

Economy Te Ōhanga

Understanding the economic value
of New Zealand's cultural system

**Manatū
Taonga**
Ministry
for Culture
& Heritage



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Key insights

New Zealand’s cultural system—including the arts, heritage, media, and sport and recreation sectors—makes a significant contribution to the wider economy, demonstrating positive return on investment and resilience despite broader economic constraints. While challenges persist, there is strong potential for growth, with global demand for New Zealand’s creative industries and unique cultural identity driving future opportunities.

Taken together, the arts and creative sector and sport and recreation sector contributed over **\$26 billion to New Zealand’s GDP** in 2025.



Creative exports were New Zealand’s **fourth largest commodity** in 2023, generating almost **NZ\$3.8 billion**.



The arts and creative sector and sport and recreation sector provide primary **employment for over 197,000 people** and includes almost 57,000 businesses.



Productivity is growing in the arts and creative sector, driven by industries such as screen, music and game development.



Māori creatives, practitioners and businesses are key contributors to New Zealand’s cultural economy, with **more than 24,000 Māori** holding primary employment in the cultural system.



In 2024, **volunteers contributed \$1.2 billion in value** for the live performance sector, and **\$3.09 billion** for the sport and recreation sector.



Cultural activity has spillover benefits outside of the cultural system, including in hospitality, tourism, health and education.



For quick statistics, see the one-page overview:
[Evidence at a glance: Economy \(Manatū Taonga\)](#)¹

About this evidence brief

This evidence brief is the first in a new series of reports synthesising available data and evidence by the areas of inquiry within Te Kāpehu | The Compass, Manatū Taonga Ministry for Culture and Heritage’s cultural system evidence framework (published July 2025), developed in partnership with the Ministry’s Crown-funded entities.

Te Kāpehu | The Compass (Manatū Taonga)²

With a focus on the arts, heritage, media and sport and recreation sectors, these briefs look across New Zealand’s complex and dynamic cultural system to highlight robust, trustworthy evidence and share key insights that can be used by a range of audiences to support decision-making, policy development, and strategic planning.

These evidence briefs support the Ministry’s broader work programme to strengthen the cultural system evidence base, as signalled in *Amplify: A Creative and Cultural Strategy for New Zealand 2025–2030*.³

“Amplify Strategic pillar: Investing for maximum impact

Maximising value for New Zealand from the creative and cultural sectors through Government investment.

Action 1.5—Develop a research programme to strengthen the evidence base for the creative and cultural sectors, to ensure funding and policy decisions are well-informed and demonstrate the sector’s value to decision-makers.”

This evidence brief focuses on the Economy area of inquiry within Te Kāpehu. When reading this brief, it is important to keep in mind that economic measures provide only one perspective on value, and there is overlap between the different areas of inquiry. The cultural system generates a range of social, cultural and wellbeing benefits that are explored in other parts of Te Kāpehu. For a complete picture, this evidence should be considered alongside those dimensions.

What is the ‘cultural system’?

“There is no universal definition of the cultural and creative sectors. Each country has its own definition and produces different types of statistics relating to cultural participation, cultural and creative employment, and other factors.” (OECD 2022, p. 22)

For the purposes of Te Kāpehu, the ‘cultural system’ refers to the diverse cultural and creative sectors, industries and producers that contribute to cultural activity within New Zealand. Manatū Taonga Ministry for Culture and Heritage’s broad portfolio of responsibilities includes the arts, culture, heritage, media and sport and recreation sectors. Following the example of how international jurisdictions like Canada represent cultural statistics (Government of Canada, n.d.), as seen in the Ministry’s *Annual Report 2024/25* (Manatū Taonga Ministry for Culture and Heritage, 2025a) and *Long-term Insights Briefing 2025* (Manatū Taonga Ministry for Culture and Heritage, 2025b), all of these sectors are included when presenting insights about New Zealand’s cultural system as a whole.

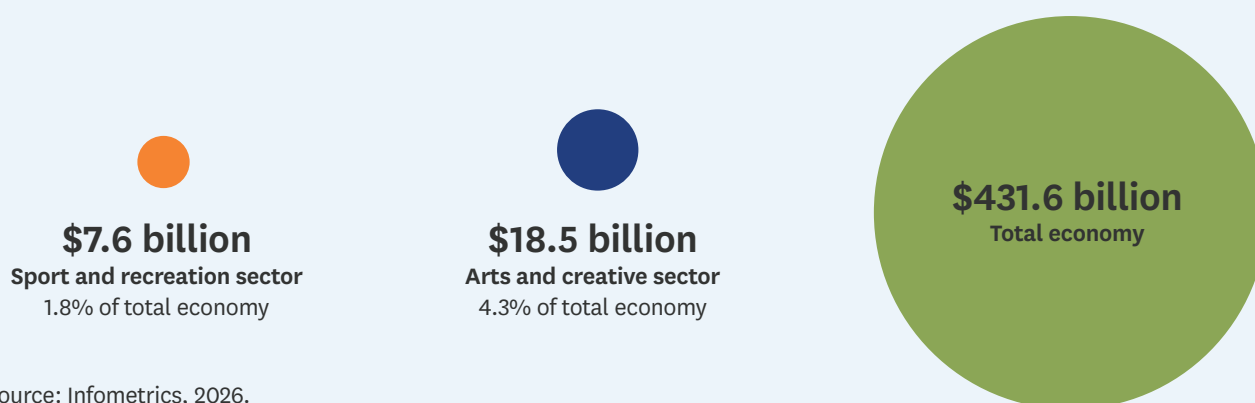
Cultural system GDP contribution and growth

Key insight

Taken together, the arts and creative and sport and recreation sectors contributed over \$26 billion to New Zealand's GDP in 2025.



In 2025, the cultural system's GDP⁴ contribution included \$18.5 billion from the arts and creative sector and \$7.6 billion from sport and recreation



Source: Infometrics, 2026.

In terms of growth, the GDP contribution of the arts and creative sector contracted -1.1 percent from the prior year, slightly more than the total economy (-0.8 percent). The sport and recreation sector grew modestly (+0.4 percent) and the heritage sector was essentially flat (-0.1 percent), indicating relative stability despite broader conditions. By contrast, the media sector declined more sharply (-3.0 percent).

Table 1. Cultural system contribution to New Zealand's GDP, year to March 2025.

Source: Infometrics, 2026.

Sector	GDP contribution	Change from prior year	% of total economy
Arts and creative	\$18.5 billion	↓ -1.1%	4.3%
Selected arts and creative subsectors*			
Arts	\$3.1 billion	↓ -1.1%	0.7%
Heritage	\$5.0 billion	↓ -0.1%	1.2%
Media	\$5.0 billion	↓ -3.0%	1.2%
Sport and recreation	\$7.6 billion	↑ 0.4%	1.8%
Total economy	\$431.6 billion	↓ -0.8%	100%

Notes. GDP is measured in constant 2025 prices. Annual data represents the year to March. All figures have been rounded.

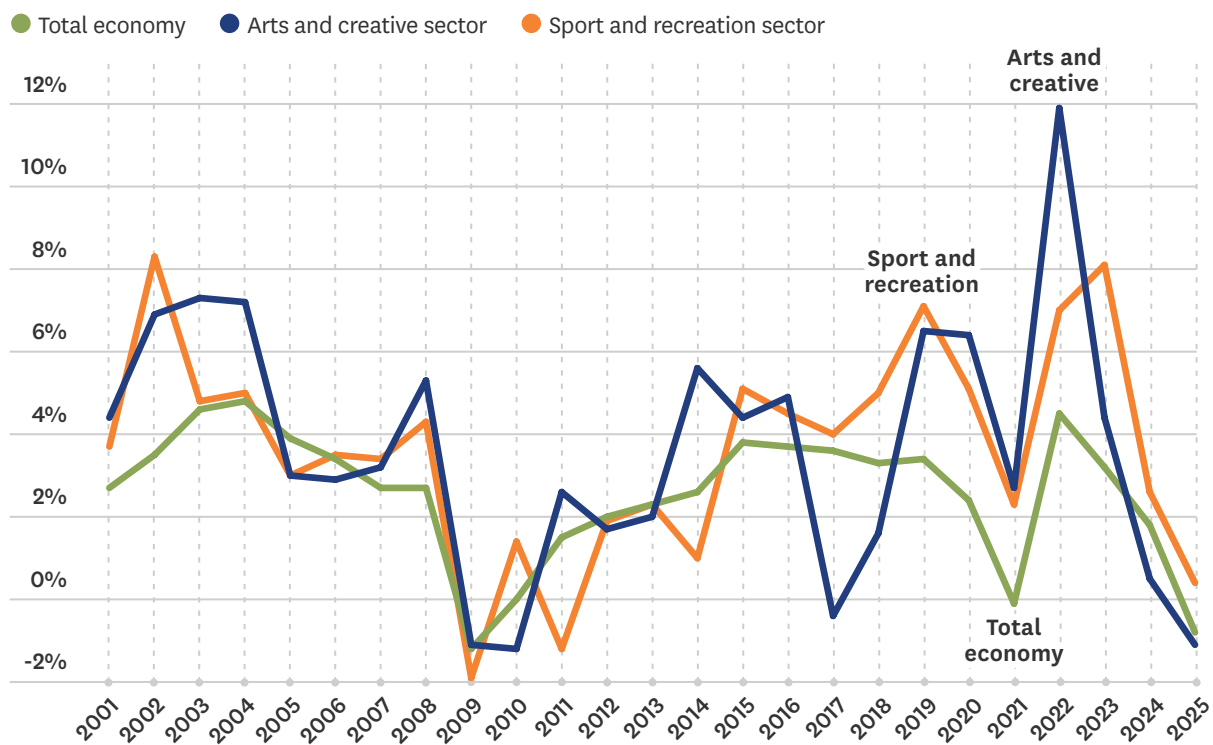
*All sector profiles are distinct. Totals for the arts, heritage and media profiles do not equal 100 percent of the arts and creative profile.

Over the past five years, the arts and creative and sport and recreation sectors have grown faster on average than the total economy

Over time, the cultural system’s direct contribution to GDP has fluctuated in response to broader economic conditions, with particular volatility seen in the arts and creative sector at times of global crisis (for example, during the Global Financial Crisis and COVID-19 pandemic). When expressed as an average over time, the cultural system has experienced more growth than the total economy in the last five years (2020–2025):

- 3.6 percent annual growth in the arts and creative sector (five-year average)
- 4.0 percent annual growth in the sport and recreation sector (five-year average)
- 1.7 percent annual growth for the total economy (five-year average).

Figure 1. GDP growth (% change) 2001–2025 for arts and creative sector, sport and recreation sector and total economy. Source: Infometrics, 2026.



New Zealand's creative exports

Key insight

Creative exports were New Zealand's fourth largest commodity in 2023, generating almost NZ\$3.8 billion.



Global demand is growing for creative exports

International creative services exports⁵ surged to US\$1.4 trillion in 2022—a 29 percent increase since 2017—while creative goods exports reached US\$713 billion, up 19 percent in the same period (UNCTAD, 2024a, 2024b). Creative services made up 19 percent of all service exports in 2022 (compared to 12 percent in 2010), whereas creative goods remain around 3 percent of total goods exports (UNCTAD, 2024b).

In 2023, New Zealand's creative goods and services exports were valued at just over US\$2.3 billion (almost NZ\$3.8 billion)

Analysis by the United Nations Conference on Trade & Development (UNCTAD) provides estimates of New Zealand's trade in creative services over time up to the year 2023 (UNCTAD, 2025). As indicated in the table below, the bulk of New Zealand's creative exports comes from creative services, many of which are digital or weightless trade.

Table 2. Exports of New Zealand creative goods and services, 2023.

Source: UNCTAD, 2025.

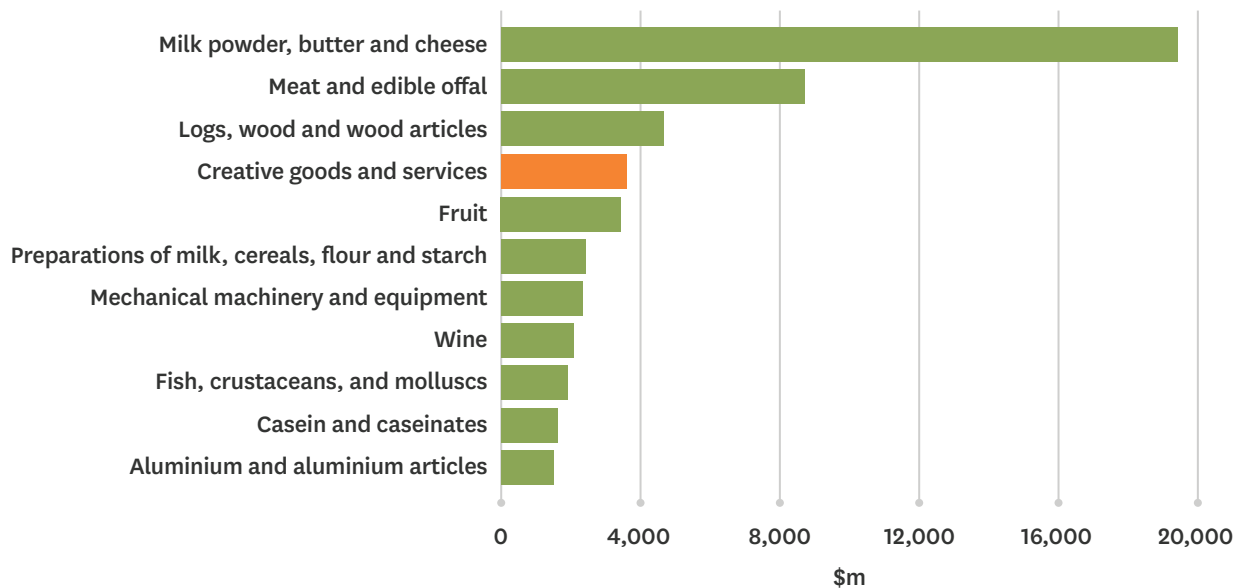
Category	US\$ at current prices in millions	NZ\$ million*
Creative goods	270	440
Creative services	2,034	3,314
Total	2,304	3,754

*Calculated using average USD to NZD exchange rate for 2023 (1.6293).

Looking by sector, the game development sector generated NZ\$709 million in weightless exports in 2024/25 (95 percent of total revenue), with revenue increasing 39 percent from the previous year (NZGDA, 2025). The screen sector⁶ has similarly generated around \$700 million in exports annually (NZIER 2017), though recent years have experienced some volatility due to global industry conditions and market dynamics (NZIER and Verian, 2025).⁷

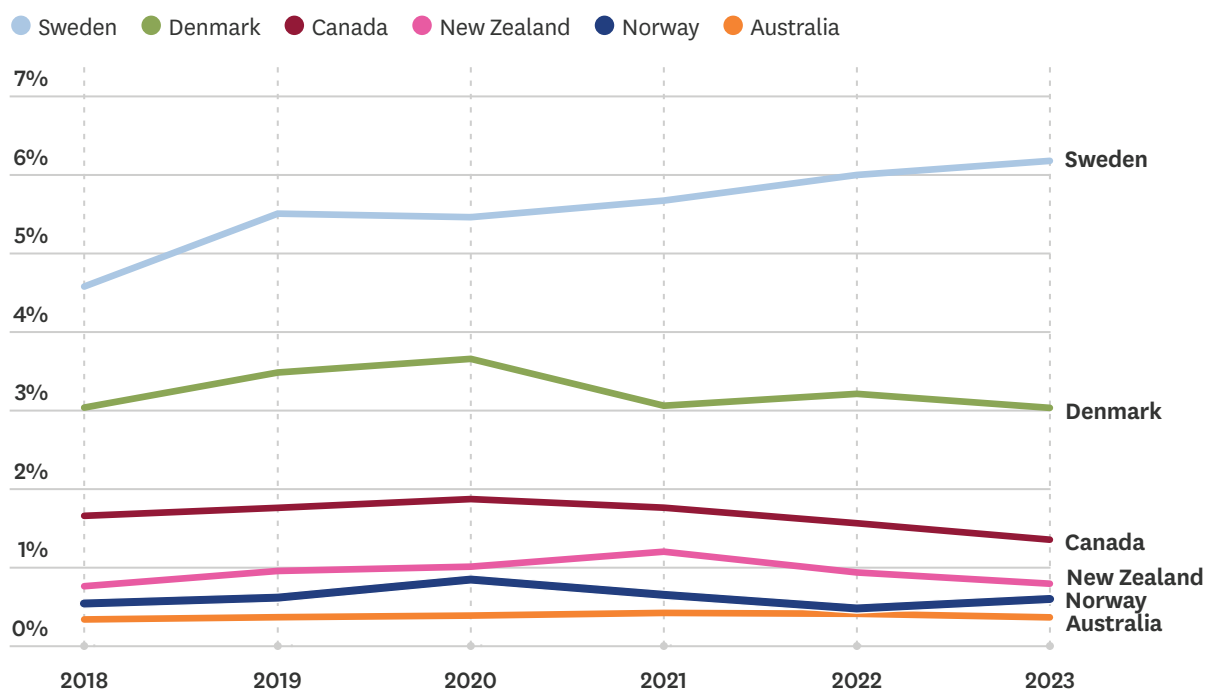
In 2023, creative exports were New Zealand’s fourth largest commodity, after dairy, meat and wood and ahead of fruit, cereals and wine (Eaqub et al., 2025).

Figure 2. Creative export share of GDP vs. top 10 commodities. Source: Eaqub et al., 2025.



As a share of GDP, the contribution of New Zealand’s creative exports is not as high as some jurisdictions like Sweden, Denmark, and Canada, but is larger than Norway and Australia (Eaqub et al., 2025).

Figure 3. Creative export share of GDP in comparison to other countries. Source: Eaqub et al., 2025.



Employment and businesses in the cultural system

Key insight

The arts and creative sector and sport and recreation sector provide primary employment for over 197,000 people⁸ and include almost 57,000 businesses.



The cultural system continues to provide significant employment opportunities for New Zealanders

However, consistent with wider economic trends, as the Reserve Bank of New Zealand (2025) has reported, “weak economic activity has continued to pass through to weaker labour market conditions” (p. 28). As such, growth across the total cultural system slowed in the year to March 2025 across employment and business measures compared to the year prior (Infometrics, 2026). For some parts of the cultural system—particularly the media sector—ongoing market, technological and audience shifts are impacting career pathways and sustainability, with recent job losses beginning to be reflected in the data. These issues are not limited to New Zealand, and are being experienced within the media and screen sectors globally.

Table 3. Number of filled jobs (primary employment only) and businesses in the cultural system, year to March 2025. Source: Infometrics, 2026.

Sector profile	Primary employment (filled jobs)	Businesses
Arts and creative	122,013	38,413
Selected arts and creative sub-sectors*		
Arts	27,633	10,590
Heritage	34,724	8,098
Media	24,959	7,648
Sport and recreation	75,186	18,516
Total cultural system (Arts and creative + sport and recreation)	197,199	56,929
Total economy	2,772,368	654,669

Note. *Sector profiles are distinct. As such, subsector figures do not equal the total arts and creative sector.

Economic forecasts indicate employment losses will continue in the arts and creative sector in 2026, before a return to modest growth

In the arts and creative sector, employment declined by -1.8 percent (or 2,186 filled jobs) in the year to March 2025, with further losses anticipated in the subsequent year (-1.0 percent or around 1,200 filled jobs). Within this, around two-thirds of these job losses (approximately 800 jobs) are forecast to occur from the media sector. The decline in employment in the arts and creative sector is greater than the decline in employment for the economy as a whole (-1.1 percent in 2025 and -0.8 percent in 2026). Modest growth across the arts and creative sector is expected to return from 2027 to add just under 8,200 net new jobs by the end of 2031. In the sport and recreation sector, employment is forecast to be slightly more stable, with modest growth continuing from 2026 to the end of 2031, and adding just over 8,400 new jobs (Infometrics, 2026).

Despite a broader economic slowdown, business growth in the cultural system continues to outpace the total economy

This growth may suggest a greater degree of confidence in their activity outlook (Infometrics, 2026).⁹

Table 4. Sector business growth (% growth from prior year), year to March 2023–2025.
Source: Infometrics, 2026.

Sector	2023	2024	2025
Arts and creative	5.3%	2.2%	1.3%
Selected arts and creative subsectors			
Arts	5.5%	4.2%	1.3%
Heritage	4.8%	2.5%	0.8%
Media	3.0%	0.1%	3.3%
Sport and recreation	4.4%	4.0%	3.0%
Total economy	1.9%	1.1%	0.5%

Productivity of the cultural and creative workforce

Key insight

Productivity is growing in the arts and creative sector, driven by industries such as screen, music and game development.

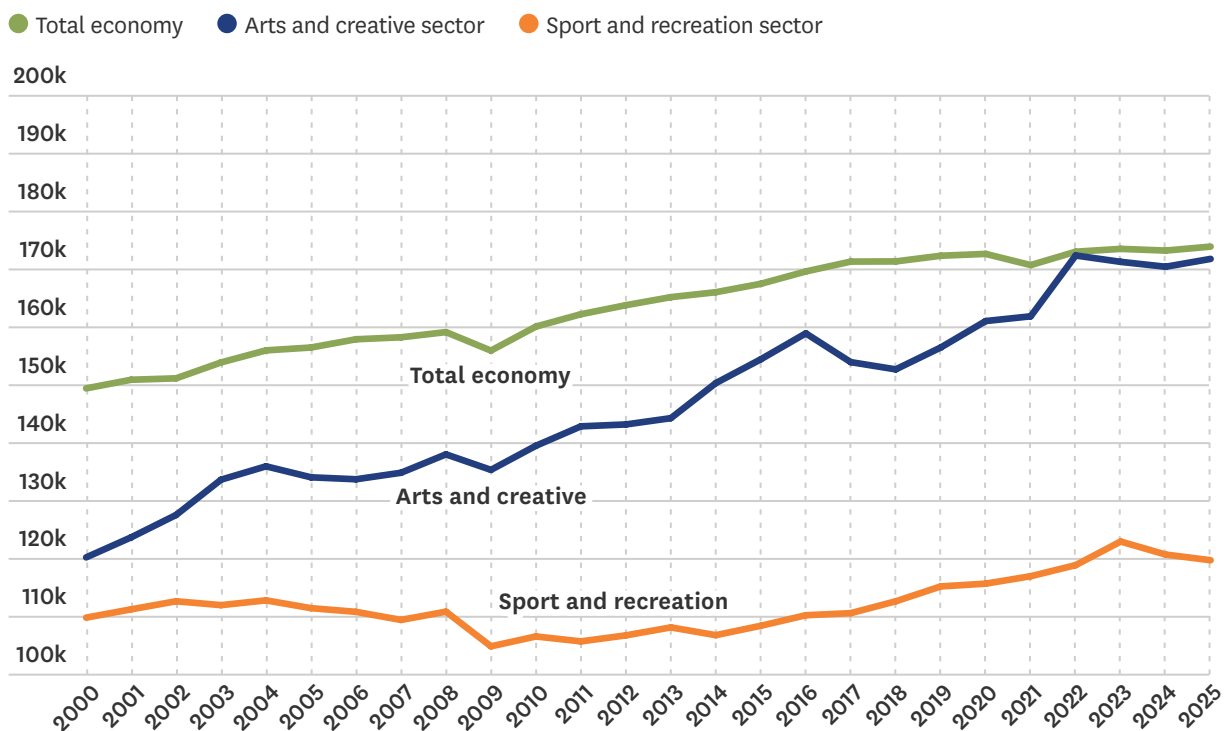


Productivity¹⁰ in the arts and creative sector has been growing over the past two decades

Over time, productivity growth can imply increasing efficiency and competitiveness of the sector (Infometrics, 2026), and lead to greater profitability. There are two main ways productivity has been measured within available cultural system data: GDP per full-time employee (GDP/FTE) and productivity adjusted by hours worked.

GDP/FTE shows how much economic output is produced by the equivalent of one full-time worker. By this measure, productivity in the arts and creative sector sits just under the total economy (\$171,918 GDP/FTE versus \$174,045 for the total economy; Infometrics, 2026). However, GDP/FTE may underrepresent productivity in parts of the workforce, for example due to inconsistent and irregular work patterns, such as part-time or seasonal work, overtime or variations in hours across industries (Eaqub et al., 2025).

Figure 4. GDP/FTE over time—arts and creative sector, sport and recreation sector and total economy. Source: Infometrics, 2026.



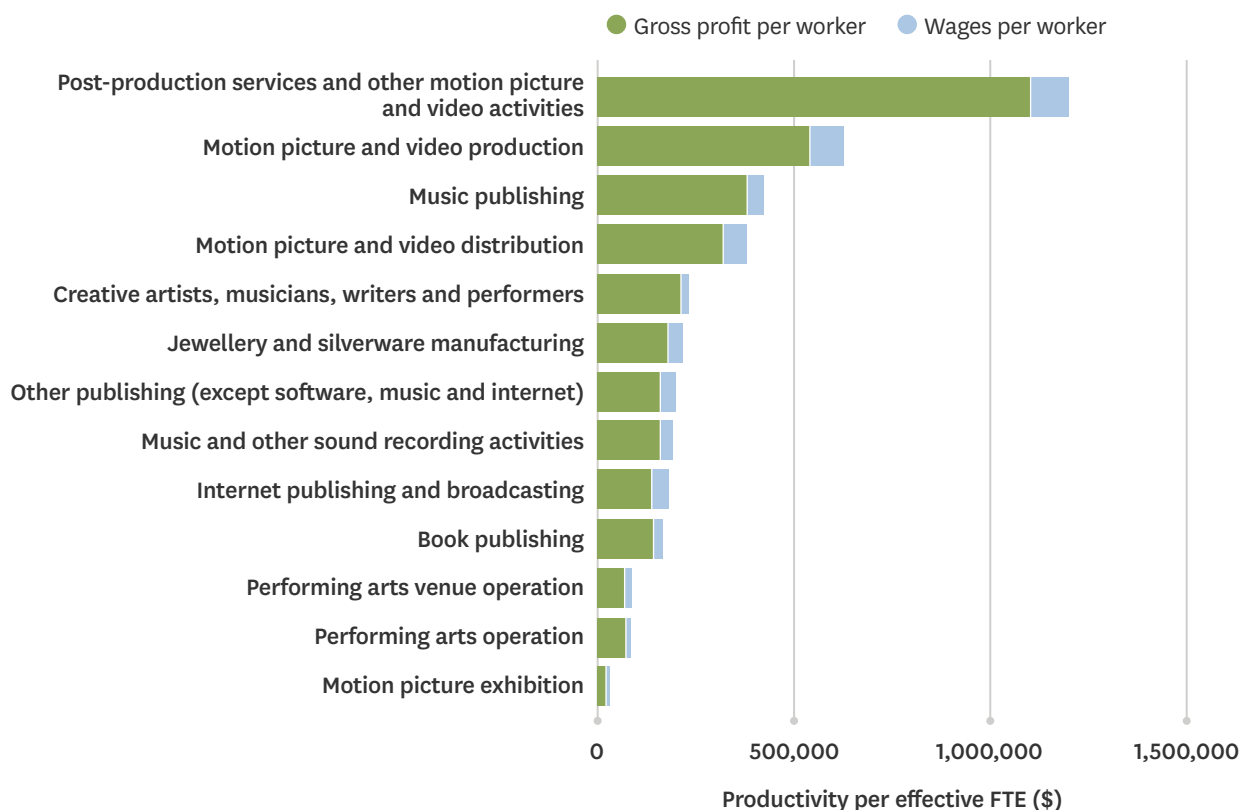
When adjusted for hours worked, productivity is considerably higher in the arts and creative sector than the economy-wide average

In contrast, calculating productivity by hours worked¹¹ is a more precise indicator of labour productivity, as it indicates how much is produced for every hour people actually work, rather than how much the average full-time worker produces. Recent analysis has found that “when adjusted for hours worked, productivity in the creative industries, for example, is approximately \$346,000, comparable to the agriculture sector at \$317,000 and well above the economy-wide average of \$197,000 per full-time equivalent worker” (Eaqub et al., 2025, p. 2).

There is wide variation in productivity between parts of the cultural system due to a range of factors

Productivity may be lower, for example, in sectors or industries that use less technology due to the nature of their work or that have a high reliance on low value jobs or non-market labour, such as sport and recreation. In other parts of the cultural system, productivity is likely even higher than the figures above, however may be underrepresented due to limitations in available data. For example, in FY2024/25 the New Zealand game development industry reported \$759 million in revenue, equating to \$535,204 revenue per employee (NZGDA, 2025). However, available national employment data has not measured game development or design as a standalone occupation separately from other multimedia specialties, so it has not been possible to measure related productivity using official statistics.¹²

Figure 5. Variation between subsectors—Hours worked. Source: Eaqub et al., 2025.



Contribution of the Māori cultural economy

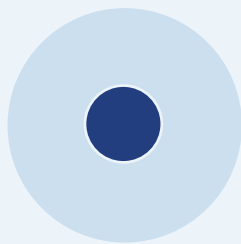
Key insight

Māori creatives, practitioners and businesses are key contributors to New Zealand's cultural economy, with more than 24,000 Māori holding primary employment in the cultural system.

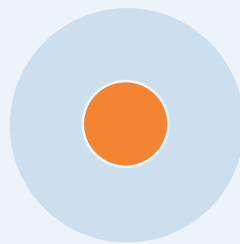


Fewer Māori are employed in the arts and creative sector than in the total workforce, and more volunteer in cultural activities

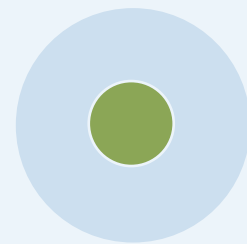
The Māori arts and creative sector contributed \$2.1 billion (out of \$18.5 billion) to GDP in the year to March 2025, and provided primary employment for just over 14,000 Māori (11.5 percent of employment in the cultural system) across just over 4,420 businesses (Infometrics, 2026). In the same time period, over 10,650 Māori held primary employment in the sport and recreation sector, equating to 14.2 percent of the sport and recreation workforce (Infometrics, 2026).¹³



11.5%
of arts and creative
employment held by
Māori, 2025



14.2%
of sport and recreation
employment held by
Māori, 2025



14.0%
of primary employment
(total economy) held by
Māori, 2025

Source: Infometrics, 2026.

Māori are underrepresented in primary employment in the arts and creative sector (11.5 percent) compared to the total workforce (14 percent; Infometrics, 2026). Data is currently limited to understand Māori participation in other forms of work in this sector (for example, secondary employment, gig economy). Recent research has found, however, that Māori have higher rates of volunteering in arts, culture and heritage activities (31 percent versus 24 percent total sample), with toi Māori activities having the highest number of weekly volunteer hours (10+; Manatū Taonga Ministry for Culture and Heritage, 2026).

Traditional economic measurement cannot fully demonstrate the broader benefits being generated by and for Māori within the cultural system

While employment and business figures can be helpful to provide a sense of the scale of the Māori cultural economy, this kind of measurement cannot express the full range of benefits being realised by and for Māori within the cultural system, and may not reflect wider Māori perspectives on economic value. For example, as noted in recent analysis of the social return on investment (SROI) of sport and recreation, Māori outcomes are multifaceted, representing these outcomes in purely economic or monetary terms may not demonstrate their full value:

“Māori aspirations are derived from an accumulation of heritage including knowledge systems, values and beliefs, and their manifestations in objects, practices and concepts — all of which have an innate life force or mana. [...] Māori stakeholders described outcomes that are consistent with Māori views of wellbeing, noting dimensions other than physical — that is, spiritual, mental, emotional, cultural health, all within a context of environmental health” (Sport New Zealand, 2022, p. 5).

In the above analysis, sport and recreation led to a range of outcomes, which are likely to contribute broadly to economic wellbeing. These included facilitating intergenerational knowledge transmission, strengthening social connections and cultural identity, and supporting leadership opportunities and self-determination.

Value of volunteering in the cultural system

Key insight

In 2024, volunteers contributed \$1.2 billion in value for the live performance sector, and \$3.09 billion for the sport and recreation sector.



Volunteers¹⁴ increase the capacity and capability of cultural system organisations and present significant cost savings

Data on volunteers in not-for-profit organisations shows the use of volunteering is heavy in both arts, culture and heritage and sport and recreation, especially when compared to paid employee numbers, with sport and recreation having the highest number of volunteers of all sectors analysed (JBWere, 2017).

- In the year to June 2024, volunteers contributed \$1.2 billion in time, skills, and professional expertise to support the live performance sector (Carter et al., 2024).
- In 2024, over 1 million volunteers gave their time to support sport and recreation activities, with 57 percent of volunteers spending 1–5 hours per week in their volunteer role (Sport NZ, 2025). Analysis of the SROI of sport and recreation has estimated the replacement value of volunteering at \$3.09 billion (Sport NZ, 2024).
- In 2021, 11,065 volunteers were utilised by museums and galleries (Museums Aotearoa & BERL, 2022). In the 2022/23 financial year, small museums and galleries had an average of 15 volunteers who worked an average of 191 hours each—the equivalent of roughly five weeks of full-time work per person (Museums Aotearoa & BERL, 2024).
- 1 in 4 adults aged 18+ (24 percent of survey respondents) volunteer to support arts, culture and heritage activities annually, with 37 percent of people who volunteer supporting cultural festivals or events. Volunteering is highest among 18–29 year olds (35 percent) and Māori (31 percent), with the most time spent per week by volunteers supporting ngā toi Māori events (10+ hours/week) (Manatū Taonga Ministry for Culture and Heritage, 2026).
- 1,150 volunteers/ workers/ stallholders supported Te Matatini biannual festival in 2025 (Te Matatini, 2025).

Ratio of paid staff compared to volunteers



Sport and recreation sector

On an FTE basis, for every paid staff member, not-for-profit organisations in the sport and recreation sector rely on one volunteer.



Arts, culture and heritage sector

On an FTE basis, for every paid staff member, not-for-profit organisations in the arts, culture and heritage sector rely on three volunteers.

● Paid staff : ● Volunteers

Source: JBWere 2021.

This data shows volunteers comprise an essential part of the workforce, and play an important role in achieving social outcomes, including strengthening networks and increasing trust and social cohesion (Carter et al., 2024), and enabling cultural participation. In sport and recreation, for example, it was estimated that “if volunteers were taken away, clubs would have a rise of at least 50 percent in expenses to provide the same services which would get passed onto the participants” (Sport NZ, 2024, p. 12).

Spillover benefits of cultural activity to other sectors

Key insight

Cultural activity has spillover benefits outside of the cultural system, including in hospitality, tourism, health and education.



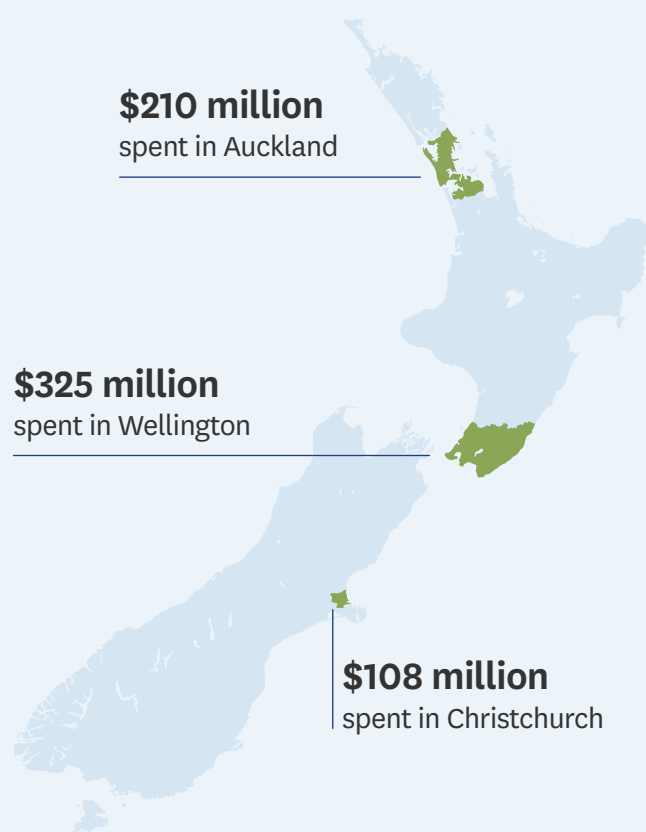
There is strong demand for cultural activity, with 8.3 percent of household spending going to recreation and culture in 2023 (Stats NZ, 2024)

By sector, domestic spending in the New Zealand arts market is valued at \$3.3 billion annually (Creative New Zealand, 2025). In sport and recreation, according to 2019 data, consumers spent \$3.85 billion or 2.1 percent of their total expenditure on goods and services related to sport and active recreation (Sport NZ, 2024). However, New Zealanders' ability and willingness to pay for cultural activities is being impacted by wider economic conditions, with cost of living cited as the top barrier to participation in recent years (Manatū Taonga Ministry for Culture and Heritage, 2023, 2026; Creative New Zealand, 2025).

New Zealand's cultural assets—valued at \$5.6 billion for museums and galleries alone (Museums Aotearoa & BERL, 2022)—maintain strong visitor appeal and stimulate associated tourist expenditure. For example, in 2022/23, visitors who indicated that visiting a gallery or museum was their main purpose for visiting the region spent significant amounts in Auckland (\$210 million), Wellington (\$325 million) and Christchurch (\$108 million). This means visitors to museums and galleries were responsible for generating 2.8 percent of all tourism expenditure in Auckland, 16 percent in Wellington, and 7.7 percent in Christchurch in that year (Museums Aotearoa & BERL, 2024).

In the screen sector, recent research found “products featuring New Zealand's culture and landscapes help attract international tourists,” with conservative estimates valuing annual international tourism expenditure linked to screen industry output at \$2.7 billion (NZIER & Verian, 2025, p. iv). Seventy-two percent of international viewers say, “watching New Zealand content made them consider visiting the country” (NZIER & Verian, 2025, p. v).¹⁵

Spend of visitors who indicated that visiting a gallery or museum was their main purpose for visiting the region, 2022/23



Cultural activity adds value to wider industries across regional economies

For example, the sport and recreation sector added \$3.96 billion of gross value or 1.4 percent of total output to the New Zealand economy in 2019, with 36 percent generated outside the sport and recreation sector in services such as building, construction and manufacturing (Sport NZ, 2024).

Live events, including live performances, sporting events, and festivals, further stimulate economic activity in the regions in which they are held. In 2023, “concerts and sporting events jointly accounted for 58 percent of all events” held in New Zealand, with sporting events emerging as the category with the highest economic impact—nearly half the overall contribution from events to the national economy (NZ Events Association, 2023). New Zealand’s co-hosting of the FIFA Women’s World Cup Australia & New Zealand 2023™ tournament was a key part of this economic impact, generating a net benefit to New Zealand of \$109.5 million (Fresh Info, 2023). Within this, economic benefits were spread across hosting regions including Auckland (\$48.9 million), Hamilton (\$6.4 million), Wellington (\$24.6 million), and Dunedin (\$6.8 million) (Fresh Info, 2023).

Within the live performance sector, in the year to June 2024, 2.3 million people aged 15+ attended live performances, spending on average \$210 at each performance with a total spend of \$2.3 billion. This included spending on tickets and merchandise as well as on hospitality, accommodation, transportation, and childcare (Carter et al., 2024).

Evidence from impact evaluations of specific events supports this trend. For example, the national kapa haka festival Te Matatini added almost \$24 million to the Taranaki region in 2025 and almost \$22 million to the Auckland region in 2023 (Te Matatini, 2023; 2025), while the World of Wearable Art (WOW) contributed \$31.8 million to the Wellington region in 2024 (Wellington NZ, 2024). In both cases, people travelling to the regions for the events comprised a significant portion of that contribution—almost \$19.6 million of the \$24 million for Te Matatini 2025 and more than \$21 million of \$31.8 million for WOW 2024.

It is worth noting that the economic value of live events to New Zealand is impacted to some extent by whether productions are internationally or locally owned. There may be less economic value retained in real terms in New Zealand if the majority of revenue from related economic activity (for example, ticket sales, merchandise) flows offshore.

Cultural organisations provide value through education and health benefits that are likely to impact future productivity

One analysis found that for FY2022/23, the per-student educational value of visiting a museum or gallery was \$40.80, with the educational value provided by museums and galleries hosting educational programmes totalling \$32 million (Museums Aotearoa & BERL, 2024).

When considering broader social impacts, analyses of SROI has shown:

The benefits of recreational physical activity across all social outcomes are estimated at \$16.8 billion, including \$9 billion in health benefits, with a SROI of \$2.12 returned for every \$1 spent (Sport NZ, 2022).

The social benefits of live performance, including value generated through positive impacts to mental health, wellbeing and civic participation are estimated at \$8.7 billion, with a SROI of \$3.20 returned for every \$1 spent (Carter et al. 2024).

Implications for future research

Economic data and evidence on the cultural system are increasingly available, but to varying degrees of quality, consistency and reliability.

Over the past five years, there has been a marked improvement in the availability of data and evidence to understand the economic contributions of the cultural system

However, there are differences in the quality, consistency and reliability of data between sectors and on the various elements within the Economy area of inquiry in Te Kāpehu. This can be attributed in a range of factors such as:

- varying organisational capability and capacity across the cultural system
- limited resources to conduct sector research, evaluation or measurement
- limited measurement of national cultural statistics (data collection, analysis and reporting)
- complexity of measuring impacts for cultural activities or investments, which often have more intangible, longer-term outcomes
- the challenge of achieving consistent measurement across a diverse cultural system to support systems-level analysis.

Gaps in the evidence base persist across the elements within Economy

There is a better need to understand aspects including:

- attributes of the non-primary workforce (for example, secondary workers, gig economy)
- the value of New Zealand's place-based heritage
- ROI/SROI of arts, culture and heritage activities, regulation and investments
- the contribution of the Māori cultural and creative economy
- interdependencies between sectors within the cultural system and with other parts of the economy.

Work to strengthen the evidence base is already underway. As signalled in *Amplify*, the Ministry is currently collaborating with the Crown-funded entities to address priority evidence gaps. This could further include working across government to improve official statistics and data collection relating to the cultural system.

Methodology

Data collection and analysis

To prepare this evidence brief, a range of New Zealand and international data and evidence were reviewed relating to the following elements within the Economy area of inquiry of Te Kāpehu: flow-on effects to the wider economy, productivity, spending, trade and exports, and work and volunteering. The review focused on New Zealand academic, government and other publicly available sources from the past five years. Evidence was analysed thematically to identify and validate findings, and a gap analysis was conducted to identify areas where there is a lack of data and evidence. Key insights were then developed and tested with a range of stakeholders and quality assurance activities were conducted. This work was completed in collaboration with the Ministry's Te Kāpehu project partners, who provided essential input throughout the process.

Use of artificial intelligence (AI)

Manatū Taonga Ministry for Culture and Heritage has used AI to develop aspects of this document in line with the Government Chief Digital Officer's *Responsible AI Guidance for the Public Service: GenAI*, including with human oversight of any generated material. AI was used specifically to help locate evidence sources, develop options to structure the evidence brief, and to provide initial drafts of some paragraphs based on outlined material.

[Responsible AI Guidance for the Public Service: GenAI \(Digital.govt.nz\)](#)¹⁶

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Ehara taku toa i te toa takitahi, engari he toa takitini.

My success is not that of an individual, but that of the collective.

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- The Arts Council of New Zealand Toi Aotearoa (Creative New Zealand)
- Heritage New Zealand Pouhere Taonga
- Ngā Taonga Sound & Vision
- NZ On Air Irirangi Te Motu
- New Zealand Film Commission Te Tumu Whakaata Taonga
- New Zealand Music Commission Te Reo Reka o Aotearoa
- Royal New Zealand Ballet
- Sport New Zealand Ihi Aotearoa
- Te Matatini Society Incorporated
- Museum of New Zealand Te Papa Tongarewa

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Endnotes

- 1 See: <https://www.mch.govt.nz/sites/default/files/2026-03/economy-evidence-a3.pdf>
- 2 See: <https://www.mch.govt.nz/publications/te-kapehu-compass-cultural-system-evidence-framework>
- 3 See: <https://www.mch.govt.nz/our-work/arts-sector/amplify-creative-and-cultural-strategy-new-zealand>
- 4 GDP is “New Zealand’s official measure of economic growth. It helps a range of data users, including policy makers, understand and manage the New Zealand economy” (Stats NZ, n.d.). In these figures, GDP measures “the value added in an industry or sector from the production of goods and services. It essentially measures the value of the land, labour, and capital used in the production process” (Infometrics, 2026).
- 5 Key creative services exports include: screen production (feature films, TV series, post-production services), music (streaming, touring, licensing), game development (Indie and AAA titles, mobile games, VR/AR experiences), design (graphic, fashion, product and spatial design), publishing (books, digital content, educational media), visual arts (exhibitions, digital prints, NFTs), and creative tech (VFX, animation, immersive media).
- 6 Export figures for the screen sector are drawn from data on the international trade of audiovisual services collected by Stats NZ. The figure in NZIER (2017) represents the motion picture sub-industry specifically, which includes “the production and distribution of film, television, commercials and videos” (p. i).
- 7 There has been significant fluctuation in New Zealand screen exports over the past five years. NZIER and Verian (2025, p. 13) explains: “exports remain more volatile and closely tied to international production cycles [...]. Consumer demand dynamics, screen production volatility, and global competition for incentives and a mobile labour force drive screen industry imports and exports.” New Zealand exports of audiovisual and related services (which includes screen) averaged \$717.69 million per year between 2020-2025 (Stats NZ, 2025b).
- 8 Currently, the available annual data for employment in the cultural system represents primary employment only. There is a lack of data which consistently measures other forms of employment within the cultural system (e.g., secondary employment, gig work). This means that the available figures may underrepresent how many people are working or generating income within the arts, heritage, media and sport and recreation sectors.
- 9 As Infometrics (2026) notes, “positive growth in the number of businesses in an area reflects increased entrepreneurial activity and economic activity as entrepreneurs are prepared to take risks and start new ventures”.
- 10 Productivity measures “how efficiently production inputs (capital and labour) are used within the economy to produce output. Growth in productivity means that a nation can, for example, produce more output from the same amount of input, or the same level of output from fewer inputs. Productivity growth is an important contributing factor to a nation’s long-term material standard of living.” (Stats NZ, 2025c)
- 11 GDP per hours worked is generally calculated by paid hours worked and does not include unpaid labour.
- 12 Until recently, limitations in the industry (ANZSIC) and occupation (ANZSCO) codes used to collect national employment data have meant that many creative and cultural jobs, including game development, could not be measured directly. In October 2024, Stats NZ released the first version of the new [National Occupation List \(NOL\)](https://www.stats.govt.nz/methods/about-the-national-occupation-list/) (<https://www.stats.govt.nz/methods/about-the-national-occupation-list/>), which replaces the use of ANZSCO codes in New Zealand. A further update (V2.0) was released in July 2025. The NOL includes some updated and new occupations relevant to the arts and creative sector, including ‘Game Designer or Developer.’ The Ministry is in the process of reviewing these changes to consider implications for our sector economic profiles (provided by Infometrics), and to support more detailed analysis of the cultural system workforce in future. However, these changes have yet to be reflected fully in available employment data.
- 13 A figure for the number of Māori businesses in the sport and recreation sector is not currently available.
- 14 The term ‘volunteer’ is used here inclusively to refer to various forms of activity whereby people donate their time, skills, knowledge or other resources without monetary compensation. This includes volunteering, service, mahi aroha, and other forms of unpaid labour.
- 15 For more detail on tourism and the cultural system, see the [Global Connections evidence brief \(Manatū Taonga\)](https://www.mch.govt.nz/publications/global-connections-evidence-brief/). (<https://www.mch.govt.nz/publications/global-connections-evidence-brief/>)
- 16 See: <https://www.digital.govt.nz/standards-and-guidance/technology-and-architecture/artificial-intelligence/responsible-ai-guidance-for-the-public-service-genai>