



Economy of the Arts in Wellington

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Final Report

MARTIN^IJENKINS

Preface

This report has been prepared for Wellington City Council by Allana Coulon, Stella McGough and Bennick Harding from MartinJenkins (Martin, Jenkins & Associates Limited). It has been peer reviewed by Nick Davis.

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Executive Summary

The arts and culture sector underpins Wellington's unique quality of life and the city's reputation as New Zealand's cultural capital. While economic impact studies are regularly undertaken for major events in Wellington city, to date there has been no assessment of the wider economic contribution made by the arts and cultural sector to Wellington. MartinJenkins was commissioned by the Wellington City Council to investigate the economic contribution of the arts and culture sector to the city and region.

This research considers the economic value and contribution from a broad perspective, recognising that the arts and culture sector contributes in a number of ways including through employment, tourism, and the 'quality of life' and attractiveness of the city for residents and businesses. The research also aims to develop a better understanding of the key relationships, networks, and partnerships which exist within the arts and culture community; and to identify and describe the key elements that are critical to the sector's ongoing success.

Economic impact studies of the arts and culture sector or creative industries use varying definitions to describe the sector. In consultation with Wellington City Council, we defined the arts and culture sector in a way that is broadly comparable to other New Zealand and international studies. Six key sub-sectors were derived using the Australia and New Zealand Standard Industry Classifications (ANZSIC) system:

- Performing Arts (including Music)
- Museum / Library / Archives
- Publishing
- Design
- Screen Production and Radio
- Visual Arts, Crafts, and Photography

Key findings

The economic contribution of Wellington's arts and culture sector

Wellington city arts and culture sector makes an important contribution to both the region and the country's arts and culture scene. Across the wider region, Wellington city accounts for 80% of all employment in the arts and culture sector, and the city hosts the majority of the region's arts events. The wider region relies heavily on Wellington city for its arts offerings, infrastructure, and events. After Auckland city, Wellington city also has the second highest share of arts and culture sector employees in New Zealand, accounting for 14% of employment in the arts and culture sector throughout New Zealand.

The arts and culture sector is a significant employer in Wellington city, employing between 4,304 and 5381 people in 2009 and accounting for 3.1% of total employment. This is similar in size to Wellington city's transport and storage industry. Within the arts and culture sector, two-thirds of the employees in the Wellington region are concentrated in two sub-sectors: design and museum / library / archives. Relative to other parts of New Zealand, Wellington also has a higher than average share of employees in the Performing Arts sub-sector.

Employment figures based on industry classifications are likely to underestimate the total number of people employed in arts and cultural occupations. This is because they only capture people employed in firms belonging to arts and culture industry groupings. The estimates do not count individuals who are self-employed contractors, or individuals working in 'creative' occupations within non-arts and culture sectors. Alternative estimates, using occupational data, put the number of people employed in the arts sector in 2006 at around 7,700, or 7.5% of total employment in Wellington City.

Wellington city's arts and culture sector has grown strongly over the past eight years but at a slower pace than growth of the sector in the Wellington region, the Auckland and Canterbury regions and employment growth in the wider labour market. Between 2001 and 2009, arts and culture sector employment in Wellington city increased by 11% and the gross output and value added for the sector had an average growth rate of 7.2% per annum.

In 2009, direct value added to the Wellington city economy was estimated at between \$284 million and \$292 million. When upstream and down-stream flow-on effects are accounted for, the total estimated value added to Wellington city's economy in 2009 was between \$495 and \$583 million.

Growth has been driven by strong employment and productivity increases in the sub-sectors of design and screen production and radio. In terms of employment, there was particularly strong growth in the number of employees in the film post-production services and architectural services with the design sub-sector. Screen production and radio also had high growth in the number independent contractors. In other sub-sectors, including performing arts, visual arts, crafts and photography, the growth has been weaker.

Audience participation in the arts and culture sector

As well as the direct economic benefits that flow from arts and culture business and employment, the sector adds to the city's unique fabric, making Wellington a lively, exciting and interesting place to live, work, and visit. The reputation of Wellington as a place with a creative and a vibrant arts and culture sector is dependent on an appetite and audience for the arts. Wellington residents play an important role in sustaining the arts and culture sector and are known to be above average consumers of arts and cultural goods and services nationally.

Audience spending is also an important component of gross output and value added. Audience spending occurs not only at arts and cultural events but also in surrounding local businesses, such as restaurants, shops, travel/transport, and accommodation. Spending by visitors to a region is particularly important given that this represents an injection of money from outside the local economy.

Wellington attracts a large number of tourists, with cultural experiences being a decision-making factor for at least one-third of international visitors to Wellington. Major arts events play a key role in attracting out-of-town visitors to the region. Economic impact studies carried out for major arts events hosted by Wellington city in 2009/10, including the International Arts Festival, the World of Wearable (WoW) Arts, and the Monet Impressionists exhibition, were estimated to bring in significant new spending to the local economy:

- World of Wearable Arts (2009) - total new spending in Wellington city by attendees and corporates estimated at \$15.1 million
- Monet and the Impressionists Exhibition (2009) - total new spending in Wellington city estimated at \$34.5 million
- International Arts Festival (2010) - generated almost \$23.1 million in new spending in the Wellington region

Wellington's arts and culture 'package' – the unique features of the sector

Wellington offers a unique arts and culture "package". Wellington's arts and culture sector has a unique combination of large and small arts and culture organisations, a culture of collaboration, a large number of existing arts and culture "spaces"; all located within a pleasant and attractive city. Particular features identified by participants in the research included:

- the natural landscape, built environment and ease of access to the city
- Wellington's capital city status and proximity to central government – attracting visitors to the city and making Wellington home of many long established and stable institutions and national arts organisations
- physical infrastructure, particularly in terms of the range of venues available and their proximity to other key features of Wellington city – e.g. the waterfront, Civic Square, cafes and restaurants
- pathways for development – through tertiary institutions and then through access to venues and opportunities for emerging artists
- strong audience for arts and culture in Wellington
- iconic events such as New Zealand International Arts Festival, World of Wearable Arts (WoW), the New Zealand Fringe Festival and the Cuba Street Carnival that showcase New Zealand and Wellington city, and generate significant economic benefits for the city

- central and local government support and investment in the arts and culture sector over a long period.

Vital partnerships and institutions within Wellington's arts and culture sector

The Wellington arts and culture sector was described by participants as an “ecosystem” with critical linkages and connections through the system where all of the elements are important to the sustainability of other parts of the sector. Specific interdependencies identified were:

- established arts and culture organisations work together - strong linkages between music and dance organisations which includes co-production, sharing of performers, and coordination of performance programmes to optimise audience share.
- tertiary education institutions offering education arts and culture programmes and key arts and culture organisations work together to development of emerging artists and provide employment which retains and attracts talented artists. For example, many musicians also teach music to emerging practitioners, and Toi Whakaari is seen to provide a lot of the “seed” for Wellington theatre particularly through BATS theatre.
- performing arts venues have come to be associated with particular art forms or audience demographics. Coordination occurs between St James / Opera House and Downstage to support the developmental pathway of arts and cultural groups.
- funding partners - Partnerships with Creative New Zealand were seen as particularly important.
- festivals such as the New Zealand International Arts Festival and the Fringe Festival require a significant number of partnerships with other organisations and practitioners to make the events happen.
- informal and formal networks within the arts and culture sector were seen as particularly strong in Wellington, with organisations such as Arts Wellington and Toi Pōneke bringing people together to socialise ideas, build relationships, and realise opportunities for co-productions.

Challenges facing Wellington city's arts and culture sector

There are a number of key challenges facing the Wellington arts and culture sector. In particular, there is a strong sense that the sector and some individual organisations are currently vulnerable in terms of future funding and sustainability. Generally depressed economic conditions and the decline in corporate sponsorship has had a negative impact on Wellington's arts and culture sector. The economic climate is also seen to be having a negative impact on volunteer numbers and willingness to help. There is a perception that the future of arts infrastructure and support organisations is fragile with some practitioners and organisations involved in performing arts (e.g. theatre, music) and visual arts being concerned about their long-term viability.

Key challenges identified by research participants were:

- urgent need for greater sectoral leadership and vision and the need for this to inform and align with the general vision of the city
- identifying new sources of funding support - art and cultural activities in Wellington are funded from a finite funding pool which is more easily accessed by established, “traditional” organisations than emerging or “risky” art forms. In addition to this, funding provided to smaller organisations tends to be project-based making forward planning difficult
- northward drift of dollars and arts practitioners - there is significant concern about the northward drift of corporate sponsorship dollars and artists. Auckland is seen as an attractive city for young and emerging artists who feel there is a “buzz” in Auckland. There were also seen to be greater job opportunities and the Auckland Council is seen to be more proactive in establishing arts and culture infrastructure
- lack of affordable rehearsal and production spaces in Wellington city
- need for greater coordination of programming and other activities would maximise benefit to individuals and organisations in the sector
- over-emphasis on discrete arts and culture events with insufficient attention given to infrastructure for the sector. This includes not only the ‘bricks and mortar’ but the underpinning arts institutions as well
- need for more coordinated marketing and promotion of the arts and culture sector and, in particular, better linkages with promotion of the city. There was a consensus view that capability for all of these leadership activities is currently low within the sector
- insufficient media coverage and critical review of Wellington city’s arts and culture sector. Research participants saw critical review of art forms as vital to promoting awareness of what the sector has to offer and sustaining audience interest and attendance.

Potential and specific opportunities

Notwithstanding the various challenges identified in this report to the health and sustainability of the local arts and culture sector, there is a relatively strong platform built up over a long period of time on which to build. While research participants were clearly concerned about a number of aspects of the current environment, most could see few reasons why Wellington cannot grow and develop its arts and culture sector significantly. While it is difficult to put a figure on the potential economic contribution of the sector, there is a strong sense among research participants that a vibrant arts and culture sector has the potential to make a significant economic contribution through a range of mechanisms, including through tourism, direct employment, and the liveability and attractiveness of the city as a place to live.

Looking forward, we recommend that the Council consider ways in which to build on these key attributes. Making a positive, visible commitment to build on key strengths will send a clear signal to the arts and cultural sectors that the Council values the sector and considers it to be an integral part of the city's ongoing success and identity.

First and foremost, there is a strong desire from the sector for a clearer sense of the vision and strategy for the region's arts and culture sector, and leadership at a political level to give the arts and cultural sector priority in city and regional decision-making. On the part of the Council, this means strengthening its role in leadership, facilitation and advocacy for the sector (building on what is currently provided by the City Arts Team).

There is a belief that to maximise the economic potential of the sector, and to avoid a potential long-term decline, there is a need for the Council to invest in the following critical elements that underpin its success:

- the city's brand and the relationship the city has with developing the arts and culture sector
- continued attraction and promotion of events that provide a platform and opportunities for local and international artists to showcase their work and which mark Wellington as "city of the arts"
- the built environment, including further strengthening of public spaces in a way that further fosters the development of the arts, with a particular emphasis on key inner city locations such as the Courtenay Place precinct and the waterfront
- funding support (this is particularly important in the current environment where the redistribution of funding is anticipated e.g. the RFO review).

There is also a strong sense that Wellington should not take its current reputation for granted and furthermore, a belief that sustaining a vibrant and economically successful arts and culture sector will require concerted and coordinated effort across a wide range of participants in the sector.

1. Introduction

Purpose

The arts and culture sector makes an important contribution to Wellington's unique quality of life and its reputation as New Zealand's cultural capital. While economic impact studies are regularly undertaken for major events in Wellington city, to date there has been no assessment of the wider economic contribution made by the arts and cultural sector (the sector) to the Wellington city and region.

MartinJenkins was commissioned by the Wellington City Council to investigate the economic contribution of the arts and culture sector to the Wellington city and region. This research considers the economic value and contribution from a broad perspective, recognising that the arts and culture sector contributes in a number of ways including through employment, tourism, quality of life, attractiveness of the city for residents and businesses, and so on. The research also aims to develop a better understanding of the key relationships, networks, and partnerships which exist within the arts and culture community; and to identify and describe the key elements that are critical to the sector's ongoing success.

The findings of the research will be used to inform future decision-making on how and where the Council should provide support and investment. The way that the Council chooses to support the arts and culture sector on an ongoing basis needs to be informed by good quality information about the economic and other benefits of the sector.

Key research questions

The aims of the research are to articulate the economic value of Wellington's arts and culture sector, and develop a better understanding of the inter-dependencies and dynamics of the sector, in order to guide Wellington City Council's future planning and decision-making. Set out below are the key questions underpinning this research:

- What economic contribution do Wellington's arts and culture entities make to Wellington city and the Wellington region now and what is the potential economic contribution in the future?
- How many people are employed in the Wellington's arts and culture sector and how has this changed over time? Are there key arts employers which a large number of other arts and culture entities and individuals rely on?
- What relationships and inter-dependencies exist between Wellington's arts and culture entities?
- What are the key elements of the Wellington arts and culture environment that play the greatest role in maintaining and supporting the development of the region's arts and culture entities?

- What elements of the Wellington arts and culture environment are critical to sustain the sector's infrastructure and pathways for development, and which ensure Wellington is an attractive city/region for residents, tourists, and business?
- What are the current key role(s) of local and central government in supporting the development of the arts and culture sector, and what are the opportunities for local government in the future?

Scope

While the principal focus of this report is on Wellington City's arts and culture sector, the research also considers the economic contribution and key issues facing the arts and culture sector across the Greater Wellington region¹.

Given our focus on the economic contribution of the arts and culture sector, particular attention is paid to revenue-generating activities of arts and culture entities. We define 'arts and culture entities' as:

- independent arts practitioners / sole traders
- enterprises working in the arts and culture sector
- arts and culture service organisations (theatres, galleries, music organisations, museums, arts coordinating bodies, e.g. Playmarket, the New Zealand Book Council, etc)

Economic impact studies of the arts and culture sector or creative industries use varying definitions of the sector. In consultation with Wellington City Council, and taking account of similar studies conducted elsewhere, we defined the arts and culture sector in a way that is broadly comparable to other New Zealand and international studies. Six key sub-sectors were derived based on the Australia and New Zealand Standard Industry Classifications (ANZSIC) system:

- Performing Arts (including Music)
- Museum / Library / Archives
- Publishing
- Design
- Screen Production and Radio
- Visual Arts, Crafts, and Photography

¹ The Greater Wellington region is comprised of Kapiti Coast District, Porirua City, Wellington City, Hutt City, Upper Hutt City, Masterton District, Carterton District, and South Wairarapa District.

The 6-digit industries which make up each of these sub-sectors are set out in Appendix 2. It should be noted that while these sub-groups are similar to a recent economic impact study of the Auckland's creative sector², the industry groups underpinning the six sub-sectors differ in important respects. The results of the two studies are not therefore directly comparable.

The remainder of this report is organised as follows:

- Section 2: Context—describes relevant background information.
- Section 3: Summary of Research Approach—describes the framework we used to map information sources to key research requirements and research questions. Detailed information on the research methods is presented in Appendix 1.
- Section 4: Economic impact analysis – present a range of economic indicators to describe the economic impact of Wellington city's arts and culture sector
- Section 5: Qualitative Research Findings – draws on the online survey of arts and culture entities and focus groups with key stakeholders to describe the inter-connectedness of Wellington city's arts and culture sector, what makes for a well-functioning sector, and the core roles of the Wellington City Council and central government in supporting the sector.
- Section 6: Conclusions—highlights the critical elements of the Wellington arts and culture sector and identifies key threats and opportunities for the future.

² Auckland City Council. 2009. Auckland's creative industries: The numbers 2009.

2. Context

Changing dynamics of the Wellington arts and culture sector

Wellington's arts and culture sector makes an important contribution to the city's social, cultural, and economic wealth. As well as the direct benefits that flow from arts and culture business and employment, the sector adds to the city's unique fabric, making Wellington a lively, exciting and interesting place to live, work, and visit. The reputation of Wellington as a place with a creative and vibrant arts and culture sector is dependent on an appetite and audience for the arts. Surveys carried out in February 2009 found that 81% of Wellingtonians and 68% of all New Zealanders agreed that Wellington is New Zealand's arts capital³. However, this reputation faces some challenges which are discussed throughout this report.

The downturn in the economy over the past 2-3 years has been strongly felt by the arts and culture sector. This is partly due to the sector's heavy reliance on financial support from government and the corporate sector, and partly due to reduced spending by private households on discretionary activities such as arts and culture events. There has also been reduced financial support available to arts entities from Community Trusts and Gaming Trusts. Over some years, there has been a shift of corporate headquarters and large businesses from the city, with corporate functions moving northward or offshore. As a consequence, office vacancy rates have risen and sponsorship dollars have declined. While there have been net migration inflows to Wellington city for a number of years, this also appears to be slowing. All of these trends have adversely affected available funding, audiences, and participants in the arts and culture sector.

There is also competition within New Zealand, with Auckland in particular growing its arts and culture economy significantly in recent years. Recent research for Creative New Zealand indicates that less than a quarter of surveyed young emerging artists were based in Wellington, while 62% were based in Auckland.⁴ The Auckland Governance Reforms mean that New Zealand's largest city has access to greater resources for region-wide initiatives, which in turn creates the potential for a more strategic and coordinated approach to arts and culture-related investment, events, city branding, promotion, and tourism. Auckland's scale means it has the potential to offer world-class facilities including stadia, arts and culture venues, and other forms of quality infrastructure.

³ Wellington City Council. Annual Report 2009/10

⁴ The survey was an open web-based survey, a total of 728 eligible responses were received. Young artists and practitioners were defined as being aged 18 to 30 years. The survey was conducted by MartinJenkins for Creative New Zealand in 2010.

Creative New Zealand's proposed changes to the Recurrently Funded Organisations (RFOs) scheme are creating significant uncertainty for Wellington city's arts and culture sector. Around half of all the arts and culture organisations that receive recurrent funding from Creative New Zealand are based in Wellington. Participants in this research anticipate that upcoming changes to this funding may have a disproportionately negative impact on Wellington-based RFOs. It is possible that one or more Wellington RFOs will be required to re-evaluate their future direction.

Several organisations that participated in the research focus groups indicated that they have considered the option of relocating to Auckland with at least one large Wellington-based organisation having done the numbers on such a move. While such changes are not imminent or certain, there is a strong belief amongst research participants that the loss of any large established arts and culture organisations from the Wellington arts and culture sector would have significant flow-on effects to other arts and culture organisations and artists in the city.

Setting the scene for Wellington

Wellington's reputation as the arts capital of New Zealand results from a number of features of the Wellington arts and culture sector. The region is home to the majority of New Zealand's national arts and culture organisations and national support bodies including: the New Zealand Symphony Orchestra, the Royal New Zealand Ballet, Taki Rua Productions, the New Zealand Book Council, the New Zealand Film Commission, and Toi Māori Aotearoa. Wellington is also home to the National Art Gallery, Archives New Zealand, the National Library of New Zealand, and the Museum of New Zealand, Te Papa Tongarewa. Approximately half of the arts and culture organisations that currently receive recurrent funding from Creative New Zealand are based in Wellington.

Alongside these well-established entities, Wellington plays a key role in developing young and emerging artists for New Zealand through its education and training institutions. This includes the New Zealand School of Music, Toi Whakaari (New Zealand Drama School), the New Zealand School of Dance, Massey University's School of Fine Arts and Victoria University's International Institute of Modern Letters.

Wellington also contributes to the national and regional arts scene by hosting national events such as the World of Wearable Arts, New Zealand International Arts Festival, and the New Zealand Fringe Festival. These events provide employment and development opportunities for a wide range of independent arts practitioners and arts and culture organisations. Historically, these events and festivals have also been an opportunity to encourage the development of New Zealand artists through their role in commissioning and/or showing new works.

As well as the national organisations, events, and supporting organisations, there are a number of regionally important organisations and venues including, the Vector Wellington Orchestra, the Opera House, Toi Pōneke Arts Centre, The New Dowse (Art Museum) in Lower Hutt, Pātaka Museum and Gallery in Porirua, and the City Gallery in Wellington. Across the Wellington region, there are a large number of performance venues of varying sizes.

As well as the vitally important museums, library, and archives sector, key commercially focused industries in the arts and culture sector that are well represented in Wellington city include film and digital production and the design industry. Both these sub-sectors are important sources of well-paying jobs for artists who often require alternative sources of income to support their art form.

3. Summary of Research Methodology

There are a number of key components to developing a comprehensive picture of economic value and contribution of the arts and culture sector. Arts and culture have economic, cultural, and social impacts on communities. While recognising the broad contribution of arts and culture to local communities, this research places a particular emphasis on the economic impacts. Guetzkow (2002)⁵ proposes that arts and culture impact on economies in a number of ways including:

- the direct payment of wages to employees
- local spending by arts venues and patronised art businesses have indirect multiplier effects
- people, especially tourists and visitors, spending money on attending the arts and on local businesses.

The presence of artists and art organisations and institutions also:

- increases the attractiveness of the area to tourists, businesses, people (especially highly skilled workers and investors)
- increases the propensity of community members to participate in the arts
- promotes a greater likelihood of revitalisation.

In order to assess the economic contribution of Wellington's arts and culture sector to the local economy, data were collected from a range of sources to ensure triangulation and validation of findings. The data sources included:

- a review of literature, annual reports and other official documents
- economic analysis using Statistics New Zealand data (using a range of sources)
- focus groups and interviews with a broad spectrum of stakeholders from the arts and culture sector
- an online survey of arts and culture organisations and independent arts practitioners.

The following table sets out the analytical framework we used to map information to the key research questions. Appendix 1 provides more detail on the research methods and definitions applied, along with a number of limitations associated with this research.

⁵ Guetzkow, J. 2002. How the arts impact communities: An introduction to the literature on arts impact studies.

Limitations in interpreting economic analysis

The sub-sectors and industries which comprise the arts and culture sector for the purposes of this research are derived from the Australia and New Zealand Standard Industry Classifications (ANZSIC). While this provides the best classification of economic activity for analysis of employment output and value add of the arts and culture sector, there are a number of limitations to the use of industry data. The main limitations are:

- arts and culture sector industries are inherently difficult to define, with some industry groupings being only partially attributable to the arts and culture sector
- the data on employment refers to employment within firms. This means that independent contractors/self-employed individuals are not counted in the employee count. A proxy for independent contractors is firms with 0 employees. However, information on firm size is not available at the 6-digit industry level. Estimates of the number of independent contractors are based on national data.
- changes to the classification of industries in ANZSIC were made in 2006, but it is not possible to retrospectively compare industry financial results prior to 2006, so we have used ANZSIC 1996 to make comparisons over time.
- ANZSIC 1996 and ANZSIC 2006 made a number of changes to industry sub-classes which impact on the measurement of the arts and culture sector. More detail on the specific implications of this are provided in Appendix 1. For this reason, we report average results for 2009 based on both ANZSIC 1996 and ANZSIC 2006.
- there are some arts and culture industries are not separately identified in ANZSIC. Further, some arts and culture workers are employed in non-arts and cultural industries. This means the percentage of GDP attributable to the arts and culture sector is likely to be underestimated by this study.
- the figures for gross output and value added should be regarded as estimates only. This is because the results are calculated using data from the Annual Enterprise Survey at a level below the design parameters of the survey.

Analytical framework

Research requirement	Key Research Questions	Our approach
Provide an assessment of the economic impact of Wellington's arts and cultural entities in Wellington city and the wider region	<ul style="list-style-type: none"> What economic contribution do Wellington's arts and culture entities make to Wellington city and the Wellington region? How do key sub-sectors contribute to the overall economic value of the arts and culture sector? How does the economic contribution of the arts and culture sector compare to other New Zealand cities and regions? How does audience spending contribute to the arts and culture sector and the wider local economy? 	<ul style="list-style-type: none"> Analysis of available economic data Document review Online survey of Wellington arts and culture entities
Identify the number of people employed	<ul style="list-style-type: none"> How many people are employed in Wellington's arts and culture sector? What is the nature of the employment and working arrangements in the sector and for those employed in arts occupations more broadly? 	<ul style="list-style-type: none"> Analysis of available economic data Document review Online survey of Wellington arts and culture entities
Identify and describe the connections and inter-relatedness of arts and cultural entities and practitioners in the Wellington city and region	<ul style="list-style-type: none"> What relationships and inter-dependencies exist between Wellington's arts and culture entities? How and in what ways do arts and culture entities rely on and/or partner with one another? 	<ul style="list-style-type: none"> Focus groups and interviews with sector stakeholders Online survey of Wellington arts and culture entities Document review
Identify the unique components of Wellington's arts and culture environment that currently maintain and support the development of arts practitioners and arts/cultural entities	<ul style="list-style-type: none"> How and in what ways does Wellington's arts and culture infrastructure maintain and support the development of arts and culture entities? What elements of Wellington's arts and culture infrastructure (including specific arts and culture organisations) are key to the sustainability of the sector? 	<ul style="list-style-type: none"> Focus groups and interviews with sector stakeholders Online survey of Wellington arts and culture entities Document review
Identify the 'critical mass' required to sustain Wellington's arts and culture infrastructure, pathways for development, and attractiveness as a city/region	<ul style="list-style-type: none"> What elements of the Wellington arts and culture environment are critical to sustain the arts and culture infrastructure, pathways for the sector's development, and ensure that Wellington is an attractive city/region for residents, tourists, and business? What are the key opportunities and threats for the sector looking forward? Assessing the responses to the above questions, what constitutes "critical mass" in terms of sustaining Wellington's arts and culture environment? 	<ul style="list-style-type: none"> Focus groups and interviews with sector stakeholders Online survey of Wellington arts and culture entities Document review
Identify the current key role(s) of local and central government in respect of developing arts practitioners and arts/cultural entities in New Zealand	<ul style="list-style-type: none"> How does central and local government currently support the arts and culture sector in Wellington city and region? What do arts and culture entities consider to be the best ways the Wellington City Council can support the arts and culture sector in the future? 	<ul style="list-style-type: none"> Focus groups and interviews with sector stakeholders and local and central government representatives Online survey of Wellington arts and culture entities Document review

4. Economic Impact Analysis

Economic contribution of Wellington’s arts and culture sector

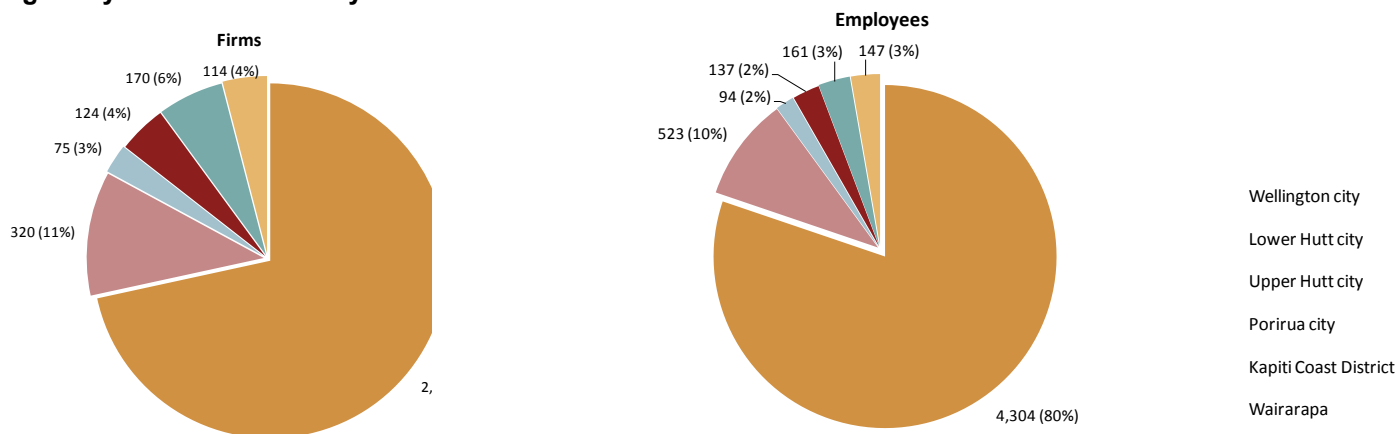
This section describes the economic contribution of the arts and culture sector, both as an employer and through value added to the local economy. The flow on impact on employment and value added in other sectors is also implemented. Where possible, an effort is made to compare and contrast the Wellington arts and culture sector with other New Zealand cities and with New Zealand as a whole. Analysis of the limited available information on audience volumes and patterns of spending on arts and cultural activities is presented.

The size and structure of Wellington’s arts and culture sector

The arts and culture sector is a significant employer in the Wellington region

In 2009 the sector employed between 5,380 and 8,019⁶ employees depending on the industry classification used. Based on ANZSIC 06 figures, 80% of employees in the arts and culture sector were employed in Wellington city (4,304 employees), almost 10% in Lower Hutt (523 employees), and the remaining 10% spread fairly evenly between Upper Hutt, Porirua, Kapiti Coast, and the Wairarapa⁷. Figure 1 below shows the distribution of firms and employees in the arts and culture sector across the Wellington region.

Figure 1: Number of firms and employees in the arts and culture sector in the Wellington region by territorial authority



Source: MartinJenkins using Statistics New Zealand Business Demography data (ANZSIC 06)

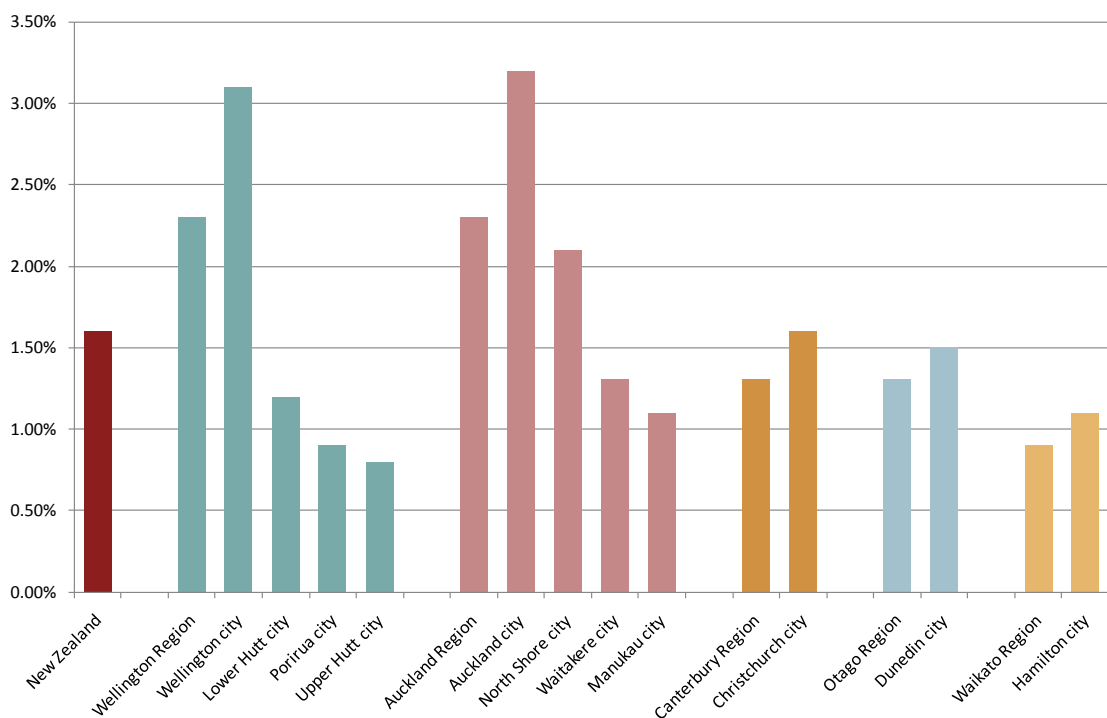
⁶ Due to a revision of the ANZSIC classification system, we report some results for 2009 as range rather than as single figures using ANZSIC 1996 and ANZSIC 2006.

⁷ Wairarapa includes Masterton District, Carterton District, and South Wairarapa District.

Density of arts and culture sector employment in Wellington city and region

In 2009, the arts and culture sector accounted for 3.1% of total employment in Wellington city and 2.3% for the Wellington region. In employment terms, the sector is similar in size to the transport and storage industry. At 3.1%, the proportion of employees in the arts and culture sector in Wellington city is also significantly higher than the national average of 1.6%. Figure 2 shows the arts and culture sector's share of employment in different locations. Wellington city has the second highest share after Auckland city.

Figure 2: Proportion of arts and culture sector employees in relation to total employees per location

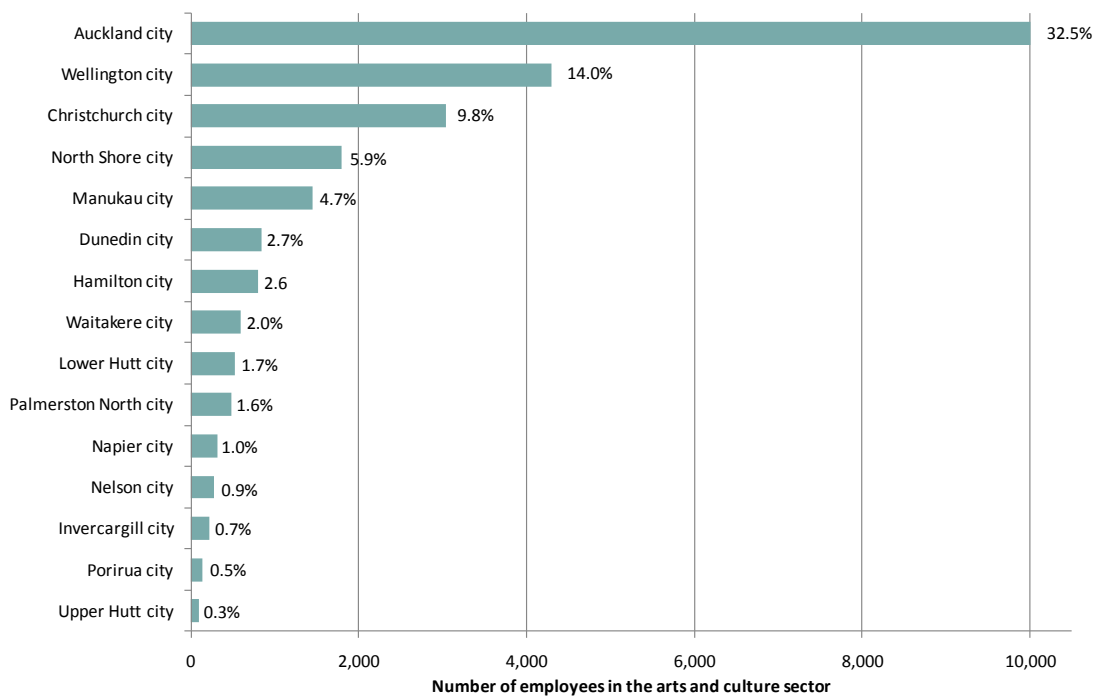


Source: MartinJenkins using Statistics New Zealand Business Demography data (ANZSIC 06)

Wellington city's share of the arts and culture sector in New Zealand

Wellington city has a significant share of New Zealand's employment in the arts and culture sector, although Auckland has a much higher share reflecting its larger size. Figure 3 compares the number of employees, and share of New Zealand's arts and culture sector, in Wellington city and elsewhere.

Figure 3: Number of arts and culture employees in each major New Zealand city, and shares within the New Zealand-wide arts and culture sector, 2009



Distribution of employment across arts and culture sub-sectors

There are some interesting differences in the size of the sub-sectors which make up the arts and culture sector, and the overall composition of the sector in the Wellington city and region. Employees in the Wellington region are concentrated in the Design and Museum / Library / Archives sub-sectors, which account for almost two-thirds of employees in the sector. Museum / Library / Archives and Performing Arts sub-sectors are over-represented in the Wellington region when compared with the national distribution of arts and culture employment (Appendix 4, Table 9).

Table 1 shows how employment in Wellington city and region is distributed across the arts and culture sub-sectors, and how this compares to the national distribution of employment in these sub-sectors.

Table 1: Employment in the arts and culture sector, 2009

Sub-sector	Wellington city		Wellington region		New Zealand
	Total number of employees	Share of total sector employment	Total number of employees	Share of total sector employment	Share of total sector employment
Design	1,480	34.4%	1,850	34.4%	40.6%
Museum / Library / Archives	1,300	30.2%	1,620	30.1%	22.5%
Performing arts (incl. music)	445	10.3%	455	8.5%	6.6%
Publishing	459	10.7%	510	9.4%	11.7%
Screen production and radio	450	10.5%	620	11.5%	11.7%
Visual arts, crafts, and photography	170	3.9%	325	6.0%	6.9%
Total	4,304	100%	5,380	100%	100%

Source: MartinJenkins using Statistics New Zealand Business Demography data (ANZSIC 06)

Growth in Wellington's arts and culture sector from 2000—2009

There has been growth in the Wellington arts and culture sector

Growth in the number of firms⁸

Wellington city experienced growth of 41% in number of firms in the arts and culture sector between 2000 and 2009. Table 2 sets out the number of firms in each sub-sector in Wellington city in 2000, 2005, and 2009.

While there was growth in all sub-sectors, there was particularly strong growth in the screen production and radio sub-sector, where the number of firms trebled. This growth is likely to be due to a strong increase in the number of independent contractors or sole traders. Firm size data is not available at the 6-digit industry level of disaggregation, however for all Motion Picture

⁸ The number of firms is a very imperfect indicator of economic activity given the highly skewed nature of the firm size distribution and its volatility across the economic cycle and in response to tax changes.

and Video activities industries⁹, the number of firms with zero employees more than doubled between 2001 and 2009. Over the same period, there was only modest growth of 21% in the number of employees. In 2009, there were approximately as many independent contractors as employees, highlighting the importance of independent contractors in this sub-sector.

The number of firms in the performing arts (incl. music) and publishing sub-sectors also grew strongly over the nine year period, although the total number of firms in both subsectors was relatively small compared to most other sub-sectors. In the publishing sub-sector, this growth occurred between 2000 and 2005, with the number of firms actually decreasing slightly between 2005 and 2009.

Table 2: Number of firms in the arts and culture sub-sector in Wellington city, 2000-2009¹⁰

Sub-sector	Number of firms			Growth in number of firms (%): 2000—2009	Annualised rate of growth
	2000	2005	2009		
Design	584	603	608	4.1%	0.5%
Museum / Library / Archive	32	35	37	15.6%	1.7%
Performing arts (incl. music)	79	87	110	39.2%	4.4%
Publishing	47	73	70	48.9%	5.4%
Screen production and radio	249	602	749	200.8%	22.3%
Visual arts, crafts, and photography	440	431	449	2.0%	0.2%
Total	1,431	1,831	2,023	41.4%	4.6%

Source: MartinJenkins using Statistics New Zealand Business Demography data (ANZSIC 06)

⁹ This result is only indicative as at the 4-digit industry level, 'motion picture and video activities' includes both production and distribution activities. In the definition of the arts and culture sector for this study, distribution activities are not included for the screen production sub-sector.

¹⁰ Using ANZSIC 06.

Employment growth in Wellington city and region

The total number of employees in the arts and culture sector in Wellington city grew by 10.9%, and by 14% for the region, between 2000 and 2009 (Table 3). At a regional level, this growth was broadly in line with aggregate employment growth; however Wellington city's growth in the arts and culture sector was comparatively slower.

Table 3: Number of employees in the arts and culture sector in New Zealand, 2000-2009

	2000	2005	2009	Net change 2000-2009	Percentage of Employment Growth: 2000—2009	Annual average rate of growth
Arts and culture sector employment in Wellington city	3,880	4,097	4,304	424	10.9%	1.2%
Total employment in Wellington city	119,760	130,990	139,600	19,840	16.6%	1.8%
Arts and culture sector employment in the Wellington region	4,719	5,112	5,380	661	14.0%	1.6%
Total employment in Wellington region	205,200	225,960	239,060	33,860	16.5%	1.8%

Source: MartinJenkins using Statistics New Zealand Business Demography data (ANZSIC 06)

Trends in the wider Wellington region

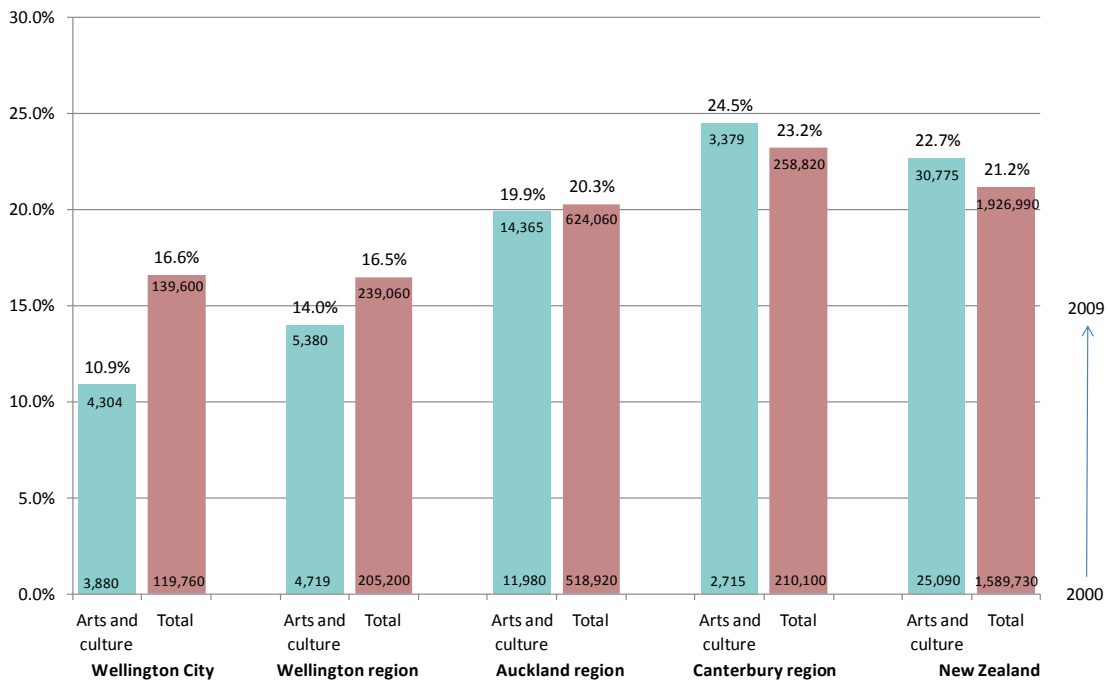
The higher rate of growth for the arts and culture sector at the regional level is explained by significant growth, from a low base, in Lower Hutt, Upper Hutt, and the Wairarapa. Although the numbers were very small, the number of arts and culture employees in Upper Hutt doubled from 46 to 94 between 2000 and 2009. Arts and culture employment in Porirua declined slightly over the same period¹¹.

¹¹ MartinJenkins using Statistics New Zealand Business Demography data (ANZSIC 06)

Comparison with Auckland and Canterbury regions

As Figure 4 shows, arts and culture employment in the Wellington region grew more slowly compared with both the Auckland and Canterbury regions. The arts and culture sector in the Canterbury region grew most strongly over the nine-year period, both in comparison with the overall growth in employment in Canterbury, and in comparison with the Auckland and Wellington regions.

Figure 4: Total employment growth in the arts and culture sector and for all industries, by geographic location, 2000-2009



Source: MartinJenkins using Statistics New Zealand Business Demography data (ANZSIC 06)

Employment growth by sub-sector

When examined by sub-sector, there are some significant variations in rates of employment growth in Wellington city's arts and culture sector¹². More detailed reporting by industry is presented in Appendix 4.

Table 4: Growth in employment for Wellington city by sub-sector, 2000-2009

Sub-sector	Number of employees			Percentage of employment growth 2000—2009
	2000	2005	2009	
Design	1,220	1,260	1,480	21.3%
Museum / Library / Archive	1,130	1,310	1,300	15.0%
Performing arts (incl. music)	439	389	445	13.7%
Publishing	501	543	459	-8.4%
Screen production and radio	355	435	450	26.8%
Visual arts, crafts, and photography	235	160	170	-27.7%
Total	3,880	4,097	4,304	10.9%

Source: MartinJenkins using Statistics New Zealand Business Demography data (ANZSIC 06)

Between 2000 and 2009, the number of employees in the design and screen production and radio sub-sectors grew most strongly. Within these sub-sectors there were some particular trends worth noting.

Within the screen production and radio sub-sector¹³ the number of employees in post-production services and other motion picture and video activities increased six-fold, albeit from a low base. Growth in employees in the screen production and radio sub-sector was complemented by the growth in firms with zero employees (ie independent contractors).

In the design sub-sector, the number of employees in architectural services more than doubled from 270 to 610 employees. At least part of this growth is likely to be explained by the strong performance of the construction sector over most of this period.

¹² At this level of disaggregation, the likelihood of sampling error means that annual employment figures are volatile. However, over a number of years it is possible to gain a sense of the direction of travel in employment growth or decline at the sub-sector level.

¹³ Includes motion picture and video production, motion picture exhibition and post-production services, and other motion picture and video activities.

Visual arts, crafts, and photography employment declined significantly over the ten-year period, and particularly between 2000 and 2005. Within this sub-sector, the principal explanation was the drop in the number of creative arts employees¹⁴ in Wellington city, with a 46% drop in numbers from 120 to 65 employees. The reduction in creative arts employees in Wellington city was offset by some small increases in employment in other parts of the Wellington region but, overall, employment of creative artists declined by 27% across the region¹⁵. Visual arts, crafts and photography, like performing arts, is a sub-sector which has a relatively higher proportion of independent practitioners. However, there was almost no change in the number of firms in the sub-sector over the same period suggesting firms are employing fewer employees in this subsector.

Within the sub-sectors shown in Table 4, other noticeable declines in employment in Wellington city for specific industry groupings between 2000 and 2009 were:

- advertising services (-17.3%) where employment fell sharply between 2000 and 2005 but subsequently increased slightly
- motion picture and video production (-22.2%), which is likely to have been offset by the strong growth in firms with zero employees in the sub-sector
- book publishing (-11.9%) which is consistent with a national trend in publishing, and mirrors a similar finding from a study undertaken in 2008 of creative industries in Auckland¹⁶.

Occupations

Employment in arts and cultural occupations

Employment figures based on industry classifications are likely to underestimate the total number of people employed in arts and cultural occupations. This is because it only captures people employed by firms belonging to arts and culture industry groupings. This does not count individuals who are self-employed contractors, or individuals working in 'creative' occupations within industries that do not produce 'arts and culture-related' goods and services¹⁷.

Based on Census 2006 data, there were 7,689 people employed in arts and culture-related occupations in Wellington city, or around 7.5% of total employment in Wellington city. In comparison, only 4,358 individuals were employed by firms in the arts and culture sector in 2006. Using an occupation approach to measure number of employees in arts and culture-related occupations increases the overall employment estimate by 76%.

¹⁴ In ANZSIC 06, this includes creative artists, musicians, writers, and performers.

¹⁵ MartinJenkins using Statistics New Zealand Business Demography data (ANZSIC 06)

¹⁶ Auckland City Council. 2009. Auckland's creative industries: The numbers 2009.

¹⁷ A study on creative industries in Australia examined creative employment from both an industry and occupational perspective. The study found that including employees in creative occupations within industries that do not produce 'creative products' increased their estimation of the total 'creative workforce' by 50%. This study described workers in non-creative industries as being 'embedded creatives' in the wider labour market.

Full time and part time employment

According to analysis by the Ministry for Culture and Heritage on employment in cultural occupations, those employed in cultural occupations are more likely to:

- be female
- have a higher level of formal education
- work part-time
- have more than one job¹⁸

However, our analysis found no significant difference between the level of part-time employment in the arts and culture sector and across all employment in Wellington city and region. This may partly reflect differences in the composition of occupations included and excluded at the sub-sector level between the studies, notably the inclusion in this research of the advertising and design sectors. Both a recent Arts Wellington survey and the online survey conducted as part of this research found higher than average levels of part-time employment for the sector. Table 5 shows the proportion of part-time employment in the arts and culture sector, relative to the proportion of all employees in 2006.

Table 5: Employment in arts related occupations by part-time and full-time, 2006

		Part-time	Full-time	Total
Wellington city	Arts and culture sector	1,584 (20.6%)	6,102 (79.4%)	7,689
	All employees	21,483 (20.9%)	81,150 (79.1%)	102,633
Wellington region	Arts and culture sector	2,796 (22.8%)	9,465 (77.2%)	12,261
	All employees	50,760 (21.7%)	182,853 (78.3%)	233,616
New Zealand	Arts and culture sector	17,820 (24.5%)	54,777 (75.5%)	72,597
	All employees	454,758 (22.9%)	1,531,017 (77.1%)	1,985,778

Source: Census of Population and Dwellings (2006). Customised tables prepared by Statistics NZ for MartinJenkins

¹⁸ Ministry for Culture and Heritage. 2009. Employment in the cultural sector.

As noted above, Arts Wellington recently conducted research into the arts and culture sector. Forty Wellington-based arts and culture organisations participated in this research, which included an economic impact study. This study reported a slightly higher proportion of part-time than indicated by the census¹⁹.

Use of volunteers and contractors by arts and culture organisations

In our survey of arts and culture organisations, respondents specified the overall make-up of their workforce, including numbers of full- and part-time employees, volunteers, and contractors that had worked for the organisation in the last financial year. Key findings were:

- of 548 employees across all responding organisations, 43% of employees were reported to be part-time
- the 44 organisations which responded to the survey reported using a total of 1800 contractors, although one organisation accounted for 750 contractors. Removing this organisation from the calculation nevertheless produced an average of 24 contractors per organisation.
- organisations reported using 2,254 volunteers in the last financial year, although one organisation accounted for 1,500 of all volunteers. The vast majority (97.5%) volunteered on a part-time basis.

Income of employees in arts and cultural occupations

Based on 2006 data, people in arts and culture occupations employed in Wellington region have a higher median income than other employed people in the city. This pattern is consistent regardless of whether people were employed in full-time or part-time work. In the Wellington region's arts and culture sector:

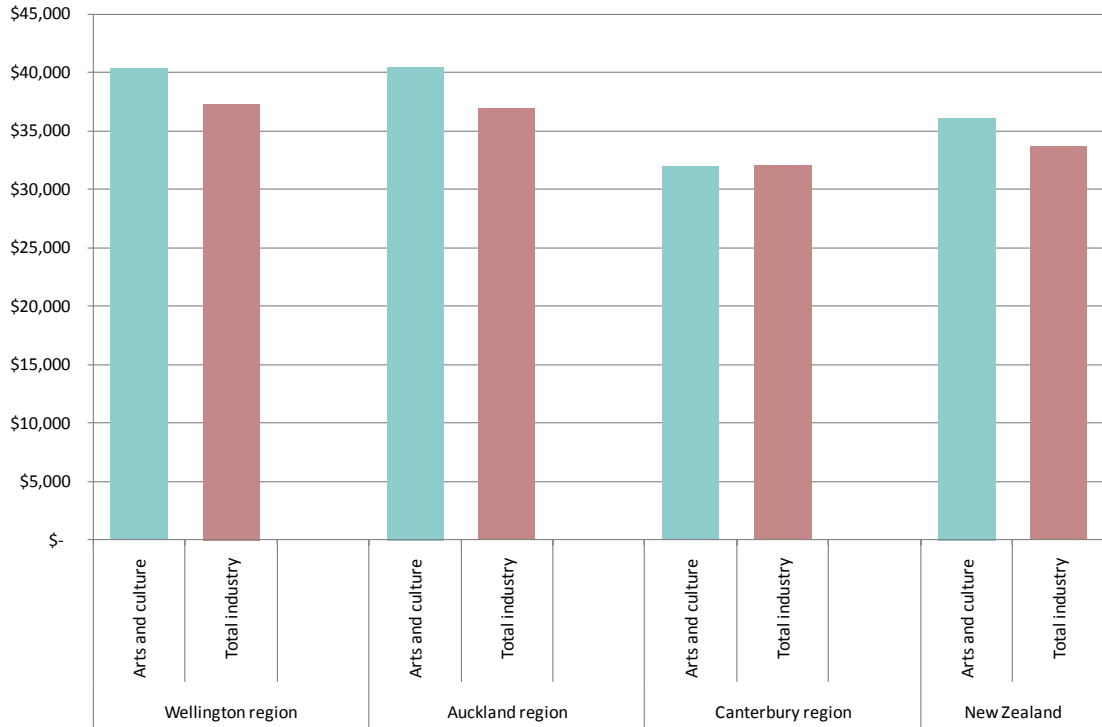
- part-time employees in arts and culture occupations had a median annual income of \$18,200 compared with \$14,300 for *all* people employed part-time.
- full-time employees in arts and culture occupations had a median annual income of \$46,800 compared with \$42,900 for *all* people employed full-time²⁰.

A similar result was found for the Auckland region and across New Zealand, although national results are likely to be heavily skewed by the high proportion of arts and culture sector employees located in Auckland and Wellington. In contrast, those people in Christchurch region's arts and culture sector earned the same, on average, as the median income of *all* employees in the region. Figure 5 shows the annual median incomes for those employed in the arts and culture sector compared to all employees for Wellington city, and the Wellington, Auckland, and Christchurch regions.

¹⁹ Unpublished. Arts Wellington. 2010. Economic Impact Survey 2010: Understanding the economic impact of arts and cultural organisations in the Wellington region. Angus and Associates.

²⁰ 2006 Census of Population and Dwellings. Customised tables prepared by Statistics NZ for MartinJenkins

Figure 5: Annual median income for arts and culture sector employees and for all employees by region, Census 2006



Source: 2006 Census of Population and Dwellings. Customised tables prepared by Statistics NZ for MartinJenkins

Economic impact of Wellington's arts and culture sector

The following section estimates the economic contribution of the arts and culture sector to Wellington city and the Wellington region.

Key findings

Wellington city

In 2009, the Wellington city's arts and culture sector is estimated to have generated between \$284 million and \$292 million in value added to the local economy. This accounts for approximately 1.9% of the gross domestic product (GDP) of Wellington city's overall economy²¹.

The use of a multiplier to allow for indirect and induced flow-on effects²² increases the estimated value added from Wellington city's arts and culture sector by a further \$256 to \$291 million, effectively doubling the size of the sector's economic impact. Total value-added, including both direct and indirect measures, is between \$495 and \$583 million in the city. The multiplier effect is comparable with multipliers derived from economic impact studies for major arts and cultural events in Wellington city in 2009, including the Monet and the Impressionists Exhibition and the World of Wearable Arts. They are slightly higher than multipliers used on a number of international studies of arts and cultural events. Comparable multipliers for similar surveys of the arts economy conducted outside New Zealand are not readily available.

Wellington region

Across the region, the value added by the sector was estimated at between \$356 million and \$378 million, or approximately 1.6% of the Wellington region's overall economy. Wellington region also accounted for approximately 15% of the total direct economic contribution of the arts and culture sector in New Zealand. In comparison, the Auckland region accounted for over half the national value added by the sector.

²¹ Regionally GDP is not calculated by Statistics NZ. Wellington city's share of GDP was estimated based on an employment weighting approach to apportion industry GDP by region industry (i.e. industry GDP x industry share of employment in city/region). This produces estimates of Wellington city's and Wellington region's GDP share of 8.5% and 13.3% respectively (based on 2007 data; these are the most recent data available). Note that these shares are higher than simple total employment share, and may underestimate the contribution of the arts and culture sector to Wellington City's GDP.

²² Up to date input-output tables are not available for the Wellington city and region. The Type II multiplier used to calculate these figures was based on the average multiplier calculated in an economic impact study (undertaken in 2005) of Auckland City's creative sector. This study developed regionalised input-output models²² to develop sub-sector specific multipliers for Auckland City and Auckland region. These ranged from 2.13 to 2.76 depending on the sub-sector. Given that the inter-industry dynamics of the arts and culture sector are likely to be similar in different geographic regions in New Zealand, we have applied the weighted average multiplier used – 2.49. The Type II multiplier was applied to valued added in 2009 as a share of output, and multiplied by the total value added of the arts and culture sector for Wellington City (for the same year) to determine the additional economic contribution of the sector when flow-on effects are accounted for.

Table 6 shows value added figures, contribution to value added figures for New Zealand, and value added per employee by location.

Table 6: Estimated value of the arts and culture sector, 2009

	Value added (\$M)	Share of New Zealand sector value added (%)	Employee count	Value added per employee (\$'000)
Wellington city	284 - 292	11.9 – 12.0	4,304 - 5381	66 - 54
Wellington region	356 - 378	14.9 – 15.6	5,380 – 8,019	66 - 47
Auckland region	1,314 - 1,277	55.0 - 52.6	14, 365 -19,075	91 - 67
New Zealand	2,391 – 2,426	100%	30, 775 – 44,970	78 - 54

Source: Annual Enterprise Survey, 2009. Customised tables prepared by Statistics NZ for MartinJenkins

Economic growth in the arts and culture sector: 2001 – 2009

Overall, the value of the arts and culture sector in New Zealand appears to have grown strongly, with gross production increasing from \$3.1 billion in 2001 to just over \$6 billion in 2009. The value added by the sector also doubled between 2001 and 2009, increasing from \$1.2 billion to \$2.4 billion (8.8% growth per annum)²³.

By comparison, Wellington city's arts and culture sector experienced slower growth with an average growth rate of 7.2% per year. Table 7 shows the change in value added, gross output, and the value added per employee between 2001 and 2009.

²³ Annual Enterprise Survey, 2009. Customised tables prepared by Statistics NZ for MartinJenkins

Table 7: Differences in economic contributions of the sector, 2001 and 2009

Location	Value added (\$M)		Difference (total %/ pa %)	Gross output (\$M)		Difference (total %/ pa %)	Value added per employee (\$'000)	
	2001	2009		2001	2009		2001	2009
Wellington city	167	292	75% / 7.2%	424	731	72% / 7.0%	34	54
Wellington region	202	378	87% / 8.1%	539	957	78% / 7.4%	29	47
Auckland region	688	1,277	86% / 8.0%	1,664	3,190	92% / 8.5%	43	67
Total New Zealand	1,234	2,426	97% / 8.8%	3,148	6,008	91% / 8.4%	33	54

Source: Annual Enterprise Survey, 2009. Customised tables prepared by Statistics NZ for MartinJenkins

Direct economic contribution by sub-sector

Table 8 shows the relative contribution of each sub-sector to Wellington city's value added and gross output. Overall, the design sub-sector contributes nearly two-thirds of the total value added by the arts and culture sector in Wellington city. Screen production and radio contributes around 15%, followed by publishing (10%). These three sub-sectors account for more than 80% of gross output, and three-quarters of value added in Wellington city's arts and culture sector. .

Architectural services alone contributed around one-quarter of all valued added by the arts and culture sector in Wellington city. As previously highlighted, this is likely to be representative of the strong performance of the construction sector over the eight year period. For Wellington city, film and video production also contributes between 9 – 14% of the sector's total value added and up to 24% of gross output.

The economic contribution of the Museums / Library / Archives is under-represented in these figures because of the high level of government funding to the sector. Salaries paid to employees of Museum operations in Wellington City are an important contributor to the local economy (estimated at \$12 - \$14 million in 2009)²⁴.

²⁴ Information for Libraries and Archives Operations is not provided by Statistics NZ as it is confidential. For this reason, "Museum / Libraries / Archives" figures are only a representative of Museum Operations for gross output, value added and salary figures provided.

Table 8: Estimated value of Wellington city's arts and culture sector by sub-sector, 2009²⁵

	Value added (\$M)	Share of value added (%)	Gross output (\$M)	Share of gross output (%)
Design	187 - 179	65.8 – 61.3	349 - 328	52.7 – 44.9
Museums / Library / Archives	2 - 3	0.8 – 1.2	19 - 21	2.9 – 2.8
Performing arts (incl. music)	5 - 21	2 - 7.3	39 - 103	5.9 – 14.1
Publishing	30 - 27	10.7 - 9.3	66 - 57	10.0 – 7.7
Screen production / radio	41 - 48	14 - 16.5	152 - 197	22.9 – 27.0
Visual arts, crafts, and photography	18 - 13	6.4 - 4.3	37 - 26	5.6 – 3.5
Total Wellington city	284 - 292	100%	662 - 731	100%

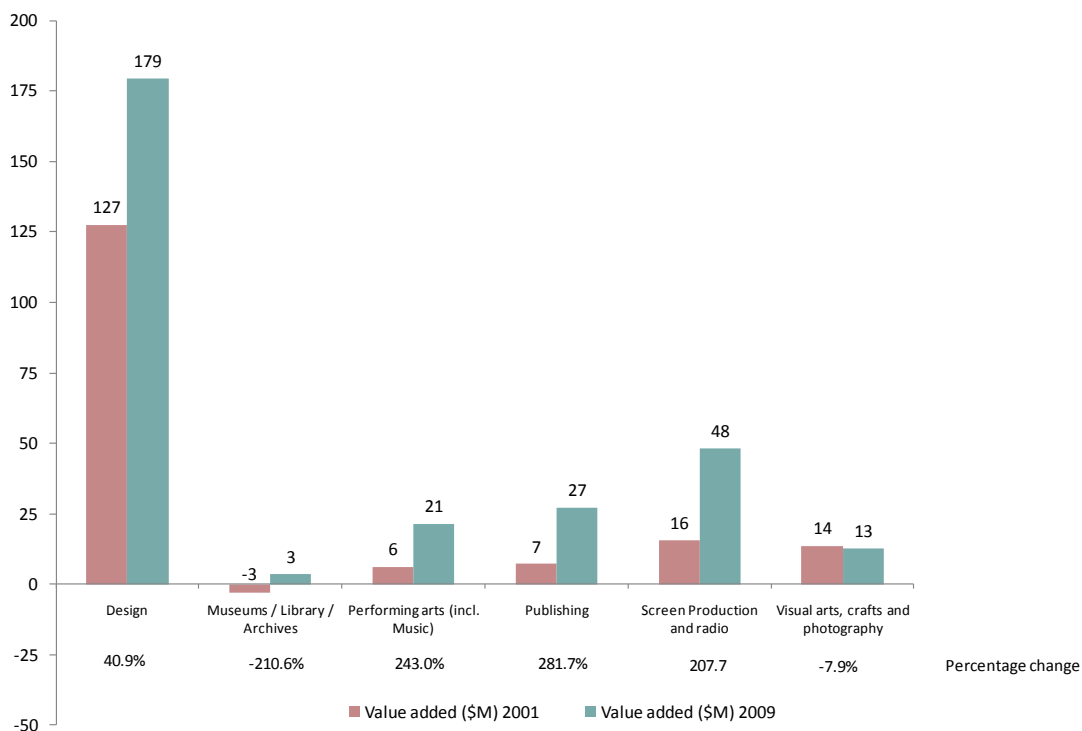
Source: Annual Enterprise Survey, 2009. Customised tables prepared by Statistics NZ for MartinJenkins

²⁵ All ranges presented in this table show ANZSIC 06 results first and ANZSIC 96 results second.

Difference in economic value of sub-sectors in Wellington city: 2001 and 2009

For most sub-sectors, there were significant increases in value added to the economy between 2001 and 2009. In absolute terms, most growth occurred in the design sub-sector, followed by screen production and radio. This reflects the strong growth in employment in these sub-sectors over the period, and the increase in the number of sole-traders in the screen production and radio sub-sector. Publishing and performing arts sub-sectors grew strongly from a low base as shown in Figure 6.

Figure 6: Difference in value added by sub-sector for Wellington city, 2001 and 2009



Source: Annual Enterprise Survey, 2009. Customised tables prepared by Statistics NZ for MartinJenkins

Audience spending

Audience spending is an important component of gross output and value added. Audience spending occurs both at arts and cultural events and in surrounding local businesses, such as restaurants, shops, travel/transport, and accommodation. Spending by visitors to a region is particularly important given that this represents an injection of money from outside the local economy. The following section provides a brief overview of what is known about the audiences of arts and cultural events and sites in Wellington.

The Arts Wellington survey of 40 Wellington-based arts and culture organisations²⁶ reported a total audience of 2.2 million people for events in the Wellington region in the 2009 financial year. Overall, 80% of all audiences within the Wellington region attended events in Wellington city. Through these events, more than one million people attended events that charged admission in the Wellington region, and a further 1.2 million people attended free events. Twenty-three percent of events had free admission, however they attracted 50% of total audience numbers.

This demonstrates the importance of free events to encourage participation in arts and culture within the city. At the same time, focus group participants highlighted that free admission events create competition for events with admission charged which can be a challenge, particularly for the performing arts sector. Coordination of calendars and events is seen as particularly important in this context.

Wellington residents

Wellington residents play an important role in sustaining the local arts and culture sector. Wellingtonians are known to be above average consumers of arts and cultural goods and services²⁷. National research²⁸ on household spending on cultural goods and services in 2010 found that households in the Wellington region spend more on cultural goods and services per household compared with households in other New Zealand regions²⁹. Figure 7 shows regional shares of aggregate annual spending on cultural goods and services alongside each regions share of national households.

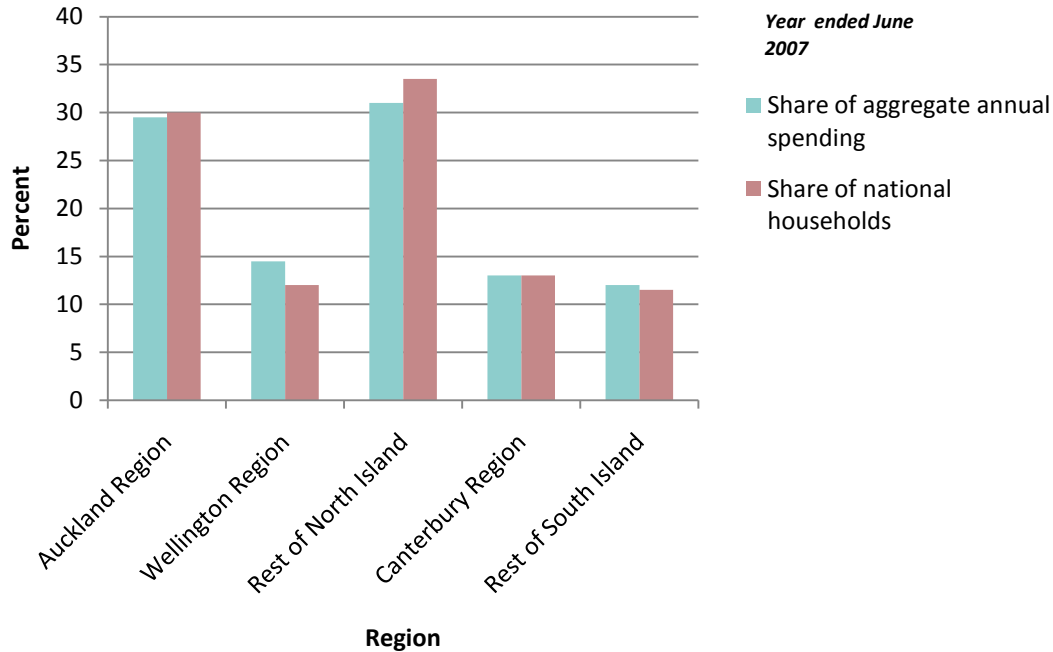
²⁶ Unpublished. Arts Wellington (2010). Economic Impact Survey 2010: Understanding the economic impact of arts and cultural organisations in the Wellington region. Angus and Associates.

²⁷ Unpublished memorandum. Wellington City Council (2009). Cultural Capital status.

²⁸ Ministry for Culture and Heritage. 2010. Household spending on culture, 2010.

²⁹ This includes a broad range of cultural goods and services including heritage, library services, literature, performing arts and music, visual arts, film and video, broadcasting, community, and government activities.

Figure 7: Regional shares in household spending on cultural goods and services, year ended June 2007



Source: Ministry for Culture and Heritage. Household spending on culture, 2010

Visitors to Wellington

A recent study of cultural tourism in New Zealand³⁰ found that cultural experiences are a factor in the travel decision-making of at least one-third of international visitors but less than 10% of domestic visitors. In the Wellington region, the top five ways in which international visitors participate in arts and culture are by visiting:

- museums (56%)
- botanical and private gardens (25%)
- parliament buildings (16%)
- art galleries (12%)
- historic buildings (12%)

³⁰ Angus and Associates, 2008. Demand for Cultural Tourism Update: June 2008. Ministry for Culture and Heritage, Wellington.

This highlights the importance of heritage and Wellington's capital city status as attractors of international visitors to the city. Between 2005 and 2008, 5% of international visitors participated in a major arts or culture event; and 7% attend a concert, theatre production, or other performing arts event.

The study found that arts/cultural/heritage experiences contribute positively to the overall quality of visitors' experiences, with both international and domestic visitors who participated in arts and cultural experiences giving higher than average satisfaction ratings for their visit³¹.

Economic impact of arts events

Economic impact studies have been carried out for a number of major arts events hosted by Wellington city, including the International Arts Festival, the World of Wearable (WoW) Arts, and the Monet Impressionists exhibition. These studies highlight the value of large national events in bringing visitors from outside the region. Collectively, in 2009/2010 these three events contributed in the order of \$72.7 million in new spending, and total³² value added of \$42.9 million to the Wellington city economy.

Key figures for each event include:

- World of Wearable Arts (2009)³³
 - Attracted a total audience of 36,156 people.
 - 65% of the WoW audience (including international visitors) came from outside the Wellington region.
 - Total new spending³⁴ by attendees and corporates was estimated to be \$15.1 million as a result of WoW.
 - The total value added to the Wellington city economy was estimated to be \$7.9 million.
- Monet and the Impressionists Exhibition (2009)³⁵
 - The total number of estimated visitors was 148,000 people.
 - 61% of visitors to the Monet Impressionists exhibition came from outside the Wellington region (52% from other places in New Zealand and 9% international visitors). Of the visitors from other parts of New Zealand, 27% came from Auckland and 17% from Canterbury.

³¹ Idem.

³² This allows for indirect and induced effects as well as direct value added.

³³ Wellington City Council. 2009. World of Wearable Art Awards. Market and Economic Impact Assessment. Report by McDermott Miller Limited.

³⁴ Spending benefited the TSB Bank Arena, Wellington City hotels, restaurants, cafes, retailers, transport, and operators of other attractions.

³⁵ Wellington City Council. 2009. Monet and the Impressionists Economic Impact Assessment Report 2009. Report by McDermott Miller Limited.

- Total new spending in Wellington city for Monet was estimated at \$34.5 million.
- The total value added to the Wellington city economy was \$14.8 million.
- International Arts Festival (2010)³⁶
 - Over 300,000 people attended over 300 events — 103,000 tickets were issued to 237 ticketed performances, and an estimated 185,000 people attended more than 65 free events. Fifty venues hosted events.
 - Over 1,000 artists from 35 countries took part in the 24-day Festival.
 - The International Arts Festival generated almost \$23.1 million in new spending in the Wellington region
 - The estimated total value added by the Festival was \$20.1 million.

³⁶ Wellington City Council. 2010. New Zealand International Arts Festival: 26 February – 21 March 2010. Post-festival report.

5. Qualitative Research Findings

Wellington as a centre for arts and culture — unique components of the environment

Wellington is often described as the arts and culture capital of New Zealand and research participants were generally supportive of this as a positive brand for the city. Positioning itself as the premier location for arts and culture in New Zealand highlights the value and intrinsic contribution of the artistic and creative sectors in making the city a good place to live.

Wellington has a unique mix of large and small arts and culture organisations, a culture of collaboration, and existing arts and cultural “spaces”. The geography and aesthetic beauty of Wellington and the compact nature of the central business district were seen as significant positives. Wellington’s arts and cultural sector is supported by having a well-defined central business district located in close proximity to key institutions and venues. Comparisons were made with Auckland, which is perceived as geographically and artistically disparate, with access and safety issues in some parts of the city.

The Wellington artistic ‘environment’

The close proximity of a diverse range of arts and cultural venues (including theatres, movie theatres, Te Papa Tongarewa and the waterfront) facilitates audience access to arts and cultural activities. From an economic perspective, businesses like restaurants and cafes have tended to flourish around these areas, catering for the audiences, artists, and organisations.

The artistic and creative sectors are credited with making a strong contribution to the city’s character. Wellington is seen as a city where there is always something interesting to see or do, with a wide range of options for participating in or simply enjoying arts and culture. Research participants identified a close relationship between this diverse offering and Wellington’s environment. Wellington’s geography, in conjunction with the types of people who live here, creates a positive appetite for the arts. In turn, this encourages more people to live in or visit Wellington. The small size of the city makes it easy to access art and culture, and for artists and organisations to collaborate and network. Having key funders and major national arts and culture organisations located here is also unique and a vitally important component of Wellington’s environment.

Cuba Street has previously been described as a large creative incubator. The rich and spontaneous social interactions this encourages are important and valuable. (Individual #25)

The combination of arts and urban environment has helped make Wellington possibly the most interesting city in New Zealand... investment by successive councils [has created] a rich urban environment, for which the arts are a part, which makes people feel good about the city. (Individual #77)

The old buildings/architecture and eclecticism of the city need to be protected. These aspects make Wellington a thriving place to live, where artists feel inspired to create. (Individual #170)

Participants identified a number of benefits associated with Wellington being the capital city. There is a disproportionately high number of nationally important organisations and arts infrastructure in Wellington, which are of value to the wider sector including:

- central government (key decisions are made here resulting in heightened political consciousness, including issues related to Māori)
- Creative New Zealand and the Ministry for Culture and Heritage
- a number of arts and culture-related national councils and representative bodies
- national performing arts companies (perceived to cooperate well with each other), including organisations that have received recurrent funding
- pre-eminent arts-related tertiary institutions and training facilities

The City Council is perceived by research participants as being supportive of a mix of arts and culture sector organisations and individuals. Respondents described the City Arts team as willing to engage and more generally the City Council as supportive because it provides forums and supports initiatives. Toi Pōneke was viewed as an excellent resource for the arts and cultural sector.

The remainder of this section covers:

- Wellington's reputation as the 'arts and culture capital'
- art forms and organisations in Wellington
- funding of the arts in Wellington
- Wellington's venues
- audiences in Wellington
- other infrastructure issues in Wellington.

The focus groups and online survey also yielded interesting information on key opportunities and challenges for the sector, and aspects to think about for the future. These are summarised in Section 5.

Wellington's reputation as the 'arts and culture capital'

The research showed strong support for the city being branded as the "best place in the country for arts and culture". A number of comments were made that having a vibrant arts and culture sector spilled beyond support for artists and into the wider economy. Connections were made with longer-term economic benefits which add to the vibrancy of the city, thus making it an attractive place for businesses, residents, and visitors.

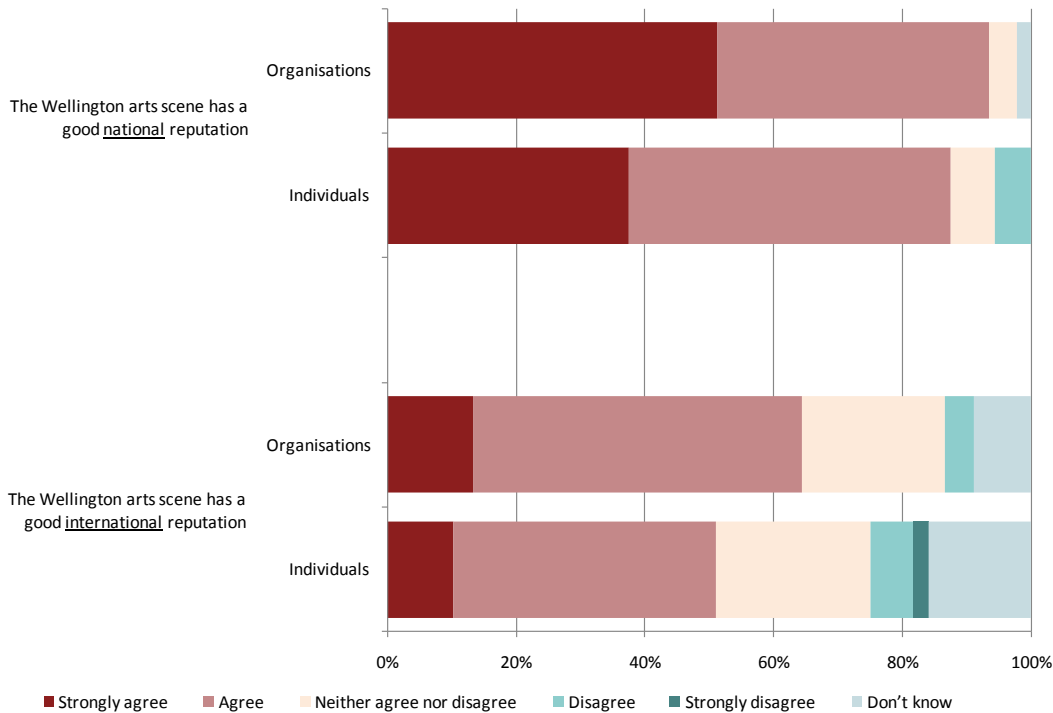
I believe that Wellington should maintain its 'Cultural and Creative Capital' branding, which includes entrepreneurship and goes hand in hand with creativity. [This] crosses boundaries from the arts ...into business – vis-a-vis web design through to Weta and Park Road. (Organisation # 160)

Imagine if Wellington was only here for the policy makers, government departments, lawyers and diplomats. How boring would that be? That's what makes Wellington so great and unique, is that we can co-exist. (Individual #33)

[The arts and culture sector] is an amazing asset to the city and should be cultivated and encouraged. It creates a vibrant social climate that everyone benefits from, even the people who don't regularly attend arts events. It's difficult to quantify in a monetary way, since the arts are often resource heavy with relatively low profits, but they are a crucial part to the quality of life that Wellingtonians enjoy. (Individual #170)

However many focus group participants expressed concern that the ideals of the concept were either not being fully achieved or that Wellington's position was fragile and under threat (in particular, from Auckland). This is discussed later in the section.

Respondents to the online survey generally had positive perceptions of Wellington's reputation for arts (Figure 8). Overall, more than 80% of respondents agreed or strongly agreed that the Wellington arts scene has a good national reputation and over 60% of responding organisations agreed that the Wellington arts scene has a good international reputation.

Figure 8: Wellington's reputation -- internationally and nationally

Source: MartinJenkins

Art forms and organisations in Wellington

The art forms and organisations represented in Wellington are a key indicator of the health of Wellington's arts and culture sector. This section looks at the key organisations and arts forms that can be found in Wellington, and the collaborations and networks that exist between them.

Presence of key organisations

Wellington city is home to a number of large institutions with important connections to central government, the country as a whole and, in some cases, international practitioners and agencies. Organisations identified as being particularly important were:

- organisations direct-line funded from the government through the Ministry for Culture and Heritage – the New Zealand Symphony Orchestra, the Royal New Zealand Ballet, the Museum of New Zealand, Te Papa Tongarewa, and the New Zealand Film Commission.
- Creative New Zealand, a significant funder of the arts and culture sector.
- tertiary institutions including those focusing specifically on an art form (e.g. the New Zealand School of Dance, Toi Whakaari: New Zealand Drama School), and those that teach art and culture programmes (including Victoria University, Massey University, and Whitireia).

- organisations currently receiving recurrent funding (RFOs) from Creative New Zealand including organisations with a national focus, organisations with a local focus, and “umbrella” service organisations.
- film production studios based in Miramar (e.g. Weta Digital, Park Road Post Production), which are seen as critical to the positioning of New Zealand and Wellington as an attractor of large film production contracts.

The Auckland challenge

While participants in the focus groups supported the concept of Wellington as the arts and culture capital of New Zealand, many felt that the city was at a “tipping point”. Participants commonly drew comparisons between Auckland and Wellington and were candid about the opportunities which Auckland presents for both individuals and organisations in the arts and culture sector, in terms of access to financial support, employment, larger audiences and infrastructure. A number of factors were identified as being critical to maintaining a sense of vibrancy with the Wellington scene:

- a strong commitment to supporting the arts in Wellington is needed from both local and central government. This could take the form of funding, explicit strategies, and promotion.
- many corporate offices are moving to Auckland reducing sponsorship opportunities. This has the potential to impact on the sustainability of Wellington-based artists and organisations.
- artistic talent is moving to Auckland — this is particularly evident in theatre with many artists and practitioners relocating to be closer to film and television work.
- with the northward migration of commercial businesses and artistic talent, there is a concern that the balance may tip unfavourably. Some individual practitioners and organisations said they feel very vulnerable, and they expressed concern that organisations with a strategic role in the arts and cultural sector (e.g. Wellington City Council) may not have a deep appreciation of the threats faced by Wellington’s arts and cultural sector.

Art forms in Wellington – strengths and weaknesses

A number of participants felt Wellington had a constant offering of arts and cultural experiences, and that art forms like theatre and music (contemporary and classical) are particularly strong. A number of participants also perceived limitations in the arts and culture offering, or considered art forms harder for Wellington-based organisations and individual practitioners to sustain themselves on.

Perceived Strengths

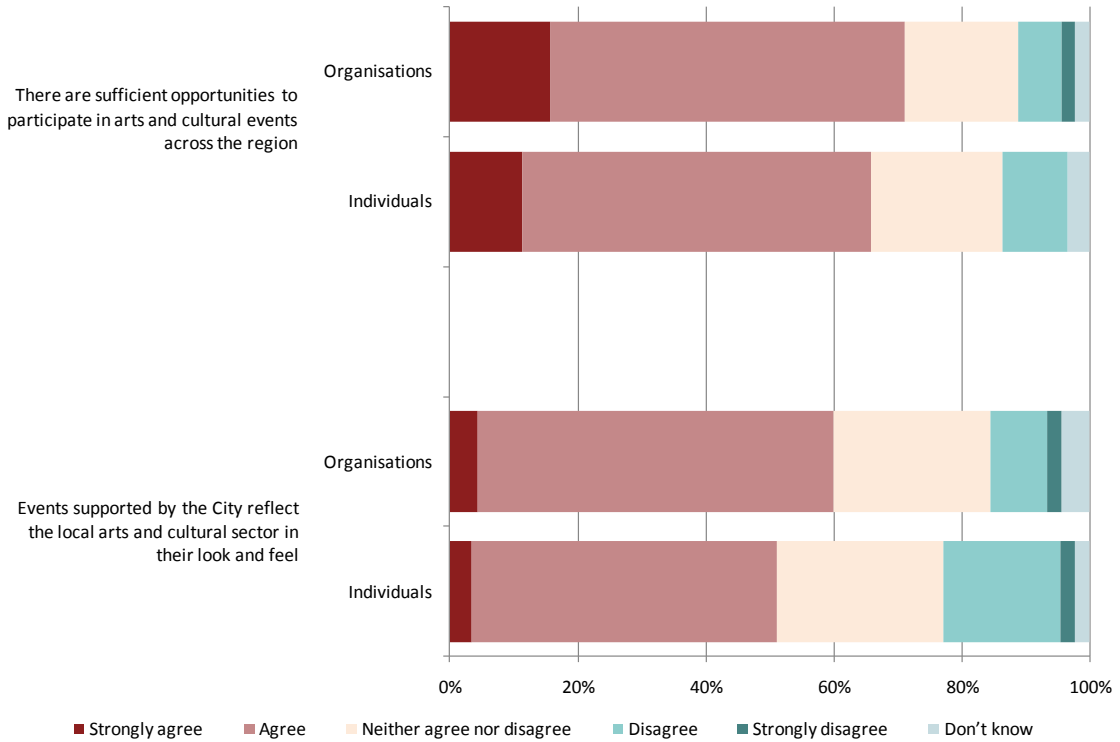
Not surprisingly, given the large number of national arts and culture organisations based in Wellington, Wellington is perceived as being dominated by established artists and “high brow” arts and culture (e.g. classical music and dance). These types of art and culture were generally seen as being well-catered for and were recognised as playing a vital role in the sector. Having large national organisations (including the Royal New Zealand Ballet, the New Zealand Symphony Orchestra and Te Papa) based in Wellington has clear economic spin-offs, although the nature and extent of these varies between organisations. These organisations provide employment not only for the artists, but also those involved in the wider infrastructure that supports them (e.g. directors, producers, technicians, sound engineers, costume makers, and lighting technicians).

The film industry was identified as a creative industry with a critical presence in Wellington. This primarily related to the world class infrastructure that exists in the sister organisations (i.e. Weta Workshop, Park Road Post Production, Stone Street Studios, and Portsmouth Hire) located around Miramar. Having artists and practitioners associated with these industries located in Wellington leads to further opportunities. Many artists and practitioners are involved in a range of artistic endeavours — from supporting other productions through to teaching. This raises the quality of the offering over the city as a whole and gives other Wellington artists access to highly skilled teachers and practitioners. Classical musicians involved in both the New Zealand Symphony Orchestra and Vector Wellington Orchestra commonly teach others, providing high quality tuition while earning additional income themselves. For musicians and other artists, being able to earn other forms of income was essential to sustain themselves as artists.

The online survey asked about opportunities to participate in arts and culture events across the region and whether events in Wellington city reflect the local arts and cultural sector (Figure 9).

- approximately 70% of respondents strongly agreed or agreed that there are sufficient opportunities for participation in events
- however, just 50% of individual respondents and 60% of organisations who responded agreed that events reflect the local arts and cultural sector in their look and feel, with very low levels of ‘strong’ agreement.

Figure 9: Participation opportunities and reflection of the city's arts and culture sector in existing events



Source: MartinJenkins

Perceived Weaknesses

Figure 9 shows that respondents consider the events currently on offer in the city are not necessarily as representative of the local arts and cultural sector as they could be. A number of focus group participants confirmed this finding, arguing that arts and artists suited to more diverse audience tastes and emerging artists are not as evident or well supported as the –established” arts in Wellington. As a result, it was perceived that there is a greater need for arts and culture to better reflect the diversity of the local community. There is a perception that theatre is not as –edgy” as it used to be and that performing arts in general are not stretching across communities and perspectives as much as they could. To some extent, these trends may be explained by the recession, with some participants emphasising that in the current economic uncertainty, it is safer to stick with what is known and more mainstream, particularly in order to ensure audience levels are maintained.

Specific art forms that are not believed by focus group participants to be well-catered for in Wellington were:

- Māori art and Māori theatre (however, there was a sense that interest was increasing)

Overall I think the Wellington arts and culture sector is vibrant and exciting although I think there is a lack of indigeneity in most of the large arts festivals and events. I also think there are few opportunities for Māori artists and Māori performing artists to develop in Wellington. (Organisation #37)
- Pacific arts in Wellington city — although the wider region was seen as being more supportive of Pacific arts (Auckland is seen as a stronger base in general, and was understood to be due to population differences, however it was felt there should be more in Wellington)
- contemporary dance (as compared to classical ballet is well-represented)
- contemporary theatre (theatre is seen to be moving to Auckland where television production is also based).

Other specific issues that were identified were:

- there is a need for coordination and promotion of the local music scene (which is seen to be flourishing in Wellington city)
- there is a need for public art investment and pointers to galleries where local art is available for sale
- Wellington does not have a strong media or critical engagement with the arts. Visual artists in particular, and to a lesser degree theatre, suffers from a lack of critical review and declining sales due to the economic recession. Currently, there is no organised or visible critical review of visual arts in the Wellington area
- the decline of Wellington-based television production means that it is harder for technical and support workers to sustain a living; these workers can tap into Wellington's strong theatre scene but the ability to cobble together an income is threatened by the lack of opportunity with television production.

Wellington's strong event focus

Many of the research participants talked of Wellington's strong focus on events. Events such as the World of Wearable Arts (World of Wearable Arts) and a range of festivals were commonly identified as key parts of the creative sector in Wellington. Sporting events such as the Rugby Sevens were also identified as attracting people to the region who may also participate in arts and culture activities, such as visiting Te Papa. Festivals (such as summer festivals and music festivals) were identified as enabling large sections of the community to participate in the arts and raising the profile of the arts. The New Zealand International Arts Festival was also identified as critical to Wellington — both in terms of Wellington's identity (as an "arty" place to visit), and for the employment and artistic opportunities it provides.

While festivals and events were generally perceived very positively, there was also a feeling that Wellington may focus a little too heavily on big events such as the New Zealand International Arts Festival and World of Wearable Arts. Both funders and audiences have limited budgets and there was a common perception that these types of events may account for disproportionately large amounts of available funding and audience share.

Key partnerships and networks between organisations — ‘the arts ecosystem’

Wellington was described as being a ‘friendly city’ where artists and organisations are well connected to each other. While there is a natural level of competition, artists and organisations are described as cooperative and collaborative, with less competition than is perceived to exist in Auckland.

The online survey asked specific questions in order to identify partnerships, collaborations and networks that are important to arts and culture organisations and practitioners in Wellington – at a local, national, and international level.

- more than 80% of survey respondents said it was very important or important to their success to have relationships and partnerships with independent practitioners and organisations in Wellington city or region, or in the rest of New Zealand.
- around two-thirds (67%) said it was very important or important to their success to have relationships and partnerships with international arts and culture organisations, although it is not possible to ascertain how many respondents had established partnerships with international arts organisations. However, the importance of exposure to international organisations and practitioners was confirmed in focus groups. Participants aspired to be seen on a par with other centres of arts and culture e.g. San Francisco and Portland, USA; Vancouver, Canada. Several of the national arts organisations who participated in the focus groups reported having existing relationships with international organisations.

Interdependence of arts and culture organisations

Figures 10 and 11³⁷ display the relative importance of organisations from the perspective of survey respondents.³⁸ There was a high degree of consistency in the organisations that are viewed as important — both organisations and individuals identified a similar group they had significant relationships with. Creative New Zealand, Toi Pōneke Arts Centre, BATS Theatre, Toi Whakaari, Te Papa, and Downstage were identified as some of the most important by both individuals and organisations.

Individuals rated the Council and the City Gallery more highly than organisations did. Organisations rated the St James Theatre Trust, the New Zealand Symphony Orchestra, and Vector Wellington Orchestra more highly than individuals did.

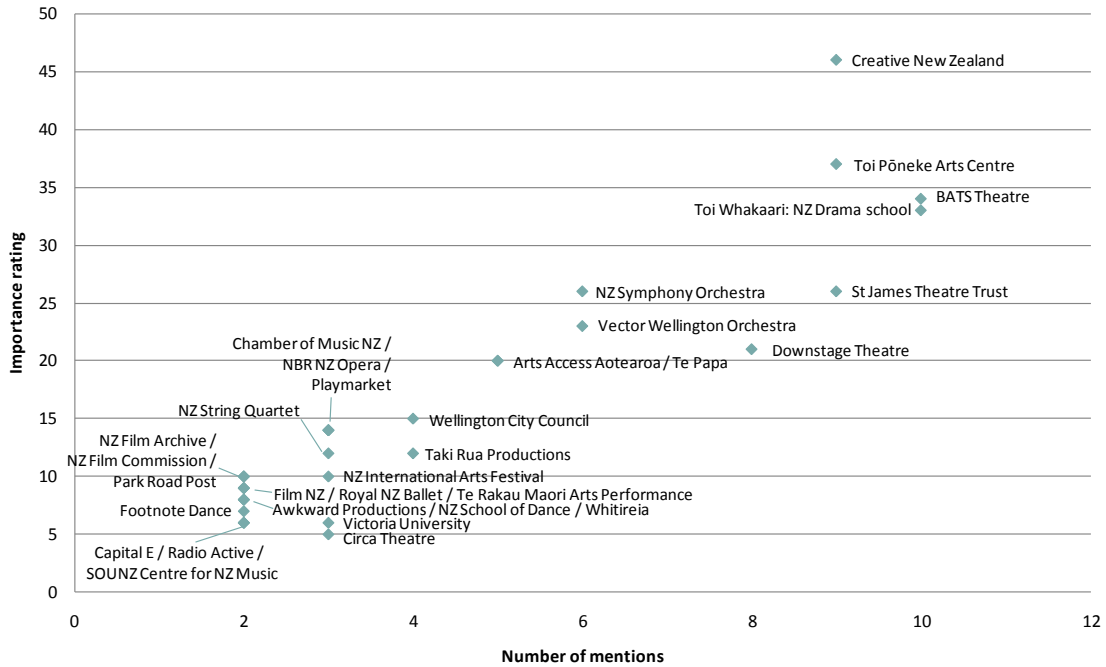
The survey results were corroborated by the focus groups in that most of the organisations represented in Figure 10 and Figure 11 were frequently discussed. Many of these organisations were described as playing a pivotal role in Wellington's arts and culture sector.

³⁷ Results should be interpreted with caution and as indicative only as:

- survey respondents were drawn from a WCC database and are not necessarily representative of the whole arts and culture sector within Wellington;
- survey respondents generated their own lists of important organisations, and this was done differently by different respondents (some only identified arts and culture organisations while others identified a broader range of agencies including funders, venues, and practitioner organisations);
- survey respondents were asked to rate the importance of organisations that could be viewed as peers or competitors, hence this would be expected to influence the importance ratings they gave.

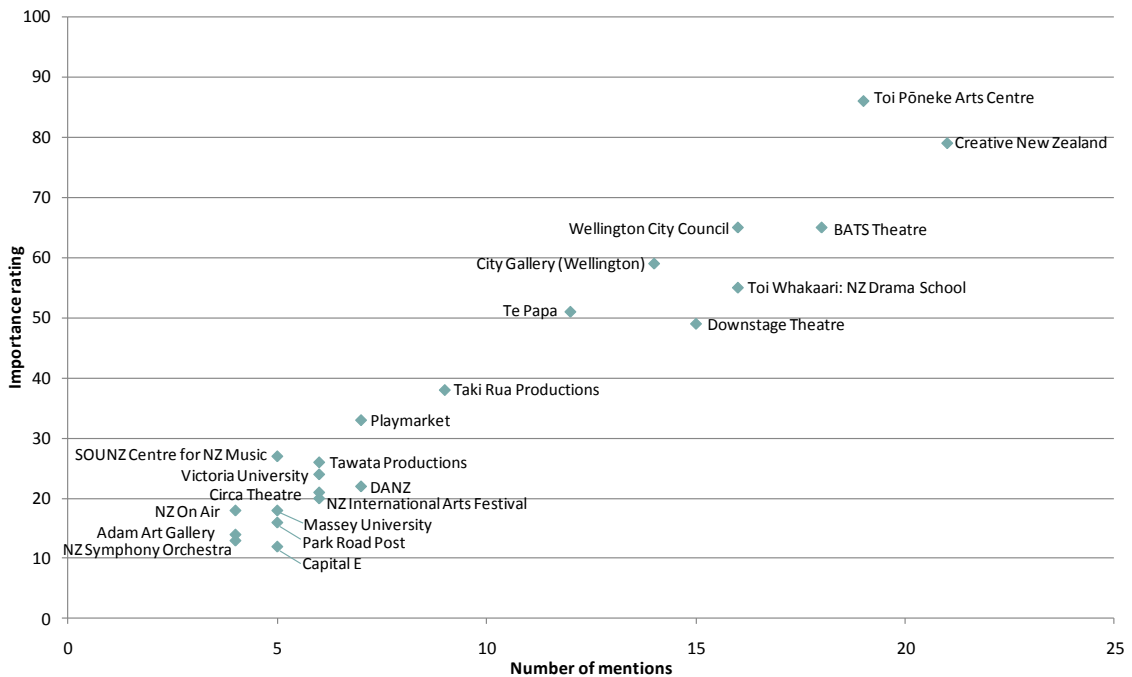
³⁸ Respondents were asked to list up to six arts and culture organisations in the Wellington region with whom they or their organisation had a significant relationship. For each respondent, the organisation they identified in the first position on the six-position list was accorded a value of six. The organisation listed in the second position was accorded a value of five, and so on. Then results were aggregated for all respondents, hence organisations that were mentioned more often and accorded higher positions in the six-position list received higher overall values.

Figure 10: Arts and culture organisations identified as important—by arts and culture organisations



Source: MartinJenkins

Figure 11: Arts and culture organisations identified as important—by individuals



Source: MartinJenkins

Important networks and collaborations

In addition to the important relationships outlined above, participants in the focus groups identified a number of pockets of strong collaboration. These were most evident between large organisations and events. Particular examples of collaboration were:

Established arts and culture organisations

- strong linkages between music and dance organisations with co-productions and sharing of performers (Vector Wellington Orchestra has partnered with the Orpheus Choir, Tudor Consort, the Royal New Zealand Ballet, and Footnote Dance). Some players within Vector Wellington Orchestra and the New Zealand Symphony Orchestra play for the other orchestra
- the New Zealand Symphony Orchestra supports the development of regional orchestras
- the Royal New Zealand Ballet, the New Zealand Symphony Orchestra, Vector Wellington Orchestra, NBR New Zealand Opera, and Chamber Music New Zealand have strong working relationships which extend to the coordination of their performance programmes to avoid clashes.

Education institutions

- graduates from the New Zealand School of Music, New Zealand School of Dance, Toi Whakaari and other tertiary institutions (Victoria and Massey Universities, Whitireia) feed into music, dance, and drama organisations
- the relationship between BATS Theatre and Toi Whakaari is seen as especially strong with Toi Whakaari providing a lot of the “seed” for Wellington city theatre.

Venues

- the St James and Opera House coordinate activities according to what is happening with Downstage and vice versa; both entities work together to support the developmental pathway of artists and arts and culture groups.

Funders

- partnerships with Creative New Zealand were seen as particularly important, and this is likely to be influenced by Creative New Zealand’s role as a significant source of funding to the arts and culture sector.

Other

- the New Zealand International Arts Festival requires around 24 active partnerships to make the festival happen
- Arts Wellington (an organised network of organisations and individual practitioners) was described as a vibrant and important vehicle for bringing people together to socialise ideas, build relationships, and realise opportunities for co-productions. The vibrancy and level of organisation of Arts Wellington was highlighted as unique.

Improving coordination of activities and collaboration

Participants in focus groups talked about improving coordination in the sector. One view put forward was that it is important to optimise —up times”, that is times when the arts and culture sector is busy performing events to the public (i.e. late summer in Wellington). Rather than competing for audiences, there is scope to dovetail events and programmes to maximise audience attendance. While participants talked about the need for greater coordination, they also acknowledged that this is hard to do because of commercial sensitivity and competitiveness. Information sharing occurs informally and is dependent on trust. The need for improved coordination also came through in the online survey.

There is sometimes too much choice but not enough days in the calendar – it would be great to have a Wellington arts calendar... to minimise clashes and to maximise good audiences for events. (Organisation #167)

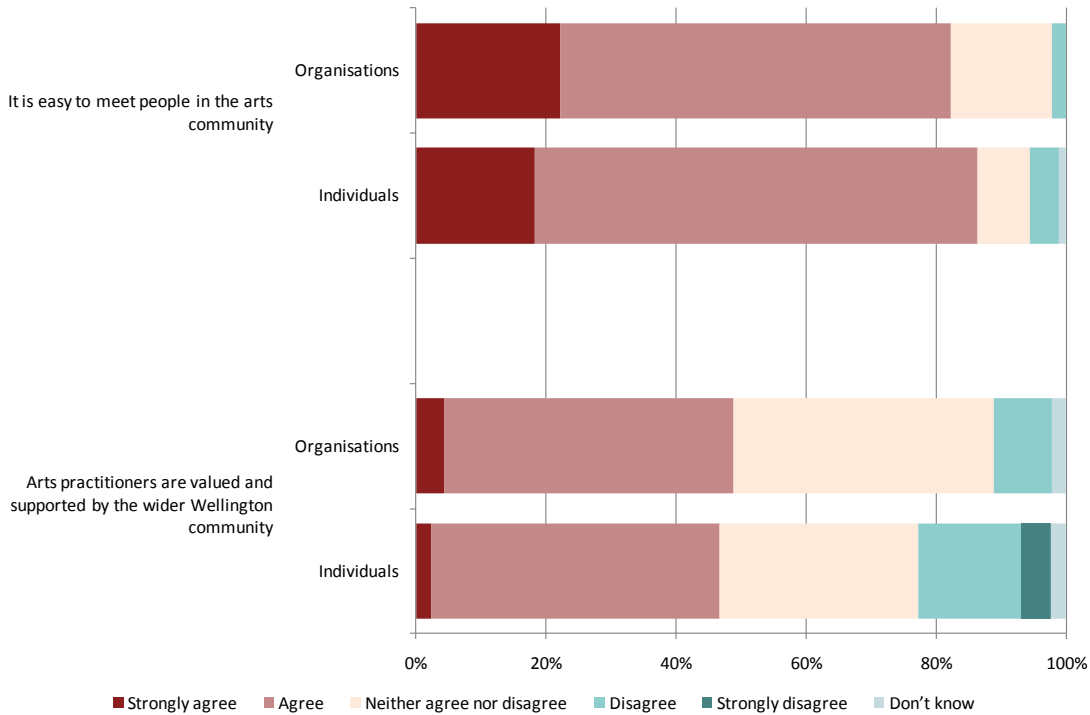
More collaboration is needed in the coordination of activities such as booking events or providing opportunities for individuals and groups to display their art. Representatives of funding bodies said that they look favourably on funding applications that include collaboration within the arts and culture sector.

Sense of community amongst artists

A number of research participants described the Wellington scene as being inter-disciplinary by nature. They saw this as an important energy in the arts and culture sector, providing a glue for organisations and individual practitioners. On the whole, Wellington artists and organisations were described as willing to share talents and abilities with a strong sense of community being evident.

- more than eight out of ten respondents (86.4% individual practitioners, 82.2% organisations) strongly agreed or agreed that it is easy to meet people in the arts and culture community.
- a much lower level of support was given to the proposition that arts practitioners are valued by the wider (i.e. non-arts) community in Wellington.

Figure 12: Sense of community in the Wellington arts and culture sector



Source: MartinJenkins

Funding of the arts in Wellington

Funding issues were highlighted as one of the key concerns facing the Wellington arts and culture sector. Funding issues were repeatedly raised in focus groups and in the online survey, by both organisations (of all sizes) and individuals. There is a strong sense that funding for arts and culture in Wellington is very constrained and are set to become tighter. The current funding situation is believed to have been brought about by:

- the economic recession
- lower levels of sponsorship (with many corporate bodies moving out of Wellington or moving their sponsorship to other activities like sport)
- relatively less funding available in Wellington than in other areas from gaming machine trusts, the Council, and Community Trusts.

Funding bodies have noticed parties approach them who have not needed their funding source previously. There has been a trend for parties to fall short of their expected contribution to funding.

Concerns about funding were seen by some as a barrier to coordination and collaboration, with people adopting a protective attitude about —the patch”.

Inequities in funding

There is a perception that certain art forms obtain funding more readily than others, and people from the community arts sub-sector said they receive relatively less funding than other art forms. Participants working in community arts felt that this sub-sector deserves greater funding because of its focus on wellbeing and broader social outcomes. There is a sense that community art could receive greater funding directly from Government because of the broad sets of outcomes it can contribute positively to.

[A challenge is] the prioritising of some arts/culture activity over others, as evidenced by subsidy levels which particularly marginalise young audiences... the activities being funded the highest have the audiences who are dying the fastest. (Organisation #23)

Funding and backhanders go to established arts rather than up and coming unique works. (Individual #33)

The following general points were also mentioned in relation to funding:

- certain types of art or activities are perceived as more likely to be funded than others:
 - events attract a lot of funding and, while events are generally seen as good for the arts and culture sector, some organisations perceived this support to be at the expense of supporting the arts infrastructure of the city
 - arts that attract “older” people are perceived as being funded more frequently than arts that attract “younger” people
 - art forms that are considered “safe” or that are easy to produce are seen as more likely to get funded than “risky” art forms
 - established art forms or groups are perceived as more likely to receive funding than emerging artists or organisations
- community groups need to compete with each other for a limited pool of funding
- a significant pool of funding is project-based and does not allow for ongoing planning or activity.

Project-based funding versus ongoing funding support

A lack of ongoing funding makes it difficult for individuals and organisations to resource their activities and plan ahead for more than a short-period. For smaller organisations and individuals funding is predominantly project-based. While this supports particular initiatives, it prevents organisations and individuals from growing, and forces many smaller organisations to rely on volunteers. Focus group participants highlighted difficulties in running organisations on a voluntary basis and difficulties in paying for professional services associated with their art form. A lack of ongoing multi-year funding means that organisations have difficulty paying salaries, rents, and administrative expenses.

Volunteers were highly regarded by focus group participants and some sectors rely heavily on volunteer input. There is a perception that volunteer numbers are declining due to busy lifestyles and recessionary pressures. A number of participants talked about the need to provide competitive remuneration to artists and financially reward all stages of a production (i.e. performance *and* rehearsal); and the basic desire to *pay* people who work for arts and culture organisations.

The limited amount of multi-year ongoing funding is seen as impacting particularly negatively on individuals' and organisations' ability to plan. This was seen as a particular issue with international touring groups who need to plan years in advance. There was a view that this prevents organisations and events from becoming sustainable, hence their potential contribution to Wellington city is not able to be fully developed or capitalised on. An example was the Cuba Street Carnival. Funding for this carnival is uncertain and yet participants talked about the special iconic status it is developing.

Key funding sources

Existing funding sources

The online survey asked respondents to rank the importance sources of funding they currently receive³⁹. The funding sources commonly identified by both organisations and individuals as being most important were Creative New Zealand, sponsorship, and local government. Organisations and individuals also identified Community or Charitable Trust or donations as important, with individuals also identifying the Ministry for Culture and Heritage as an important funding source.

It is important to note that we did not ask respondents to indicate the proportion of financial support they received from each of the funding sources. Although the Ministry for Culture and Heritage was not mentioned as frequently as other funding sources, this government department provides significant financial support to organisations like Te Papa and the New Zealand Symphony Orchestra.

³⁹ Respondents were asked to identify from a list of known funding sources, the sources they received funding from in the last 12 months. Respondents were then asked to rank the importance of these funding sources relative to each other. The highest ranked source would be accorded a value of six, because there were six funding sources to choose from. The second ranked source would be accorded a value of five and so on. If only one source was selected, this would be accorded a value of six because it was the most important source of funding.

Expanding the funding base for arts and culture

Although there is pessimism about current and future funding opportunities, there was positive will from a number of participants and respondents to engage with the business/corporate sector. They talked about the need for initiatives to increase sponsorship, branding opportunities, regular giving, and philanthropy. Some research participants were very positive about engaging with the private sector, and were keen to upskill themselves and their organisations to build their funding base and promote their activities. A few participants expressed the sentiment that “it’s no use crying poor” when the whole country is being seen to tighten its “financial belt”.

While there is a desire to expand the funding base for the arts and culture sector, a few participants talked about the very limited capability within the sector to build these relationships and undertake extensive fundraising activities. These participants talked about the need for ongoing mentoring and support (rather than one-off workshops) to upskill themselves.

Creative New Zealand: Review of Recurrently Funded Organisations (RFOs)

Creative New Zealand’s Review was raised by a number of focus group participants and survey respondents. Participants believe that the Review will result in a shift of funding away from the Wellington region to other parts of the country based on a population-based approach to funding.

However, positive references were made to Creative New Zealand’s new direction in fostering emerging practitioners and innovation. This was coupled with concerns from participants that the Review seems to ignore the broader economic impacts of the decisions, as well as the implication that Wellington will be particularly negatively impacted by the new direction. Participants expressed concern that long-standing infrastructure and organisations will be undermined by the review, and that art forms that take a long term to build (e.g. orchestra work) could disappear.

Wellington’s venues

Wellington has a wide range of diverse venues and they are well used by artists and organisations. However, strong and consistent feedback was received in the online survey that accessing venues is one of the key challenges for both individual and arts and culture organisations. Response to the online survey identified:

- the un-affordability of existing venues
- lack of appropriate venues and the need for venues to be able to accommodate a range of art forms and audience sizes (mid-sized venues of approximately 300-800 seats were most commonly identified as lacking and others identified the need for a very large venue. Other issues mentioned were a lack of venues with good parking, venues able to house circus,

live music venues and/or spaces where loud noise levels are acceptable, appropriate spaces for Māori and Pacific theatre/arts, and smaller pop-up venues)

With availability of spaces in Wellington shrinking, organisations like ours may end up being driven out of Wellington. WCC [Wellington City Council] can make a difference in the area of buildings and facilities available for venue-dependent arts and culture organisations like us (in the same way that it does for sport and recreational facilities). (Organisation #153)

- lack of rehearsal space
- scope for more creative use of potential venues or rehearsal space (i.e. using venues or commercial space during “down time”)
- lack of information and coordination about which venues are available and when, and their features.

These comments were echoed by a number of focus group participants who talked about a lack of rehearsal and performance space in Wellington city and in surrounding suburbs. Although Toi Pōneke was acknowledged as a significant achievement for Wellington city’s arts and culture sector, a few participants described it as an uninviting space and costly to use. A number of participants acknowledged that Wellington city contains a good range of venues that met a range of needs, but there was a sense that community-based arts and cultural experiences are best suited to venues in suburban areas and that there is a perceived lack of available spaces in the suburbs. For community arts, proximity of venues to their communities of interest is seen as important for generating a sense of community ownership.

Positive features of Wellington’s venues

A number of venues were identified as particularly important including:

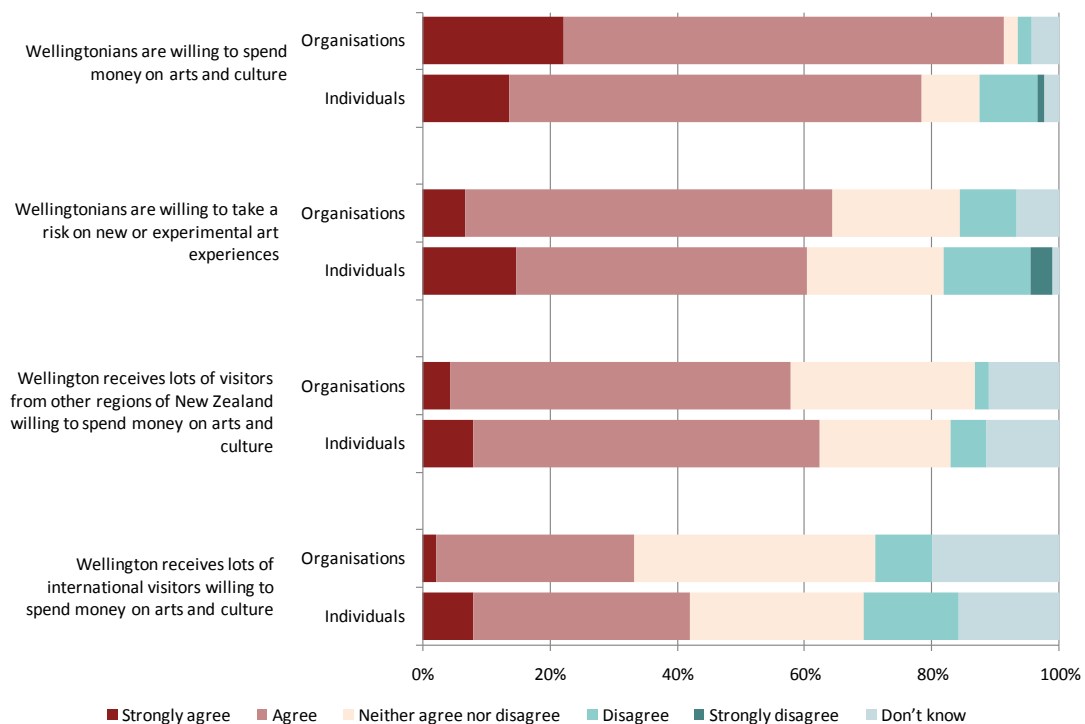
- Te Papa Tongarewa was described by a few participants as “iconic” and a “lynch pin” for Wellington, and it is particularly important for attracting visitors (both from New Zealand and internationally)
- theatres, in particular Downstage Theatre were described as important to the city — bringing in people and acting as draw cards for particular areas of the city
- for emerging theatre artists there appears to be a “venue pathway”. BATS Theatre is a popular starting point and, if a show is well-received, it may move to Downstage Theatre and then to the Opera House.

Audiences in Wellington

Survey respondents had a generally positive view of Wellington’s arts and culture audiences:

- Wellingtonians are seen as having a good appetite for arts and culture
 - while they are seen as being willing to spend money on arts and culture, there was less agreement with the proposition that Wellingtonians are willing to take a risk on new or experimental art. This view was apparent from the focus groups and the online survey
- respondents were more likely to agree that visitors from other regions of New Zealand were willing to spend money on the arts in Wellington (individuals 62.5%, organisations 57.7%) than international visitors.

Figure 13: Audiences for arts and culture in Wellington



Source: MartinJenkins

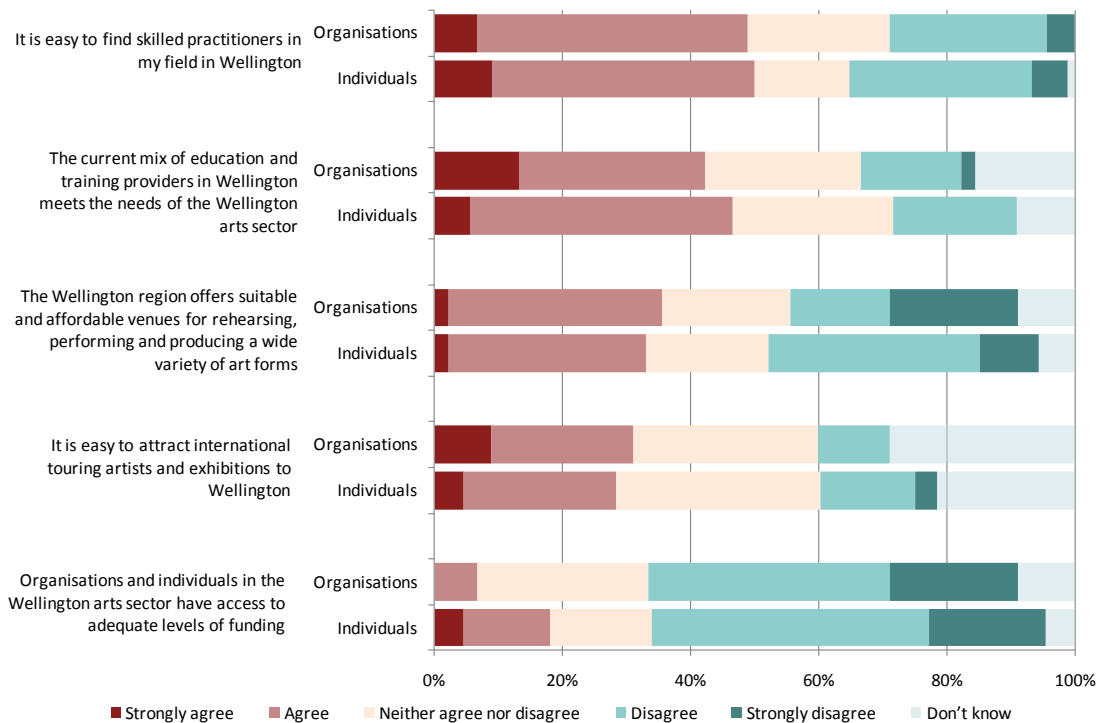
Focus group participants generally held positive perceptions of Wellington city’s audience for arts and culture. The population base of Wellington is seen to correlate closely to ‘the typical arts audience’, with the presence of a skilled and educated workforce who earn relatively high incomes. There is a sense that Wellingtonians are critical, engaged, and questioning; and that there is a core constituency keen to support the arts. Ongoing provision of arts and culture experiences and regular events are supported by an existing audience that is appreciative and interested.

Important infrastructure issues in Wellington

Respondents to the online survey were asked to think about a range of infrastructure elements, and the extent to which these features are present in Wellington’s arts and culture sector.

Figure 14 implies there is variation in the degree to which respondents consider key infrastructural elements to be present. Respondents most commonly agreed that it was easy to find skilled practitioners in their field in Wellington and that the current mix of education and training providers in Wellington met the needs of the arts sector. Respondents were least likely to agree that organisations and individuals in the sector had access to adequate levels of funding support.

Figure 14: Presence of important infrastructural elements in Wellington



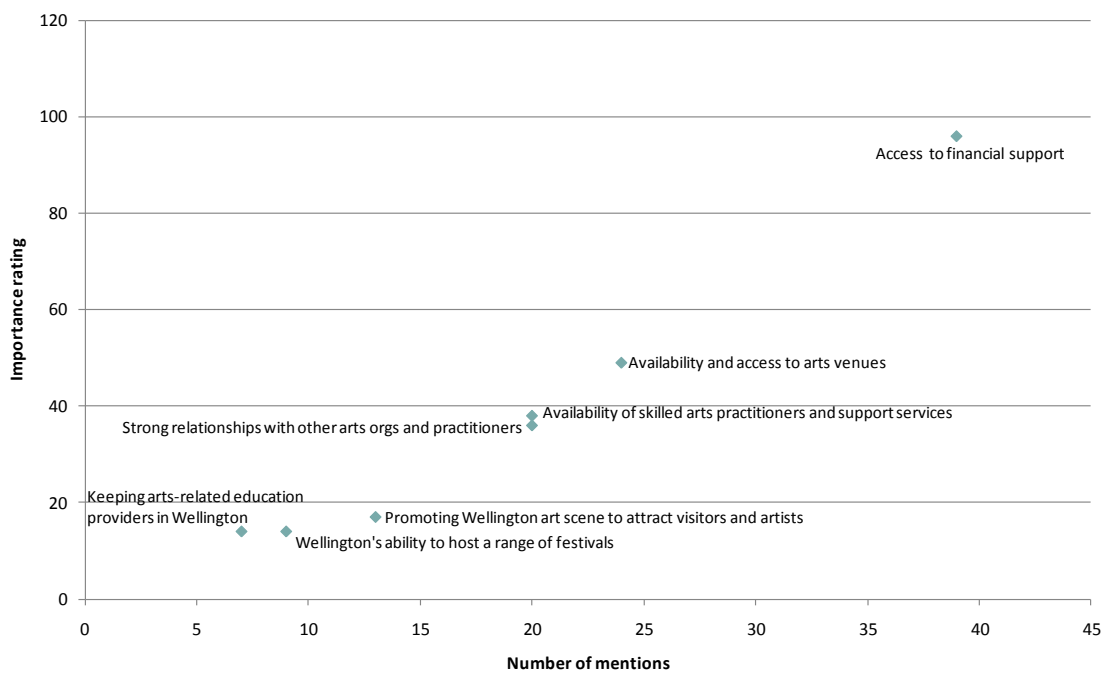
Source: MartinJenkins

Survey respondents were also asked to rate how critical certain factors were to their success in the Wellington region ⁴⁰

- access to financial support was most important for both organisations and individuals
- organisations rated venues, skilled practitioners, and relationships with other organisations highly
- individuals gave high ratings to these elements and Wellington's ability to continue hosting a range of small and large events and festivals.

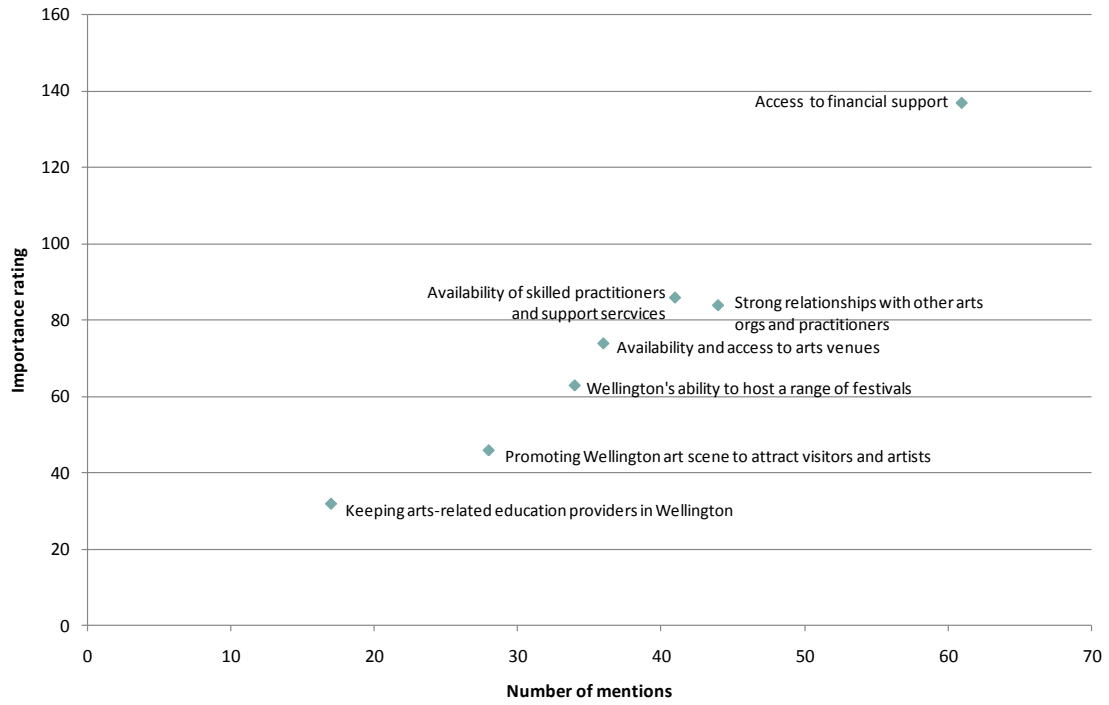
Figure 15 and 16 summarise the relative importance of these perceived critical factors for both individuals and organisations.

Figure 15: Critical factors for succeeding in Wellington — organisations



⁴⁰ Respondents were provided with a list of factors that determine success in the arts and cultural sector. Seven factors were listed, and respondents were asked to choose three factors, and rank them in order of importance. Each respondent's responses were accorded values according to the rank values they ascribed. The first factor chosen received a score of three, the second factor chosen received a score of two, and the third factor chosen received a score of one.

Figure 16: Critical factors for succeeding in Wellington — individuals



Source: MartinJenkins

The roles of central and local government

Ways in which government currently supports Wellington's arts and culture sector

Cultural industries create job growth, turn ordinary cities into “destination cities,” create interconnections between arts and business, revitalize urban areas, attract skilled workers, and create spin-off businesses... Public and private assistance can facilitate the growth of arts and culture as a strong, interconnected, and legitimate industry.

(Creative City Network of Canada)

There are a number of common ways in which governments in different countries, and at national and local levels, support arts and culture. Traditional roles include direct provision, subsidisation, and regulation to ensure equitable access to arts, culture and heritage resources and services (in particular where national heritage is concerned). Other contributions include providing information about and for the sector, facilitating collaboration, delivering education, training and on-going professional development of people in the sector, and supporting the arts and culture sector as an ‘export’ industry for tourists through marketing and promotion.

Central government's role

At the national level, central government supports the arts and culture sector — both across New Zealand, and specifically in the Wellington region — in all of these ways. In particular, central government is a direct provider of critical arts infrastructure and directly supports the production of arts and culture goods and services. Examples include the administration of the National Library of New Zealand, Archives New Zealand, and Te Papa as an autonomous crown entity.

Central government (through the Ministry for Culture and Heritage, Creative New Zealand and, to a much lesser extent, the Department of Internal Affairs) also plays key roles as funders of nationally and regionally important arts and culture organisations. Direct operational funding is provided through Vote: Arts, Culture and Heritage to a number of national organisations including Te Matatini (the national body for Māori performing arts), the Royal New Zealand Ballet, the New Zealand Symphony Orchestra, the New Zealand Film Commission, and the New Zealand Broadcasting Commission (New Zealand On Air). All of these organisations currently have their head office based in Wellington city, hence central government policy has locally observable impacts.

Creative New Zealand provides funding to the arts and culture sector of New Zealand, at both a central and local level (i.e. through funding delegated to territorial local authorities). There is a core set of organisations based in Wellington who currently receive funding from Creative New Zealand on a recurrent basis through the RFO programme. Wellington-based RFOs include Toi Māori Aotearoa, Taki Rua Productions, BATS theatre, DANZ — Dance Aotearoa New Zealand, Capital E — National Theatre for Children, the New Zealand International Arts Festival,

Chamber Music New Zealand, Playmarket, New Zealand String Quartet, and the New Zealand Book Council. These organisations have been confirmed as being part of Creative New Zealand's Arts Leadership Programme⁴¹. Creative New Zealand also supports advocacy activities for the arts, and builds capability by developing leadership, facilitating human resource workshops, and developing audiences and markets. In the future, it plans to build the sector's capability in applying for funding.

Through the Creative Communities Scheme, Creative New Zealand also provides funding to local authorities for distribution within local communities to support and encourage local communities to create art, and these present diverse opportunities for accessing and participating in arts activities.

Central government and local government support for arts and culture overlap to a degree in Wellington. To some extent this is to be expected and reflects a combination of alignment between national and local priorities for arts and culture, the nature of the arts organisations based in Wellington and its capital city status. Central government policy and investment in support of arts and culture has significant positive impacts on Wellington given the presence of a number of key national institutions which receive recurrent government funding. There are signals of a shift in central government policy towards supporting new and emerging art. However, there is a pattern of ongoing core support to nationally and regionally important organisations which is likely to continue in some measure.

Alongside central government investment and support, the Wellington City Council fulfils an important role in supporting the broader arts and culture sector in the Wellington region through mechanisms and activities that specifically respond to the local needs of the city and region. These functions are described in more detail below.

Wellington city Council supports the arts and culture sector through...

...investment in infrastructure

Largely driven by successive mayors, the Council has been a strong supporter of the arts and culture sector over the past 10–15 years. At the broadest level, there has been significant investment in infrastructure, organisation and facilitation of events and the arts and culture sector in Wellington more generally since the mid-1990s (by both central and local government). In particular, the opening of Te Papa in 1998 was a significant addition to the city's arts and culture offering. Over half of international visitors to the Wellington region visit museums in the region. The Council has continued to leverage off this investment by choosing to provide ongoing annual funding to Te Papa.

⁴¹ Effective from 1 January 2012; personal communication Wellington City Council, December 2010

Other investment in the city over the past 10-15 years to support the development of arts, culture and events has included the construction of Westpac Stadium, the development of Courtenay Place and the waterfront, and the refurbishment of historic theatres and auditoriums including St James Theatre, the Opera House, and the Embassy Theatre. More recently, the Council has also invested in developing an arts hub for Wellington city through the Toi Pōneke Arts Centre.

...providing financial support

The Wellington city Council provides some funding to support the arts and culture sector. This includes funding for galleries and museums operated by the Wellington Museums Trust⁴², operation of the Wellington City Archives, subsidised access to performance spaces, and one-off grants from a contestable funding pool. Through the 2010 cultural pool of funding, \$318,014 was available for distribution in the form of contestable grants. Through City Communities, the Convention Centre manages a \$45,000 venue grant subsidy for community groups to access major venues in Wellington city. The Council also provides cultural grants for strategically important organisations or events in the form of a three-year contract.

As well as funding a range of arts and culture organisations and independent practitioners in the city, the Council has also developed strategic partnerships with key art organisations in the region such as the New Zealand International Arts Festival, Toi Pōneke Arts Centre, St James Charitable Theatre Trust, and the Public Art Panel and Wellington Sculpture Trust (for public art).

The Wellington City Council also directly provides a range of arts and culture events and festivals. These include events such as the annual Summer City Festival, which acts as an umbrella for a number of outdoor concerts and events.

...facilitating resource consent and application processes

Wellington City Council has been very permissive of arts activity in the past by facilitating access to public spaces for free events, or assisting event producers in the process of seeking road closures. More recently, this support has been pulled back somewhat due to a range of factors, for example health and safety concerns and the cost of road closures. At times, the Council, through the City Arts team, also acts as a facilitator for arts and culture organisations and independent practitioners — paving the way for people in the arts and culture community to make contact with appropriate local or central government services or providers where necessary.

⁴² Includes the City Gallery, Museum of Wellington City to Sea, the Wellington Cable Car Museum, the Colonial Cottage Museum, the New Zealand Cricket Museum, Carter Observatory, and Capital E.

...marketing and promotion

The Wellington city Council and the Positively Wellington Tourism CCO (PWT) support the arts and culture sector through marketing and promotion of events and activities in the sector. The Council uses a number of mechanisms for this. Examples include publishing a regular guide to recreation activities and events in Wellington (Feeling Great), and supporting (alongside central and local government agencies) a nationwide website for New Zealand's creative sector, The Big Idea.

PWT take a lead role in marketing Wellington city and managing the city's brand, and part of this role includes promoting cultural activities in the city. On a contractual basis, PWT has directly assisted Te Papa to market three events, including the successful Monet Impressionists Exhibition.

...as an information and networking hub

With the establishment of the City Arts team nearly four years ago, significant effort has been put into building networks and facilitating partnerships and collaboration across the arts and culture sector. This includes networks and partnerships between different art forms and artists with arts-related support services. In particular, Toi Pōneke is intended to be an interactive hub for Wellington's arts and culture sector. Both physical and online space has been designed with the intention that anyone can access and contribute information on arts development and participation. The City Arts team ran an extensive process on 'Mapping the Future of the Arts in Wellington' which brought together arts and culture practitioners in a series of six art form-specific hui to work toward developing a shared vision for the future of arts in the city.

How local arts practitioners and organisations view the current and future roles of the Council

Through the focus groups and online survey, stakeholders identified a range of ways in which they believe the Council could support Wellington's arts and culture sector in the future.

Survey respondents identified four common areas where they saw a clear role for the Council. These were:

- the ongoing provision of funding to arts and culture organisations. A number of respondents highlighted the need for more funding certainty and identified the need for core, annual, or ongoing funding in addition to project-based funding. Others identified specific priorities for funding, including for:
 - collaboration
 - community and diversity projects
 - the encouragement of more grassroots, experimental, and ethnically diverse arts activities

- facilitating access to venues for both rehearsal and performance, including access to existing venues, through subsidisation or smarter use of existing spaces. As previously noted, a few respondents also perceived gaps in the city's current venue options
- greater facilitation of networks and collaboration within the arts and culture sector, not just in Wellington city but between local authorities across the Wellington region
- increased support for arts and culture organisations in the areas of marketing, promotion, and coordination of events information and planning. Particular gaps were identified in relation to the coordination and promotion of events, as well as insufficient media engagement and critical review of performing and visual arts in the region.

Many participants also identified a number of areas where there is a lack of skills and knowledge in the sector or (in some cases) funding to carry activities out effectively. Examples of these functions included advocacy, fundraising, marketing, and promotion. There was also recognition that, given the limited resources within the arts and culture sector, there may be value in combining existing resources and using them more efficiently. Many respondents saw a role for an organisation to coordinate and develop funding partnerships, particularly with the private sector, on behalf of arts and culture organisations. Some people from the sector considered that the Council might be well-placed to perform this role.

Driving a vision for Wellington's arts and culture sector

Stakeholders are looking to the Council to support the development of an overarching vision for Wellington's arts and culture sector, which would articulate how the arts and culture sector can best contribute to achieving the city and region's wider economic and social goals. Stakeholders agreed that, given the diverse nature of the arts and culture sector, there is a need for one organisation to be responsible for looking across the whole sector and identifying potential opportunities and synergies. Respondents clearly saw a role for local government to fulfil this role — not just in Wellington city but across the region. While there was a strong focus on the need to work and plan regionally, there were also those who considered there was a need for a regional amenities fund similar to the one established in the Auckland region.

Focus group respondents highlighted the value they believe arts and culture can bring to a city or region, and drew on international examples of cities who had invested in arts and culture to revitalise their city. Examples included Brisbane (Australia) and Portland (Oregon, USA). In particular, some respondents considered it was important for the Council to think about the role of the arts and culture sector as a potential driver for economic development, and consider the role of the arts and culture sector within the broader economic agenda. The role of arts and culture activity for providing direct economic benefits to a region, foster "spin-off" businesses, and stimulate economic regeneration has been highlighted in other cities (e.g. Creative City Network of Canada, 2005).

Participants also argued that, beyond the direct support which local government could offer the arts and culture sector, there was a need to think about and continue improving the general aesthetic of the city, as part of a wider package which attracts people to live, visit, and return to Wellington. In particular, participants made reference to the importance of decisions regarding the redevelopment of Courtney Place. The Council may need to develop a stronger position on the place and importance of arts and culture to the city's attractiveness and economic wellbeing, and plan and fund accordingly.

6. Conclusions

In this final section of the report, we draw together key findings from the strands of research. This section covers:

- factors that contribute to the vibrancy of Wellington’s arts and culture sector
- challenges facing Wellington city’s arts and culture sector
- critical institutions to Wellington’s arts and culture sector
- potential and specific opportunities.

The Wellington arts and culture sector has grown relatively strongly over the past nine years but the growth has been uneven across the sector. In particular, the growth has been driven by strong employment and productivity increases in the sub-sectors of design, and screen production and radio. For certain sub-sectors, including performing arts, visual arts, crafts and photography, the growth has been weaker. In comparison with other major cities, employment growth in Wellington city has been slower, although this has been offset to a degree by stronger growth in the arts and culture sector in other cities and districts in the region.

Wellington city makes an important contribution to both the region and the country’s arts and culture sector. Looking across the wider region, Wellington city accounts for 80% of all employment in the arts and culture sector, and the city hosts the majority of the region’s arts events. The wider region relies heavily on Wellington city for its arts offerings, infrastructure, and events. After Auckland city, Wellington city has the second highest share of arts and culture sector employees in New Zealand, accounting for 14% of employment in the arts and culture sector throughout New Zealand.

Factors that contribute to the vibrancy of Wellington’s arts and culture sector

Wellington’s arts and culture sector has a unique combination of large and small arts and culture organisations, a culture of collaboration, a large number of existing arts and culture “spaces”; all located within a pleasant and attractive city.

Wellington is described as offering a unique arts and culture “package”:

- **Natural landscape and the built environment.** Wellington city is described as having attractive natural landscapes, a compact and vibrant central business district, attractive public spaces, and a range of venues that offer high quality accommodation and hospitality
- **Capital city status and proximity to central government.** As the capital of New Zealand and the seat of central government, Wellington has a natural advantage in attracting domestic and international visitors to the city. The proximity to government also allows for more direct relationships with central government agencies

- **Physical infrastructure.** Wellington has a broad range of venues and institutions that offer a range of arts and culture experiences. The close proximity of physical infrastructure, and general features of Wellington city (e.g. displays of public art, Civic Square, the waterfront, Cuba Mall, and Courtenay Place) create a coherence between arts and culture venues, local retailers, accommodation, restaurants and cafes and so on
- **Long-established and stable institutions.** The presence of large, well-established institutions provides stability to the arts and culture sector, and these are seen to provide opportunities for learning, funding, collaboration, and partnership. Large institutions have strong working relationships and networks with each other, and across the sector
- **Pathways for development.** The presence of tertiary education institutions with arts and culture study programmes, the range of venues, and coordination among venue operators, means there are clear developmental pathways for emerging New Zealand artists. This is especially so for the performing arts
- **Audience.** There is a strong audience for arts and culture in Wellington, and Wellingtonians are described as seeking out arts and culture experiences. Wellingtonians have higher than average incomes and are higher than average consumers of arts and cultural goods and services
- **Iconic events.** Wellington is home to a number of events that have developed an iconic status, such as New Zealand International Arts Festival, World of Wearable Arts (WoW), the New Zealand Fringe Festival and the Cuba Street Carnival. These events provide opportunities to showcase New Zealand and local arts and culture, increase and maintain Wellington city's reputation as an arts and culture capital, and result in significant economic spin-offs for the city
- **Support for the arts and culture sector.** Over a number of years, the Wellington City Council has offered sustained support to the arts and culture sector. The Council has been known to provide a range of support such as grants, venue subsidies, assistance with infrastructure for special events, provision of information and non-funding support, and advocacy
- **Wellington's reputation at national and international levels.** Wellington is regarded highly among New Zealanders for its arts and culture sector, and to a lesser extent it has an international reputation for arts and culture. Having a strong reputation is critical to attract people to the city to live and visit, as well as strengthening patronage of arts and cultural events. An image as a vibrant, creative city is also likely to attract and retain individual practitioners and organisations.

Challenges facing Wellington city's arts and culture sector

A number of challenges for the arts and culture sector were identified in the research. In particular, there is a strong sense that the sector and some individual organisations are currently vulnerable in terms of future funding and sustainability. There is a perception that the future of arts infrastructure and support organisations is fragile. Practitioners and organisations involved in performing arts (e.g. theatre, music) and visual arts perceive significant threats to their long-term viability.

Funding

Art and cultural activities in Wellington are funded from a finite funding pool. Funding is perceived to be more easily accessed by established, ~~tr~~“traditional” organisations than emerging or ~~r~~“risky” art forms. Most funding provided to smaller organisations tends to be project-based, which limits the ability to plan with confidence beyond a short horizon.

Organisations and individual practitioners are highly dependent on government funding which is increasingly constrained as a result of the economic recession and other factors. Specifically, there is concern a particular concern that Creative New Zealand's Review of RFOs will result in funding being shifted away from Wellington to fit more proportionately to the distribution of New Zealand's population (i.e. especially to Auckland); and that established institutions will have to curb their activity or may cease to exist. The full implications of the RFO review will not be known until late 2011 which is creating anxiety in the sector. The balance of demand for funding from the arts and culture sector, and the available supply of funding, has changed such that groups are approaching non-traditional funders more frequently. Generally depressed economic conditions and the decline in corporate sponsorship is having a negative impact on Wellington's arts and culture sector.

The ‘northward’ drift

Many participants in the research perceive Auckland to be ~~the~~“the head office” economy. Indeed, population shifts and the increasing presence of corporate headquarters in Auckland is having an impact on Wellington's economic landscape.

Auckland is seen as an attractive city for young and emerging artists who feel there is a ~~b~~“buzz” in Auckland. In particular, participants saw Pacific arts in Auckland as being more sustainable due to greater support from the community, audience numbers and more events. There were also seen to be greater opportunities for people working in theatre to find multiple forms of paid employment in Auckland due to the presence of the television and film industry (and growing theatre industry). Respondents are concerned that the greater size of the new Auckland Council will allow it to be more aggressive in promotion of the arts and culture, exacerbating northward drift of individuals and organisations.

A lesser but still important challenge is the lure of overseas centres for arts and cultural activity. The breadth of activity in larger centres, and the potential for individual practitioners to benefit from larger markets and more stable infrastructure, are draw cards.

Other specific challenges

Other specific challenges raised by individual practitioners and organisations included:

- **Access to affordable venues.** A number of research participants felt there was a lack of affordable rehearsal and production spaces in Wellington city
- **Lack of coordination.** There was a sense that greater coordination of programming and other activities would maximise benefit to individuals and organisations in the sector. Specific points were made around coordinating the scheduling of events and programmes to ensure everyone gets an audience for their work
- **Focus on events in contrast to infrastructure.** There is a perception that policymakers are focusing too much on discrete arts and culture events, and that insufficient attention is being given to infrastructure for the sector. This includes not only the bricks and mortar but the underpinning arts institutions as well
- **Lack of risk-taking in the current economic climate.** A number of research participants said there is a lack of risk-taking current arts and culture offerings. Programming was more likely to occur with safe, conservative subject matter than with more experimental or socially critical material
- **Fatigue of sector workers and volunteers.** Parts of the arts and culture sector rely heavily on volunteers. The economic climate is seen as having a negative impact on volunteer numbers and willingness to help. There is a general weariness among people in the sector and this is often related to continual struggle for funding or funding uncertainty
- **Perceived gaps in venues.** Although Wellington has a substantial range of venue types and sizes, a number of research participants perceived a gap for a 3-800 and 5000+ capacity venues. Venues that sustain a range of arts and culture forms, and that attract a range of audiences (e.g. mainstream and community arts), were seen as important now and in the future
- **Opportunities for marketing, promotion, and funding.** A strong theme from the research was that coordinated marketing and promotion is needed in the arts and culture sector. Such capability may not exist in organisations, and individual practitioners have limited time to undertake these activities. A few research participants expressed a willingness to partner with other sectors, and develop more partnerships with businesses to increase their pool of funding. Likewise, the opportunity for relationships and partnerships with business was highlighted by participants from central government. There was a consensus view that capability in all of these areas is currently low within the sector

- **A lack of media coverage and critical review.** A number of research participants felt that media coverage and critical review of Wellington city's arts and culture sector was lacking. These participants saw critical review as vital to sustaining audience interest and attendance
- **A need for greater sectoral leadership and vision.** A consistent theme from the research was the need for greater sectoral leadership and vision; and the need for this to inform and align with the general vision of the city. Many research participants are keen to have an overall strategy for Wellington's arts and cultural sector.

Critical institutions to Wellington's arts and cultural sector

A number of research participants referred to the sector as an "ecosystem". By this, they meant that there are delicately balanced links and flows through the system which can be easily disrupted. Similarly, they described Wellington's arts and cultural sector as an integrated and unique package where all elements are important to the sustainability of other elements. Respondents were reluctant to single out particular organisations as being of particular importance. Organisations that were frequently mentioned in focus groups included Creative New Zealand, Te Papa, the major Wellington-based theatres and the NZSO and Vector Wellington Orchestra.

A number of key arts and culture institutions and organisations are based in Wellington city, and strong pockets of collaboration exist.

Specific interdependencies emerged from the research:

- **Established arts and culture organisations work together.** There are strong linkages between music and dance organisations which includes co-production, sharing of performers, and coordination of performance programmes to optimise audience share. In particular, Vector Wellington Orchestra partners with groups such as the Tudor Consort, the Royal New Zealand Ballet, the Orpheus Choir, and Footnote Dance Company. Additionally, coordination of programming occurs between the Royal New Zealand Ballet, the New Zealand Symphony Orchestra, Vector Wellington Orchestra, Chamber Music New Zealand, and the NBR New Zealand Opera
- **Tertiary education institutions.** The significant presence of tertiary education arts and culture programmes and the presence of key arts and culture organisations supports the development of both sectors. For example, many musicians also teach music to emerging practitioners, and Toi Whakaari is seen to provide a lot of the "seed" for Wellington theatre particularly through BATS theatre

- **Venues.** A range of venues exist within Wellington city, and venues have come to be associated with particular art forms or audience demographics. Coordination occurs between St James / Opera House and Downstage to support the developmental pathway of arts and cultural groups
- **Funding bodies.** Partnerships with Creative New Zealand were seen as particularly important. This is likely to be due to Creative New Zealand's role as a significant source of funding to the arts and culture sector
- **Festivals.** The New Zealand International Arts Festival requires a significant number of partnerships with other organisations and practitioners to make the festival happen. The Fringe Festival provides important exposure for emerging artists, a platform for established practitioners to try more experimental work, and an opportunity for audiences to see work outside the mainstream. However the Festival continues to struggle financially, despite contributing to a significant increase in arts and culture activity in Wellington city
- **Networks.** Arts Wellington (an organised network of organisations and individual practitioners) was described as a positive force for bringing people together to socialise ideas, build relationships, and realise opportunities for co-productions.

Opportunities for the sector

Wellington has in many respects an enviable reputation as the country's arts capital, and has many of the essential elements that are critical to sustaining a vibrant and economically significant arts and culture sector. As well as the museums, library and archives sector — where Wellington has world-class facilities — the city and region has clear commercial strengths in film and digital production, and the design industry. These industries have the potential to significantly lift their contribution to the local economy. Similarly, the arts and culture sector has an important role to play in maintaining Wellington's growing reputation as a tourism destination.

Notwithstanding the various threats identified in this report to the health and sustainability of the local arts and culture sector, there is a relatively strong platform built up over a long period of time on which to build. While research participants were clearly concerned about a number of aspects of the current environment, most could see few reasons why Wellington cannot grow and develop its arts and culture sector significantly. While it is difficult to put a figure on the potential economic contribution of the sector, there is a strong sense amongst research participants that a vibrant arts and culture sector has the potential to make a significant economic contribution through a range of mechanisms, including through tourism, direct employment, and the liveability and attractiveness of the city as a place to live.

Yet there is also a strong sense that Wellington should not take its current reputation for granted and furthermore, a belief that sustaining a vibrant and economically successful arts and culture sector will require concerted and coordinated effort across a wide range of participants in the sector.

Role of the Council

Looking forward, we recommend that the Council consider ways in which to build on these key attributes. Making a positive, visible commitment to build on key strengths will send a clear signal to the arts and cultural sectors that the Council values the sector as an integral part of the city's ongoing success and identity.

First and foremost, there is a strong desire from the sector for a clearer sense of the vision and strategy for the region's arts and culture sector, and leadership at a political level to give the arts and cultural sector priority in city and regional decision-making. On the part of the Council, this means strengthening its role in leadership, facilitation and advocacy for the sector and working with central government agencies to ensure the needs and interests of the arts and culture sector in Wellington are taken into account.

Related to this, there is a belief that to maximise the economic potential of the sector, and to avoid a potential long-term decline, there is a need for the Council to invest in the following critical elements that underpin its success, including:

- marketing and promotion of the importance of the sector to the city's brand, and in particular the contribution the city makes to the development of the arts and culture sector in New Zealand
- continued attraction and promotion of key events that provide a platform and opportunities for local and international artists to showcase their work and which mark Wellington as "city of the arts"
- further strengthening of public spaces in a way that further fosters the development of the arts, with a particular emphasis on key inner city locations such as the Courtney Place precinct and the waterfront
- funding support (this is particularly important in the current environment where the redistribution of funding is anticipated e.g. the RFO review).
- facilitating networks of arts practitioners and organisations, including a strong network of arts and cultural venues, institutions and places, that enable Wellington to collectively harness the rich resources within the diverse arts and culture sector, including
- encouraging the development of capability of arts administrators and organisations, including in relation to promotion and marketing, fund-raising, and coordinated planning.

Appendix 1: Research methods

Economic analysis

Defining the arts and culture sector

Economic impact surveys of arts and culture sector or creative industries use varying definitions. Using a value chain concept for creative products⁴³, the economic activities arguably associated with, or resulting from, the arts and culture sector could include activities from pre-creation, through to consumption and post-sale maintenance. In consultation with Wellington City Council and in consideration of similar studies conducted elsewhere, we defined the arts and culture sector in a way that is broadly comparable to other New Zealand and international studies. While the emphasis was predominantly placed on the pre-creation and creation stages of the value chain, for a number of sub-sectors including screen production, publishing and design, it is difficult to differentiate economic activity which involves the primary creative activities and the commercialisation of creative products. Where this is the case, we have erred on the side of including these activities.

A full list of the six-digit industries which comprise the arts and culture sector for the purposes of this study is provided in Appendix 2. Appendix 2 also shows how these economic activities were assigned to the six key sub-sectors set out below.

Industry classifications

The primary focus is on independent arts practitioners and organisations that produce art and/or support the arts and culture sector for a financial return. Given the focus on economic contribution, industry classifications are the most appropriate way of identifying groups of businesses or firms which carry out similar economic activities. This may include any organisation undertaking productive activities, including companies or enterprises, sole traders, and not-for-profit organisations.

The following six broad sub-groups have been used in this study:

- Performing Arts (including Music)
- Museum / Library / Archives
- Publishing
- Design
- Screen Production and Radio
- Visual Arts, Crafts and Photography

⁴³ The Australian Creative Industries Innovation Centre identifies five broad stages of the value chain for creative products: pre-creation, creation, realisation, consumption, and post-sale.

These sub-sectors are derived from the Australia and New Zealand Standard Industry Classifications (ANZSIC). While this provides the best classification of economic activity for analysis of the employment numbers and economic contribution of the arts and culture sector, there are a number of limitations with using ANZSIC:

- economic activities commonly associated with the arts and culture sector are not grouped under one sub-division but are dispersed under different groupings and industry sub-divisions. This requires some judgement as to what is included and left out.
- there are also industry groups which are arguably only partially attributable to the arts and culture sector. For example, 'other education' is a category which includes a mixture of arts related education providers (e.g. ballet school operation, music school operation) and other non arts-related disciplines. It is not possible, given available data, to accurately apportion.
- periodically the ANZSIC is revised to better reflect changes in the economy, including the nature and structure of industries. ANZSIC was last revised in 2006, however it is not possible to retrospectively compare industry financial results prior to 2006.
- changes to classifications can also lead to big changes in the preferred measurement approach, for example ANZSIC 96 had a classification called "Services to the arts (not elsewhere classified)". This industrial sub-class included the following primary activities:
 - Casting agency operation
 - Costume design service
 - Services to the arts nec
 - Set designing service
 - Theatre lighting service
 - Theatre ticket agency operation (computerised or manual)

However, this sub-class no longer exists in ANZSIC 06, and the above primary activities have instead been distributed across a range of mostly general (non-arts) sub-classes:

- Other Goods and Equipment Rental and Hiring nec
- Management Advice and Related Consulting Services
- Employment Placement and Recruitment Services
- Other Administrative Services nec
- Creative Artists, Musicians, Writers and Performers

Given these limitations, we have used industry groupings from both the ANZSIC 1996 (ANZSIC 96) and ANZSIC 2006 (ANZSIC 06) classifications and report some results for 2009 as ranges rather than single figures. Where single figures are used, they are based on ANZSIC 06.

Occupational classifications

In order to provide an alternative picture of the number of people employed in the sector, we used occupational classifications. Arts and culture-related occupations were identified in the Australian and New Zealand Standard Classification of Occupations. This list of occupations is presented in Appendix 3.

Data on people employed in arts occupations was last collected on an annual basis in the Census 2006. While this information is now somewhat out of date, it still provides a sense of the size of the labour force employed in arts occupations compared to the number of employees employed in arts and culture industries. The expectation being that there would be significantly more people employed in arts occupations for two reasons. First, only those employed by firms are counted in business demography data. Second, the occupational data also includes individuals who work in art or culture related occupations but in non-art related industries, e.g. individuals in arts-related occupations who may be working in the health sector.

Assumptions / methods for arriving at output and value added figures

The measurement of the direct economic impact of the arts and culture sector in this study is based on an estimation of the gross outputs and value added to the economy through goods and services provided in a given year. To estimate this, we used financial statistics⁴⁴ from the Annual Enterprise Survey (AES) and apportioned these on the basis of the number of employees in a geographical area for each of the detailed industries which comprise the arts and culture sector. The same exercise was carried out using relevant industry groupings from both ANZSIC 96 and ANZSIC 06 to provide a range. Furthermore, in order to gain a sense of the trend over time, the same apportionment was carried out for 2001 and 2009, using ANZSIC 96⁴⁵.

The approach described above uses a top-down methodology to estimate the value added to the economy attributable to the arts and culture sector at national, regional and district levels. A top-down approach is justified where the bottom-up approach cannot be implemented for a given industry due to a lack of unit level data for that industry⁴⁶. This method for allocating regional GDP or value add uses a variable with a regional dimension correlated with GDP (e.g. employment numbers or wages paid). Although not ideal⁴⁷, the best available proxy for this analysis was employee numbers in relevant ANZSIC industry groupings. A similar approach has been used in a series of reports on the economic contribution of Auckland's creative sector⁴⁸.

⁴⁴ This included financial information at an industry level for sales, salaries paid, profit, value added and gross output

⁴⁵ It is not possible to use ANZSIC 06 retrospectively with the Annual Enterprise Survey.

⁴⁶ Statistics New Zealand, 2007. Regional GDP sources, concepts and methods.

⁴⁷ http://unstats.un.org/unsd/economic_stat/China/Regional-gdp-concepts-sources-methods-New%20Zealand.pdf

⁴⁸ Employee numbers do not differentiate between higher-paid workers who are generating high value-added for geographical units, and lower-paid employees generating lower value-added.

⁴⁸ Market Economics, 2005. The economic contribution of Auckland's creative sector: Prepared for Auckland City

Total value added was determined using a multiplier to account for indirect and induced effects of value added to the Wellington economy. A Type II multiplier used to calculate these figures was based on the average multiplier calculated for an economic impact study of the Auckland city's creative sector in 2005. This study developed regionalised input-output models to develop sub-sector specific multipliers for Auckland city which ranged from 2.13 to 2.76 depending on the sub-sector. Given that the inter-industry dynamics of the arts and culture sector are likely to be similar in different geographic regions in New Zealand, we have applied the weighted average multiplier used – 2.49. The Type II multiplier was applied to valued added in 2009 as a share of output and multiplied by the total value added of the arts and culture sector for Wellington city in the same year to determine the additional economic contribution of the sector when flow-on effects are accounted for.

Survey of arts and culture organisations and independent practitioners

The Council's city Arts team provided MartinJenkins with a list of organisations and individual practitioners that feature on their database. Individual practitioners and organisations from the database were recorded as practicing a range of art forms: broadcasting, film, literary, Māori arts, Māori music, Pacific arts, Pacific music, music, performing arts, visual arts, and general arts. 128 organisations and 110 individual practitioners were invited to participate in the survey. 44 organisations and 66 individuals responded to the survey yielding response rates of 34% (organisations) and 60% (individuals). 133 responses were received in total, yielding an overall response rate of 56%.

It is important to remember that we invited a convenient sample of individuals and organisations from Wellington's arts and cultural sector to participate in the online survey. These individuals and organisations may not be representative of the population of organisations and individuals that form Wellington's arts and cultural sector. The reference population for individuals and organisations is *individuals and organisations known to Wellington City Council who feature on Wellington City Council's database*. We were not able to systematically sample individuals or organisations according to art form or other variables because we do not know the characteristics of the arts and cultural sector's population in Wellington.

Organisations and individual practitioners were asked a number of questions about their organisation or work, providing us with valuable contextual information for who responded to the survey. In general, however, there were insufficient numbers of organisations or individuals to perform stratified analyses of the results. Below is a brief description of the profile of respondents to the online survey.

Profile of respondents

Around half (51.5%) of responding organisations are charitable trusts, and a further 24.2% operate as companies.

A broad range of art forms are represented by those who responded to the survey as shown in the table below. Relatively high proportions of organisational and individual respondents identified their main art form as theatre, music (including opera), visual arts, film/moving image, or dance.

Response	Organisations		Individuals	
	Frequency	Count	Frequency	Count
Craft/Object art	12.0%	3	4.9%	3
Dance	24.0%	6	8.2%	5
Music (including opera)	28.0%	7	24.6%	15
Theatre	40.0%	10	31.1%	19
Inter-arts (skills and techniques drawn from a range of art forms or cultural traditions)	4.0%	1	9.8%	6
Film / Moving Image	12.0%	3	13.1%	8
Literature	8.0%	2	6.6%	4
Media arts (e.g. electronic and digital arts)	8.0%	2	4.9%	3
Visual Arts	12.0%	3	16.4%	10
Māori arts	12.0%	3	6.6%	4
Pacific arts	4.0%	1	8.2%	5
Other	20.0%	5	8.2%	5

Source: MartinJenkins

Independent arts practitioners and arts and culture organisations who responded to the survey were asked to identify whether they primarily produce art or support the arts. On average, responding organisations that produce art have been in existence for close to 30 years (29.8 years), and responding organisations that support art have been in existence for more than 20 years (22.9 years). The majority of these organisations have always operated in the Wellington region. Individual respondents had been providing arts-related services to the Wellington region for an average of 12.8 years, and around half of respondents (52.8%) have been providing arts-related services for between one and 10 years. More than one-third of respondents (34.1%) were in the 11-20 years range, 10.2% in the 21-30 years range, and 3.4% in the 31+ years range.

A copy of the questionnaire is provided in Appendix 5.

Focus Groups

Given the limited time and resource available, it was decided early on to conduct a series of focus groups with different segments of the arts and culture sector in Wellington, rather than a larger series of individual interviews. We conducted seven focus groups and three one-to-one interviews and spoke with about 25-30 practitioners in total.

The focus groups and interviews included representatives from the following groups of stakeholders:

- Wellington City Council
- Positively Wellington Tourism
- Central government agencies
- Direct line funded organisations based in Wellington
- Recurrently funded organisations based in Wellington
- Arts institutions that receive financial support from Wellington City Council
- Locally and regionally important organisations
- Community arts / Social services organisations
- Independent practitioners with their own company

The focus group guide is provided in Appendix 6.

Appendix 2: ANZSIC 06 and ANZSIC 96

ANZSIC 06 Industries		
Sub-sector	Category	Code
Design	Architectural services	M692100
Design	Other Specialised Design Services	M692400
Design	Advertising Services	M694000
Museum/Library/Archives	Libraries and Archives	J601000
Museum/Library/Archives	Museum Operation	R891000
Performing arts (incl. Music)	Music Publishing	J552100
Performing arts (incl. Music)	Music and Other Sound Recording Activities	J552200
Performing arts (incl. Music)	Performing Arts Operation	R900100
Performing arts (incl. Music)	Performing Arts Venue Operation	R900300
Publishing	Magazine and Other Periodical Publishing	J541200
Publishing	Book Publishing	J541300
Publishing	Other Publishing (except Software, Music and Internet)	J541900
Screen Production and radio	Motion Picture and Video Production	J551100
Screen Production and radio	Motion Picture Exhibition	J551300
Screen Production and radio	Postproduction Services and Other Motion Picture and Video Activities	J551400
Visual arts, crafts and photography	Jewellery and Silverware Manufacturing	C259100
Visual arts, crafts and photography	Professional Photographic Services	M699100
Visual arts, crafts and photography	Creative Artists, Musicians, Writers and Performers	R900200

ANZSIC 96		
Sub-sector	Category	Code
Design	Architectural Services	L782100
Design	Advertising Services	L785100
Design	Commercial Art and Display Services	L785200
Museums/Library/Archives	Libraries	P921000
Museums/Library/Archives	Museums	P922000
Performing arts (incl. Music)	Other Education	N844000
Performing arts (incl. Music)	Music and Theatre Productions	P924100
Performing arts (incl. Music)	Sound Recording Studios	P925100
Performing arts (incl. Music)	Performing Arts Venues	P925200
Performing arts (incl. Music)	Services to the Arts nec	P925900
Publishing	Services to printing	C241300
Publishing	Book and other Publishing	C242300
Screen Production and radio	Recorded Media Manufacturing and Publishing	C243000
Screen Production and radio	Film and Video Production	P911100
Screen Production and radio	Motion Picture Exhibition	P911300
Visual arts, crafts and photography	Jewellery and Silverware Manufacturing	C294100
Visual arts, crafts and photography	Creative Arts	P924200
Visual arts, crafts and photography	Photographic Studios	Q952300

Appendix 3: Occupation categories

NZSC099		
Sub-sector	Category	Code
Screen Production and radio	Cinema Projectionist	31323
Screen Production and radio	Camera Operator	31212
Screen Production and radio	Sound Recording Equipment Controller	31313
Screen Production and radio	Broadcasting Transmitting and Studio Equipment Operator	31321
Screen Production and radio	Radio and Television Presenter	33671
Screen Production and radio	Broadcasting and Theatrical Production Manager	12212
Design	Architect	21411
Design	Resource management Planner	21412
Design	Landscape Architect	21413
Design	Graphic Designer	33631
Design	Fashion Designer	33632
Design	Industrial Designer	33634
Design	Interior Designer	33636
Design	Draughting Technician	31181
Design	Signwriter	71243
Design	Advertising and Public Relations Manager	12251
Design	Public Relations Officer	24132
Performing Arts (incl. Music)	Dancer	33651
Performing Arts (incl. Music)	Dancing Teacher and/or Choreographer	33652
Performing Arts (incl. Music)	Actor	33661
Performing Arts (incl. Music)	Artistic Director	33662
Performing Arts (incl. Music)	Conference/Function Organiser	33212

NZSC099		
Sub-sector	Category	Code
Performing Arts (incl. Music)	Ticket-Seller	42113
Performing Arts (incl. Music)	Beauty Therapist	51412
Performing Arts (incl. Music)	Fashion and other Model	52311
Performing Arts (incl. Music)	Composer, Arranger and/or Conductor	33641
Performing Arts (incl. Music)	Instrumentalist	33642
Performing Arts (incl. Music)	Singer	33643
Performing Arts (incl. Music)	Singing and Music Teacher	33644
Performing Arts (incl. Music)	Musical Instrument Maker, Repairer and Tuner	73121
Publishing	Author and Critic	33611
Publishing	Reporter	33612
Publishing	Editor	33613
Publishing	Sub-Editor	33614
Publishing	Copywriter	33615
Publishing	Proof-Reader	41432
Visual arts, crafts and photography	Photographer	31311
Visual arts, crafts and photography	Sculptor, Painter and Related Artist	33621
Visual arts, crafts and photography	Clown, Magician, Acrobat and Related Worker	33681
Visual arts, crafts and photography	Jeweller and Jewellery Repairer	73131
Visual arts, crafts and photography	Gem Cutter and Polisher	73132
Visual arts, crafts and photography	Photographic Darkroom Operator	82231

Appendix 4: Reported tables with industry codes

Table 9: Employment in the arts and culture sector, using ANZSIC 06 codes, 2009

Sub-sector	Wellington city		Wellington region		New Zealand
	Total number of employees	Share of total sector employment	Total number of employees	Share of total sector employment	Share of total sector employment
Design	1,480	34.4%	1,850	34.4%	40.6%
Architectural Services	610	14.2%	720	13.4%	13.8%
Other Specialised Design Services	440	10.2%	630	11.7%	11.8%
Advertising Services	430	10.0%	500	9.3%	15.0%
Museum / Library / Archives	1,300	30.2%	1,620	30.1%	22.5%
Libraries and Archives	700	16.3%	940	17.5%	14.8%
Museum Operation	600	13.9%	680	12.6%	7.8%
Performing arts (incl. Music)	445	10.3%	455	8.5%	6.6%
Music Publishing	0	0.0%	0	0.0%	0.1%
Music and Other Sound Recording Activities	15	0.3%	15	0.3%	0.3%
Performing Arts Operation	300	7.0%	310	5.8%	3.4%
Performing Arts Venue Operation	130	3.0%	130	2.4%	2.9%
Publishing	459	10.7%	510	9.4%	11.7%
Magazine and Other	80	1.9%	100	1.9%	7.9%

Sub-sector	Wellington city		Wellington region		New Zealand
	Total number of employees	Share of total sector employment	Total number of employees	Share of total sector employment	Share of total sector employment
Periodical Publishing					
Book Publishing	370	8.6%	390	7.2%	3.6%
Other Publishing (except Software, Music and Internet)	9	0.2%	20	0.4%	0.2%
Screen Production and radio	450	10.5%	620	11.5%	11.7%
Motion Picture and Video Production	140	3.3%	160	3.0%	3.9%
Motion Picture Exhibition	200	4.6%	340	6.3%	6.9%
Postproduction Services and Other Motion Picture and Video Activities	110	2.6%	120	2.2%	0.9%
Visual arts, crafts and photography	170	3.9%	325	6.0%	6.9%
Jewellery and Silverware Manufacturing	75	1.7%	160	3.0%	2.5%
Professional Photographic Services	30	0.7%	80	1.5%	2.2%
Creative Artists, Musicians, Writers and Performers	65	1.5%	85	1.6%	2.2%
Total	4,304	100%	5,380	100%	100%

Table 10: Growth in employment for Wellington city by ANZSIC 06 codes, 2000-2009

Sub-sector	Number of employees in Wellington city			Percentage of employment growth 2000-2009
	2000	2005	2009	
Design	1,220	1,260	1,480	21.3%
Architectural Services	270	460	610	125.9%
Other Specialised Design Services	430	430	440	2.3%
Advertising Services	520	370	430	-17.3%
Museum / Library / Archive	1,130	1,310	1,300	15.0%
Libraries and Archives	580	680	700	20.7%
Museum Operation	550	630	600	9.1%
Performing arts (incl. Music)	439	389	445	13.7%
Music Publishing	0	0	0	-
Music and Other Sound Recording Activities	9	9	15	66.7%
Performing Arts Operation	250	280	300	20.0%
Performing Arts Venue Operation	180	100	130	-27.8%
Publishing	501	543	459	-8.4%
Magazine and Other Periodical Publishing	75	100	80	6.7%
Book Publishing	420	440	370	-11.9%
Other Publishing (except Software, Music and Internet)	6	3	9	50.0%
Screen Production and radio	355	435	450	26.8%
Motion Picture and Video Production	180	210	140	-22.2%

Sub-sector	Number of employees in Wellington city			Percentage of employment growth 2000-2009
	2000	2005	2009	
Motion Picture Exhibition	160	200	200	25.0%
Postproduction Services and Other Motion Picture and Video Activities	15	25	110	633.3%
Visual arts, crafts and photography	235	160	170	-27.7%
Jewellery and Silverware Manufacturing	80	80	75	-6.3%
Professional Photographic Services	35	45	30	-14.3%
Creative Artists, Musicians, Writers and Performers	120	35	65	-45.8%
Total	3,880	4,097	4,304	10.9%

Table 11: Estimated value of the Wellington city arts and culture sector by ANZSIC 06 and ANZSIC 96 industry codes, 2009

	Value Added (\$M)	Share of Value Added (%)	Gross output (\$M)	Share of Gross output (%)
Design	187 – 179	65.8 – 61.3	349 – 328	52.7 – 44.9
Architectural Services (06)	76	26.6	105	15.8
Other Specialised Design Services (06)	51	18.1	95	14.3
Advertising Services (06)	60	21.3	150	22.6
Architectural Services (96)	77	26.2	109	14.5
Advertising Services (96)	59	20.1	146	20.0
Commercial Art and Display Services (96)	44	15.0	76	10.4
Museum / Library / Archive	2 – 3	0.8 – 1.2	19 – 21	2.9 – 2.8
Libraries and Archives (06)	-	-	-	-
Museum Operation (06)	2	0.8	19 -	2.9
Libraries (96)	-	-	2	0.2
Museums (96)	3	1.2	19	2.6
Performing arts (incl. Music)	5	2.0	39	5.9
Music Publishing (06)	-	-	-	-
Music and Other Sound Recording Activities (06)	2	0.7	5	0.7
Performing Arts Operation (06)	1	0.5	27	4.1
Performing Arts Venue Operation (06)	2	0.7	7	1.1
Other Education (96)	11	3.8	54	7.4
Music and Theatre Productions (96)	1	0.5	27	3.7
Sound Recording Studios (96)	2	0.7	5	0.6

	Value Added (\$M)	Share of Value Added (%)	Gross output (\$M)	Share of Gross output (%)
Performing Arts Venues (96)	2	0.7	7	1.0
Services to the Arts nec (96)	5	1.7	10	1.4
Publishing	30 - 27	10.7 – 9.3	66 - 57	10.0 – 7.7
Magazine and Other Periodical Publishing (06)	5	1.6	14	2.2
Book Publishing (06)	25	8.8	50	7.6
Other Publishing (except Software, Music and Internet) (06)	1	0.2	1	0.2
Services to Printing (96)	2	0.6	4	0.5
Book and other Publishing (96)	25	8.7	53	7.2
Screen Production and radio	41 - 48	14.0 - 16.5	152 - 197	22.9 – 27.0
Motion Picture and Video Production (06)	26	9.3	117	17.6
Motion Picture Exhibition (06)	6	2.0	18	2.7
Postproduction Services and Other Motion Picture and Video Activities (06)	8	3.0	17	2.6
Recorded Media Manufacturing and Publishing (96)	0	0.1	1	0.2
Film and Video Production (96)	42	14.4	177	24.3
Motion Picture Exhibition (96)	6	2.0	18	2.5
Visual arts, crafts and photography	18 - 13	6.4 – 4.3	37 - 26	5.6 – 3.5
Jewellery and Silverware Manufacturing (06)	5	1.8	12	1.8
Professional Photographic Services (06)	3	1.0	6	0.8
Creative Artists, Musicians, Writers and Performers (06)	10	3.6	19	2.9

	Value Added (\$M)	Share of Value Added (%)	Gross output (\$M)	Share of Gross output (%)
Jewellery and Silverware Manufacturing (96)	5	1.7	12	1.6
Creative Arts (96)	5	1.7	10	1.3
Photographic Studios (96)	2	0.8	5	0.6
Total	284 - 292	100%	662 - 731	100%

Appendix 5: Survey

Wellington City Council—Economy of the Arts Survey

Thank you for being willing to take part in this online survey for Wellington City Council.

We are using the survey to learn more about:

- the importance of the Wellington arts and culture sector to Wellington's economy
- which features of Wellington's arts and cultural sector are essential to keep and develop
- what is great about Wellington as a place for people to practice and support the arts – and what is challenging
- the most important ways the Council can support the arts and culture sector in the future

Research findings will help the Council to plan and make decisions about how they can best provide support and prioritise investment to sustain the Wellington arts and culture sector, now and in the future.

Your responses to this survey are confidential. Survey analysis and reporting will highlight and explore key themes, but will not identify individual respondents.

We know that some of you have been interviewed or surveyed a number of times over the last month or two, and we want to thank you for your understanding and patience. Your views are important to this research project.

The survey should take about 15-20 minutes to complete.

Thank you for your time!

Answering questions

To respond all you need to do is click on the box or circle you want to choose. If you change your mind just click on the new response. If your original response is still selected, clicking on it again will deselect it. If this doesn't work, click the "reset" button. This will clear your answer to that question only. It will not change your responses to previous questions.

Saving your answers

To save your answers to date, so that you can come back to the survey later, click "save". You can reuse the same link to re-enter the survey. When you go back into the survey it will take you to where you left off, you will not be able to go back and change your saved answers. Please note that if you have submitted your response you won't be able to re-enter the survey.

Submitting your response

When you have completed the survey, click 'submit'. Please note that when you have submitted your response you won't be able to re-enter the survey.

1. Are you responding to this survey:

Note: If you select 'none of the above' you will not be required to complete this survey.

- as an independent arts practitioner or sole trader >>>> Individual survey
 - on behalf of an arts organisation >>>> Organisation survey
 - other person involved in the Wellington arts and culture sector >>>> Individual survey
 - none of the above >>>> Skip to End
-

Organisations

About your organisation

2. Which of the following best describes the legal status of your organisation?

- Company
- Charitable trust
- Incorporated society or non-charitable trust
- Informal organisation (no legal status)
- Other (please provide details) _____

3. What percentage (%) of your art-related activities is undertaken:

Please estimate to the nearest 10%.

- In Wellington city _____
- Elsewhere in the Wellington region (including Hutt Valley, Porirua, Kapiti or Wairarapa)

- Elsewhere in New Zealand _____
- Overseas _____

For the question below, please use the following definitions:

Produce art includes creating, performing and producing art.

Support the arts includes, but is not limited to, providing infrastructure (venue, training), mentoring, organising events, post-production services, publishing, design services, preserving art and culture and providing resources. This includes libraries and museums.

4. How would you best describe your organisation's main involvement with the arts as being to:

- Produce art
- Support the arts through services and provision of infrastructure >>>> Skip to Q6
- I cannot identify one option, we do both

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5. Which of the following do you consider your organisations main art form to be?

- Craft/Object art
- Dance
- Music (including opera)
- Theatre
- Inter-arts (skills and techniques drawn from a range of art forms or cultural traditions)
- Film / Moving Image
- Literature
- Media arts (e.g. electronic and digital arts)
- Visual Arts
- Māori arts
- Pacific arts
- Other (please specify) _____

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6. In supporting the arts, which of the following best describes your organisation's main activity or purpose:

- Performing Arts Venue
- Arts Education Provider
- Library/Museum/Archives
- Events organiser
- Production relating to film/media
- Publishing services
- Community Arts centre or organisation
- Other support services related to the arts (please specify) _____

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7. How many years has your organisation been in existence?

Numbers of years _____

8. How many years has your organisation been based in the Wellington region?

Number of years _____

9. Does your organisation have any intention of moving away from the Wellington region in the next 1-2 years?

- Yes
- No >>>> Skip to Q10
- Unsure >>>> Skip to Q10

9a. Why does your organisation intend to move away from Wellington in the next 1-2 years?
Please provide details

9b. If you move in the next 1-2 years, it is likely to be to:

- Auckland
- Another New Zealand city/region (please specify) _____
- Overseas
- Unsure at this stage

People working in your organisation

For the following question, please use the following definitions:

Full time = 30 hours or more per week

Part time = fewer than 30 hours per week

10. On average over the last 12 months, how many people working for your organisation on a regular basis were:

Employees

Full time employees _____

Part time employees _____

Volunteers

Full time volunteers _____

Part time volunteers _____

Contractors

Full time contractors _____

Part time contractors _____

11. Over the past 12 months, has the number of people (including volunteers, contractors and employees) working for your organisation:

- increased
- stayed the same
- decreased

12. Over the next 12 months, do you expect the number of people (including volunteers, contractors and employees) working for your organisation to:

- increase
- stay the same
- decrease
- unsure

	Very important	Important	Neither important nor unimportant	Unimportant	Not important at all
Independent arts practitioners in the Wellington city/region	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other arts and culture organisations in the Wellington city/region	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other arts and culture organisations in the rest of New Zealand	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
International arts and culture organisations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Relationships and networks between art organisations

13. How important to the overall success of your organisation are your relationships and partnerships with:

14. In order of importance, please list up to six other Arts and culture organisations in the Wellington city/region with whom your organisation has a significant relationship.

Please only enter one organisation per box

1 _____

2 _____

3 _____

4 _____

5 _____

6 _____

Features of the Arts and culture sector in the Wellington region

Infrastructure

15a. Thinking about infrastructure (including venues, training, funding and access to skills, talent and support), to what extent do you agree that the following statements accurately reflect the current Wellington arts environment?

	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree	Don't know
Organisations and individuals in the Wellington arts and culture sector have access to adequate levels of funding	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The Wellington region offers suitable and affordable venues for rehearsing, performing and producing a wide variety of art forms	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The current mix of education and training providers in Wellington meets	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

the needs of the Wellington arts and culture sector						
It is easy to find skilled practitioners in my field in Wellington	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
It is easy to attract international touring artists and exhibitions to Wellington	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Audiences

15b. Thinking about audiences, to what extent do you agree that the following statements accurately reflect the current Wellington arts environment?

	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree	Don't know
Wellingtonians are willing to spend money on arts and culture	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Wellingtonians are willing to take a risk on new or experimental art experiences	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Wellington receives lots of visitors from other regions of New Zealand willing to spend money on arts and culture	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Wellington receives lots of international visitors willing to spend money on arts and culture	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Reputation

15c. Thinking about reputation, to what extent do you agree that the following statements accurately reflect the current Wellington arts environment?

	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree	Don't know
The Wellington arts scene has a good national reputation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The Wellington arts scene has a good international reputation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Arts and culture community

15d. Thinking about the arts and culture community, to what extent do you agree that the following statements accurately reflect the current Wellington arts environment?

	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree	Don't know
It is easy to meet people in the arts and culture community	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Arts practitioners are valued and supported by the wider Wellington community	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Events

15e. Thinking about events, to what extent do you agree that the following statements accurately reflect the current Wellington arts environment?

	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree	Don't know
There are sufficient opportunities to participate in arts and cultural events across the region	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Events supported by the city reflect the local arts and cultural sector in their look and feel	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

16. Are there any unique features of Wellington's arts environment, not listed in the previous questions, that are important to your organisation?

17. In your view, is there any infrastructure or feature of a thriving local arts scene that is missing in Wellington?

18. What are the features of Wellington, if any, that make it a challenging/difficult place to practise the Arts or provide services related to the Arts?

19. In order of importance, which of the following are the most critical to your organisation succeeding in the Wellington region:

Please choose the top 3 and rank in order of importance.

	1	2	3
Access to financial support through grants, subsidies, sponsorship or donations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ongoing availability and access to Wellington arts venues	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Availability of skilled practitioners and support service providers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Keeping arts-related education providers and training institutions in Wellington	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Having strong networks and relationships with other arts and culture organisations and independent practitioners	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Wellington's ability to continue hosting a range of small and large events/festivals, e.g. World Of Wearable Arts, NZ Fringe Festival, etc	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Promoting the quality and reputation of the Wellington's art scene in order to attract visitors and touring artists	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Sector priorities for local Government support

20. Local government organisations currently support the local arts and culture sector in a number of ways (i.e. funding, providing venues, information provision, facilitating festivals and community events, promotional activities).

Please identify the three most important ways in which you think local government can support arts and culture sector in the future?

Response 1

Response 2

Response 3

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Funding for arts and culture organisations

For the following question, please use the following definitions:

Total income includes income from all sources including all forms of operating revenue, grants, subsidies, sponsorship and donations.

21. For the last financial year, approximately what was your total income FROM ALL SOURCES?

Total income \$ _____

22. For the last financial year, approximately what were your total expenses for salaries, wages and contractors fees?

Total expenses \$ _____

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23. In the last financial year, has your organisation's income:

- increased
- stayed about the same
- decreased

24. Over the next 12 months, do you expect your organisation's income to:

- increase
- stay about the same
- decrease
- unsure

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25. In the last financial year, what proportion of the income received by your organisation came from the following three sources:

- a) operating revenue (e.g. ticket sales, merchandise sales, royalties)
- b) grants and subsidies (e.g. local or central government grants or subsidies)
- c) sponsorship or donations (sponsorship, proceeds from fundraising, etc)?

Please round to the nearest 10%.

Operating revenue _____

Grants and subsidies _____

Sponsorship and donations _____

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26. For grants, subsidies, sponsorship and donations did you receive funding from the following sources in the last 12 months?

Please tick all that apply.

- Local Government grant or subsidy (e.g. Wellington City Council)
- Ministry for Culture and Heritage
- Creative New Zealand
- A Community or Charitable Trust grant or donation
- Lottery grant
- Other fundraising and donations
- Sponsorship
- None / Not applicable >>>> Skip to Final page

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27. Please rank these sources in order of importance for your organisation:

	1	2	3	4	5	6	7	8
Local Government grant or subsidy (e.g. Wellington City Council)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ministry for Culture and Heritage	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Creative New Zealand	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
A Community or Charitable Trust grant or donation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lottery grant	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other fundraising and donations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sponsorship	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
None / Not applicable	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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28. What would happen, if for any reason, your organisation no longer received your most important source of funding from grants, subsidies, sponsorship or donations? Our organisation would:

Please tick all that apply.

- Seriously consider the option of ceasing to exist
- Raise any membership fees and charges
- Fundraise the shortfall
- Apply to other organisations/funding schemes for funding
- Draw more heavily on volunteers/members to cover costs/services
- Have to restrict some aspect of our service/operation
- Continue as usual with minimal impact on our activities
- Diversify the range of profit-generating services and activities provided by the organisation
- Other (please specify) _____

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Individuals**About the services you provide**

2. What percentage (%) of your art-related activities is undertaken:

Please estimate to the nearest 10%.

- In Wellington city _____

- Else where in the Wellington region (including Hutt Valley, Porirua, Kapiti or Wairarapa)

- Elsewhere in New Zealand _____

- Overseas _____

Page 2 of 19

For the question below, please use the following definitions:

Support the arts includes, but is not limited to, providing infrastructure (venue, training), mentoring, organising events, post-production services, publishing, design services, preserving art and culture and providing resources. This includes libraries and museums.

Produce art includes creating, performing and producing art.

3. How would you best describe your main involvement with the arts as being to:

- Produce art
- Support the arts through services and provision of infrastructure >>>> Skip to Q5
- I cannot identify one option, I do both

Page 3 of 19

4. What art form would you consider to be your main art form?

- Craft/Object art
- Dance
- Music (including opera)
- Theatre
- Inter-arts (skills and techniques drawn from a range of art forms or cultural traditions)
- Film / Moving Image
- Literature
- Media arts (e.g. electronic and digital arts)
- Visual Arts
- Māori arts
- Pacific arts
- Other (please specify) _____

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5. In supporting the arts, which of the following best describes your main activity or purpose:

- Providing arts education or training
- Mentoring
- Volunteering time or expertise
- Providing paid expert advice
- Managing an informal network
- Organising events
- Providing production services relating to film/media
- Publishing services
- Providing other support services related to the arts (please specify) _____

Page 5 of 19

6. How many years have you been providing art-related services to the Wellington region?

Numbers of years _____

7. Do you have any intention of moving away from the Wellington region in the next 1-2 years?

- Yes
- No >>>> Skip to Q8
- Unsure >>>> Skip to Q8

7a. Why do you intend to move away from Wellington in the next 1-2 years?

Please provide details

7b. If you move in the next 1-2 years, it is likely to be to:

- Auckland
- Another New Zealand city/region (please specify) _____
- Overseas
- Unsure at this stage

Relationships and networks between art organisations

8. How important to your overall success are your relationships and partnerships with:

	Very important	Important	Neither important nor unimportant	Unimportant	Not important at all
Independent arts practitioners in the Wellington city/region	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other arts and culture organisations in the Wellington city/region	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other arts and culture organisations in the rest of New Zealand	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
International arts and culture organisations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

9. In order of importance, please list up to six Arts and culture organisations in the Wellington city/region with whom you have a significant relationship.

Please only enter one organisation per box.

1 _____
 2 _____
 3 _____
 4 _____
 5 _____
 6 _____

Features of the Arts and culture sector in the Wellington region

Infrastructure

10a. Thinking about infrastructure (including venues, training, funding and access to skills, talent and support), to what extent do you agree that the following statements accurately reflect the current Wellington arts environment?

	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree	Don't know
Organisations and individuals in the Wellington arts and culture sector have access to adequate levels of funding	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The Wellington region offers suitable and affordable venues for rehearsing, performing and producing a wide variety of art forms	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The current mix of education and training providers in Wellington meets the needs of the Wellington arts and culture sector	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
It is easy to find skilled practitioners in my field in Wellington	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

It is easy to attract international touring artists and exhibitions to Wellington	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
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Audiences

10b. Thinking about audiences, to what extent do you agree that the following statements accurately reflect the current Wellington arts environment?

	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree	Don't know
Wellingtonians are willing to spend money on arts and culture	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Wellingtonians are willing to take a risk on new or experimental art experiences	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Wellington receives lots of visitors from other regions of New Zealand willing to spend money on arts and culture	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Wellington receives lots of international visitors willing to spend money on arts and culture	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Reputation

10c. Thinking about reputation, to what extent do you agree that the following statements accurately reflect the current Wellington arts environment?

	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree	Don't know
The Wellington arts scene has a good national reputation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The Wellington arts scene has a good international reputation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Arts and culture community

10d. Thinking about the arts and culture community, to what extent do you agree that the following statements accurately reflect the current Wellington arts environment?

	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree	Don't know
It is easy to meet people in the arts and culture community	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Arts practitioners are valued and supported by the wider Wellington community	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
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Events

10e. Thinking about events, to what extent do you agree that the following statements accurately reflect the current Wellington arts environment?

	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree	Don't know
There are sufficient opportunities to participate in arts and cultural events across the region	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Events supported by the city reflect the local arts and cultural sector in their look and feel	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

11. Are there any unique features of Wellington's arts environment, not listed in the previous questions, that are important to you as an independent arts practitioner or person involved in the Wellington arts and culture sector?

12. In your view, is there any infrastructure or feature of a thriving local arts scene that is missing in Wellington?

13. What are the features of Wellington, if any, that make it a challenging/difficult place to practise the Arts or provide services related to the Arts?

14. In order of importance, which of the following are the most critical to you succeeding in the Wellington region:

Please choose the top 3 and rank in order of importance.

	1	2	3
Access to financial support through grants, subsidies, sponsorship or donations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ongoing availability and access to Wellington arts venues	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Availability of skilled practitioners and support service providers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Keeping arts-related education providers and training institutions in Wellington	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Having strong networks and relationships with other arts and culture organisations and independent practitioners	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Wellington's ability to continue hosting a range of small and large events/festivals, e.g. World Of Wearable Arts, NZ Fringe Festival, etc	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Promoting the quality and reputation of the Wellington's art scene in order to attract visitors and touring artists	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Sector priorities for local Government support

15. Local government organisations currently support the local arts and culture sector in a number of ways (i.e. funding, providing venues, information provision, facilitating festivals and community events, promotional activities).

Please identify the three most important ways in which you think local government can support arts and culture sector in the future?

Response 1

Response 2

Response 3

16. In the last financial year, what proportion of the income you received from arts-related activities came from the following three sources:

- a) operating revenue (e.g. ticket sales, merchandise sales, royalties)
- b) grants and subsidies (e.g. local or central government grants or subsidies)
- c) sponsorship or donations (sponsorship, proceeds from fundraising, etc)?

Please round to the nearest 10%.

Operating revenue _____

Grants and subsidies _____

Sponsorship and donations _____

17. For grants, subsidies, sponsorship and donations, did you receive funding from the following sources in the last 12 months?

Please tick all that apply.

- Local Government grant or subsidy (e.g. Wellington City Council)
- Ministry for Culture and Heritage
- Creative New Zealand
- A Community or Charitable Trust grant or donation
- Other fundraising and donations
- Sponsorship
- None / Not applicable >>>> Skip to Final page

18. Please rank these sources in order of importance

	1	2	3	4	5	6	7
Local Government grant or subsidy (e.g. Wellington City Council)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ministry for Culture and Heritage	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Creative New Zealand	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
A Community or Charitable Trust grant or donation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other fundraising and donations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sponsorship	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
None / Not applicable	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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Thank you for taking the time to complete this survey.

Do you have any other comment you wish to make about the Wellington arts and culture sector?

End of survey.

Appendix 6: Focus Group questions

Positively Wellington Tourism

Wellington City Council has commissioned research to assess the contribution of the Wellington's arts and cultural sector to Wellington's economy, and identify factors that are critical to ensuring a thriving arts and culture sector in the future. The research will be used to help the Council plan and make decisions about how and where it should best provide support and what its investment priorities for the arts and culture sector need to be now, and for the future.

As part of the research, MartinJenkins is conducting a series of focus groups with key organisations and individuals contributing to the Wellington arts and culture sector that can provide an informed perspective of the opportunities and challenges facing the sector and the region.

We are interested in learning about:

- What is the importance to New Zealand of having a thriving arts scene in Wellington region and a reputation as the arts capital of New Zealand?
- What makes Wellington city or region different from other regions with regards to the arts?
 - Some of the areas for discussion might include:
 - Infrastructure (venues for rehearsing, performing and producing, funding, access to key people and capability)
 - Networks and relationships between arts and culture organisations and individuals
 - Education providers and training institutions
 - Community driven youth arts opportunities, e.g. orchestras, bands, dance
 - Nature and size of audiences (willing to pay, willing to experiment)
 - Reputation of Wellington arts scene (for visitors and touring artists)
 - Art resources – including libraries, archives and museums
 - Range of small and large events, e.g. Artsplash, international, World of Wearable Arts
 - Ethnic arts and festivals

- Which arts and culture entities and elements of Wellington's arts environment can we not afford to lose?
 - for the success of the Wellington region's art sector – as an attractive city/region for residents/tourists/business?
 - for New Zealand's wider arts infrastructure and reputation?
- Thinking about the arts and culture entities and elements we've discussed, are there any significant gaps or areas for improvement? What needs to be done better?
- Valuable networks and partnerships within the arts and culture sector in the Wellington region
 - How integrated is the Wellington arts and culture sector for the purposes of promoting Wellington as being a thriving arts city/region ?
 - In your mind, which are the key relationships within the arts and culture sector and key sub-sectors which it is critical to maintain?
 - Who should be working together who aren't currently?
 - What, if any, is the role of government (central or local) in facilitating networks and partnerships in the Wellington arts and culture sector? What can be done?
- What other kinds of local or central government support are most important to building/maintaining a strong arts and culture sector in Wellington city?

Wellington City Council Discussion Group (Group 1)

- Introductions
- Introduce session

Discussion points:

1. In what ways, and to what extent, has Wellington City Council been supporting the arts and culture sector in recent years?
2. What support do arts and culture organisations seek from the Council, and have there been trends in this over time? (e.g., are more organisations requesting funding now and, if so, why?)
3. Based on the Council's interactions with arts and culture organisations and practitioners, what are the main funding and other challenges facing arts and culture organisations overall, and in key sub-sectors?
4. What is the Council's understanding of the likely outcomes of the RFO review? What does the Council see as the key risks?
5. Apart from funding, what do you see being the key opportunities and threats for Wellington Arts and culture sector?
6. What is the Council's view on the appropriate role for local government?
7. What are the obstacles or challenges to increasing Council support for the arts?

Central Government stakeholders (Group 2)

Welcome to the group, thank them for coming.

Foci of the research:

1. Economic impact of Wellington's arts and cultural sector
2. Relationships and inter-dependencies to make it vibrant and sustainable
3. Art infrastructure: what is critical, what is needed?
4. Explore ways that local and central government can best assist and support

Housekeeping: recorder and how we would use the recording, location of toilets.

Range of topics to cover: need to maintain the momentum of the discussion.

Fact gathering:

1. As you introduce yourself to the group, would you please describe the ways in which your organisation supports the arts and culture sector?

General warm-up:

2. What is your take on the current health and outlook of New Zealand's arts and culture sector?

Probe around the following:

- What are the front-of-mind opportunities and threats?
 - What about funding challenges and the implications of these?
 - How does Wellington compare with other New Zealand regions?
3. Funding challenges: What do arts practitioners, organisations etc do or say in response to these challenges? What messages have they given your agency?
 4. What is the importance to New Zealand of having a thriving arts and cultural sector?

5. What do you think makes Wellington different from other regions with regards to arts and culture?

Probe around the following:

- Infrastructure (e.g. venues for rehearsing, performing and producing; access to key people and institutions that build capability, access to funding)
 - Networks and relationships between arts and culture organisations and individuals
 - Education providers and training institutions
 - Community-driven arts and culture
 - Nature and size of audiences (willing to appreciate, willing to experiment, willing to pay)
 - Reputation of Wellington's arts and culture scene (for visitors and touring artists)
 - Art and culture resources – including libraries, archives and museums
 - Range of arts and culture events
 - Ethnic arts and cultural festivals
6. Which entities and elements in Wellington's arts and culture scene are critical to its success?
7. From your perspective, what are the key networks and partnerships in Wellington's arts and cultural sector?
8. Central and Local Government provide support to arts and culture, and earlier you described the support your organisation provides to the arts and culture sector. What changes, if any, are happening now or are likely in the future?

Focus Group Discussion Guide (groups 4-9)

Welcome to the group, thank them for coming.

Foci of the research:

1. Economic impact of Wellington's arts and culture sector
2. Relationships and inter-dependencies to make it vibrant and sustainable
3. Art infrastructure: what is critical, what is needed?
4. Explore ways that local and central government can best assist and support

Welcome to group: thank them for coming

Housekeeping: tape recorder and how we would use the recording

Range of topics to cover: need to maintain the momentum of the discussion

Project purpose: Introduce the project's purpose and specific research questions

Brief introductions: Have a brief round of introductions including a brief description of roles

General warm-up:

1. How would you describe the pulse or the health of Wellington city's arts scene?
2. What are the things that do / would make Wellington city a great place for people involved in the arts?

Probe around the following:

- Infrastructure: venues for rehearsing, performing, and producing
- Capable people and important networks/relationships
- Access to funds
- Training institutions, professional development, mentoring
- [Nature and size of audiences: willing to pay, willing to experiment]
- [Reputation of Wellington's arts scene (e.g. for visitors, touring artists)]
- [Art resources (including libraries, archives, museums)]

For each, draw out:

- How critical is this element to individuals/organisations in the Wellington arts scene?
- Which of these are essential to keep and develop?

- What is important to sustaining the essential elements?
 - What could be better, or done better?
3. What are the front-of-mind **opportunities** and **threats** facing you / your organisation / the Wellington arts scene in the short- to medium-term?

Let's now think about the networks, relationships, and partnerships that exist in the Wellington arts scene:

4. Who do you work or partner with?

Probe around the following:

- How do these relationships help you achieve your goals?
- Which of these are critical to your survival/success? Think about what the consequences would be if you didn't have these relationships/partnerships/networks.
- Are there relationships/partnerships/networks that you / your organisation would find beneficial that you don't currently have? How do you think these would be beneficial?

Thinking about "bricks and mortar" in particular:

5. Which venues / exhibition spaces / rehearsal or production facilities are important to you / your organisation? Are there any gaps?

Thinking about the council and central government:

6. What are the best ways they can support you / your organisation to make a strong Wellington city arts scene?

Probe around the following:

- Funding
- Venues
- Information provision
- Facilitating festivals / events
- Promotional activity

Appendix 7: References

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