

WELLINGTON REGIONAL

SCREEN SECTOR STRATEGY



Wellington
UNESCO City of Film

Te Upoko o te Ika

2022 – 2027





Contents

BACKGROUND	2
STRATEGY DEVELOPMENT PROCESS	3
PAST, PRESENT AND FUTURE: WHERE DO WE WANT TO BE?	4
OVER-ARCHING LOCAL ISSUES FOR THE WELLINGTON SCREEN SECTOR	6
GLOBAL TRENDS THAT AFFECT US	8
WELLINGTON STAKEHOLDER NEEDS AND OUTCOMES	16
WELLINGTON ALIGNED WITH THE NEW ZEALAND SCREEN STRATEGY SECTOR	22
WELLINGTON SCREEN SECTOR STRATEGIC GOALS	25
NEXT STEPS	34
APPENDIX AND STRATEGY AUTHORSHIP	36

Background

WellingtonNZ and its regional film office, Screen Wellington, have commissioned the development of this five-year screen sector strategy for the Wellington region.

It has been designed to help provide direction on what plans and activities Screen Wellington and the screen sector itself can take to sustainably and significantly stabilise and further develop the industry in the Wellington region.

The contents of this strategy are a reflection of interviews, design workshops and feedback sessions conducted with screen sector stakeholders from May to November 2021.

The screen sector is recognised as a growing sector with potential to contribute significantly to Aotearoa New Zealand's GDP, employment, and economic, cultural and social diversification. As an internationally-oriented, high-value sector, screen can both attract and export investment, partnerships, and highly-skilled talent, create high-value jobs, and provide spill-over benefits, including reputational and tourism.

In 2019, Wellington joined 245 other cities around the globe in the UNESCO Creative Cities Network, recognised as a UNESCO City of Film for excellence in their fields for building and nurturing creativity and fostering international collaboration.

Driven by new technologies, increased globalisation, new consumption mechanisms and other factors, the screen

sector is rapidly changing. This includes consumption and distribution patterns and trends, a shift away from feature films towards television series, and the rise of streaming services. Digital technologies are also enabling businesses involved in screen production to engage in other areas, such as interactive entertainment like gaming.

Due in part to Wellington's innovative and successful screen industry, the capital has become the centre of Aotearoa New Zealand's tech and gaming community over the last two decades. These two sectors are rapidly converging.

Despite all of Wellington screen sector's potential, it is experiencing challenges and has not achieved growth over the past decade. There are large, established businesses and small businesses in the sector, but some portions lack mid-sized businesses and consistent projects. It is a sector that is predominantly service-based and can struggle due to the cyclical nature of work that can define the industry.

Wellington has an opportunity to better support and scale up the broader screen sector, including better supporting game development to forge new frontiers in the convergence of film, gaming, and interactive content mediums and technologies. This would help create new, exciting exportable IP and retain and attract talent to the region for new and unique jobs for the future.

The Wellington region recognises the weight and opportunity the screen and creative technology sectors offer.

SCREEN SECTOR DEFINITION

This strategy defines 'screen' as narratives or creative content created, told and consumed through screen platforms.

'Screen production' is the process of telling stories using various creative media that can be consumed through film, game, interactive media, animation, VFX, sound and other storytelling processes and mediums.

Strategy development process



Screen Wellington has worked closely with Creative HQ to gather information from the screen sector to create this five-year strategy. Below is the process that has been taken to develop this document.



Creative HQ conducted 23 empathy-based interviews across the Wellington screen sector eco-system to understand the biggest challenges, desired outcomes, local market interests and viewpoints. Interviewees included producers, content creators, production houses, educational institutions, guilds and local councils.



Creative HQ then facilitated two one-day design workshops in June 2021. They involved 13 participants from a cross section of the Wellington screen sector eco-system, including producers, location scouts, guild members, educators, local government and content writers. The workshops were designed to get feedback and further clarification on findings from the first round of interviews, determine alignment and relative prioritisation to the New Zealand 2030 screen sector strategy, develop potential plans for the sector going forward, and concept initiatives that could address sector development opportunities.



The findings were written up as a draft strategy document and distributed across the Wellington screen sector for review and comment. The feedback has been received and integrated into this final document.





Past, present and future: Where do we want to be?

Based on the needs and desired outcomes articulated by the Wellington screen sector, a vision for a desired local eco-system was created. This vision will serve to guide us in our plan and initiatives, and make sure the goals we set for the region can deliver a sustainable operating eco-system.



Comparing two potential future scenarios for Wellington's screen sector

Under one scenario the sector grows at its historical average, while in the other it grows 1%pa faster

	SCENARIO		DIFFERENCE
	Historical growth	Historical growth + 1%pa	
 Total businesses	1,861	1,953	92
 Total employment	3,604	3,782	178
 Average earnings (\$pa)	\$78,500	\$82,300	\$3,800
 Screen sector GDP (\$m)	\$317m	\$349m	\$32m



VISION

Wellington's screen industry is stable and sustainable, exporting high-value content and technology and contributing to Wellington's global reputation as a flourishing, vibrant region renowned for its creative and technical innovation and talent.

Creation of IP:

The conditions where people feel capable and confident to generate innovative content and technology that adapts to changing needs

Stable workflow:

A collective focus on the types of work that allow for longer-term investment of energy and resources

Talent development:

A commitment to wellness and diversity in the workplace and open opportunities for learning and growth

Collaboration:

An environment where people actively seek opportunities to work together

THE OPPORTUNITY FOR THE WELLINGTON SCREEN SECTOR

Accomplishing this vision will see the creation and growth of more companies of scale, resulting in more high-value, well-paid and stable jobs accessible to everyone.

Over-arching local issues for the Wellington screen sector

Throughout all interviews, workshops and feedback sessions, it was clear that the biggest limiting issue identified for Wellington's screen sector is the cyclical and unpredictable nature of work. It is the result of a sector made up of predominantly small, fee-for-service based businesses operating within a work stream of larger but intermittent projects.

The peaks and troughs created by one-off, very large incoming projects, and a lack of continuous work for the wider industry and individual companies locally, means the sector lacks control over its pipeline and is therefore unstable. This can create an inability to plan for the future, which limits growth and keeps the sector in a state of constant reaction.

*"Employment rates in the production sub-sector in Wellington peaked in 2012, and growth in this sub-sector in the capital has been flat for almost the past decade."**

This cyclical and unpredictable nature of work leads to the needs highlighted in the following section.

Many have said that a consistent pipeline of smaller (\$5-\$7m) projects that are longer-running would create stability for the smaller fee-for-service based businesses. But, more importantly perhaps, if local IP creators are supported to develop innovative content and technology, companies of scale would follow, further creating IP exports and partnerships of value and seeding the local eco-system through increased investment and international exports. If this happened, the needs outlined in the next section would largely be addressed over time.

"Screen has been recognised as a growing sector with potential to contribute to New Zealand's COP, employment and economic diversification. As an internationally-oriented, high-value sector, screen can attract international investment, highly-skilled workers, create jobs and provide spill-over benefits, including reputational and tourism."

*Source: MBIE Screen Sector Report - Nov 2017

Looking back

To know our history is to clearly see our future

1936

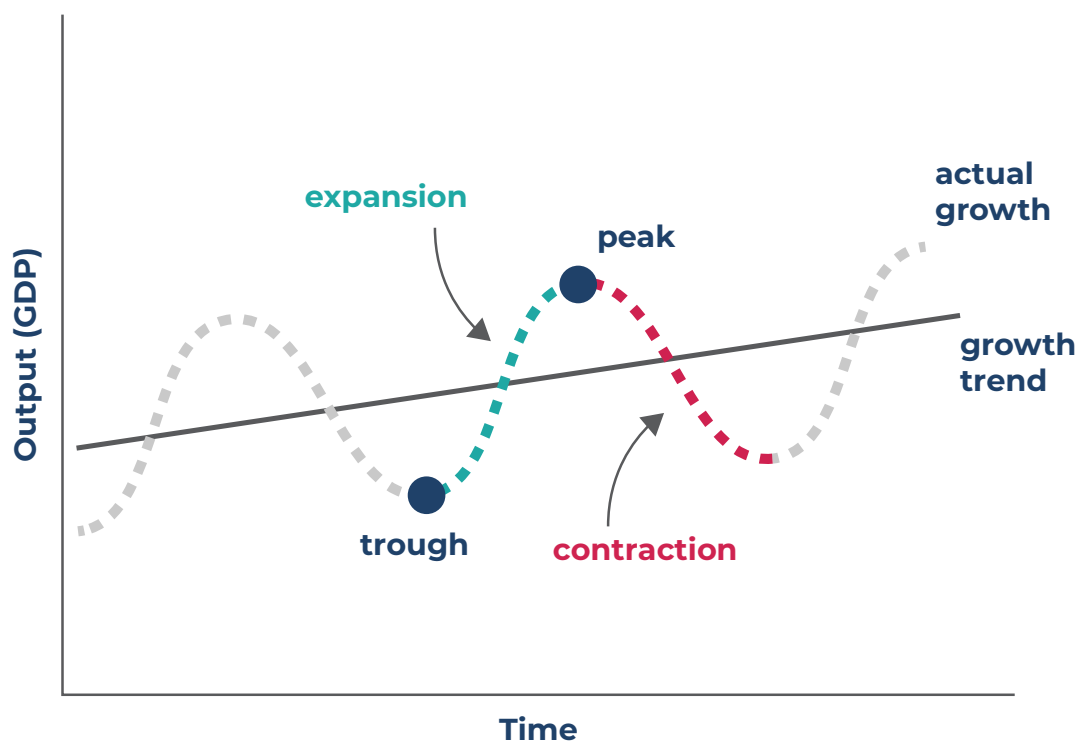
NZ Film Unit established in Miramar, Wellington

1941

National Film Library is established

"Driven by new technologies, increased globalisation and other factors, the screen sector is rapidly changing. This includes changing consumption and distribution patterns and trends, a shift away from feature films towards television series, the rise of streaming services

and the decline of cinematic releases due to the COVID-19 pandemic. Digital technologies are also enabling businesses involved in screen production to engage in other areas, such as interactive entertainment (i.e. gaming)."



1962

NZ Broadcasting Corporation established

1970s

Advertising boom kicks off

1973

Marmalade Sound and Vision opens

Global trends that affect us

The Wellington screen sector has the potential to be a beacon for content and innovation for the world. Being close to, and aware of, global trends and how they can affect us now and into the future is critical for developing a regional strategy that can position the local screen sector for growth that is stable and sustainable, but also allows for the attraction of talent and investment interest globally.

The following tables highlight current global trends, the challenges and opportunities these present for the Wellington region, and their potential to impact or provide opportunity for the local screen sector.



1974

Silverscreen Productions
launched by Geoff Dixon

1975

Avalon Studios is built and opens
in Lower Hutt

1977

Dave Gibson starts Gibson Group



Convergence of film, gaming and interactive media

Advances in game and film-making technology now allow independent film and TV creators to access high-end VFX and post-production tools that would previously have been out of reach on small budget productions.

This has allowed for greater experimentation and generation of multi modal content and delivery mechanisms.

CHALLENGES/OPPORTUNITIES

- Innovative uses of technology for local storytelling
- Strong history of IP creation from the local gaming sector
- Lack of dedicated R&D/test space in Wellington for new technologies may limit opportunities
- Spatial requirement is not large so opportunity could be found
- Industry demand for convergence technology has accelerated due to the growth of remote working
- Democratisation of access to technology to create high-end content
- Digital locations can be created and used by all kinds of productions
- Filming activity can occur in remote ways if physical access is limited
- Greater access to remote talent around the world in the area of convergence and the cross-over with game and VFX

IMPACTS

- Screen sector opportunities extend across different sectors (e.g. health, tourism, business and creative)
- Wellington's recognised connectedness supports new innovation in creative industries
- Educational and commercial opportunities may be hampered by not having dedicated testing and R&D spaces and talent that is not up to speed/trained
- New high-value jobs created – hybrid of gaming and VFX skills and competencies
- Skilled people have more access to tools to tell their diverse stories
- Technology processes lessen physical impact on the environment and can protect social and cultural concerns of sensitive locations
- Global talent is available for local content and IP creation

1978

NZ Film Commission established

1980

TVNZ established in Avalon, Lower Hutt

1981

NZ Film Archive established



Growth of post-production capability

Post-production is a global growth area boosted by the ability to work remotely and the advancement of new technologies.

CHALLENGES/OPPORTUNITIES

New content creation pipelines and technology development in sound and animation

New Zealand is known for its high capability in sound and picture post, animation and VFX

New Zealand animated IP can be created, produced and exported

Technologies such as virtual production bring together existing strengths in film-making, VFX, animation and game development

IMPACTS

Increased remote working opportunities mean place-based employment is less important, superseded by an emphasis on skills

Owning IP can keep high-value jobs and investment in the region

New Zealand can be a key destination for post-production services

Proliferation of technology will increase competition for talent from other parts of the world

1987

Peter Jackson makes his first feature film, *Bad Taste*

1988

TVNZ becomes state-owned enterprise

1989

NZ On Air established and TV3, New Zealand's first private TV channel, established



New opportunities for indigenous storytelling

Indigenous stories tap into not only the original inhabitants of a place and their world view, but also into another way of making sense of the world around us that has been told through stories over countless generations.

Seven of the 10 most internationally successful films from Aotearoa are either helmed by Māori or about Māori.*

*Source: *The Spinoff*, 2021

CHALLENGES/OPPORTUNITIES

New, fresh stories and IP are globally in demand (e.g. Japanese manga, US superhero stories)

Aotearoa New Zealand has a unique way of making and telling stories

Aotearoa New Zealand also has different stories to other places in the world

Aotearoa New Zealand is seen as a credible partner for other indigenous storytellers

IMPACTS

New Zealand's stories are being told internationally which creates cultural capital and placemaking opportunities

Owning IP can keep high-value jobs and investment in the region and can empower diverse creators and practitioners

Talent development and elevation opportunities

1990

BBC producer Ray Thompson establishes Cloud 9 Entertainment based at Avalon Studios

1991

Film NZ established

1991

Wētā Workshop established by Sir Richard Taylor and Lady Tania Rodger



Climate change and the rise of sustainability

Sustainability of the whenua (land), the tangata whenua (people) and the mahi (work) is key to ensure a sustainable screen sector and planet. The awareness of the importance of sustainability has grown in all sectors and for all businesses in New Zealand.

CHALLENGES/OPPORTUNITIES

Wellington's commitment to becoming carbon zero by 2050

Supporting the journey of screen businesses to become sustainable and carbon neutral with specific programmes

Developing a supportive, viable industry for people to lead fulfilling and healthy lives

Support screen businesses committed to maintaining sustainable work and income for their employees

Fostering a culture of wellbeing and respect in screen sector workplaces

'Film-friendly Forever' status is nurtured and maintained

Projects led in partnership with mana whenua

IMPACTS

Attractive proposition to investors, content platforms and creators – Wellington is a carbon net zero place to make stories

The Wellington region is the easiest and most supportive place to create screen content

Physical and digital location access is managed and maintained in partnership with mana whenua, council and private landowners

The screen industry attracts and retains talent

A new diversity of workers feel welcome across all aspects of the production spectrum

Meaningful partnerships established with mana whenua

1993

Wētā Digital established by Sir Peter Jackson, Sir Richard Taylor and Jamie Selkirk

1993

Jane Campion and Anna Paquin win Academy Awards™ for *The Piano*

1995

Screen Wellington established within Wellington City Council



Consumption changes are driving business model changes

Content is now accessible to consumers through many platforms giving access to a wider and more diverse audience.

This trend is driving significant changes in how businesses in the screen sector operate and make money.

CHALLENGES/OPPORTUNITIES

User-generated content platforms like YouTube and TikTok will continue to draw audiences away from traditional film and broadcast content and see growth in 'produced' content on their platforms

Increased access to broader audiences and reduced reliance on 'middleman' intermediaries

Global demand for content is increasing, so too is the need to meet consumers where they are, but not through traditional channels

Increase in interest in series content that can be consumed across many channels

IMPACTS

Investment and other capability can be sourced outside the historically narrow funding models

Greater network of new and international relationships can bring more work to the region and New Zealand

Owning IP can mean high-value jobs and investment are kept in the region

There are more opportunities for New Zealand to deliver more diverse stories to global audiences

Production of series content can create longer-term work projects that allow for greater resource investment and collaboration

1997

Sir Peter Jackson purchases the National Film Unit for the Crown and buys the paint factory in Stone Street, Miramar to convert into film studios

1997

Sidhe Interactive launches (now PikPok)

1998

Lord of the Rings trilogy is announced to film in New Zealand



Government incentives and interventions drive change

Globally, film production incentives have become a key public policy phenomenon in the screen sector over the past several decades.

These programmes are designed to support and attract valuable film and TV drama projects (collectively 'film') to a country or region by offering a return on eligible qualifying screen production expenditure.

These incentives have a large influence on the local screen sector. They often drive the investment behaviour of participants and can be tied to positive outcomes for communities, including workforce, partnerships and investment outcomes.

CHALLENGES/OPPORTUNITIES

Screen incentives are deemed necessary for attracting global fee-for-service projects (not businesses)

Government incentives struggle to keep up in a fast-changing content and technology landscape and therefore are not always fit-for-purpose

New Zealand productions are not incentivised to create internships and social outcomes which will provide sustainable employment and create sustainable businesses

In a small jurisdiction like New Zealand, incentives can be seen as a race to the bottom and unaffordable

The sector should advocate for a change to support local talent, content, business and screen production by incentivising creation of exportable IP

IMPACTS

An industry reliant on commercial incentives without ongoing positive impact outcomes is not sustainable and is vulnerable to political and public will and sentiment

The incentive provision takes a narrow view of what is 'screen'

New convergent technologies are not covered or included in the PDV (post, digital and VFX) incentive

Parameters of incentive provision modify the market that is attracted to film in New Zealand – small numbers of larger projects are attracted to New Zealand (incentives kick in at NZ\$75m) rather than more mid-tier projects (NZ\$3-7m)

Local businesses and talent miss out on the stepping stone scale-up opportunities to enter the screen sector and build a career/business

**Source: Olsberg SPI Global Incentives White Paper - June 2019.*

1998

Bret McKenzie and Jemaine Clement form *Flight of the Conchords*

2000

Massive Software is created by Stephen Regelous

2001

TVNZ becomes Crown entity



Placemaking as an economic driver

Communities like Wellington are looking to promote their regions as great places to live, work, learn and enjoy. This creates lifestyles that will attract talent and investment when the Wellington story is told to the world.

Wellington is a recognised UNESCO City of Film and by strengthening and sustaining the sector it can better maximise this opportunity.

CHALLENGES/OPPORTUNITIES

The New Zealand image understood by most global citizens is built largely upon our amazing landscapes that feature in film content

Artists are often the core of regional regeneration, especially in European cities

Wellington could be an attractive destination due to the creative, tech-savvy, engaged community that makes amazing content

Business tourists are a large market for Aotearoa New Zealand and align with more focused tourism targets

Wellington has several top tier universities teaching, researching and learning in the areas of screen and easy access to high-level sector practitioners. However, this is not as connected as it could be with competing interests and there are no shared outcomes with the city or the sector

IMPACTS

Increase in global awareness leading to a rise in incoming projects, talent and investment

Resurgence in local cultural diversity due to artistic and innovation influence

Wellington is well-placed to become a global centre of excellence for screen

2001

NZ Game Developers Association established

2001-2003

Many New Zealanders win Academy Awards™ for *Lord of the Rings* trilogy

2002

Local Government NZ Film-Friendly Protocol is released

Wellington stakeholder needs and outcomes

As a result of interviews, analysis and design workshops with local screen sector representatives, the following needs and outcomes were developed and determined to be the highest priority for the Wellington screen sector.



2002

Screen Industry Taskforce assembled to make recommendations to Government on building a sustainable screen industry

2003

NZ Screen Incentives launched

2004

Taika Waititi and Ainsley Gardiner's *Two cars, One Night* nominated for Academy Award™



The Wellington screen sector needs a long-term, future-focused vision that caters for diversity, encourages collaboration, provides stability and ensures the wellbeing of the workforce.

Currently participants in the sector feel that operators work in silos. This hinders creativity, opportunities and investment, and has a negative impact on the wellbeing of its members.

Having a shared vision with agreed goals would enable a more cohesive, collaborative and innovative sector.

WORKSHOP INSIGHTS THAT SUPPORT THIS NEED:



A shared vision would help the sector to collaborate.



The vision must be future-focused and push boundaries, creating deliberate opportunity for cross-collaboration between sub-sectors.



Focusing on using the many skills of the sector's workforce that are converging will enable individuals and businesses to have more diverse opportunities.



For example, the vision could detail projects where technology used in gaming can be transferred into film, and VR technology skills can be transferred into other sectors such as health and education.

QUOTES FROM INTERVIEWS THAT SUPPORT THIS NEED:

"It goes back to joining up the dots and getting our ducks lined up. Cohesive front rather than individuals."

"We need to collaborate as an industry and make capacity visible through infrastructure and work out a 'systems view' - with visibility of gaps in the market."

"The power would come from a myriad of companies working together."

"Education has a role here, investment in new tech, investment into screen related research, incubators, etc."

"It's very important for us as indigenous film-makers to be across the entire pipeline of film-making, everything from conception, through production, right through to distribution. We need to be across all of that because they all intertwined and without us participating in every single part of that, we won't have true story sovereignty."

2005

Park Road Post opens in Miramar

2005

King Kong wins Academy Awards™

2007

Flight of the Conchords airs on HBO



The Wellington screen sector participants need better business acumen and connections to source private investment, create and commercialise IP, and lower reliance on film incentives.

Participants say the current funding model hinders IP and business development but finding and attracting private investment is not a skillset many possess.

Greater and more diverse income for businesses from commercialisation of IP created, leading to a more stable and healthier sector.

WORKSHOP INSIGHTS THAT SUPPORT THIS NEED:



The current funding model for film does not adequately support the development of all local exportable IP, and more diversified investment sources are crucial.



It is noted that many Wellington creatives are good at creating IP, but not so good at protecting, selling and marketing IP.



Establishing new sources of funding might enable more diverse projects to take off, new business models to thrive, and more talent to be sustained in the sector.



Professional development in the areas of business acumen is required for producers.



Better understanding of access to international partners for producers to create export driven opportunities is required.

QUOTES FROM INTERVIEWS THAT SUPPORT THIS NEED:

"We need salespeople to sell our IP."

"We need to understand how we partner 'there's a missing middle' – we have lots of new start-ups with ideas and large established ones, but nothing in the middle."

"More mid-layer content produced. Doesn't need to be a \$700m project. By using technology you can greatly reduce the cost of production."

"I move from a service producer across into a creative producer (finding artists and connecting them with funding), and the most difficult step is financial support during that transition period. Moving from a weekly pay cheque, across to an investment/capital finance cashflow to stay afloat while finding traction for producing my first films (where my brand is established) is the trickiest step in the process. I would say a business development grant that would allow for individuals with a strong professional background to reshape their business model in the creative arts sector would be a huge benefit. Game-changing in fact."

"Key plan must be to attract investment to the sector, both for IP development and infrastructure. Training is important but unless there are fulltime jobs to go to, people cannot survive in the industry, it has to be more sustainable."

2007-2009

Flight of the Conchords nominated for nine Emmy Awards™

2011

Bret McKenzie wins Academy Award™ and a Grammy™ for *The Muppets*

2013

Regional Film Office Network of NZ (RFONZ) is established



WORKSHOP INSIGHTS THAT SUPPORT THIS NEED:



Advertise capacity and capability of the Wellington screen sector.



Tell the Wellington screen story.

QUOTES FROM INTERVIEWS THAT SUPPORT THIS NEED:

"Screen Wellington and WellingtonNZ have a much bigger role to play to support the sector and put Wellington back on the map to attract screen sector business into Wellington. Having a solid, action-focused marketing strategy that is supported with adequate resourcing will strengthen Wellington and benefit a broad range of sectors."

"As a starter action, we urgently need proper proactive marketing and promotion of our screen sector to enable business attraction. The focus needs to be on telling our screen sector story and showcasing our wide and varied skillsets in action to keep us alive and vibrant on the world stage. We need to be promoted as active and forward facing, not only relying on past successes to attract investment. Creating a strong marketing campaign and comms plan will help kickstart some of the suggested initiatives to come together more easily."

"We (still) need to attract the business of those big companies and projects to come here. This is a fantastic filming location because there's so much to offer and in such a small space you can get to any coastline, rivers, mountains, cities, whatever. Our crews are phenomenal. I just wish our industry was seen like other exportable industries because we actually are! We're incredible, we punch above our weight in the world, but I think it's time that we need to, and perhaps the Government needs to, see our export industry as important."

2014

NZ Screen Production Grant is reviewed and changed to make more globally competitive

2014

Māoriland Film Festival launches in Ōtaki

2019

Lane Street Studios project begins



The Wellington screen sector needs to address its ability to attract, maintain, and develop a skilled and diverse workforce.

There is a shortage of skilled talent throughout the sector, it is difficult to break in, and it lacks diversity.

A more sustainable sector due to greater opportunities for work, better training, and the attraction of diverse and skilled people to the sector.

WORKSHOP INSIGHTS THAT SUPPORT THIS NEED:



Wellington is losing its workforce to Auckland because of Auckland's steadier workflow.



The contractual arrangements for individuals used in the screen sector make it difficult for mid-size companies to take on apprentices/ interns, stunting the development of a skilled workforce.



The current tertiary education system is not adequately addressing and providing 'fit-for-purpose' training for many roles within the sector.



'Breaking in' to the sector is difficult because experienced skilled staff (especially in film) are reluctant to train new people for fear of jobs being taken on a short-term contractual basis by the people they are training.



Diversity in the sector is crucial to telling Wellington stories, however attracting diverse people is hindered by the lack of stable work and income.

QUOTES FROM INTERVIEWS THAT SUPPORT THIS NEED:

"More sustainable sector would result in more content created in Wellington."

"There would be more opportunities for diverse people to consider the screen industry as a potential career option."

"Universities have the ability and interest in doing all manner of trainings, industry-led workshops, lecture series, certifications, and are very interested in working with industry on what this could look like."

"Universities do have initiatives for developing entrepreneurship and have been discussing how to bring this more fully into screen programmes and are very keen to build on and develop further opportunities for industry co/labs, trainings, research, internships and productions. Challenges for industry include time constraints and project demands. Resourcing and funding would help this."

2019


Wellington Paranormal season one airs

2019

Many New Zealanders win an Academy Award™ for *Jojo Rabbit*

2020

Wētā Animated is launched by Sir Peter Jackson, Sean Parker and Dame Fran Walsh



"There would be more opportunities for diverse people to consider the screen industry as a potential career option."

2020

Kāpiti Coast film *Poppy* is one of the first in the world to restart filming after first Covid wave

2022

Jane Campion establishes Netflix-supported film-maker intensive in Wellington

Wellington aligned with the New Zealand Screen Sector Strategy

The intention is to align the Wellington Screen Sector Strategy with the Aotearoa New Zealand Screen Sector Strategy 2030 as much as possible and practical. As such, participants in the workshops were asked to prioritise the needs and desired outcomes from the interview findings into the areas of the national strategic framework and five-year plan.

Wellington screen sector workshop participants agreed that all five long-term goals from the 2030 strategy are important to the Wellington region. However, it was determined that local needs align most greatly with the national strategies of collaboration, content, capability and culture. Much like the national strategy, collaboration was of the highest importance to the Wellington screen sector and should be made the highest priority.

Investing in collaboration, content, capability and culture will enhance the Wellington economy due to the screen sector's contribution.

In subsequent feedback it was highlighted that the creation of content and IP was of paramount importance to the local screen sector and would lead to positive outcomes for the other priorities. It was also reinforced that collaboration for its own sake is not realistic. Instead, a set of shared goals and outcomes through specific projects and initiatives is a better mechanism to lead to collaboration and collective success in achieving the goals.



Aotearoa New Zealand Screen Sector Strategy 2030 – Strategic Framework

NGĀ WHĀINGA (GOALS)	TUKUNA IHO (OUTCOMES)
COLLABORATION	
Collaborate effectively within and outside the sector	An organised and cohesive sector expands
CONTENT	
Create compelling content that resonates with audiences everywhere	Local and overseas audiences enjoy and want more of the sector's content
CAPABILITY	
Increase capacity and capability, with well-paid, fulfilling jobs and successful businesses for New Zealanders	Talent is nurtured, careers flourish, and businesses prosper
CONTRIBUTION	
Make a greater contribution to New Zealand's economy, culture, and international identity	The sector makes a substantial and growing contribution to the economy
CULTURE	
Ensure Ngā Taonga Tuku Iho (the sharing of knowledge) promotes greater use of Te Reo and Tikanga Māori in the sector's practices and processes, thereby reflecting New Zealand's unique culture	Te Taumata Māori (Māori success) ensures the sector successfully reflects New Zealand's unique and diverse cultural landscape



Wellington screen sector strategic goals

Based on the screen sector's needs and desired outcomes, and through ideas generated in the strategy workshops, five strategic goals have been developed with related actions and activities to achieve them over the next five years.

This five-year plan will address key challenges highlighted by the sector and move the Wellington screen sector closer to achieving the desired vision for the local screen eco-system. Additionally, effort has been made to align the components of the plan framework outlined in the Aotearoa New Zealand Screen Sector Strategy 2030.

GOALS

The following goals have been developed for the Wellington screen sector

01

Identify and support initiatives to stabilise the sector

02

Build better awareness of the screen sector to attract local and international projects, talent, partnerships and investment

03

Develop a connected eco-system that fosters collaboration and drives future-thinking

04

Ensure systems, process and regulations allow ease of business and maintain a 'film-friendly' region

05

Leverage the UNESCO City of Film designation and programme of work to promote Māori stories and storytellers, foster diversity and engage residents and visitors.

Wellington screen sector five-year plan

The target is to make progress towards meeting the plan's goals within a five-year timeframe.

Achieving each goal will require a partnership approach across the sector. Some goals will be served by advocacy with central government and regions, while others will require investment by local government/WellingtonNZ/Wellington City Council. Others will simply be goals set by businesses and individuals that can be achieved in their day-to-day participation, operations and individual activities.

SECTOR SUGGESTED INITIATIVES

Each goal will be delivered through a variety of actions, activities and initiatives. During the workshops, participants were asked to develop ideas for desired solutions to meet the needs of the sector and the goals that emerged from the national strategic framework. Those solution concepts were then further refined through feedback and workshops to make up the suggested

initiatives within the five-year plan. The icons are representative of these initiatives.

These suggested initiatives will be critical for the strategy to achieve its goals. Each suggested initiative is described in a basic way, and each initiative that goes forward will be developed into a detailed workplan with allocations for resourcing and other requirements, including establishing governance and partnerships.

SECTOR SUGGESTED INITIATIVES



Sector steering group

A body made up of sector representatives that holds accountability and governance for this strategy. These should be paid roles. The body could have several functions, such as advising Screen Wellington, promoting and implementing initiatives and providing support for funding initiatives.



Collaborative promotional content

A project co-designed with local industry to promote Wellington's screen sector externally. This could include a platform for the local screen sector to collaborate and co-create promotional content. This could result in creating an anthology, a winning pitch for a screen project, a new game, interactive experience, marketing tools and resources. The purpose would be both promotional and a vehicle for collaboration and training for local talent.



Collaborative working spaces

Support physical spaces where the Wellington screen eco-system can work side by side and collaboratively. The space could have producers/writers, incubator businesses, investors, education providers and academics, researchers, studios and post-production capabilities, events, and community spaces.

Such a space could be the face of Wellington's growing screen sector to the world.



Data collection

Measure the economic and cultural impact of the screen sector in Wellington, its capacity and the 'size of the prize' market share opportunity. This will allow the sector to better measure the success of target initiatives and advocate for what it needs - education, infrastructure, talent/career pathways, funding investment, so the it can continue to develop and grow.



Industry events

Regular industry events to collaborate and raise the profile of the screen sector in Wellington and celebrate initiatives and successes. This could include round tables held every quarter with stakeholders and industry to keep it up-to-date, and a keystone/anchor event for Wellington - 'Converge'.



Online 'film-friendly' toolkit for industry and stakeholders

A resource kit available on the Screen Wellington website with easy to access infographics/ PDFs/ videos on expectations of film-makers, permissions to film, crew expectations, certification, health and safety, locations, and the people and studio resources available here.



Business incubator programmes

Incubator programmes for developing innovative businesses, and research and development. These could involve partnerships between WellingtonNZ, local screen sector stakeholders, universities and private/angel investors, could operate from collaborative working spaces.



Leverage Wellington UNESCO City of Film designation

Leverage Wellington's UNESCO City of Film designation to further sector outcomes, community outcomes, international relationships and eco-system building.

01

Identify and support initiatives to stabilise the sector



Steering group



Incubator programme



Industry events



Incentives/grants



Data

Why is this important?

The screen sector needs balance and stability by having predictable projects and revenue.

The area for growth, particularly in Wellington, lies in local businesses and talent creating their own IP as well as servicing large incoming projects to create a pipeline where the value chain is owned by industry in as many areas as possible.

Government agencies play a key role in the sector by administering screen incentives and other mechanisms to encourage incoming service work.

What does success look like?

The screen sector is understood and recognised as an important driver of the economy and support for its development will be sustainably funded to reflect the role it plays in Wellington as a creative capital.

Through sector advocacy, Government initiatives work better for screen businesses, production and development of IP.

Key actions

- Source private investment and partnership opportunities
- Build and deliver programmes to develop specific business acumen, sales and marketing skillsets
- Create and attract events that focus on investment, partnership, and professional development outcomes
- Support initiatives that attract key players to relocate to Wellington and partner with Wellington producers and businesses

02

Build better awareness of the screen sector to attract local and international projects, talent, partnerships and investment



Collaborative marketing



Steering group



Data



Events



Leverage UNESCO designation

Why is this important?

An awareness of what Wellington can offer projects, new businesses, talent and investors is key to ensuring the success and stability of the sector. The capability of the sector to stabilise and grow relies on a stable flow of IP creation and service work – reliant on constant rejuvenation and awareness.

What does success look like?

By collaborating to market Wellington's screen businesses, infrastructure, talented crew and collaborators, we attract more productions, partnership and investment.

By celebrating our successes and Wellington's rich screen heritage as a UNESCO City of Film, we attract and retain the next generation of storytellers to live, work, and create in Wellington.

Key actions

- Tell the story of the Wellington screen sector
- Media and communications plan and campaigns co-designed and produced with industry
- Collaborate with New Zealand Film Commission on servicing enquiries and attracting more productions to the region
- Conduct market research to identify the global opportunities and markets for export IP and partnerships for sector businesses and content
- Leverage the Wellington UNESCO City of Film designation, programmes and events to promote Wellington as the best place to make, learn about and watch films.

03

Develop a connected eco-system that fosters collaboration and drives future-thinking



Steering group



Collaborative working space



Incubator programme



Industry events



Data



Leverage UNESCO designation

Why is this important?

To create an eco-system that is sustainable both commercially and creatively, the Wellington screen industry must collaborate locally to generate diverse new ideas that bring different people together, build enduring relationships, and ultimately deliver increased compelling content.

The screen sector in Wellington can act in a siloed manner and this needs to be resolved to enable local, national, and international success.

What does success look like?

More visible, accessible collaborations like workshops, informative series and projects can, in turn, generate new business opportunities, new stories, compelling content, investment opportunities and long-term sustainability.

A strong industry group and Screen Wellington have broad oversight of the sector and funding opportunities. Together they can connect, foster collaboration and avoid duplication.

Key actions

- Create opportunities for the industry to connect and collaborate. This may include initiatives like industry events, incubator programmes, collaborative marketing and the support of co-working or "centre of excellence" spaces
- Work with industry, the Workforce Development Council, and tertiary institutions to co-create and support viable programmes and initiatives to educate and enable new and diverse entrants to the screen sector
- Establish a sector advisory group with broad oversight of the sector and opportunities to connect, foster collaboration and avoid duplication.

04

Ensure systems, processes and regulations allow for ease of business and a 'film-friendly' region



Steering group



Film-friendly resources



Data



Leverage UNESCO designation

Why is this important?

To ensure Wellington remains 'film-friendly', ongoing awareness of filming as a key activity for the region and efficient responsive systems will help Wellington to meet the increased demand for filming activity and maximise and better manage this opportunity for growth.

Ongoing support and partnership with councils.

More robust health and safety protocols are required to keep filming safe.

What does success look like?

Wellington can meet existing demand and is prepared for future growth to support projects and businesses with robust, responsive services, and ensure doing business is easy, safe, and costs are competitive.

Screen Wellington and the sector foster enduring relationships with council, mana whenua and local businesses to ensure everyone realises and benefits from the culture, vibrancy and economic flow-on that filming activity brings to the region.

Key actions

- Maintain and improve council and iwi stakeholder partnerships and MOUs for land use, permitting and parking
- Maintain and improve health and safety material and information for improved work environments on location
- Continue to support infrastructure initiatives to meet current and future demand
- Research key data around the vibrancy that filming activity brings to the region to create key messaging to councillors, retailers, hospitality owners and residents

05

Leverage the UNESCO City of Film designation and programme of work to promote Māori stories and storytellers, foster diversity and engage residents and visitors.



Collaborative marketing



Industry events



Incentives/grants



Data

Why is this important?

Diversity and inclusion in the sector will ensure greater sustainability. Connectivity between screen and community through partnering on key priorities and programmes builds a civic pride and ownership of our City of Film designation. The UNESCO Creative City network provides international awareness and recognition, allow more opportunities to promote our stories on the world stage.

What does success look like?

- Young people can envisage a creative life and living in Wellington
- Our diverse communities are reflected in front of, and behind, the camera
- More opportunities and improved access for mana whenua and Wellington's Māori screen practitioners from around the motu to share their work and sustain careers at home. Residents and visitors are connected to our place through our stories

Key actions

- Programmes to remove barriers for film-makers from diverse backgrounds
- Engage rangatahi with screen experiences and inspire them to create content
- Use screen technology to tell our history, stories and culture in public spaces
- Grow the local economy through screen tourism, including events, film festivals, exhibitions, experiences and attractions
- Support skills development, industry preparedness and better connections between tertiary/film and digital screen study programmes and the sector through mentoring, workshops and internships



00:02:33:22

 **Wellington**
UNESCO City of Film
Te Upoko o te Ika

Next steps

Screen Wellington and WellingtonNZ will develop the sector steering group to create a plan for each goal and outline the delivery of activities over the next five years. The plan will be reviewed and updated annually.

This strategy is a living document, which means it must constantly reflect the current situation but also serve as a guide for WellingtonNZ, Screen Wellington, the industry, the educators and Government in order to drive visible and measurable achievement in key areas identified for growth and leverage.

A strong and well-adopted strategy will help Wellington take advantage of opportunities to address challenges, and therefore create a more sustainable, collaborative, diverse, valued and healthy industry.

For the Wellington screen sector five-year plan to achieve its goals, everyone in the sector must play their role. Working together to grow, nurture, and sustain an industry now will be beneficial in years to come.





Appendix and strategy authorship

The following links relate to relevant Government, screen sector and economic strategies at time of printing.

Economic Context to the Wellington Regional Screen Sector Strategy

Wellington Regional Economic Development Plan

Aotearoa New Zealand Screen Sector Strategy 2030 screensectorstrategy.nz

UNESCO City of Film Strategy

www.wellingtoncityoffilm.com/about-wellington-unesco-city-of-film



WellingtonNZ

ABOUT WELLINGTONNZ

WellingtonNZ is the Wellington region's economic development agency, tasked with enhancing prosperity, vibrancy, and livability by making the Wellington region wildly famous as a place to visit, live, study, work, do business, and invest.

WellingtonNZ's priority areas of focus are developing jobs and skills and placemaking. WellingtonNZ looks to do this by collaborating and engaging with businesses and other organisations to build business capability, attract and host events, operate civic venues, and market the region to the world.

www.wellingtonnz.com/business



ABOUT CREATIVE HQ

Creative HQ, Wellington's innovation hub, operates throughout New Zealand and internationally. It is the largest provider of structured innovation programmes in New Zealand. This work includes structured innovation workshops, sprints, programmes, and events for Government, corporates, and start-ups.

Creative HQ is owned by WellingtonNZ.

www.creativehq.co.nz



ABOUT SCREEN WELLINGTON

Screen Wellington is the Wellington regional film office and was established in 1995 to make filming in the Wellington region easy by enabling location access, connecting landowners and locations to film crews, and issuing permits to film-makers to shoot in the region on public property.

As a driver of economic, cultural, and social development and wellbeing, Screen Wellington works to advocate and support the development of the screen sector in key areas of the screen industry, including project attraction, workforce development and training initiatives, business development, investment, business events and infrastructure development projects in the region. The Wellington UNESCO City of Film programme focuses on collaborating with our Creative City colleagues in Aotearoa and worldwide to elevate the visual storytellers of Wellington, and to bring an array of cultural experiences to the people of Wellington.

www.screenwellington.com

