, demonstrate New Zealand's capacity to attract large-scale international productions and generate significant offshore earnings. The subsequent decline highlights the sensitivity of exports to production timing, exchange rate movements, and international competition for investment. Overall, exports remain an important source of value for the industry, both as a generator of foreign income and as a channel for promoting New Zealand's creative capabilities on the global stage.

Overall trade dynamics in screen production

Taken together, the contrasting trends in imports and exports highlight both the opportunities and challenges facing New Zealand's screen industry. Imports have grown steadily, indicating strong domestic demand for screen content but also underlining the dominance of international content in the local market. Exports, by contrast, have been more volatile, reflecting the cyclical nature of international production activity and New Zealand's reliance on attracting large offshore projects. The interplay between these trends points to an industry that is deeply integrated into global markets, with significant potential to generate foreign earnings but also ongoing exposure to international competition and shifting consumer preferences.

5.2 Tourism and the screen industry

There is often a time lag in the release of tourism GDP statistics, reflecting the complexity of the analysis required before official figures can be published. According to Stats NZ, for the year to March 2024, tourism directly generated $17.0 billion in value added, equivalent to 4.4% of GDP. A further $11.7 billion was contributed indirectly through tourism-related activity across the wider economy.

Tourism is shaped by a wide range of factors, from natural attractions and cultural experiences to personal connections and the search for novelty. Within this mix, the screen industry plays a distinct role by projecting images of New Zealand to global audiences, embedding its landscapes, culture, and stories in popular imagination. Such exposure enhances the country's soft power, strengthening its global reputation not only as a place to visit but also as a creative nation with distinctive cultural assets. Even when screen productions may not be the primary driver of visitor flows, they extend the reach of New Zealand's tourism offering and reinforce the appeal of its natural and cultural attractions on the world stage.

How screen exposure drives tourism attraction and economic returns

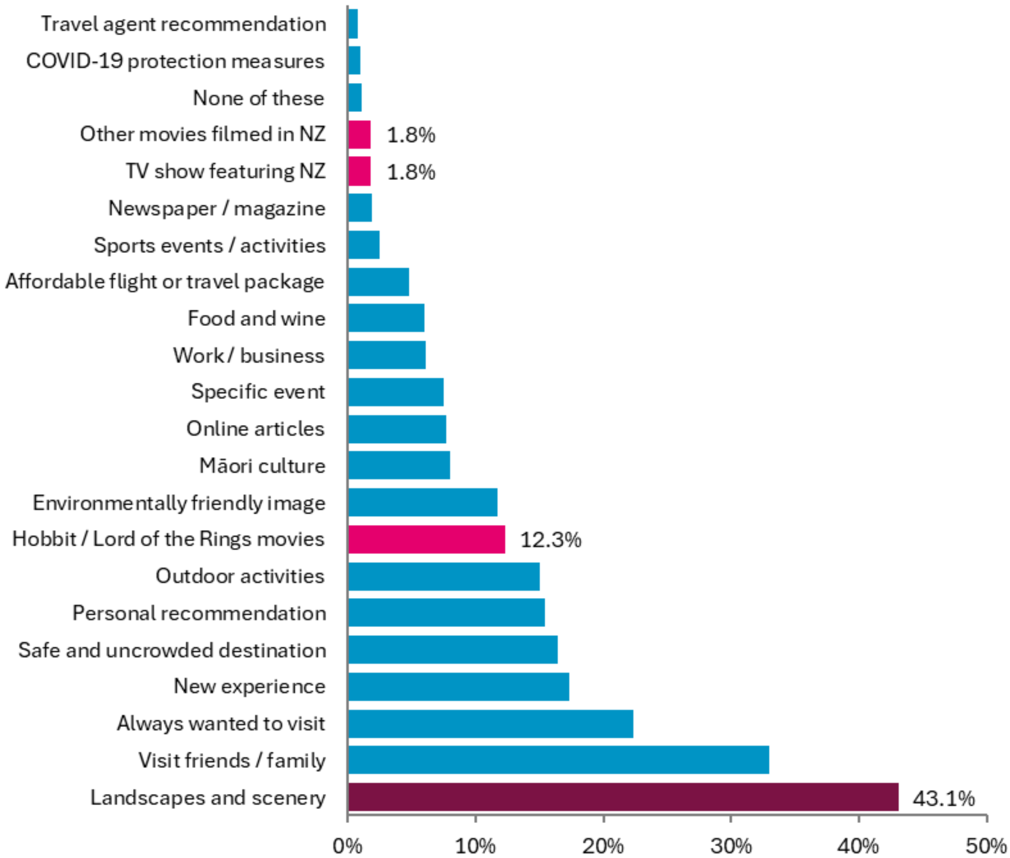
Screen-induced tourism delivers tangible economic benefits by attracting international visitors whose spending contributes directly to tourism exports. This reinforces the role of the screen industry not only as a cultural asset but also as a driver of economic returns through international tourism.

Insights from the New Zealand Story show that New Zealand is recognised as a location of screen production due to its landscape and scenery. The connection between New Zealand and *the Lord of the Rings* productions and scenery still resonates; however, it is fading as younger audiences are less likely to make the automatic connection between the productions and New Zealand creators (New Zealand Story and Fiftyfive5 2025).

Figure 9 shows the range of factors influencing international visitors' decisions to travel to New Zealand. Natural attractions such as landscapes and scenery are the strongest motivators, supported by personal connections – such as visiting friends and family – and by the search for new or unique experiences. Screen-related influences play a smaller but still significant role, with 12.3% of visitors citing *The Hobbit* or *Lord of the Rings* movies and 3.6% citing other television series and movies filmed in New Zealand. The combination of screen attraction factors indicated that 15.9% of international visitors reported New Zealand Screen production and New Zealand on screen as factors in their decision to visit New Zealand. Verian's findings indicate that 72% of respondents to the international survey agreed that screen content made them consider visiting New Zealand.

Figure 9 Visitor attraction factors

Factors in deciding to visit New Zealand



Source: MBIE (2025) International Visitor Survey June quarter 2025

For the year ended March 2024, international tourism expenditure rose by 59.9% ($6.3 billion) to reach $16.9 billion, a return to levels comparable with 2019 ($17.2 billion). Applying the finding that 15.9% of international visitors cite New Zealand films or television as an influence on their travel decision, the screen industry's contribution to tourism expenditure can be estimated at around $2.7 billion. This scale rivals or exceeds other drivers of tourism – for example, sporting events, which annually contribute to international tourism attraction, but not at the same level as the enduring pull of screen imagery embedded in global popular culture. The figures demonstrate that screen production is not only an industry in its own right but also a powerful catalyst for the visitor economy, reinforcing New Zealand's international brand and delivering significant spillover benefits across accommodation, hospitality, transport, and regional development.

While not the dominant driver of tourism, these results indicate that screen productions contribute to New Zealand's international profile by embedding its imagery in global popular culture. This highlights the value of linking film and tourism promotion through policy and marketing strategies, leveraging screen exposure to sustain and grow international visitor demand.

5.3 Soft power and screen production diplomacy

Soft power refers to a nation's ability to shape preferences, influence behaviour, and build goodwill internationally through attraction rather than coercion. Unlike hard power, which relies on economic or military might, soft power emerges from cultural assets, values, institutions, and policies that resonate globally. Diplomacy in this context is not only conducted through formal channels of statecraft but also through the stories, images, and cultural outputs that circulate worldwide.

For New Zealand, screen production plays a critical role in projecting soft power. Iconic films such as *The Lord of the Rings* and *The Hobbit* have embedded New Zealand's landscapes, creativity, and technical expertise in global popular culture. More recent research shows that landscapes and Māori culture remain the most strongly associated features of New Zealand screen content. International viewers recognise these elements as distinctive (New Zealand Story and Fiftyfive5 2025).

Screen-driven soft power also supports foreign policy objectives. When audiences engage with New Zealand content, they form an emotional connection with the country, often leading to increased interest in visiting, studying, or investing. Such connections contribute to long-term partnerships, foster cross-cultural understanding, and reinforce New Zealand's position as a credible and constructive voice in international forums.

Importantly, screen production also acts as a cross-sectoral catalyst. Partnerships such as the Minecraft-Tourism NZ collaboration illustrate how film and digital storytelling can promote tourism, innovation, and cultural diplomacy simultaneously. By linking screen outputs to broader government and industry strategies, New Zealand maximises the diplomatic and economic dividends of cultural exports, ensuring that screen production is not just an artistic endeavour but also a cornerstone of national influence.

Diplomatic strategies increasingly recognise the value of cultural exports in building influence. By investing in the screen industry, New Zealand not only gains economic returns but also advances its soft power, amplifying its presence on the world stage. In a competitive global environment, where reputation and visibility matter as much as resources, screen production represents a vital instrument of twenty-first-century diplomacy.

6 Industry financial statistics

This section presents insights into the combined financial performance of the screen industry, based on data from the Business Performance Benchmarker. The financial statistics are sourced from Stats NZ's Annual Enterprise Survey (AES) and the Business Performance Benchmarker (Stats NZ 2025a). These datasets provide a robust and detailed view of business performance in New Zealand. However, they are not without limitations: coverage does not extend to all industries, some data is suppressed to protect confidentiality, and the results are based on a combination of survey responses and administrative tax data, which may introduce estimation error. Larger enterprises are also more likely to be represented.

These statistics should be interpreted as retrospective indicators, reflecting business conditions up to 2024. They do not capture more recent developments, including structural shifts in the economy, evolving competitive dynamics, or policy changes introduced since then. They may exclude the impact of recent global market dynamics and changes in investment incentives that have emerged in 2025. Policymakers are encouraged to use this data alongside more recent intelligence, such as real-time industry reporting, forward-looking economic modelling, and stakeholder consultation, to inform timely and effective decision-making.

6.1 Income patterns across the screen industry reflect both recovery and structural strain

Table 1 shows the total operating and non-operating income by the focus subindustries (Stats NZ 2023b). Motion picture and video production income dominates, but margins are tightening as expenditure grows faster than income. Post-production services emerged as a growth area, with increased income and improved profitability attributed to international contracts and the operation of the Post, Digital and Visual Effects (PDV) rebate. Distribution remained financially constrained, with revenues approximately covering costs. Exhibition showed signs of audience recovery but continued to operate at a loss due to rising expenses.

Table 1 Income by ANZSIC group

$millions

Industry class	2022	2023	2024
Cable and other subscription broadcasting	C	C	C
Free-to-air television broadcasting	C	C	C
Motion picture and video distribution	120	147	145
Motion picture and video production	1,715	1,493	1,694
Motion picture exhibition	177	242	250
Other information services	6	9	11
Post-production services and other motion picture and video activities	C	778	800

Note: data for 2023 and 2024 are provisional. C denotes confidential.

Source: Stats NZ (2025a) Business Performance Benchmarker

6.2 Expenditure across the screen value chain is concentrated in production and post-production

Table 2 shows the total operating and non-operating expenditure by subindustry (Stats NZ 2023a). Motion picture production accounted for more than $1.3 billion in annual outlays, while PDV activities consistently added around $760 million. Together, these two segments account for the majority of industry spending supported by rebates, reflecting their central role in project lifecycles and their significant contribution to employment and capability development. Distribution and exhibition also registered significant outlays, with distribution costs fluctuating in line with rights and marketing activity, and exhibition facing rising operating expenses as cinemas adjusted to post-COVID conditions and audience fragmentation. The stability of production and post-production spending points to ongoing demand and capacity utilisation, while the sharp increase in exhibition costs highlights pressures on downstream operators in the theatrical market.

Table 2 Expenditure by ANZSIC group

$millions

Industry class	2022	2023	2024
Cable and other subscription broadcasting	C	C	C
Free-to-air television broadcasting	C	C	C
Motion picture and video distribution	114	148	142
Motion picture and video production	1,430	1,366	1,376
Motion picture exhibition	186	258	261
Other information services	5	7	10
Post-production services and other motion picture and video activities	763	759	764

Note: data for 2023 and 2024 are provisional. C denotes confidential.

Source: Stats NZ (2025a) Business Performance Benchmarker

6.3 Profitability remains uneven across the screen industry

Table 3 shows total profit, which is total income less total expenditure plus change in stocks (Stats NZ 2023c). Profitability across the screen industry was uneven. Movie and video production profits declined from $210 million in 2022 to $187 million in 2024. At the same time, distribution losses persisted from 2022 to 2024 amid pressure from subscription-based video on-demand.

In contrast, PDV saw strong growth, with profits rising from $20 million in 2023 to $36 million in 2024, driven by international demand and high capacity utilisation. However, early 2025 indicators suggest softening demand, linked to increased international competition. These trends point to growing uncertainty in PDV and underscore the need for sustained innovation to maintain competitiveness.

As a major broadcaster, TVNZ reported a net profit after tax of $25.7 million for the 2025 financial year. This represents a significant improvement from the $85 million loss in 2024. The turnaround reflects cost-cutting and reprioritisation in the wake of lower revenue, challenging domestic economic conditions and a changing digital world (TVNZ 2025).

Table 3 Profit by ANZSIC group

$millions

Industry class	2022	2023	2024
Cable and other subscription broadcasting	C	C	C
Free-to-air television broadcasting	C	C	C
Motion picture and video distribution	5	-3	0
Motion picture and video production	210	195	187
Motion picture exhibition	-10	-16	-13
Other information services	2	2	2
Post-production services and other motion picture and video activities	C	20	36

Note: data for 2023 and 2024 are provisional. C denotes confidential.

Source: Stats NZ (2025a) Business Performance Benchmarker

6.4 Policy implications: Responding to streaming-led change

The rise of streaming platforms is reshaping how New Zealand screen content is financed, produced, and consumed. While global services expand market reach, they also challenge the viability of traditional distribution and exhibition channels. Policy needs to adapt to ensure New Zealand retains both cultural visibility and economic value in this shifting environment.

Key considerations include:

- Local content incentives: encourage streaming platforms to commission or acquire New Zealand content, ensuring domestic stories reach global audiences.
- Support for co-productions: Encourage co-production and international collaboration partners, linking international finance with local talent and cultural authenticity.
- Domestic visibility: There's a need to invest in marketing and digital promotion so that New Zealand audiences are aware of local content available on domestic video-on-demand (VOD) platforms. Without this, local content risks being overlooked.
- Global discoverability: New Zealand content also needs to stand out in crowded international streaming catalogues. This means ensuring it's visible and promoted effectively on platforms like Netflix, Amazon Prime, etc., where competition for attention is high.
- Exhibition resilience: Support innovation in cinema to sustain local audience engagement with New Zealand films and series.

By aligning policy with the opportunities and risks of streaming, New Zealand can secure long-term benefits for its creative economy while ensuring its stories continue to reach and influence global audiences.

Global shifts in incentives and market dynamics underline the urgency of aligning New Zealand's policy settings with the realities of a more contested industry. The international 'arms race' on incentives shows that fiscal tools are now core economic levers, but competitiveness is also a factor.

For New Zealand, the response must also focus on industry performance:

- building scale in businesses so they can capture efficiencies and invest in innovation
- strengthening skills and training pathways to stabilise incomes in a contractor-heavy workforce
- ensuring that local content, especially Māori, is visible in a global marketplace dominated by streaming.

These steps are essential to maintain resilience and long-term value capture. Policy stability remains an asset, but without targeted support to address structural weaknesses and enable growth, New Zealand risks losing ground to rivals who are actively reshaping their industries to attract investment and develop capability.

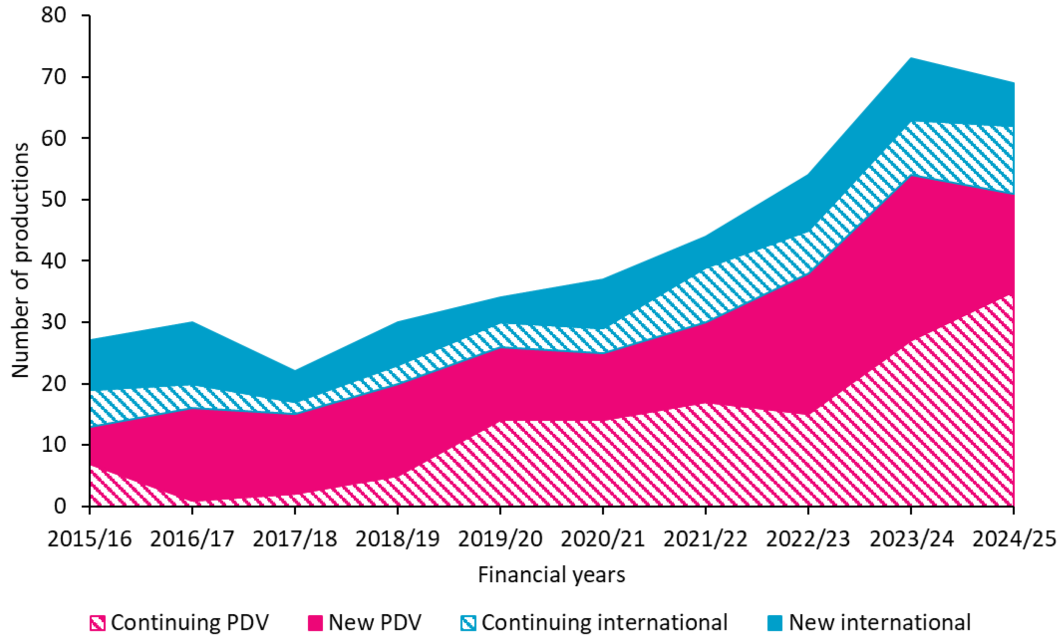
7 Public and private investment screen production

The screen industry attracts public and private investment and sales. In this section, we explore the available information on this theme. However, it is essential to acknowledge that the data in this section do not fully represent the total private investment in screen industry production and production infrastructure, as some investments and expenditures are inherently private activities.

7.1 The number of international productions has grown over time

Figure 10 presents production activity generated through the NZSPR for international productions, including PDV, over the past ten years. The increase in international NZSPR productions is evidence of sustained industry activity contributing to long-term economic impact. While PDV productions provide consistent demand volume and work, the much greater production expenditure of live-action production means they deliver greater economic impact, reinforcing the importance of continuing to attract large-scale international productions alongside maintaining PDV growth.

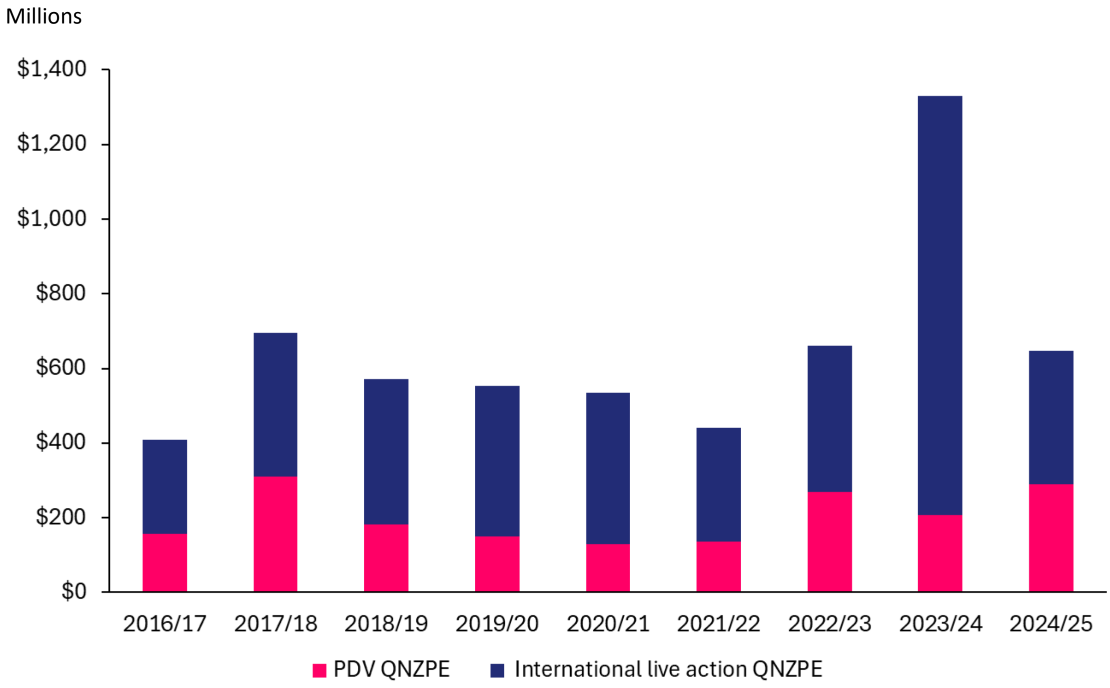
Figure 10 Pipeline of NZSPR international productions



Source: NZIER analysis of NZFC data

Figure 11 shows the Qualifying New Zealand Production Expenditure (QNZPE) for international NZSPR applications was $647 million last financial year. Live-action productions accounted for the largest share of this expenditure, at approximately $358 million. In comparison, PDV-only productions, while smaller in scale, continue to provide steady economic value through employment and specialised services. This breakdown highlights not only the scale of international investment but also the different ways in which live-action and PDV productions stimulate economic activity in New Zealand.

Figure 11 Qualifying expenditure on approved NZSPR international productions



Source: NZFC data supplied

7.2 The demand for local production investment is robust

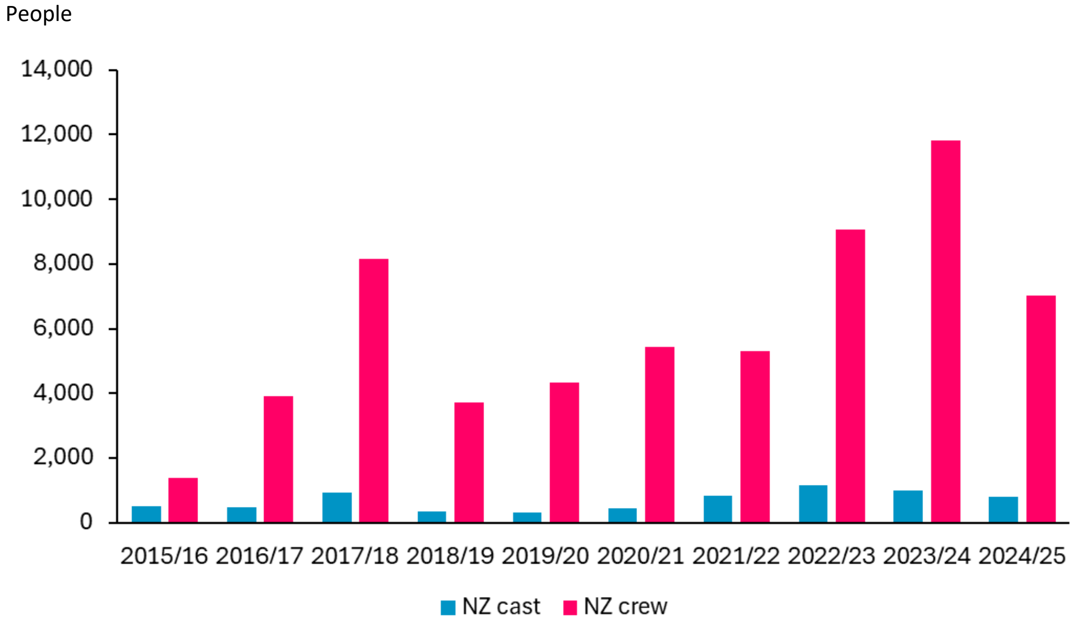
Support for local productions from NZ On Air has significantly increased:

- Before 2023, NZ On Air could only fund 2 to 3 large-scale domestic dramas annually. Its contributions covered 80%–94% of each production's budget, which typically ranged between $6 million and $7 million.
- Since the introduction of co-investment in 2023/24, NZ On Air has supported ten large-scale dramas, contributing an average of $2.4 million per project.
- These productions have collectively attracted $40 million in non-government funding, the majority of which has come from international sources.

New Zealand screen stories are achieving international reach with economic impact

Figure 12 shows that international productions grow crew opportunities, while local productions sustain cast, together strengthening New Zealand's screen workforce. The data from Screen Production Grant/Rebate (SPG/R) activity between 2015/16 and 2024/25 highlights the contribution of New Zealand cast and crew to both local and international productions undertaken in New Zealand. Crew participation has been the most significant component. These job numbers are a subset of the overall screen industry discussed in section 2. The overall picture is of a workforce that is strongly engaged across both local and international projects, with international productions in particular providing significant opportunities for New Zealand crews. Cast numbers appear more variable, reflecting shifts in the type and scale of productions undertaken.

Figure 12 Local cast and crew jobs on local and international productions



Source: NZFC data supplied

Assessing local and international production activity and impact

The screen industry in New Zealand attracts substantial public and private investment and generates measurable economic and cultural benefits. International productions continue to provide large-scale opportunities, particularly for New Zealand. Local productions remain vital for cast employment and the expression of New Zealand stories, supported by multiple funding agencies. Sales successes such as *A Mistake, Joika, Wellington Paranormal,* and *The Brokenwood Mysteries* illustrate international demand for distinctive local content. Together, these trends demonstrate an industry that is both globally competitive and nationally significant, contributing to jobs, investment, and cultural presence.

8 Global trends and New Zealand's competitiveness

Over the past five years, screen production incentives have evolved rapidly as governments recognise their role in attracting high-value international productions. These schemes are no longer viewed simply as cultural policies but as core economic tools. They influence where major film and television projects are located, shape employment opportunities and infrastructure development, and underpin soft power by enhancing a country's global profile through cultural exports. The international trend has been toward higher incentive rates, clearer rules of eligibility, and targeted support for specific subindustries such as visual effects and independent productions.

8.1 The Australian incentives

Australia offers a range of screen incentives designed to attract productions and support the Australian screen industry. These include:

- **The location offset** provides a 30% tax rebate for large-budget film and television productions filmed in Australia. This incentive can be supplemented by additional support from state and territory governments. Eligible formats include feature films, telemovies, miniseries, and television series (including documentary, reality, animation, and live action).
- **The PDV Offset** offers a 30% tax rebate for productions that carry out post-production, digital, and visual effects work in Australia. This can be further enhanced with up to 15% in additional incentives from state and territory governments.
- **Various state and territory location incentives**: Individual Australian states and territories offer competitive grants and incentives to attract productions to film locally. Some provide more than 10% support on a case-by-case basis. Additional incentives are also available for productions that carry out post-production, sound, music, and visual effects work with studios based in those regions.
- **State and territory PDV incentives** of 15% or more in some states for productions that undertake post-production, sound, music, and visual effects work within their regions. These state-level incentives can be combined with the federal 30% Location Offset or the 30% PDV Offset, providing substantial support for eligible projects.
- **The producer offset provides** a 30% rebate for non-theatrical feature projects, TV series, and other formats, and a 40% rebate for theatrical feature projects for Australian productions and official co-productions.
- **Official treaty co-productions** are established under formal arrangements between Australia and the governments of other countries, providing creative and economic benefits for both producers. This means the incentives and eligibility requirements vary on a case-by-case basis,

Australia has been among the most assertive in reforming its screen incentive settings. In 2023, the federal government lifted the Location Offset from 16.5% to 30%. This immediately moved Australia into the top tier of competitive jurisdictions for attracting large-scale international productions. The change was accompanied by higher minimum qualifying expenditure thresholds. For example, features must now spend at least A$20 million locally, and television series must spend at least A$1.5 million per hour. These thresholds are designed to ensure that only major projects qualify and that the economic impact flows strongly into the local industry.

Australia's growing competitiveness poses a significant challenge for New Zealand's screen industry, particularly due to the close geographic proximity and ease of travel between the two countries. Enhanced financial incentives offered by Australia may increasingly attract productions that might otherwise be based in New Zealand. As discussed in section 2, New Zealand's screen industry workforce is primarily made up of contractors who frequently move between projects. This high level of mobility, combined with the seamless travel between the two economies, makes it likely that talent will shift across the Tasman in response to more attractive opportunities.

The implications of this trend are multifaceted. Economically, a shift in production to Australia could result in reduced domestic investment, fewer job opportunities, and diminished returns for local businesses that support the screen industry, such as post-production houses, equipment suppliers, and hospitality services. Strategically, New Zealand risks losing its competitive edge in the global screen market if it cannot match or counterbalance Australia's incentives. This could also impact the development of local content, as fewer productions may mean fewer opportunities for New Zealand stories to be told and exported.

Furthermore, the trans-Tasman mobility of the workforce may lead to a talent drain, where experienced professionals increasingly base themselves in Australia, weakening New Zealand's capacity to scale up for larger or more complex productions. Over time, this could erode the depth and resilience of the domestic talent pool, making it harder to attract international productions or sustain a vibrant local industry.

8.2 The United Kingdom's reforms

The United Kingdom has chosen a structural overhaul rather than a simple rate increase. In 2024, it introduced the Audio-Visual Expenditure Credit (AVEC) to replace the older system of separate incentives for film, high-end television, animation, and children's programming. The AVEC offers a more transparent and flexible credit structure. It includes higher rates for high-end television, animation, and VFX work, sectors where the United Kingdom already has a strong international standing.

A significant innovation has been the introduction of the Independent Film Tax Credit (IFTC). This provides enhanced incentives for lower-budget domestic films, ensuring that independent producers, who are often squeezed by market consolidation and streaming platform commissioning strategies, continue to thrive. The United Kingdom's reforms aim to sustain a broad-based ecosystem that can support both large-scale inward investment and a vibrant independent sector. The government has also taken steps to remove certain expenditure caps and to expand VFX incentives, acknowledging the growing importance of digital production technologies in the global industry.

8.3 Uncertainty from the US

The threat of 100 percent tariffs in the US on foreign screen production has added to the uncertainty in the screen industry in the US and further abroad. In general, as uncertainty increases, investment decreases or is delayed until the future is clearer.

8.4 Implications for competitiveness

New Zealand’s competitiveness increasingly rests on factors beyond headline rebate rates. The country’s unique landscapes, highly skilled crews, and reputation for quality remain strong drawcards. Cultural authenticity, particularly through Māori storytelling, adds value that cannot easily be replicated elsewhere. Policy stability also enhances credibility. However, as Australia and the United Kingdom raise their incentive rates and tailor them to industry needs, New Zealand faces growing pressure. Without adjustments, there is a risk that marquee productions will be drawn away, reducing opportunities for New Zealand workers, businesses, and associated industries such as tourism and technology.

Another implication is the potential erosion of New Zealand’s position in the international production pipeline. If studios consistently favour more generous jurisdictions, local crews may miss opportunities to work on large projects, slowing skills development and weakening long-term resilience. The broader spillovers from screen production, such as technology transfer, infrastructure investment, and soft power gains through global visibility, could also diminish. Therefore, the screen industry should focus on improving efficiency and productivity to enhance competitiveness and reduce reliance on subsidies.

8.5 The way forward

The challenge for New Zealand is to balance fiscal prudence with strategic investment. Maintaining incentives at current levels provides certainty, but it may not be enough to compete with increasingly generous overseas offers. One option is to refine the existing rebate criteria to ensure that projects deliver maximum local value in terms of employment, training, and cultural promotion. Another is to consider targeted enhancements, such as additional incentives for VFX or independent productions, following the United Kingdom's lead.

Ultimately, competitiveness will depend on a combination of stable but responsive incentives, investment in talent development, and the cultivation of international partnerships. New Zealand’s screen industry has already demonstrated its ability to contribute to the economic and cultural wellbeing of New Zealand. With the right policy mix, it can continue to attract global productions, strengthen its domestic storytelling, and leverage screen content to boost economic performance and soft power. The policy settings should consider global competition and return-on-investment mechanisms while avoiding a race to the bottom.

To strengthen evidence-based decision-making and enhance industry resilience, we recommend developing a comprehensive, enduring screen industry survey. Such a survey would provide a consistent, reliable mechanism for tracking trends, benchmarking performance, and assessing economic and cultural impacts over time. By generating data, the survey would enable policymakers, industry leaders, and investors to identify emerging opportunities, address structural challenges, and assess the effectiveness of policy interventions. This initiative would also support transparency and accountability, ensuring that public and private investment decisions are informed by robust insights into workforce dynamics, production capacity, and global competitiveness. Implementing this recommendation will position the screen industry to adapt proactively in a rapidly evolving media environment and maintain its contribution to New Zealand’s economy and cultural identity.

COVID-19 impacts and the case for recovery support

The case for support is especially strong in the wake of COVID-19, which exposed the vulnerabilities of a contractor-heavy workforce, disrupted production pipelines, and accelerated structural shifts toward streaming. During the height of the pandemic, the New Zealand screen industry experienced a sharp contraction: contractor numbers dropped significantly between 2020 and 2021, waged employment fell below long-term averages, and GDP contributions from motion picture and sound recording activities declined well below the one billion recorded for the year to March 2023. Exhibition was particularly hard-hit, with cinema revenues collapsing as restrictions curtailed audience attendance, while distribution margins eroded under the rapid shift to streaming.

Although the industry has rebounded, with employment returning to pre-pandemic levels by 2024, the volatility of incomes and the persistence of losses in exhibition show that the scars of COVID-19 remain. Margins remain tight in key subindustries, and downstream areas continue to struggle with high costs and changed consumer behaviour. Strategic investment is therefore critical to consolidate recovery by sustaining jobs, rebuilding confidence among international partners, and ensuring that New Zealand retains the skills and infrastructure needed for long-term growth. Support targeted at training, business scaling, and content development will not only offset the lingering impacts of the pandemic but also position the industry to thrive in an uncertain and highly competitive global environment.

9 Cultural impact of the screen industry

9.1 Background

The New Zealand screen industry is recognised as a contributor to the national economy. Its role in shaping cultural identity, supporting social connection, and sharing Aotearoa New Zealand's stories with global audiences is also increasingly recognised. As audiences, content, and media environments continue to evolve, there is a growing need to assess the cultural outcomes of screen production alongside its economic impact. This research seeks to understand the extent to which New Zealand and Māori screen content may shape or reflect cultural perceptions, values, and connections, locally and internationally.

This section of the report complements the economic section by focusing on non-market value. This is a value that counts' but is hard to count' as part of the total screen sector value.

9.2 Purpose

This research, commissioned by the New Zealand Film Commission, NZ On Air, and Te Māngai Pāho, is designed to inform policy, sector strategy, and public investment. Its overarching purpose is to:

- Examine how screen content contributes to cultural impact and shapes how New Zealand is seen internationally.
- Explore how screen stories reflect national identity, values, and social connection.
- Consider the role of Māori culture in New Zealand storytelling.
- Support the representation and inclusion of New Zealand's diverse communities.

By providing a detailed, evidence-based assessment of the screen sector's cultural contribution, this research supports the recognition of cultural value alongside economic outcomes.

9.3 Key areas of inquiry

This research explores several key areas of inquiry that are directly relevant to the sector:

- In what ways does screen content contribute to a shared sense of identity and belonging for New Zealanders?
- How do New Zealanders see themselves and their communities reflected on screen?
- What is the role of Māori culture in shaping both local and international perceptions of New Zealand?
- How does New Zealand's screen content influence the way the world sees and engages with New Zealand?

9.4 Application and scope

The findings of this research are intended to inform policymakers, industry leaders, cultural practitioners, and the wider public. The evidence base will support strategic investment, policy development, and sector advocacy by ensuring that the cultural value of screen production is incorporated into decision-making. The scope of the research encompasses both domestic and international aspects, with a focus on the role of Māori culture and the authentic representation of New Zealand's diverse communities.

10 Methodology overview – Cultural impact

Structured into three phases, the research aims to explore the cultural influence of New Zealand and Māori screen content through robust and representative insights.

10.1 Phase 1: Qualitative online forum

A two-day online forum engaged 36 New Zealanders, recruited via PFI panel, social media, and networks. Quotas ensured balanced representation by age, gender, and ethnicity. Within this we recruited a diverse group of respondents living in different regions, including people who identified as disabled, LGBTQI+, and people who identified as migrants. Thematic analysis was used to surface key domains of cultural impact.

10.2 Phase 2: National quantitative survey

An online survey of 1,182 New Zealanders aged 15 and over was conducted using Consumer Link and Dynata panels. Quotas for age, gender, region, and ethnicity were applied to ensure the final sample reflected national population benchmarks. To support robust analysis of key population groups, additional sample boosts were applied to achieve the following total sample sizes: Māori (n=336), Pacific peoples (n=145), and Asian peoples (n=229). All data were weighted to align with national benchmarks.

10.3 Phase 3: International quantitative survey

The international survey (n=522) was conducted online in five countries, using email invitations to a nationally representative sample (age, gender, location) in each. The screener sample was weighted to national proportions, and only qualifiers carried these weights into the main analysis, ensuring a representative base without imposing national proportions on the likely niche subgroup of viewers of New Zealand and Māori content. Aggregate results use a weighted average by sample size, giving each country equal influence.

Table 4 Methodology: Summary table

Summary of methodological approach

Phase	Method and platform	Sample and recruitment
1. Qualitative online forum	2 day online forum	36 participants; PFI panel, social media, networks; quotas for age, gender, ethnicity, region.
2. National quantitative survey	Online survey via partner panels	1,182 respondents (15+); quotas for age, gender, region, ethnicity; boosts for Māori, Pacific peoples, and Asian peoples.
3. International quantitative survey	Online survey via global partner panel; translated for France	522 respondents across 5 countries: Australia (n=107), France (n=100), India (n=100), UK (n=114), US (n=101); subgroup of non-viewers (n=87)

Source: Verian

11 Key themes from the cultural impact assessment

The following themes bring together insights from the qualitative research, national survey, and international survey. They show how New Zealand and Māori screen content contribute to cultural identity, support inclusion, and build connections within Aotearoa New Zealand and internationally.

Each theme is backed by strong evidence, highlighting the broad influence of local storytelling on how people understand themselves, others, and New Zealand's place in the world.

11.1 National identity: A shared foundation with room to grow

New Zealand's national identity is shaped by a mix of cultures, values, and connections to the natural environment, and it continues to evolve. Many New Zealanders describe the country as multicultural, grounded in Māori culture, and defined by qualities such as friendliness, creativity, and a strong connection to nature. This shared sense of identity provides a starting point for cultural impact, while also showing where the national story could grow to include a wider range of voices.

Key evidence

- 65% of New Zealanders describe New Zealand traits in positive terms – friendly, kind, laidback, and fair.
- 49% connect national identity with te taiao – nature, scenery, beaches, mountains.
- 44% mention diverse cultures – Māori, multicultural, inclusive (see Figure 13).
- 51% **strongly agree** that New Zealand is multicultural, 40% **strongly agree** that Māori culture gives New Zealand its unique identity (see Figure 14).
- However, between 29% and 37% are ambivalent or disagree that New Zealanders are hardworking, welcoming, or strongly identify as a Pacific nation (see Figure 15).

While there is broad agreement on many aspects of national identity, elements such as work ethic, Pacific identity, and inclusiveness are less consistently shared.

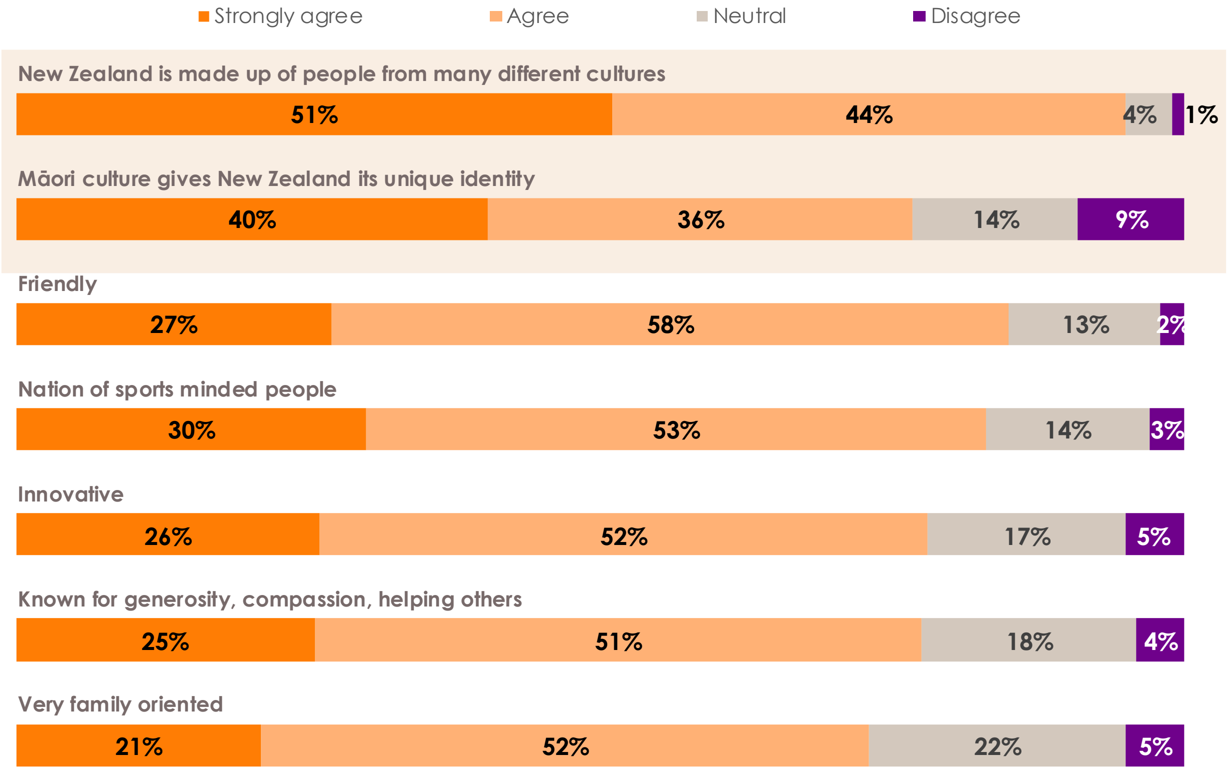
This suggests opportunities for screen content to further develop and reflect the full diversity of contemporary New Zealand society.

Figure 13 Themes from open-ended reflections on national identity

65% describe our traits positively	49% connect us with our taiao	44% mention diverse cultures
Friendly, kind, welcoming, laid back, chill, relaxed, easy going, honest, open, proud, creative, talented, innovative, strong, fair.	Being outside, in nature, our beautiful scenery, beaches, mountains, exploring, caring for and protecting our environment.	Māori, multicultural, diverse and inclusive.

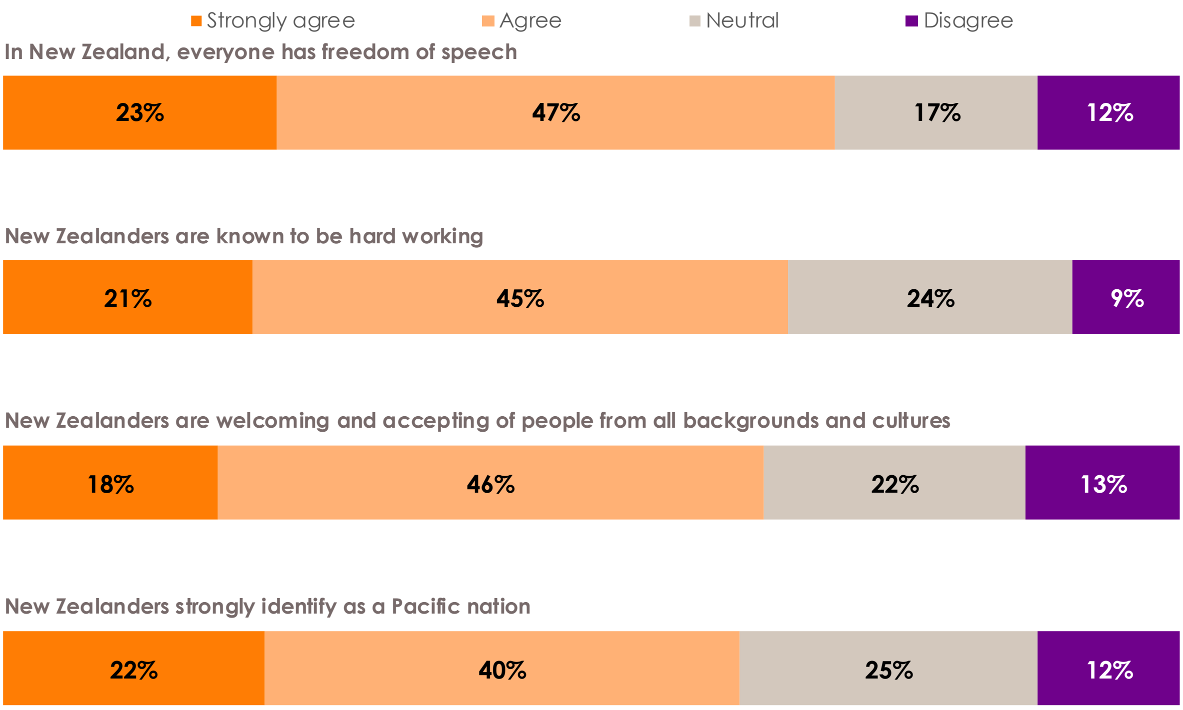
Source: New Zealand Cultural Impact Survey

Figure 14 Prompted perspectives on national identity – part one



Source: New Zealand Cultural Impact Survey

Figure 15 Prompted perspectives on national identity – part two



Source: New Zealand Cultural Impact Survey

Qualitative insights

Participants express the emotional resonance of seeing their country reflected on screen:

> "Local content plays a massive part in showing who we are. It helps define our culture, showcase our diversity and shape how Kiwis and the outside world see New Zealand."
>
> [Male, Pākehā, 16–25 years, Hamilton]

Another participant reflected on the loss that would come from not seeing local stories:

> "A world without local New Zealand content would make me so sad … That world would be bland and flavourless like unseasoned food. Homogenous slop... You would only see the sparkling Waitematā, the majestic Remarkables, the wild West Coast if you lived there. Not everyone has the ability to travel throughout our country physically, but you can on a screen. All those people I would never know about, nor hear their stories, the colours and vibrant wonder of our country and people – gone. Our humour – gone. A grey, boring, silent, humourless place."
>
> [Female, Pasifika / Pākehā, 40+ years, Auckland]

International perspective

International survey respondents most commonly associate New Zealand with its natural landscapes and its people, who are values-based and welcoming. Māori culture is also a prominent association, reinforcing that the elements New Zealanders consider central to national identity are similarly recognised by global viewers (see Figure 16).

Figure 16 Impact of New Zealand content on international associations with New Zealand

What makes NZ content stand out

	Total	AUS	FRA	IND	UK	US
The scenery or natural landscapes	54%	54	57	68	49	51
The cultural elements (e.g. representation of Māori, the indigenous people of NZ)	52%	46	53	53	45	54
The accents or way people speak	45%	60	19	36	54	46
The use of the Māori language or other languages	34%	46	30	40	24	30
The themes or topics covered (e.g. identity, relationships, environment, social justice, humour)	30%	22	28	50	29	24
The overall vibe or tone (e.g. relaxed, intense, emotional, quirky)	28%	33	18	31	23	32
The actors or talent involved	28%	38	14	30	25	27
It reminds me of New Zealand	26%	29	19	40	16	23
The humour or storytelling style	23%	24	15	22	23	26
It feels different to content made elsewhere	22%	12	26	31	22	19
The production quality	20%	18	11	40	17	19
The pacing or structure of the story – how the story unfolds	19%	7	17	39	15	15

66% or more selected　34%-65% selected　33% or less selected

Source: International Survey

In summary

These findings demonstrate that New Zealanders share a sense of national identity, but it’s not fixed; it’s still developing. Screen content helps reinforce common values and expand the national story to include a wider range of experiences.

International survey results show that key elements of New Zealand’s identity (its natural environment, values, and Māori culture) resonate strongly with global audiences, further supporting the reach and relevance of local storytelling.

The next theme explores how screen content serves as a foundation for belonging and pride across New Zealand.

11.2 Screen content as a foundation of national identity and belonging

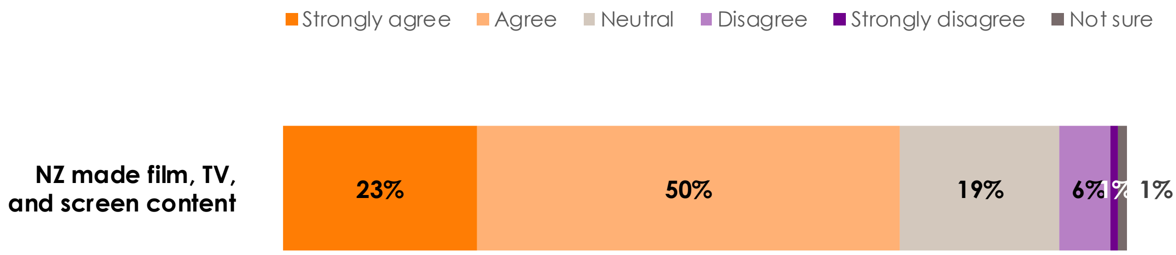
Screen content is recognised as an important part of New Zealand’s national identity, helping to build a sense of belonging and pride. This connection is especially strong among Māori, Pacific peoples, and younger audiences, and is reflected in qualitative insights, national survey data, and international findings.

Key evidence

- 73% of New Zealanders agree that New Zealand-made film and TV are a key part of national identity (see Figure 17).
- Nearly half report feeling a connection to the country through locally made content, with this effect especially strong for Māori, Pacific, and younger audiences (see Figure 18 and Figure 19).
- Statistical modelling using Bayesian Belief Network (BBN)* analysis confirms that a sense of belonging is the most powerful and direct driver of cultural impact for New Zealand-made content, amplifying connection, hope, and optimism (see Figure 20).

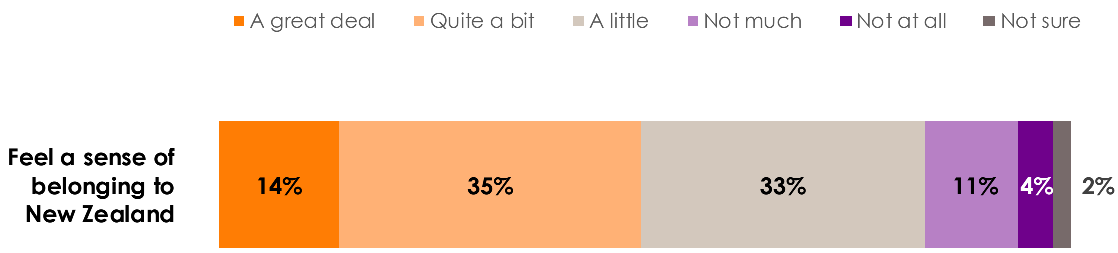
***Bayesian Belief Network (BBN)** analysis is a statistical modelling technique used in this study to identify the most influential factors contributing to cultural impact. It maps the relationships between beliefs, attitudes, and experiences to identify which elements of screen content most strongly influence cultural impact among New Zealanders.

Figure 17 New Zealand-made film and TV impact on national identity



Source: New Zealand Cultural Impact Survey

Figure 18 Impact on sense of belonging



Source: New Zealand Cultural Impact Survey

Figure 19 Sense of belonging – demographic profile

% who say NZ made content makes them feel a sense of belonging to New Zealand (a great deal/quite a bit)

Total	**49%**
Men	50%
Women	49%
15-24 years	53%
25-29 years	61% ▲
30-49 years	43%
50+ years	49%
NZ European	49%
Māori	60% ▲
Pacific	58% ▲
Asian	45%
Other*	24% ▼
Auckland/Wellington	51%
Rest of North Island	47%
South Island	48%

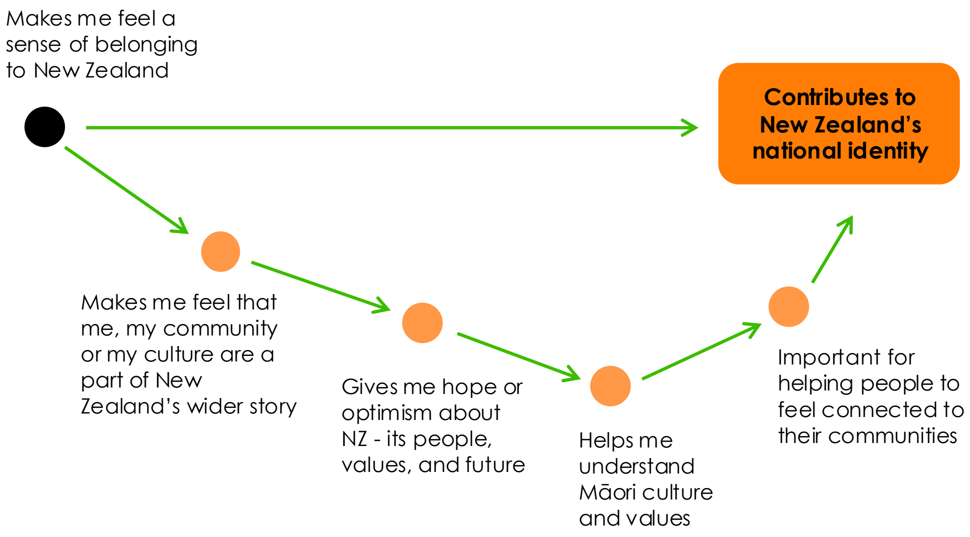
Speakers of te reo Māori	63% ▲
LGBQTI+	57%
Disabled	57%
Small household	45%
Medium household	54%
Large household	44%
Intergenerational household	62% ▲
Low income	47%
Medium income	47%
High income	51%

*This group includes anyone who selected 'Other European' or 'Other ethnicity'. That is, those who do not identify as Māori, Pacific, Asian, or NZ European.

Significantly higher than total ▲
Significantly lower than total ▼

Source: New Zealand Cultural Impact Survey

Figure 20 BBN – Impact drivers of New Zealand made film, TV and content



Base: All respondents who did not have a missing response to the independent and dependent measures (n=948).
Note: Threshold value, 0.80

Source: New Zealand Cultural Impact Survey.

Qualitative insights

This sense of belonging is deeply felt by audiences.

"Local content makes me feel proud to be New Zealander. The arts are important for civilisation in terms of promoting ideas, thoughts and history and it feels good to see local talent being developed here in New Zealand and this will allow us to better tell our own stories on bigger stages."

[Male, Pasifika, 26–39 years, Dunedin]

"[Local content] also shapes our national identity by showing what makes New Zealand celebrated. We can take pride in our landscape, values and cultural diversity through local content."

[Female, Asian, 26-39 years, Auckland]

International perspective

International survey respondents view New Zealand screen content as a meaningful way to understand the country's identity and values. Over 80% say it helps them gain insight into Māori culture, relationships, and community in New Zealand, while nearly 8 in 10 report that it gives them a sense of everyday life and lifestyle in New Zealand (see Figure 21).

Figure 21 Impact on international perceptions of New Zealand

Perceptions of NZ via NZ content

	% Agree (NET)	TOTAL	AUS	FRA	IND	UK	US
Respect for nature	Shows a deep respect for nature and the environment	85	78	87	93	85	87
Everyday life in NZ	Gives me a sense of the people of New Zealand - who they are, what they do, and what matters to them	83	87	80	85	76	82
	Helps me understand relationships in New Zealand, such as family dynamics, friendships, and community connections	80	83	81	90	76	81
	Gives me a sense of everyday life in New Zealand, including their culture and lifestyle	78	83	74	84	77	80
Culture and inclusivity	Helps me understand Indigenous/Māori culture, including traditions, values, and worldviews	81	80	81	80	84	76
	Gives insight into Pacific cultures and their place within New Zealand society	80	83	77	75	78	77
	Promotes values of inclusion and cultural understanding	78	87	67	79	74	79
	Reflects the experiences of diverse communities living in New Zealand, including new migrants and multicultural groups	77	76	72	94	71	75
Social issues	Highlights the importance of community and collective wellbeing in New Zealand	79	80	79	79	74	79
	Highlights social issues, including challenges faced by individuals or communities	74	78	72	83	68	72
	Reflects a strong sense of fairness and social justice	69	72	58	86	67	72
NZ's image	Has influenced how I think about New Zealand as a country	76	73	70	92	76	79

66% or more people agree (NET) | 34-65% agree (NET) | 33% or less agree (NET)

Source: International Survey

In summary

Together, these findings show that screen content plays an important role in shaping national identity and supporting a sense of belonging, both within New Zealand and internationally. The evidence highlights the value of prioritising content that fosters belonging, particularly for Māori, Pacific peoples, and younger audiences.

In addition to strengthening connections among New Zealanders, international survey results indicate that New Zealand screen content also encourages global audiences to engage with and better understand the country's identity and culture.

The next section explores how Māori culture is central, not peripheral, to New Zealand's screen identity.

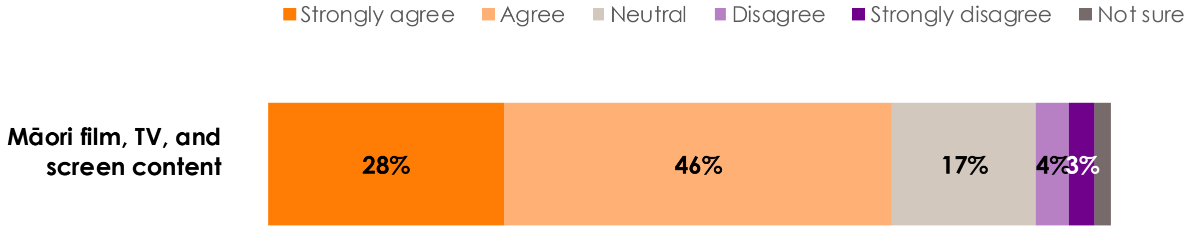
11.3 Māori culture: Central, not peripheral

Māori culture is not an add-on to New Zealand's screen identity; it plays a central and defining role. Both locally and internationally, Māori-led storytelling is recognised as a distinctive national strength, contributing to cultural understanding and supporting a sense of belonging among all New Zealanders.

Key evidence

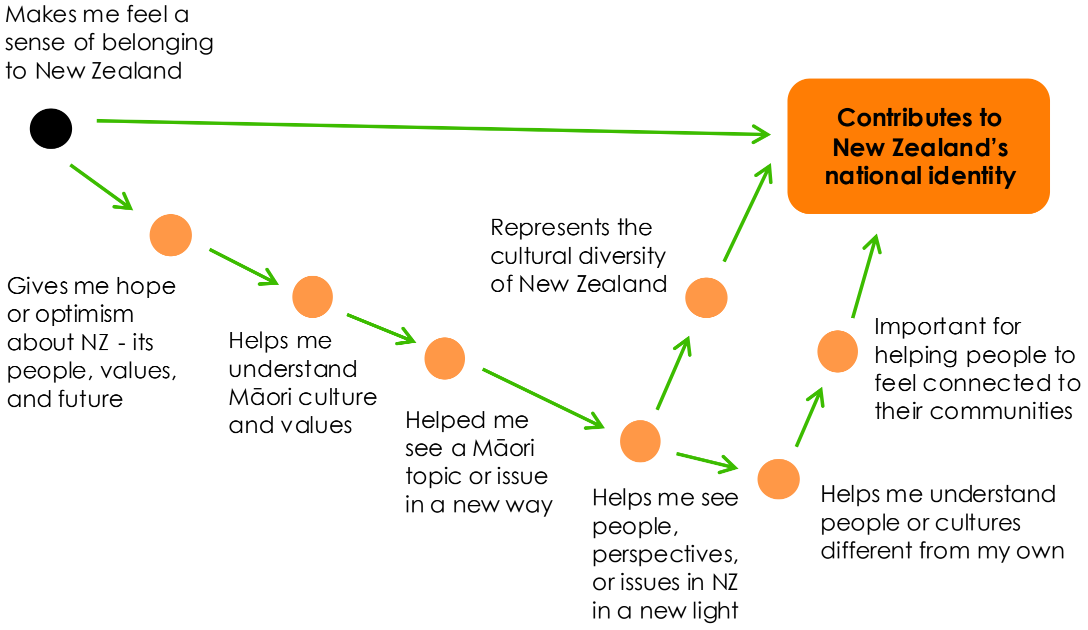
- 74% of viewers agree Māori film, TV, and screen content is an important part of New Zealand's sense of identity (see Figure 22).
- BBN analysis shows Māori-led storytelling not only fosters belonging but also deepens understanding for the wider population (see Figure 23).

Figure 22 Māori film, TV, and screen content impact on national identity



Source: New Zealand Cultural Impact Survey

Figure 23 BBN – Impact drivers: Māori film, TV and content



Base: All respondents who did not have a missing response to the independent and dependent measures (n=948).
Note: Threshold value, 0.80

Source: New Zealand Cultural Impact Survey

Qualitative insights

Qualitative research reveals that Māori content is:

- **An Educator**: an accessible resource for learning te reo Māori and understanding tikanga, benefiting both Māori and non-Māori.
- **A Normaliser**: The presence of Māori faces, language, and customs on screen helps to counteract stereotypes, build bridges between communities, and consolidate a bicultural future.
- **An Awareness Raiser**: Māori content shines a spotlight on New Zealand's history and contemporary challenges, sparking kōrero about intergenerational resilience and fostering empathy.
- **A Source of Pride and Connection**: Seeing Māori culture celebrated on screen evokes pride and strengthens identity for both Māori and non-Māori.
- **A Bridge Across Communities**: Māori content is seen as vital for building understanding and social cohesion, not just for Māori but for all New Zealanders:

> "I believe it is important because visibility – seeing Māori culture on TV, hearing Māori language – makes it more normalised. If it's not seen or heard, it becomes unnatural, and people believe it's foreign. Māori not only is an official language of NZ, but also the indigenous culture and it's important to me for this to be showcased and respected."
>
> [Male, Māori, 26-39 years, Auckland]

> "I think showing Māori perspectives on historical events works really well as most of us view these events from a non-Māori point of view and are taught these events from a European point of view. Having these showcased from a Māori POV is really important to ensure both sides of the story are being told. It benefits us by allowing us to think critically about our history as a country and to understand the importance of historical events and their impact on our society."
>
> [Male, Asian, 16-25 years, Dunedin]

International perspective

Māori led narratives are recognised internationally as a distinctive strength of New Zealand's screen content. Between 66% and 87% of global survey respondents agree that these stories help position New Zealand as a leader in Indigenous storytelling. Māori culture is widely seen as a defining feature of the country's screen identity and a key reason international audiences value local content.

Here is what the research tells us about how international audiences respond to Māori narratives:

- 87% of international viewers say Māori stories help them value Indigenous storytelling more broadly (see Figure 24).
- 83% say Māori stories give New Zealand a distinctive voice in global film and television and make New Zealand culture feel more distinctive and authentic.
- 84% believe Māori stories drive perceptions of how New Zealand is perceived internationally.

Figure 24 Global impact of Māori storytelling

Indigenous storytelling

	% Agree (NET)	TOTAL	AUS	FRA	IND	UK	US
Global impact and cultural leadership	Have helped me understand the value of Indigenous storytelling in today's world	87	87	86	92	91	84
	Give New Zealand a distinctive voice in global film and television	83	82	82	91	82	83
	Play an important role in how New Zealand is perceived internationally	84	84	75	88	92	81
	Have made me more interested in Indigenous perspectives from other countries	77	78	61	84	79	92
	Have made me think more about Indigenous experiences globally	76	74	77	82	74	77
	Help position New Zealand as a leader in Indigenous storytelling	75	87	70	77	80	66
NZ identity and cultural definition	Have deepened my understanding of New Zealand's cultural roots	84	79	85	87	86	86
	Make New Zealand's culture feel more distinctive and authentic	83	86	76	85	83	82
	Help define how I see New Zealand's identity	81	78	74	93	81	81
	Have increased my awareness of Māori culture	81	84	74	78	81	76
	Have shaped my impression of New Zealand as a diverse and inclusive society	81	84	68	86	85	78
	Have made me more interested in learning about the country's history and people	79	76	69	93	78	85

66% or more people agree (NET) 34-65% agree (NET) 33% or less agree (NET)

Here

Source: International Survey

In summary

These findings indicate that Māori culture plays a central role in New Zealand's screen identity. Māori-led storytelling contributes to national identity and belonging while also distinguishing New Zealand in the global screen landscape.

International survey results highlight Māori narratives as a distinctive cultural asset, positioning New Zealand as a recognised leader in Indigenous storytelling and cultural authenticity.

The next theme explores how diversity, inclusion, and representation are evolving across New Zealand's screen sector.

11.4 Diversity, inclusion, and representation: Progress and gaps

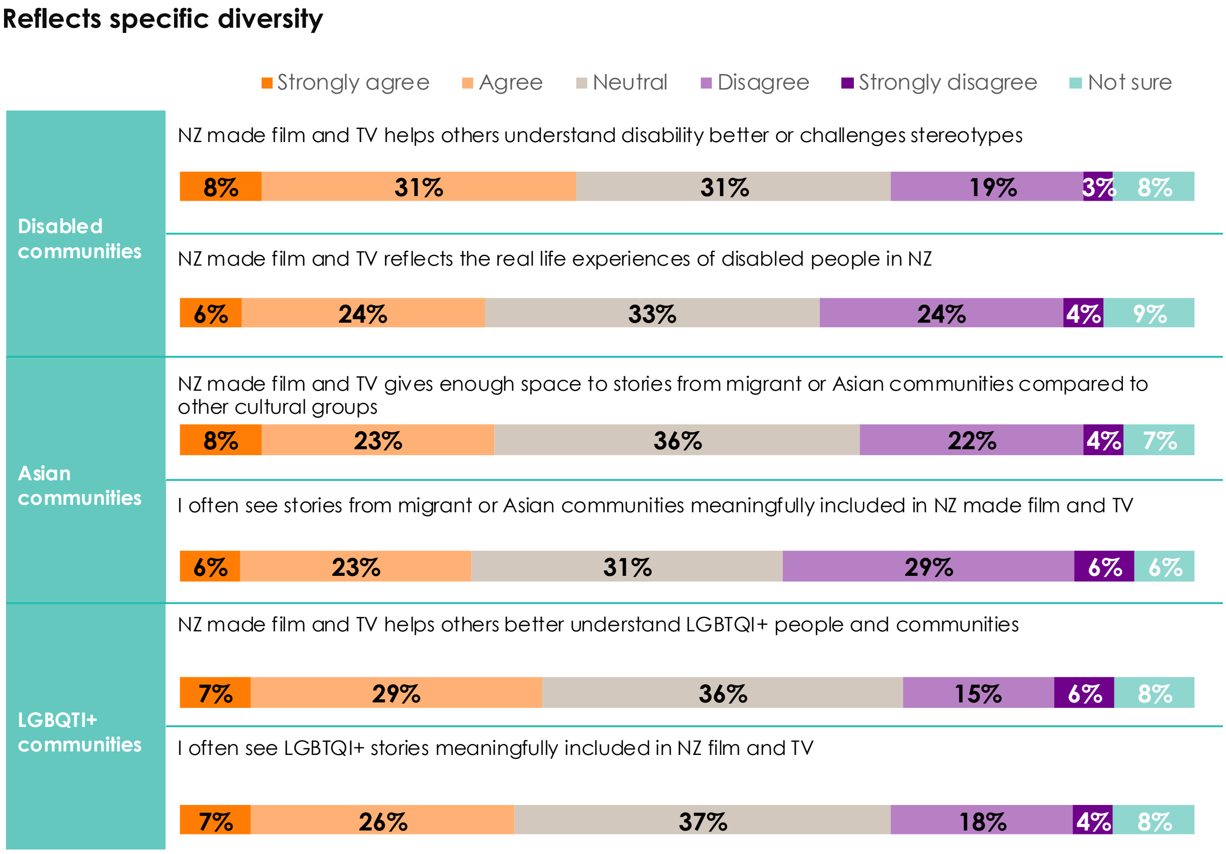
Diversity and authentic representation are central to New Zealand's evolving screen landscape. While there has been notable progress in reflecting Māori, Pacific, and broader 'Kiwi' experiences, significant gaps remain in the representation of Asian, disabled, and LGBTQI+ communities.

This theme draws on qualitative insights, national survey data, and international findings to highlight both areas of progress and ongoing challenges.

Key evidence

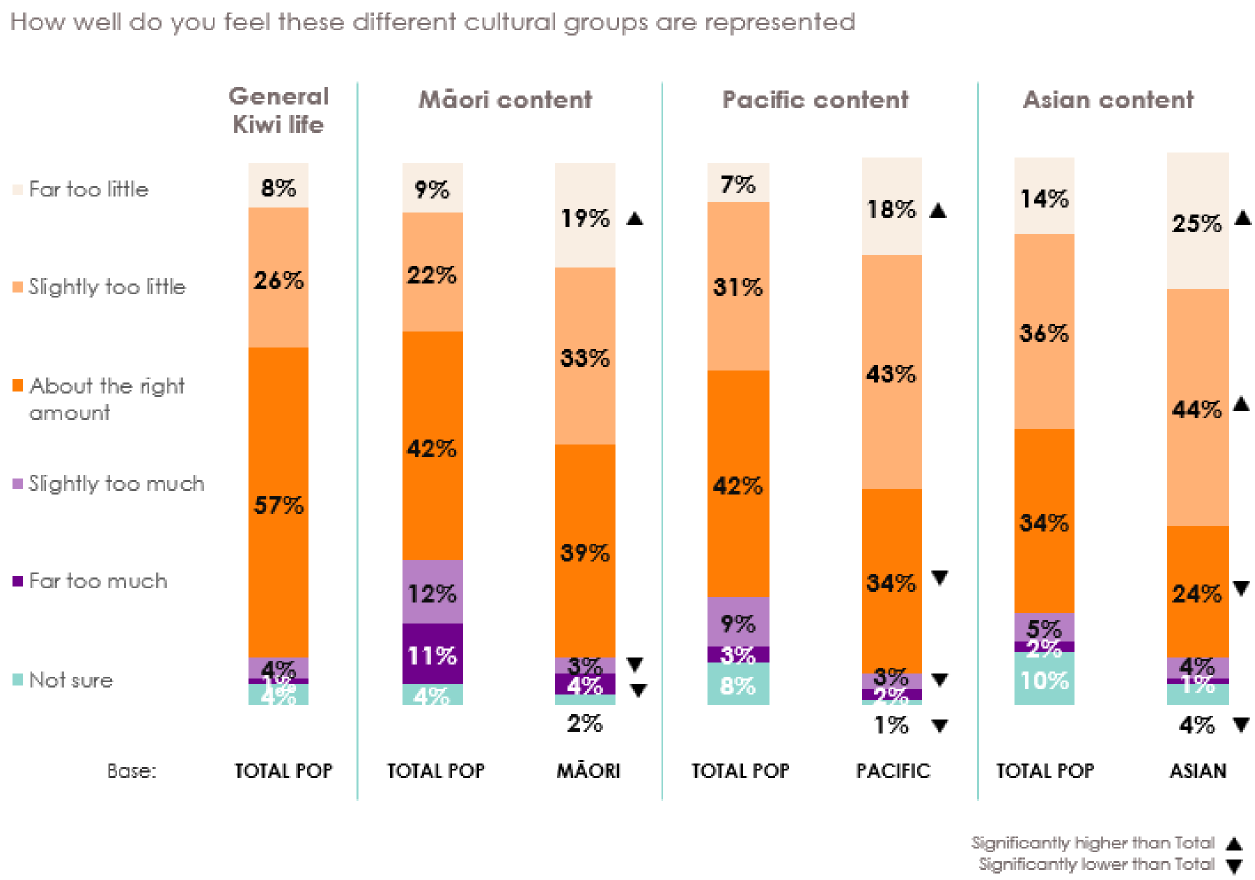
- 44% of New Zealanders mention diverse cultures as central to national identity (see Figure 13).
- Only 30% agree that New Zealand film and TV reflect the real-life experiences of disabled people, 29% for Asian communities, and 34% for LGBTQI+ communities (see Figure 25).
- Many believe Māori, Pacific, and Asian content is underrepresented compared to everyday 'Kiwi' life, with Māori, Pacific, and Asian respondents especially likely to feel this way (see Figure 26).
- BBN analysis identifies diversity and authentic representation as strong, direct drivers of cultural impact, supporting belonging and broadening understanding.

Figure 25 Representation of diverse communities



Source: New Zealand Cultural Impact Survey

Figure 26 Perceived balance of representation

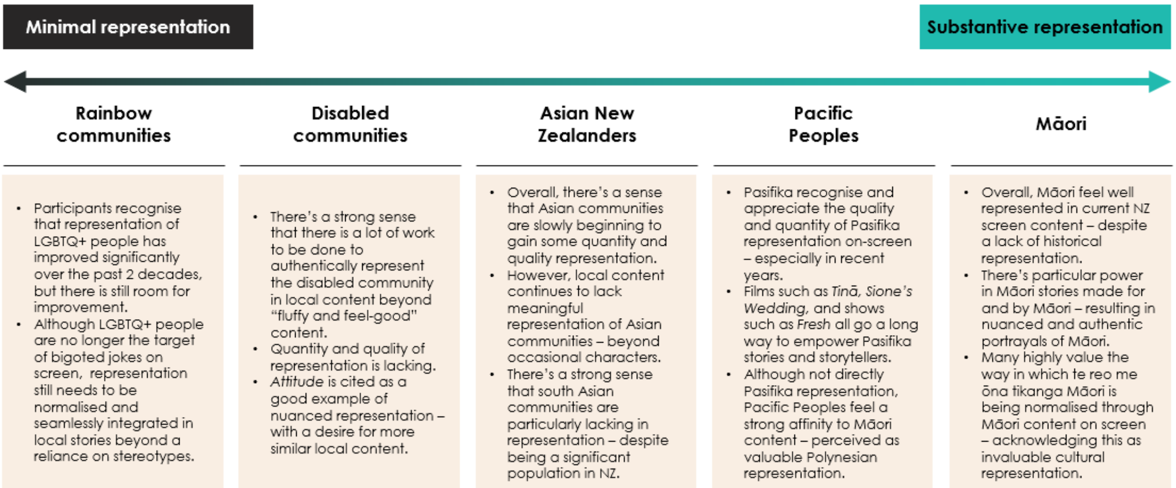


Source: New Zealand Cultural Impact Survey

Qualitative insights

Qualitative research highlights the lived experience behind the numbers, showing both the progress and the ongoing desire for more balanced, authentic representation across all communities.

Figure 27 Spectrum of representation



Source: NZ Cultural Impact - qualitative insights.

International perspective

International survey respondents recognise New Zealand screen content for its inclusive approach and cultural insight, with over 78% agreeing that it promotes these values (See Figure 21).

In summary

Together, these findings highlight the importance of continuing to broaden representation within New Zealand screen content. Authentic storytelling from all communities contributes to a stronger sense of belonging and cultural understanding, while also enhancing New Zealand's identity in a global context.

International survey results show that New Zealand's reputation for inclusivity is recognised globally.

The next theme explores how screen content can drive social cohesion and wellbeing across the nation.

11.5 Screen content as a driver of social cohesion and wellbeing

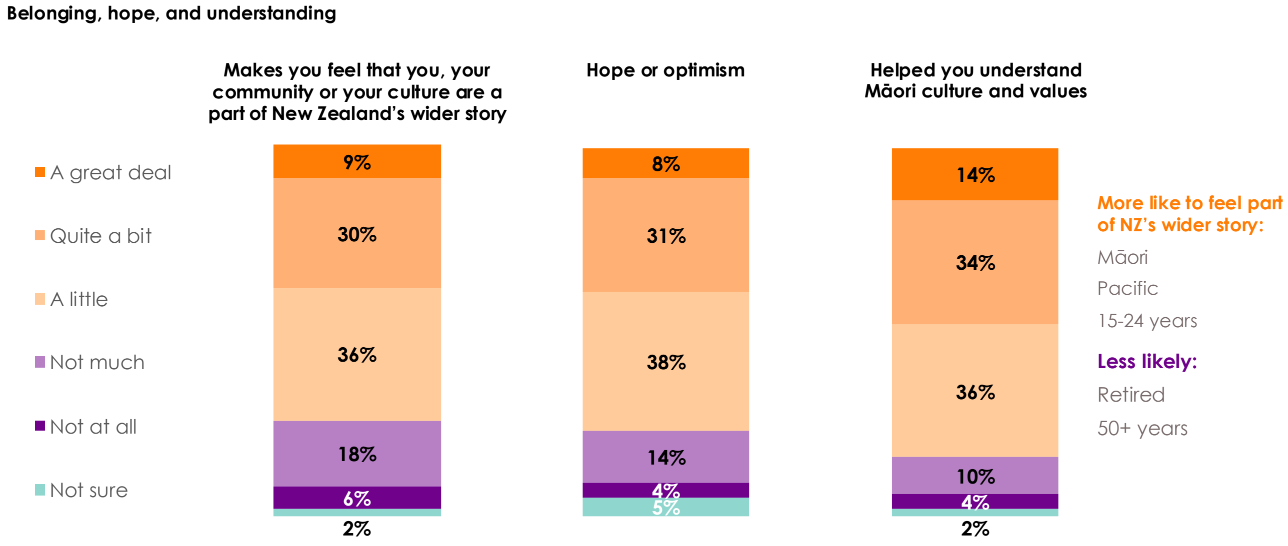
Screen content in New Zealand contributes to more than entertainment – it also connects people, encourages optimism, and supports social cohesion.

Drawing on qualitative insights, national survey data, and international findings, this theme explores how locally made content helps foster a sense of community and collective wellbeing.

Key evidence:

- Around three in four New Zealanders say that locally made content helps them feel part of the national story, gives them hope for the future, and deepens their understanding of Māori culture and values (see Figure 28).
- These effects are particularly evident among younger people, Māori, and Pacific communities, and are less pronounced among older New Zealanders.
- Bayesian Belief Network (BBN) analysis shows that when content fosters a sense of belonging, it also contributes to increased feelings of hope and optimism (see Figure 20).

Figure 28 Belonging, hope, and understanding



Source: New Zealand Cultural Impact Survey

Qualitative insights

Participants describe local content as a way to "bring community together and celebrate the good that is happening," empowering people and creating a more positive country:

> "[Local content] makes me feel like I'm connected to my community and that I have an awareness of what's happening around the country. It makes me feel represented in some ways and makes me grateful for living in New Zealand… It's an easy way for the community to be connected. It's a way of creating healthy opinions of people and collectives that are striving for the same thing."
>
> [Female, Māori, 16–25 years, Christchurch]

Another participant noted:

> "[Local content] can highlight the good that there is within all communities. There is so much emphasis on the bad which I think is not helpful and just creating lonely, anxious and depressed individuals. We need to bring community together and celebrate the good that is happening through the media for all to see. This will empower people and create a more positive country for us all."
>
> [Male, Pākehā, 26–39 years, Whangārei]

International perspective

The contribution of New Zealand screen content to social cohesion and wellbeing is recognised globally. More than 80% of international survey respondents agree that New Zealand content highlights the importance of community and collective wellbeing, and helps them understand relationships and everyday life in New Zealand (see Figure 21).

In summary

These findings highlight the role of screen content in supporting social cohesion and wellbeing. By reflecting shared experiences and diverse perspectives, locally made content helps New Zealanders feel connected to a broader national story and fosters optimism about the future.

International survey results indicate that these impacts are recognised and valued globally, reinforcing the broader relevance of community and connection in screen storytelling.

The next theme explores how storytelling on screen can challenge, inspire, and educate audiences across Aotearoa and beyond.

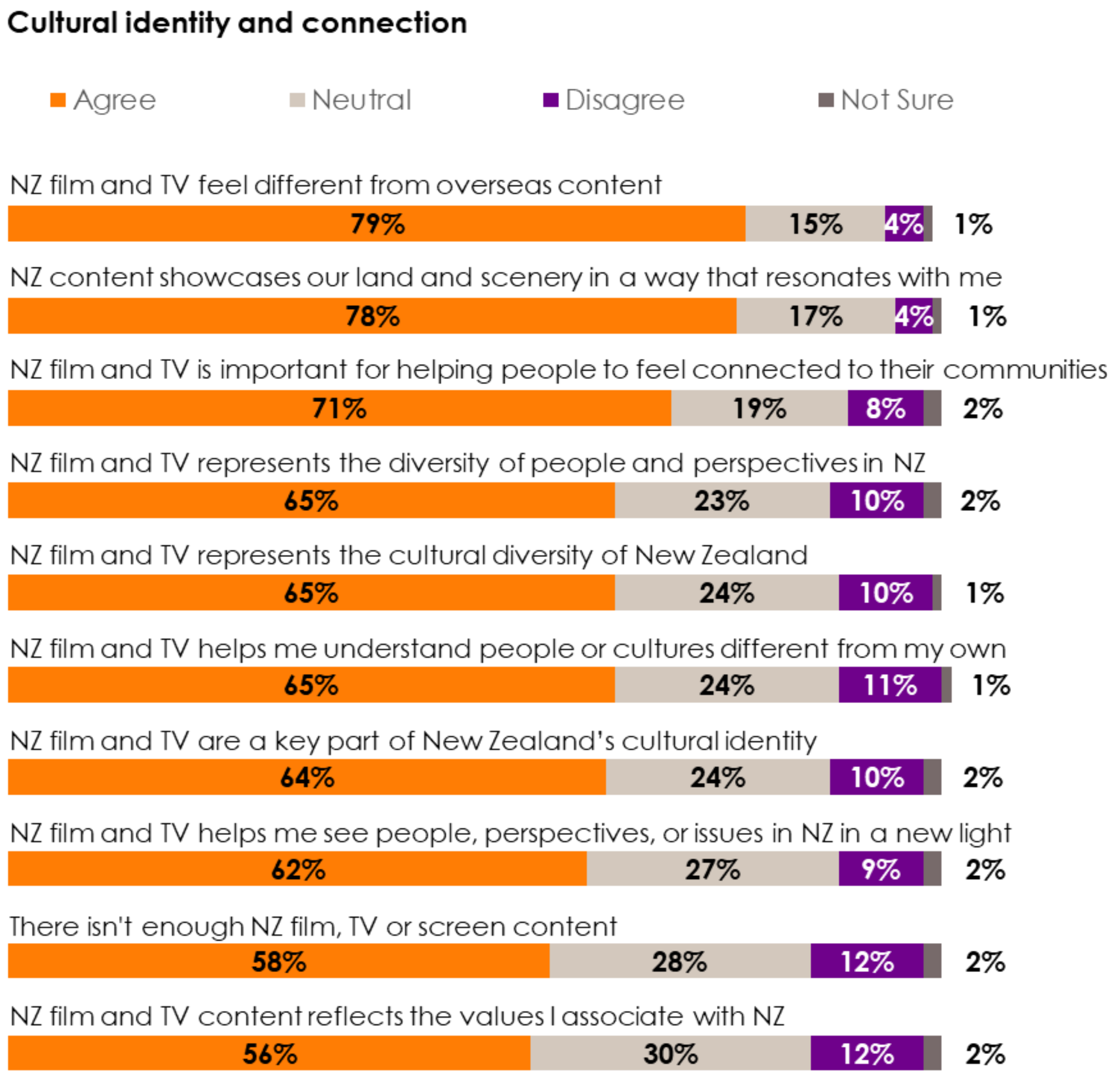
11.6 The power of storytelling to challenge, inspire, and educate

Screen content in New Zealand plays a role beyond entertainment; it can prompt reflection, introduce new perspectives, and support learning. Through storytelling, locally made content challenges assumptions, broadens understanding, and provides insight into New Zealand's history, values, and diversity.

Key evidence:

- 65% of New Zealanders agree that local content represents a diversity of people and perspectives and helps them understand cultures or communities different from their own (see Figure 29).
- 62% agree that New Zealand content helps them view people, perspectives, or issues within the country in a new light (see Figure 29).

Figure 29 Impact on identity and connection



Source: New Zealand Cultural Impact Survey

Qualitative insights

Participants describe the importance of seeing themselves and their communities reflected on screen:

"[Local content] is important for our identities and for a sense of belonging to see ourselves reflected back to us. The more diverse the better. I want to see people like myself, or my neighbours and storekeepers with all our different cultures and hear languages I know and ones I do not know on the screen and see how we all navigate our way in this same country."

[Female, Pasifika / Pākehā, 40+ years, Auckland]

Local content also acts as a bridge, helping New Zealanders understand each other:

> "[Consuming Māori content] makes me feel like more of a kiwi – especially when I recognise words / phrases in Te Reo and Māori stories."
>
> [Male, Asian, 16-25 years, Dunedin]

International perspective

New Zealand storytelling encourages curiosity and reflection among global audiences. Nearly 8 in 10 international survey respondents say that New Zealand content increased their interest in learning more about the country, while 68% report that it prompted deeper reflection on topics such as identity, environment, or community (see Figure 30).

Figure 30 Cultural and social impact on international audiences

Cultural and social impact

	% Agree (NET)	TOTAL	AUS	FRA	IND	UK	US
Interest in NZ	Made me more curious to learn about New Zealand, such as its people, places, or way of life	78	76	71	82	77	81
	Has made me more interested in New Zealand's culture or history	76	76	69	91	76	81
	Made me consider visiting New Zealand because of what I've seen in its films or TV shows	72	72	63	83	68	78
	Made me want to look for more information about the country online or in books	67	59	63	85	63	82
Cultural perspectives	Offers authentic representation of its people and communities	76	74	68	92	78	81
	Presents a unique cultural perspective I don't often see elsewhere	75	77	65	88	76	84
Reflection and critical thinking	Has helped me understand experiences different from my own	74	73	63	90	74	84
	Has made me reflect more deeply on topics like identity, environment, or community	68	63	61	89	66	75
	Has encouraged me to think critically about cultural or social challenges in my own country	64	63	57	82	57	69
Engagement and action	Has sparked conversations with others about cultural or social issues	60	52	55	78	53	64
	Led me to follow or engage with New Zealand creators or actors on social media	51	39	41	78	52	47

66% or more people agree (NET) 34-65% agree (NET) 33% or less agree (NET)

Source: International Survey

In summary

These findings show that local screen storytelling can help people learn, think differently, and understand others. By challenging assumptions and sharing a range of experiences, locally made content encourages New Zealanders to consider new perspectives and imagine a more inclusive future.

International survey results suggest that New Zealand storytelling sparks curiosity and helps global audiences better understand the country's culture and identity.

The next theme explores how this global reach enhances New Zealand's soft power and appeal as a destination.

11.7 Global reach, soft power, and tourism

New Zealand's screen content plays a meaningful role in shaping how the country is perceived internationally. It encourages global audiences to engage more deeply with New Zealand by highlighting distinctive cultural and environmental features.

International survey respondents most commonly associate New Zealand screen content with its landscapes and Māori culture – elements that help differentiate the country from other destinations and reinforce its unique identity.

Evidence:

- Landscapes and Māori culture are the top international associations with New Zealand screen content (see Figure 29).
- 72% of international viewers say watching New Zealand content made them consider visiting the country (see Figure 21).
- Māori-led narratives are a global strength, with 66% to 87% of viewers across markets agreeing they help position New Zealand as a leader in Indigenous storytelling (see Figure 28).

While the economic report identifies landscapes as a key driver of tourism, international survey data suggests that locally produced screen content also shapes how these landscapes are perceived and valued. By featuring New Zealand's natural environment, screen content helps reinforce its appeal as a destination. Even though the entertainment value itself isn't directly measured, the connection between screen storytelling, cultural assets, and tourism interest is clear.

Qualitative insights

Participants in the qualitative research highlighted the pride and recognition that come from seeing New Zealand's stories on the world stage:

> "As a nation we have gained global recognition primarily through our representation in film and television. I also believe that local content is an awesome platform for showcasing the very best and brightest of our national identity, our various cultures and celebrating them on a well-publicised platform."
>
> [Non-binary, Pākehā, 26–39 years, Christchurch]

Another participant noted:

> I think the key here is diversity. I think we show to the world that we do for the most part appreciate and respect people of all ethnicities, cultures, religions and genders. I think we show this on our screens a lot better than most other places.
>
> [Male, Pākehā, 26-39 years, Whangārei]

In summary

Our findings show that New Zealand’s screen content helps build international interest and shapes how the country is seen globally. By featuring landscapes, Māori culture, and unique local stories, it supports New Zealand’s reputation as a culturally diverse and inclusive nation.

Global survey results suggest that audiences associate New Zealand content with authenticity, diversity, and Indigenous leadership – qualities that help set the country apart and position screen content as part of its international identity and future growth.

11.8 Summary and recommendations

In summary

Findings from all phases of the research show that New Zealand and Māori screen content play an important role in shaping national identity, supporting belonging and inclusion, and contributing to social connection and international engagement.

By showcasing New Zealand's landscapes, values, and diverse communities – and by elevating Māori storytelling – locally made content influences how New Zealanders see themselves and how the country is understood globally.

Continued support for authentic, inclusive, and locally grounded storytelling will help ensure the screen sector continues to deliver cultural, social, and international value.

Recommendations

Prioritise content that builds belonging and national identity
Support the creation of screen content that reflects and strengthens a shared sense of identity and connection. Focus on Māori, Pacific peoples, and younger audiences, where the impact is especially strong.

Continue and deepen investment in Māori-led storytelling
Recognise Māori culture as a central part of New Zealand's screen identity and international reputation. Strengthen support for Māori creators and stories to build belonging within Aotearoa and reinforce New Zealand's position as a leader in Indigenous storytelling globally.

Broaden and strengthen authentic representation
Address ongoing gaps in the representation of Asian, disabled, and LGBTQI+ communities. Support content that reflects the full diversity of New Zealand society, so that all communities can see themselves represented on screen.

Leverage screen content for social cohesion and wellbeing
Support storytelling projects that help bring people together, encourage conversation, and promote a sense of optimism. Especially for communities that have been underrepresented or marginalised.

Maximise global reach and soft power
Promote New Zealand's unique stories, landscapes, and Māori culture to international audiences. Use screen content as a tool to support nation branding, tourism, and cultural diplomacy – building on strong global associations with authenticity, diversity, and Indigenous leadership.

Ensure accessibility and discoverability
Make it easier for local and international audiences to find and engage with New Zealand screen content. Improve visibility through digital platforms, partnerships, and targeted outreach in key markets.

Implementing these recommendations can help the screen sector continue to contribute to New Zealand's cultural, social, and international presence by supporting national identity, inclusion, and global engagement.

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Appendix A Data definitions

The **geographic unit** represents a business location engaged in one, or predominantly one, kind of economic activity at a single physical site or base (e.g. a factory, a farm, a shop, a school, an office). Geographic units are unique to enterprises, and an enterprise unit can have one or many geographic units (business locations). Typically, an enterprise unit only has a single geographic unit, unless the enterprise has paid employees who permanently work at more than one location. In SBR, geographic units can be transferred between enterprises. For example, if enterprise A sells a café to enterprise B as a going concern, the related geographic unit on SBR is moved from enterprise A to enterprise B.

The **enterprise unit** represents the legal business entity (e.g. a limited company, a partnership, a trust, an incorporated society). Where a group of limited companies is linked by ownership of shares, we record each individual limited company in the statistics as a separate enterprise.

Table 5 NZSIOC to ANZSIC concordance

NZSIOC	ANZSIC
Broadcasting and internet publishing	Cable and Other Subscription Broadcasting
	Free-to-Air Television Broadcasting
	Internet Publishing and Broadcasting
	Radio Broadcasting
Motion picture and sound recording activities	Motion Picture and Video Distribution
	Motion Picture and Video Production
	Motion Picture Exhibition
	Music and Other Sound Recording Activities
	Music Publishing
	Post-production Services and Other Motion Picture and Video Activities
Publishing (except internet and music publishing)	Book Publishing
	Directory and Mailing List Publishing
	Magazine and Other Periodical Publishing
	Newspaper Publishing
	Other Publishing (except Software, Music and Internet)
	Software Publishing

Source: Stats NZ

Appendix B Economic data

To assess the screen production, several different data sources were used, which covered the following areas:

- Employment by region
- GDP contribution of screen production
- Export contribution of the screen production
- Income data from the screen production.

B.1 How is the screen categorised in the ANZSIC system?

There are several ways to define business operations in New Zealand. The first of which is the Australian and New Zealand Standard Industrial Classification (ANZSIC) system. This system comprises divisions, subdivisions, groups, and classes, each adding more granular detail about a particular sector. An example in the meat industry is listed below in Table 6 (Australian Bureau of Statistics 2013).

Table 6 ANZSIC numbering system example

An example using the meat industry.

Level	Example
Division	C Manufacturing
Subdivision	11 Food Product Manufacturing
Group	111 Meat and Meat Product Manufacturing
Class	1111 Meat Processing

Source: Australian Bureau of Statistics

This structure is important as it allows us to examine sectors within the screen industry. Our focus is on the classes within the group 'motion picture and video activities'. This structure is based on the Ministry of Business, Innovation & Employment's report *Economic Trends in the New Zealand Screen Sector* (Ministry of Business, Innovation & Employment 2024). We also include Free-to-Air Television Broadcasting, cable and other subscription broadcasting, and other information services.

Table 7 ANZSIC screen sector

The screen sector business codes.

Level	Example
Division	J Information Media and Telecommunications
Subdivision	55 Motion Picture and Sound Recording Activities
	56 Broadcasting (except Internet)
	60 Library and Other Information Services
Group	551 Motion Picture and Video Activities
	562 Television Broadcasting
	602 Other Information Services
Class	5511 Motion Picture and Video Production
	5512 Motion Picture and Video Distribution
	5513 Motion Picture Exhibition
	5514 Post-production Services and Other Motion Picture and Video Activities
	5621 Free-to-Air Television Broadcasting
	5622 Cable and Other Subscription Broadcasting
	5602 Other Information Services

Source: Australian Bureau of Statistics

A different categorisation system is also utilised to reflect the unique composition of New Zealand's industries. The New Zealand Standard Industry Output Categories (NZSIOC) is an aggregation of ANZSIC codes to allow the publication of data and to reflect the importance of specific sectors, such as agriculture and its upstream and downstream industries. The annual National Accounts and the Annual Enterprise Survey are published at this level and are used to determine GDP contributions and assessment of financial position (Stats NZ, n.d.-a).