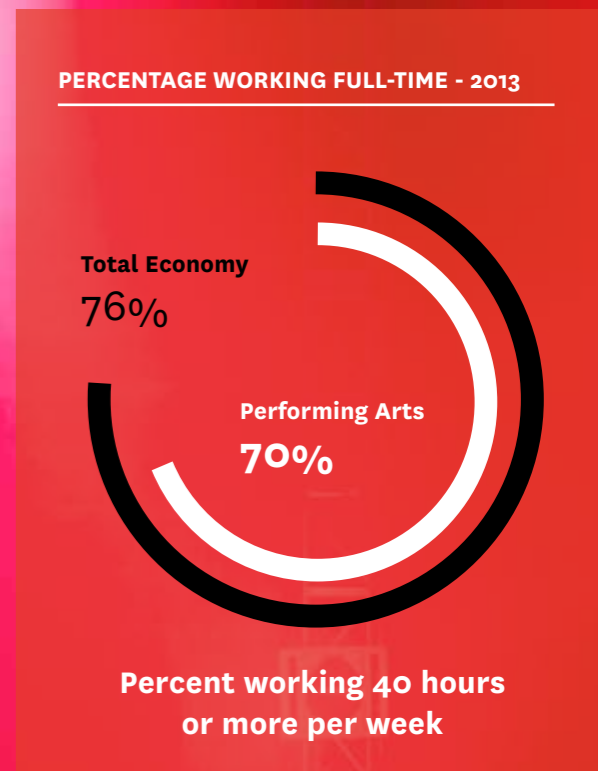
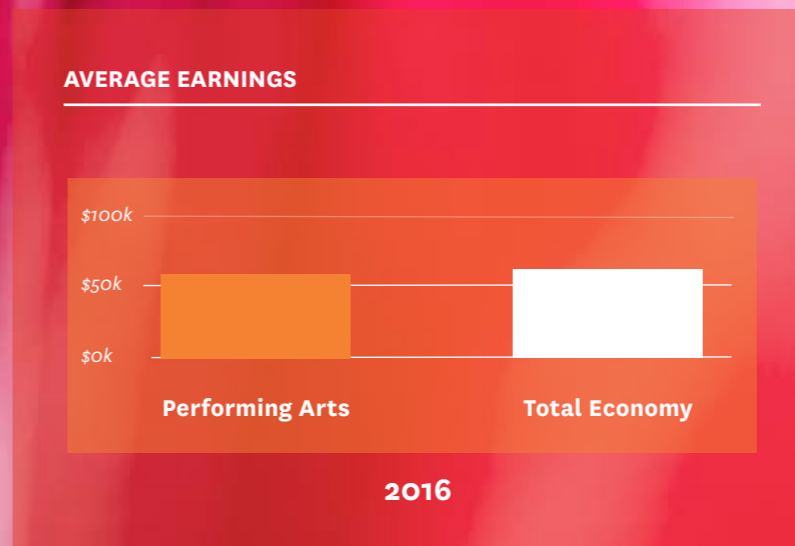
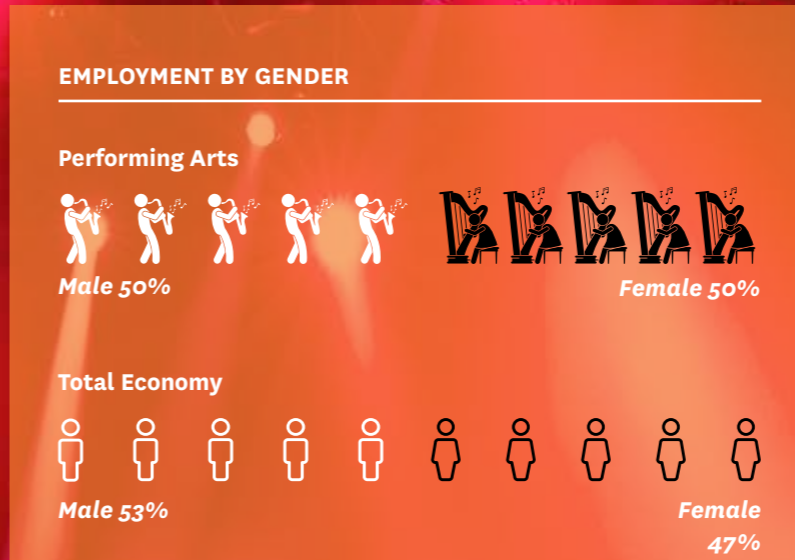
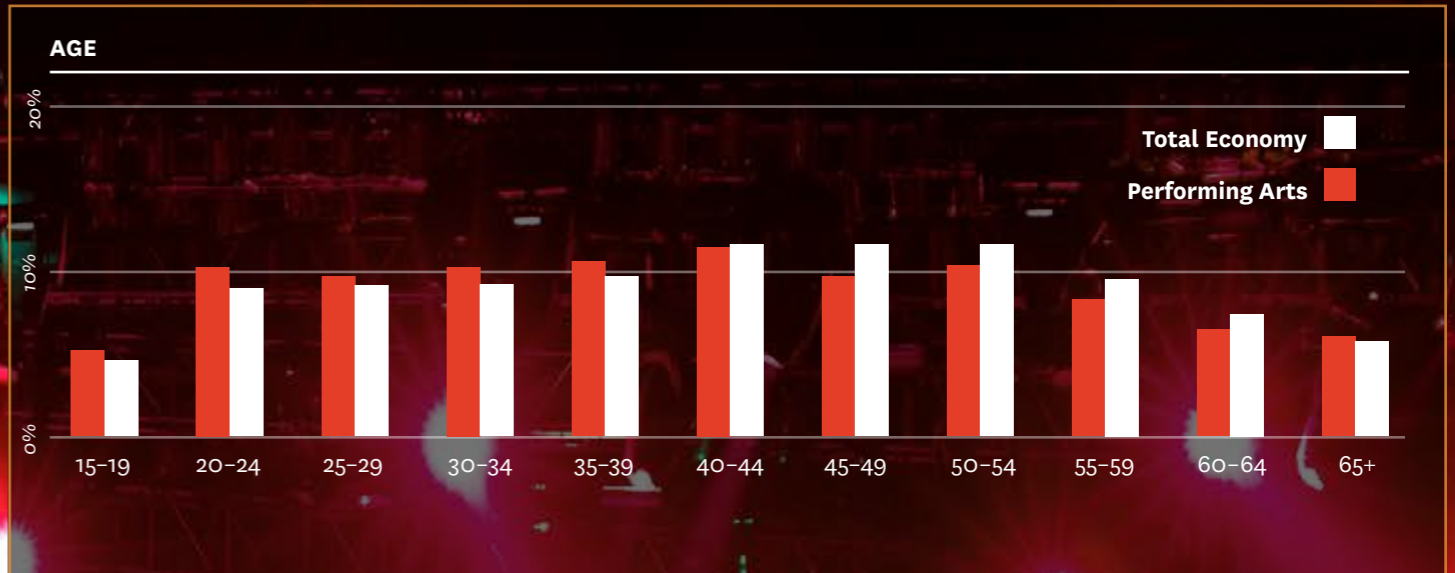


— Performing Arts



The performing arts industry enriches and energises the cultural and social life of New Zealanders. Professionals in the performing arts space are producing, creating and educating through a wide range of dynamic and complex mediums. As an active form of recreation, performing arts is a natural fit with Skills Active, and in April 2017 it was added to the organisation's gazetted scope.

Industry snapshot



Professionals in the performing arts space are producing, creating and educating through a wide range of dynamic and complex mediums

Industry profile

The workforce includes a high proportion of freelancers, contractors and volunteers. In a report commissioned by the Ministry for Culture and Heritage, 6% of organisations surveyed were entirely staffed by volunteers. Between 65% and 80% of organisations in the industry employ freelancers or contractors.¹²⁴

In 2016, there were 9,227 business units operating in the performing arts industry, up from 8,111 five years earlier. Growth in

the industry's business units over the five years to 2016 has been greater than growth in business units in the total economy.

Performing arts businesses employed an average of three people in 2016, fewer than the average of 4.3 people employed per business unit in the total economy.

Employment growth in the performing arts industry in the five years to 2016 was at an average of 2.3% per annum – growth is predicted to continue at a slightly higher rate

THE INDUSTRY HAS THREE DISTINCT GROUPS

NATIONAL ORGANISATIONS:



There are numerous stakeholders in the performing arts industry. National organisations include the Ministry for Culture and Heritage, and Creative New Zealand. Many performing arts and cultural organisations service

the industry, as well as specialist bodies such as Dance New Zealand, Entertainment Venues Association of New Zealand, and Entertainment Technology New Zealand.

LOCAL AUTHORITIES:



Local authorities are the major owners and managers of residential and event spaces and studios in

New Zealand, many of which service both sport and recreation and the arts.

EMPLOYERS AND PROVIDERS:



These include production companies, technical service companies, production houses, temporary event and theatre spaces, recording studios, event venues,

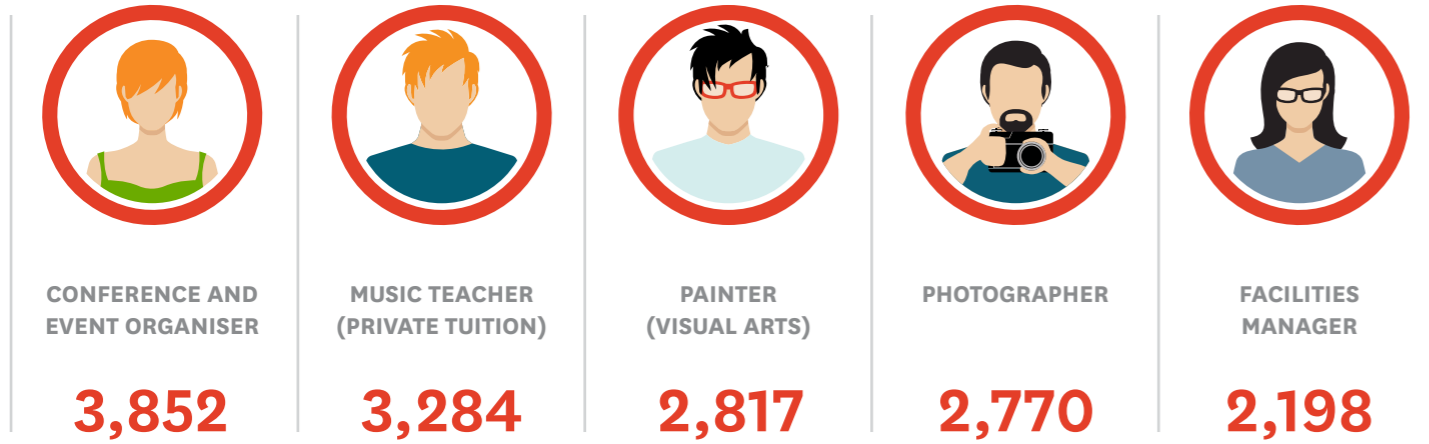
music industry organisations and private teachers of performing arts, such as dance, drama and music.



¹²⁴Skills and training needs in the cultural industry, AC Nielsen, 2008

Workforce profile

TOP FIVE JOBS BY VOLUME



In 2016, there were 27,255 people employed in the performing arts industry, which equates to 1.2% of the New Zealand workforce.

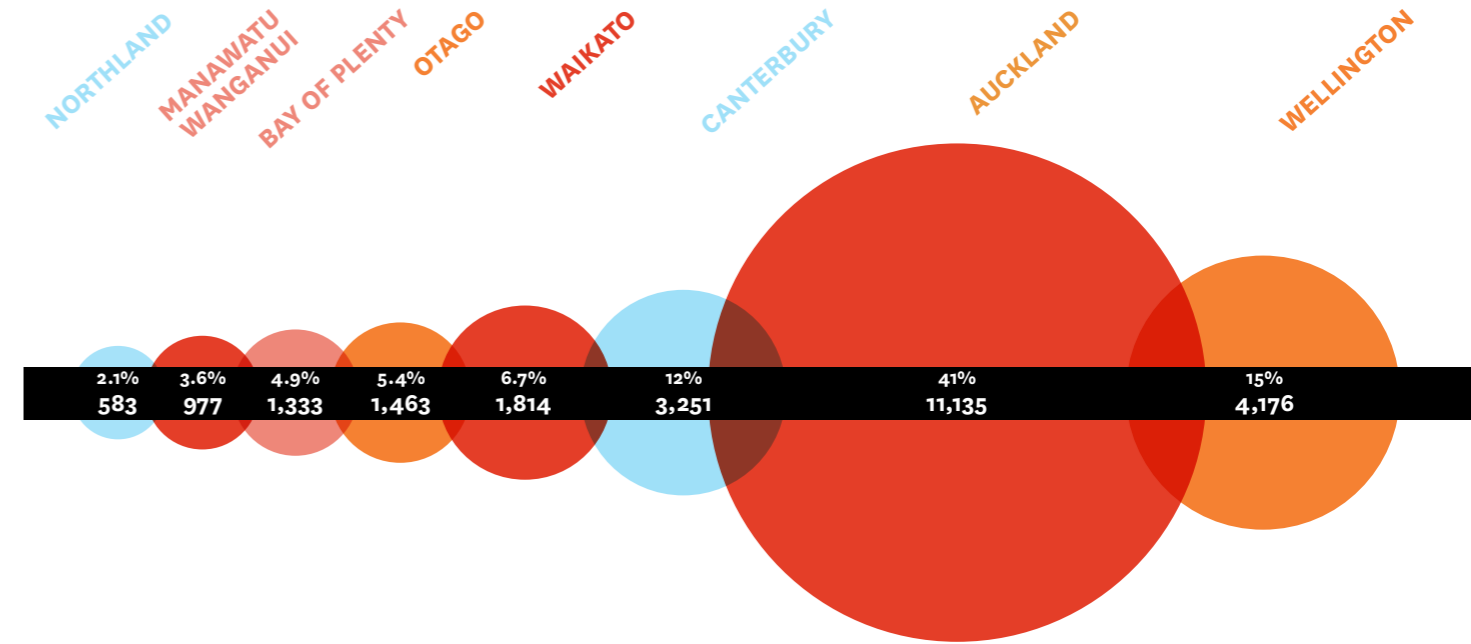
Employment growth in the performing arts industry in the five years to 2016, of 2.3% per annum, was stronger than employment growth in the total economy (1.9% per annum).

In the five years to 2021, employment in the performing arts industry is expected to grow by an average of 2.7% per annum compared to growth in the total economy of 2.3% per annum. Over this period, employment in the industry is expected to reach 31,178 in 2021.

REGIONAL EMPLOYMENT

Some 11,135 – or 41% of all working performing arts professionals were based in the Auckland region in 2016. Performing arts jobs

in Auckland grew at a faster rate than employment nationally between 2011 and 2016.



Employment is expected to reach 31,178 in 2021



Workforce makeup

TYPE OF EMPLOYMENT

Many performing arts professionals are in part-time, casual contract, project or portfolio employment, including periods of self-employment.

In 2016, 32.7% of performing arts professionals were self-employed. This is much higher than the total economy's self-employment rate of 18.0%. Over the past five years, the self-employment rate in the performing arts industry has increased, while the total economy self-employment rate has decreased.

Some 30% of people in the industry work a total of fewer than 40 hours a week, compared with 24% of people in the total economy.

These figures reflect the high number of volunteers, and part-time and casual employment in the performing arts workforce.

Many performing arts professionals are in part-time, casual contract, project or portfolio employment, including periods of self-employment

GENDER

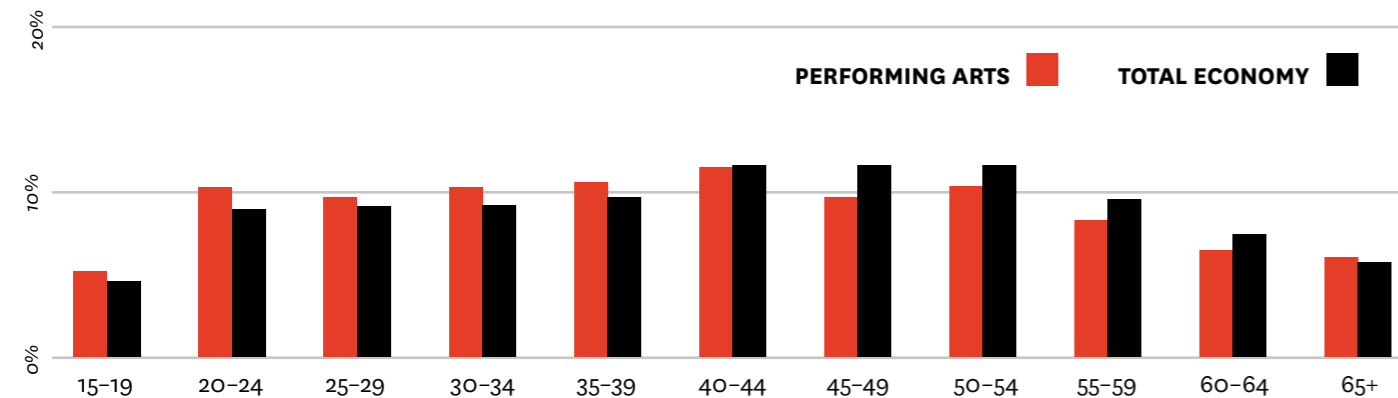
The performing arts industry has good gender balance. In 2016, 49.9% of those employed in the industry were male, and 50.1% female. The percentage of females increased from 48.9% to 50.1% between 2001 and 2016. Over the same period, the percentage of females in the total economy increased from 45.5% to 47.2%.



AGE

Performing arts has the most even spread of age demographics of any industry that Skills Active works with. In 2013, the average age

of people in the performing arts industry was 42 years compared to 43 years in the total economy.

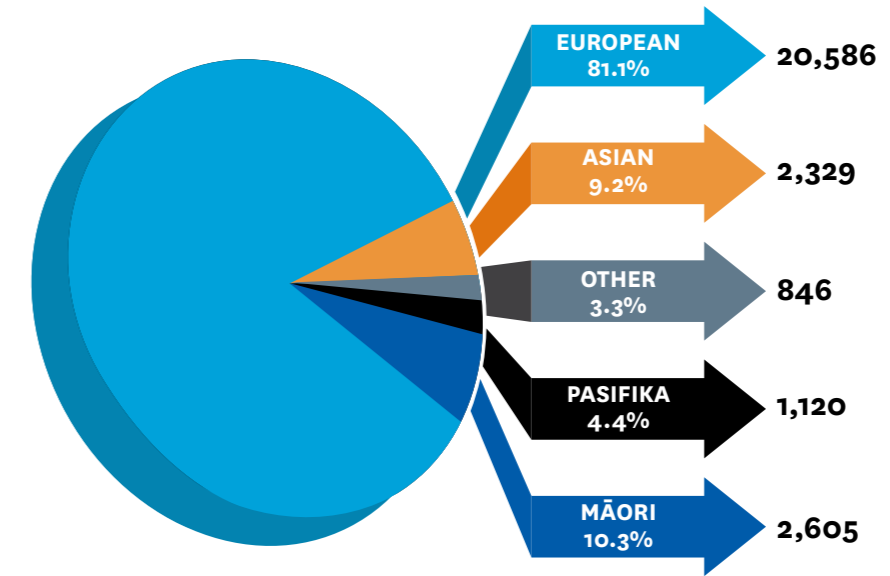


ETHNICITY

In 2013, there were more people working in performing arts who identified as NZ European/Pakeha than in the total workforce – 81.1% compared with 77.2%.

accounted for 10.3% - which is lower than the 11.1% of people who identify as Māori in the total economy. Pasifika people make up 4.4%, and Asian people at 9.2%.

People identifying as Māori in the performing arts industry in 2013



SKILL LEVEL¹²⁵

Many people enter performing arts with post-school qualifications, while others achieve direct entry as a result of individual talent. Some 31.5% of people working in the industry have a bachelor's degree or higher. However, these qualifications are not necessarily directly related to performing arts.

proportion of low-skilled occupations (7.9%) than the total economy (38%), and had a larger proportion of highly-skilled occupations (62%) than the total economy (33%).

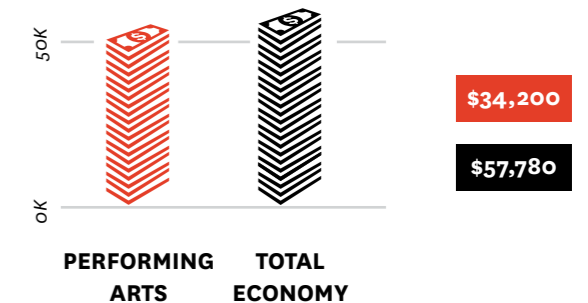
In 2016, the performing arts industry had a much smaller

In 2013, some 8.8% of people in the performing arts industry had no qualification (11.6% in 2006). This was lower than the total economy (13.6% in 2013 and 17.8 in 2006).

EARNINGS

Annual average earnings for a professional in the performing arts industry in 2016 was \$53,100, which is lower than average earnings in the total economy of \$57,780.

Annual average earnings in the performing arts industry grew at a slower rate than the total economy over the past decade – 2.9% growth per annum, compared with 3.4% for the total economy.



¹²⁵Highly-skilled occupations typically require a bachelor degree or higher qualification. Medium-high-skilled occupations typically require an NZ Register Diploma, an Associate Degree or Advanced Diploma. Low-skilled occupations typically require an NZ Register Level 3 qualification or lower.

Impact

In 2016, the performing arts industry contributed \$2.058 billion to the New Zealand GDP, or 0.9% of the total GDP. Over the five years to 2016, the industry's contribution to the GDP grew by 3.7% per annum, compared with 2.5% per annum growth in the economy as a whole. In the two years to 2016, GDP growth in the performing arts industry was stronger than GDP growth in the total economy.

Participation has matched industry growth. A 2014 Creative New Zealand survey found that 85% of New Zealanders had attended a performing arts event or location in the past 12 months, and 58% had been actively involved in the creation or production of such an event in the same period.¹²⁶ Part of the attendance growth may be due to a turn-around in the economy, and an increase in domestic disposable income.

The events and entertainment part of the industry has also seen ongoing growth and contribution to local economies.

As an example of income derived from venues, in 2016, Auckland Live secured many headlining concerts and shows, attracting more than 800,000 people to 1074 events.¹²⁷ Meanwhile,

Auckland Stadia attracted 285,000 people across 1153 community and commercial events. The summer line-up featured best-selling recording artists Adele, Justin Bieber, Guns N' Roses, Coldplay and Bruce Springsteen.

Major events in Wellington over summer 2015-16 were also a significant tourism driver. Westpac Stadium hosted a total of 62 major event days in the 2016/17 financial year, hosting over 480,000 fans.¹²⁸

ECONOMIC CONTRIBUTION

\$2.058B
GDP

0.9% of New Zealand's GDP in 2016



Vicki Cooksley
President of
Entertainment
Technology New Zealand
(ETNZ)

Even in tight economic times, people often go to shows and events as a means of escape. This makes the events and entertainment industry an important component to the wellbeing of the population.

Currently, there is a shortage of skilled senior practitioners across many of the disciplines within the industry, which has stemmed, in part, from a lack of training options, with most courses being classroom based and aiming towards the management side of the industry. This has led to a lack of skilled people on the floor.

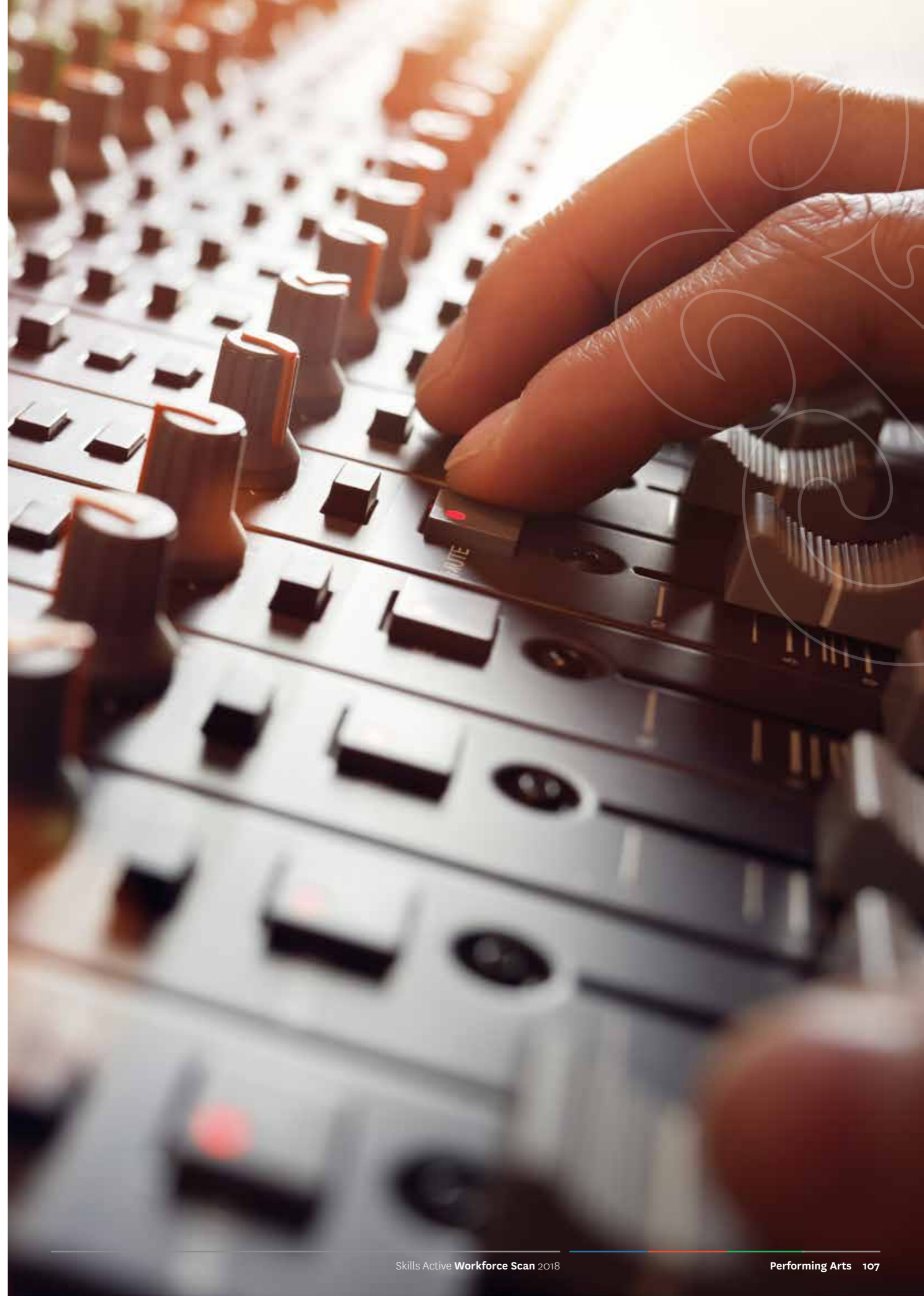
There is also a perception that the industry does not offer a viable career path, as there were no nationally recognised qualifications.

With the lodging of the New Zealand Certificate in Entertainment and Event Technology on the New Zealand Qualifications Framework it is hoped that the current training void will be addressed. This qualification is designed to be able to be attained through several different approaches, including on-the-job learning, which reduces some of the barriers (such as cost), to predominantly classroom-based learning. It is hoped that having a nationally-recognised qualification will add legitimacy to the industry as a career option for new entrants into the workforce.

¹²⁶New Zealanders and the Arts, Creative New Zealand, 2014

¹²⁷Annual Report, Regional Facilities Auckland, 2017

¹²⁸Annual Report, Westpac Stadium, 2017



Trends/Issues/Risks

POLITICAL

Health and safety responsibilities

With a typical performance being hosted by a venue, produced by a touring company, and delivered by a range of workers, from permanent staff through to freelancers and contractors, performing arts stakeholders have to be clear on the obligations of all parties under the new health and safety regime. This can be particularly challenging for smaller regional venues, with fewer resources.

Investment into event venues¹²⁹

Councils continue to see the economic value of investment in event venues, with large developments and re-developments, integrating performing arts spaces with other usable spaces, occurring in major centres. However, local authorities nationwide are facing venue closures and big earthquake-strengthening bills, which impact on their ability to deliver performing arts and generate revenues.¹³⁰ With these changes continuing to impact on venues, innovation and entrepreneurship is developing and will continue to grow in New Zealand.

ECONOMIC

Vying for the arts funding pool

Performing arts professionals and companies are competing with each other and with other areas of the arts for a limited central funding resource from Creative NZ.¹³¹ Applying for grants, fellowships and other forms of funding is a significant piece of

work for many performing arts organisations, on top of their core activities. Despite this, there is a portion of the performing arts industry who run in a commercial nature, and therefore do not rely on external funding.

SOCIAL

Difficult schedules

The hours of work required of performing arts professionals can be extremely demanding, including long days, late nights, and stints of intense activity followed by periods of little or no work. 46% of 2017 survey respondents identified work hours as a barrier to recruiting staff in the performing arts industry. Industry professionals can experience stress, overwork and burnout.¹³²

The needs of an ageing population

The power of the arts to stimulate minds and connect communities is becoming more important as New Zealand's population ages, and older people face a greater likelihood of isolation and loneliness.¹³³

TECHNOLOGICAL

New technology and equipment

Automation and the fast pace of technological change could drive job losses or changes in environment and technical skill sets required, such as automation engineers and operators.

Mobile technology

The proliferation of tablets and smartphones creates an opening for forward-thinking performing arts organisations to reach attendees and participants in new ways.

Training environment

Training in the performing arts happens at various levels, including at community level, through arts businesses (dance, drama or music studios, both private businesses and sole traders) or community projects (circus, drama, dance or music projects, or special training and events for youth, adults or older people). Specialist training takes place in public universities and polytechnics, private institutions, and in the workplace through on-job training.¹³⁴

Access to and availability of suitable training is one of the biggest barriers for workplaces in training and developing their staff.

With the advent of a dedicated performing arts industry training organisation, the industry can look forward to better channels for recognising and building on the skills of its people from within.

BARRIERS TO INDUSTRY TRAINING AND QUALIFICATION COMPLETION

With more than 30% of the performing arts industry being self-employed, and many working less than full-time hours, the biggest barriers to training and development include:

- High self-employment level
- Lack of continuous work, and erratic hours
- Access to and availability of suitable training/assessment

- Cost and relevance of training.

There are many dance and music instructors who run their own businesses, and are unqualified. This highlights an industry need for qualifications related to small business management.

CURRENT AND FUTURE SKILL NEEDS

With a diverse set of occupations and roles in the industry, striking the right balance between certain skill sets is seen as a key skills development issue.^{135, 136, 137} These skill areas include:

- Technical skills
- Health and safety understanding
- Customer management skills
- Production and event management.

The 2017 Skills Active Workplace Survey results indicated that many employers have difficulty staffing highly-skilled roles. Lack of skill and expertise was indicated as a barrier to recruiting by approximately 50% of respondents. Regional and remote venues and facilities find it particularly challenging to attract and recruit skilled employees.



¹²⁹Workplace Survey, Skills Active, 2017 ¹³⁰Press release: Creative New Zealand to invest \$24 million in NZ's arts organisations, Creative NZ, August 2017 ¹³¹Press release: Creative New Zealand to invest \$24 million in NZ's arts organisations, Creative NZ, August 2017 ¹³²Mental Wellness in the Performing Arts, Dr Tania Kopytko, DANZ Magazine, September 2016 ¹³³The arts improve personal wellbeing, Advocacy Toolkit, Creative NZ, www.creativenz.govt.nz

¹³⁴Workplace Survey, Skills Active, 2017 ¹³⁵Stage one needs analysis report for performing arts for the Targeted Review of Qualifications, Alison Viskovic, 2013 ¹³⁶Skills and training needs in the cultural industry, ACNielsen, 2008 ¹³⁷Workplace Survey, Skills Active, 2017