



8 Conclusion

In conclusion

Snapshot: Auckland's creative industries is intended to help the council understand the needs of different sectors of Auckland's economy. The council will develop an action plan following the publication of this report.

As the four research reports that comprise *Snapshot* demonstrate, the opportunity is sizeable. To restate themes from earlier in the report, Auckland, so often seen as crippled by its 'bigness', is also resourced by its size. Auckland has critical mass: a deeper pool of talent than anywhere else in the country and a bigger stage on which this talent can perform.

Collectively the city, and the region (for the two need to be considered together), have critical mass in the creative industries, a substantial economic resource. The importance of harnessing this resource is heightened by the economic challenges facing New Zealand as a whole. It is a matter of some urgency.

The challenge for the sector itself, the national and local public agencies, the private businesses and the councils, will be to how to understand the opportunities, articulate and make use of them. And to use them not just for Auckland, but for New Zealand.

The point of commissioning research is to listen, learn, understand and change. The "things to understand, things to hear and things to focus on" outlined in the summary chapter of this report represent a starting point and confirm the commentaries of other creative industries' reports. *Snapshot: Auckland's creative industries* is thus both a provider of detail about Auckland's creative industries and a call to action.

We conclude *Snapshot* with three final reflections on Auckland.

As an Aucklander, what frustrates me about Auckland is that it has all the opportunities: amazing location, scale, size, climate, colour, energy – but it isn't realising those opportunities in an imaginative or courageous way – the potential is huge... Auckland is in so many ways a divine city.

Dame Cheryll Sotheran

... It just has a sense of having a lot of potential. There are a lot of people here that are creative, that are excited to be here, that feel the potential of being all the way out, away from the rest of the world and yet having access to everything a big city has.

Software Development Company Representative

Auckland is a 360° city, one-and-a-half million people spread out over an area the size of London. It has huge and wonderful resources. You wouldn't have to do much to make it fantastic.

Gordon Moller

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A

Frontier Network interviewees

Michael Barnett, Chief Executive, Auckland Chamber of Commerce, Auckland Regional Council Councillor

Michael Bird, Manager, Sustainable Development, (with Blake Shepherd, Policy Adviser), Ministry of Economic Development

Paul Blomfield, formerly Creative Sector Specialist, New Zealand Trade and Enterprise

Russell Brown, media commentator and music/technology specialist

Fraser Gardyne, President, Designers Institute of New Zealand (DINZ)

Dr Ruth Harley, Chief Executive, New Zealand Film Commission (with Commission managers Kate Kennedy and Rachel Mansfield)

Dr Manying Ip, Associate Professor, School of Asian Studies, the University of Auckland

Desna Jury, Head of School of Art and Design, Auckland University of Technology (AUT)

Sir Hugh Kawharu, Chairman, Ngati Whatua o Orakei Maori Trust Board (with kaumatua Danny Tumahai and artist Bernard Makaore)

Elizabeth Kerr, Chief Executive, Creative New Zealand (with senior managers Rob Garrett and Cath Cardiff)

Martin Matthews, Chief Executive, Ministry for Culture and Heritage

Gordon Moller, President, New Zealand Institute of Architects (NZIA)

Michael Moynahan, formerly Chair, Booksellers New Zealand

Clare O'Leary, formerly Creative/Digital Sector Manager, New Zealand Trade and Enterprise

Rod Oram, business journalist

Professor Sharman Pretty, Dean of the National Institute of Creative Arts and Industries, the University of Auckland

Pradeep Sharma, Research Fellow and Lecturer, Master of Design Management, Unitec

Brendan Smyth, Music Programme Manager, NZ On Air (with Cath Andersen, Chief Executive, New Zealand Music Industry Commission)

Dame Cheryl Sotheran, Sector Director Creative Industries, New Zealand Trade and Enterprise

Andrew Stone, President, Communications Agencies Association of NZ (CAANZ)

Paul Voigt, Investment Manager Screen Production, Investment New Zealand

Pauline A. Winter, Chair, Pacific Business Trust

Appendices

B

Further detail on the ANZSIC codes

Guided by international and national studies, Auckland City's economic development group has defined the creative sector to contain six sub-sectors (see chapter 2). Industry groupings from the Australia and New Zealand Standard Industrial Classification (ANZSIC) system have been matched to each sub-sector to form a basis for the economic analysis.

The definitions and classifications are summarised below, based on the ANZSIC6 industry codes.

Summary of creative industry sub-sectors based on ANZSIC codes

	INDUSTRY	ANZSIC AND DESCRIPTION	NOTES
1	Publishing		
	Book	C242300 – Book and other publishing	100% of ANZSIC
	Authors	P924200 – Creative arts	Authors, journalists and writers (own account) 27.7% of ANZSIC
	Newspaper	C242100 – Newspaper printing or publishing	100% of ANZSIC
	Periodicals	C242200 – Other periodical publishing	100% of ANZSIC
2	Design		
	Advertising	L785100 – Advertising services	100% of ANZSIC
	Graphic design	L785200 – Commercial advertising and display services	100% of ANZSIC
	Designer fashion	L786900 – Business services, not elsewhere classified (nec)	3.9% of ANZSIC, based on occupation classification statistics
	Architecture	L782100 – Architectural services	100% of ANZSIC
3	Music		
	Recording and promotion	P925100 – Sound recording studios	100% of ANZSIC
	Composers	P924200 – Creative arts	18.5% of ANZSIC category – composers (Music)
	Physical production	C243000 – Recorded media manufacturing and publishing	100% of ANZSIC
4	Performing arts		
	Theatre production	P924100 – Music and theatre production	100% of ANZSIC
	Performing arts venues	P925200 – Performing arts venues	100% of ANZSIC
	Services to the arts	P925900 – Services to the arts	100% of ANZSIC
		P924200 – Creative arts	16.8% of sector related to Performing arts

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5	Visual arts, crafts and photography		
	Art galleries and dealers	G525900 – Retailing nec	Art galleries, less than 2% of ANZSIC
	Photography	Q952300 – Photographic studios	100% of ANZSIC
	Visual arts	P924200 – Creative arts	32.8% of ANZSIC – Visual arts component
	Crafts	P924200 – Creative arts	4.2% OF ANZSIC
		C221500 – Textile finishing	16.7% of ANZSIC
		C222900 – Textile product manufacturing	1.9% of ANZSIC
		C232900 – Wood products manufacturing nec	2.3% of ANZSIC
		C261000 – Glass and glass product manufacturing	1.8% of ANZSIC
		C262900 – Ceramic product manufacturing nec	13.6% of ANZSIC
		C294100 – Jewellery and silverware manufacturing	100% of ANZSIC

6	Screen production and radio/digital media		
	Film and video	P911100 – Film and video production	100% of ANZSIC
	Television	P912200 – Television services	100% of ANZSIC
	Radio	P912100 – Radio services	100% of ANZSIC
	Digital media		No suitable ANZSIC codes exist for this area. Estimates are based on alternate data. Our definition of digital media includes some web design, entertainment software and interactive leisure software.

The creative sector has been subdivided into six sub sectors and ANZSIC codes matched to each sub-sector. For example, in the case of publishing there are four ANZSIC codes that encompass activities that are publishing related, they are; book and other publishing; creative arts; newspaper printing and publishing and other periodical publishing.

Official Statistics New Zealand employment information (from the Business Demographics data set 2003) has been used and in most instances, entire ANZSIC codes have been used to form a creative sub-sector. However, there are a few exceptions (listed below) where activities and occupations were split between creative sub-sectors or generated from information gathered outside the official statistics business frame.

Creative arts	Distributed across the six creative sub-sectors according to the underlying occupations and activities within the creative arts code ie 28% in publishing; 19% in music; 17% in performing arts and 37% in visual arts.
Crafts	This is part of the visual arts sub-sector. There is no ANZSIC code that directly matches this. Therefore, relevant manufacturing ANZSIC codes were used with employment numbers estimated from occupational data.
Digital media	There is no matching ANZSIC code. An analysis of company lists and interview with key players in the sector resulted in an estimate of 200 Auckland FTEs.
Art galleries	There is no matching ANZSIC code. An analysis of a number of commercially available databases resulted in sixty-five art galleries being identified in Auckland City, each having on average 1.5 Full-Time Equivalent (FTE) employees.
Designer fashion	The part of the apparel sector focussed on 'clothing design; manufacture of clothes for exhibition; consultancy and diffusion lines' (The Designer Fashion Industry in New Zealand, Industry New Zealand – June 2002) is coded under the business services ANZSIC code in the design sub-sector. Based on an analysis of occupations in the business services code 213 FTEs were estimated to be employed in designer fashion in Auckland.

The Market Economics Ltd GDP analysis in chapter 2 of this report is based on the industries exactly as defined above. The employment analysis in this report (also in chapter 2) excludes the data where there was no matching ANZSIC code and also excludes the small number of manufacturing employees included in the crafts section of the table above, 'Summary of creative industry sub-sectors based on ANZSIC codes'.

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C

Creative occupations in Auckland city

To gain a greater understanding of the number and location (in the economy) of people working in creative professions and the extent to which the creative sector (defined by ANZSIC codes) captures the total creative workforce in Auckland city, an analysis of the occupational make-up of all ANZSIC codes was undertaken.

For each ANZSIC code a Creativity Index was calculated to reflect the percentage of full time equivalent workers 'creative occupations'. The table below shows the top fifty ANZSIC codes, based on the Creativity Index, ranked in descending order.

Top 50 ANZSIC codes ranked by creativity indices

ANZSIC GROUP	ANZSIC code	Creativity Index	% of all FTEs	% of creative FTE's	Cumulative % of all FTE's	Cumulative % of creative FTEs
Creative arts	P924200	78.3	0.3	4.8	0.3	4.8
Music and theatre productions	P924100	63.9	0.1	1.1	0.4	5.9
Photographic studios	Q952300	62.1	0.1	2.0	0.5	7.9
Jewellery and silverware manufacturing	C294100	58.8	0.1	1.3	0.6	9.2
Sound recording studios	P925100	57.9	0.0	0.4	0.6	9.6
Commercial art and display services	L785200	55.7	0.6	7.0	1.2	16.6
Radio services	P912100	53.3	0.2	2.1	1.4	18.7
Film and video production	P911100	51.9	0.7	7.5	2.1	26.2
Television services	P912200	43.5	0.5	5.0	2.6	31.2
Wooden furniture and upholstered seat manufacturing	C292100	42.5	0.4	3.7	3.0	34.9
Architectural services	L782100	39.0	0.6	5.3	3.6	40.2
Recorded media manufacturing and publishing	C243000	35.2	0.0	0.1	3.6	40.3
Services to printing	C241300	33.6	0.2	1.4	3.8	41.7
Other periodical publishing	C242200	32.9	0.3	2.3	4.1	44.0
Cardigan and pullover manufacturing	C223200	32.7	0.1	0.4	4.2	44.3
Book and other publishing	C242300	31.6	0.2	1.1	4.4	45.5
Newspaper printing or publishing	C242100	31.4	0.4	2.6	4.7	48.0
Performing arts venues	P925200	30.2	0.1	0.7	4.9	48.8
Services to the arts nec	P925900	30.1	0.1	0.5	4.9	49.3
Museums	P922000	27.5	0.1	0.7	5.0	50.0
Advertising services	L785100	26.5	0.8	4.4	5.8	54.4
Knitting mill product manufacturing	C223900	24.40.0	0.0	0.2	5.8	54.5
Furniture manufacturing nec	C292900	20.0	0.1	0.3	5.9	54.8

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Printing	C241200	19.7	0.7	2.8	6.6	57.6
Textile product manufacturing nec	C222900	19.1	0.1	0.4	6.7	58.0
Synthetic fibre textile manufacturing	C221200	18.2	0.0	0.1	6.7	58.2
Manufacturing nec	C294900	17.2	0.3	1.0	7.0	59.1
Ceramic product manufacturing nec	C262900	16.7	0.0	0.1	7.0	59.3
Wooden structure component manufacturing	C232300	16.2	0.2	0.6	7.2	59.9
Mattress manufacturing (except rubber)	C292300	15.9	0.1	0.2	7.2	60.1
Textile finishing	C221500	15.6	0.0	0.0	7.2	60.1
Motion picture exhibition	P911300	15.0	0.1	0.3	7.3	60.4
Ceramic tile and pipe manufacturing	C262300	15.0	0.0	0.0	7.3	60.4
Clothing manufacturing	C224000	14.2	0.7	2.1	8.0	62.5
Wood product manufacturing nec	C232900	13.6	0.1	0.2	8.1	62.7
Toy and sporting good manufacturing	C294200	12.8	0.1	0.2	8.1	62.9
Other education	N844000	12.2	1.1	3.0	9.3	65.9
Jewellery and watch wholesaling	F479200	11.9	0.1	0.1	9.3	66.1
Wool textile manufacturing	C221400	11.7	0.0	0.1	9.4	66.1
Watch and jewellery retailing	G525500	11.6	0.2	0.4	9.5	66.5
Computer consultancy services	L783400	11.5	1.8	4.5	11.3	71.0
Textile floor covering manufacturing	C222200	11.0	0.0	0.1	11.4	71.1
Made-up textile product manufacturing	C222100	10.4	0.1	0.3	11.5	71.4
Photographic film processing	Q952200	10.2	0.1	0.2	11.6	71.7
Sheet metal furniture manufacturing	C292200	9.5	0.1	0.2	11.7	71.8
Electric light and sign manufacturing	C285400	9.5	0.0	0.1	11.7	71.9
Furniture wholesaling	F473200	9.1	0.1	0.1	11.8	72.0
Glass and glass product manufacturing	C261000	8.9	0.1	0.2	11.9	72.2
Personal services nec	Q952900	8.5	0.1	0.2	12.0	72.4
Clothing wholesaling	F472200	7.7	0.3	0.4	12.3	72.9

In this table the ANZSIC codes coloured red are the industries that make up the creative sector as defined in this report.

The creative sector accounts for almost a half (49 per cent) of the city's creative workforce as defined by occupation. The remaining 51 per cent are dispersed throughout the Auckland economy.

Creative employment summary

	Creativity index	% of all FTEs	% of creative FTEs
Creative sector (defined by ANZSIC)	42.2	5.4	49.1
Other industries with a creative workforce (defined by occupation)	15.9	6.9	23.8
Non-creative industries	1.4	87.7	27.1
Total	4.6	100	100

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D

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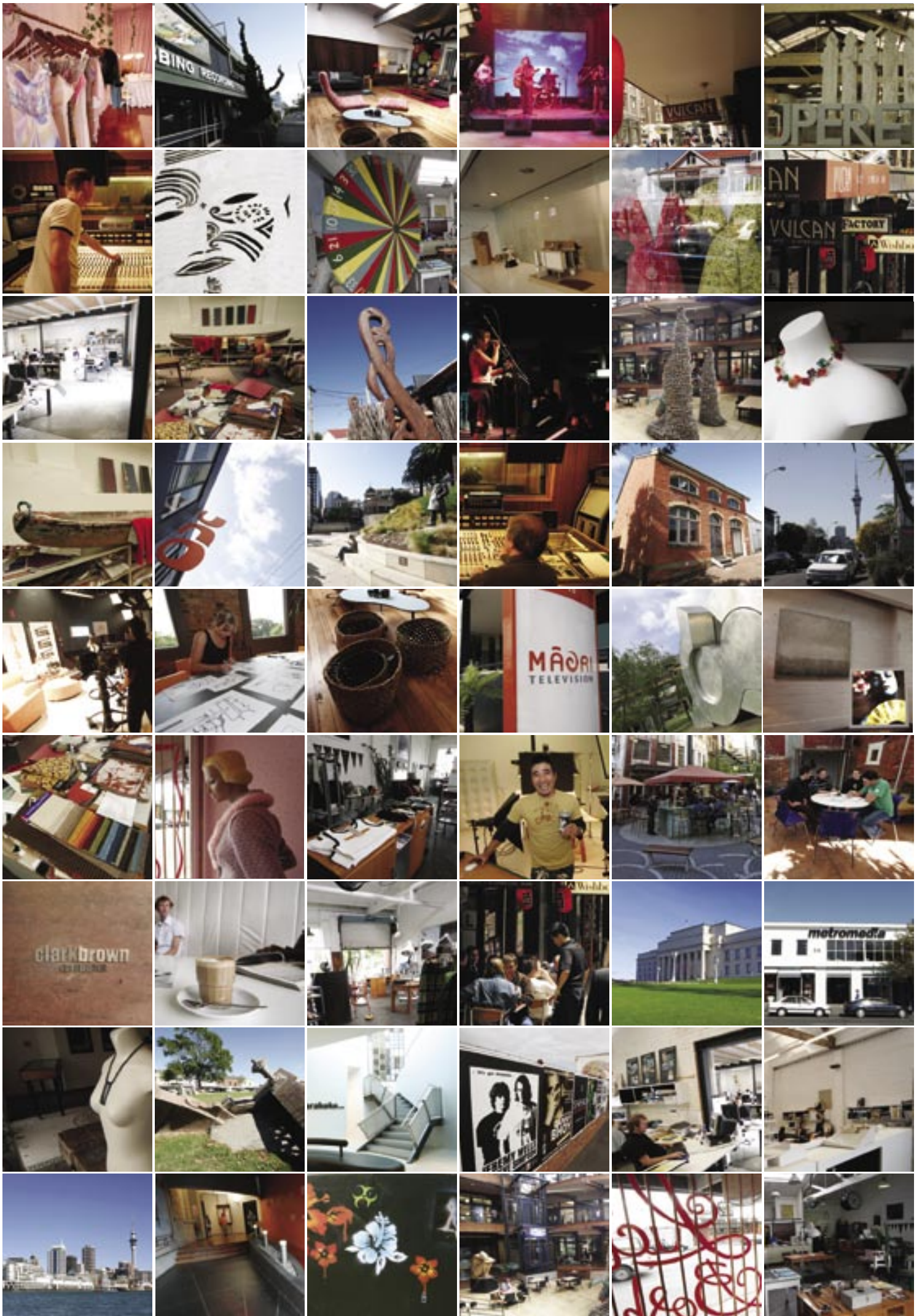
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"This representation of particle dynamics acknowledges the diversity and changing face of Auckland's creative sector, as well as the productive collisions which generated Auckland's unique volcanic landscape. The emergent patterns depict success and opportunity through innovation and relationships."

Shaun Lee

