



Our Vision Ngā Wawatatanga

VALUE / TE UARATANGA

We want our society to value and aspire towards creativity and innovation and to embrace music and the creative arts as valuable tools to teach, complement, contextualise and enrich all fields of endeavour and all aspects of life. A greater sense of creativity's value among our population will fuel and incentivise creative achievement. The potential and adaptability of our population will be enhanced by creative skills and understanding. We want to see New Zealand reaping the many benefits of a rich and active creative culture – and to see New Zealand music sitting proudly at the heart of our national identity and brand.

EDUCATION / TE MĀTAURANGA

We want to see all New Zealand children given access to creative skills that will give them a crucial advantage in an economy that depends on creativity and innovation to be competitive. If we're going to expect creativity and innovation from adults, we must be prepared to teach these things to them as children. Through the skilled and structured teaching of Music and the Arts – from Early Childhood right through to Tertiary level – fresh creative talent can be better identified and nurtured; engaged, discerning audiences can be inspired and developed; and the creative potential and capability of our population can be unleashed.

INVESTMENT / TE WHAKATŌPU-KAHA

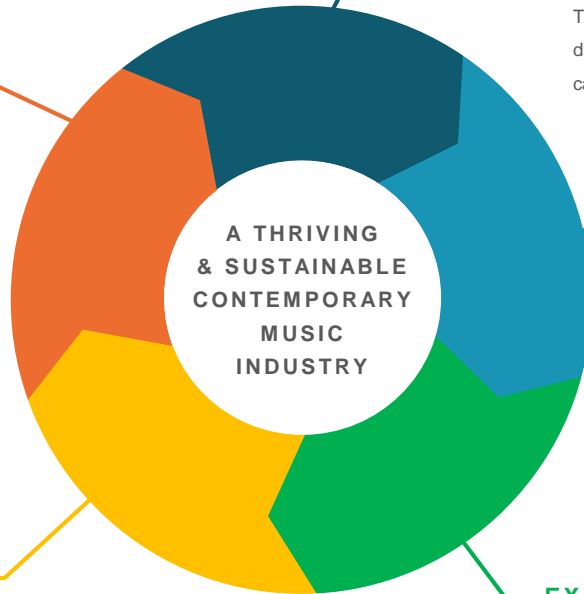
We'd like to see our emerging and established artists empowered to create, experiment and excel through strategic investment that reflects their true value. The music industry includes an innovative technological and commercial ecosystem that intersects with many other industries. By cultivating this alongside a flourishing artistic fringe, a vibrant classical environment, a healthy live scene, a rich cultural spectrum and a thriving Waiata Māori and Te Reo Māori community – we will fuel a robust and competitive mainstream with a unique and distinctive voice, as well as nurture a powerful collaborative innovation partner for other sectors.

PROTECTION / TE WHAKAĀHURUTANGA

New Zealand legislation needs to value and protect intellectual property, so that our creativity generates returns for our artists and our economy. The term of protection for New Zealand works should be consistent with the rest of the world. Our creative practitioners should work in the knowledge that they will be fairly remunerated and rewarded for their success. Valuing and protecting intellectual property incentivises creativity, innovation and excellence, and ensures that our artists can sustain themselves and their careers.

EXPANSION / TE HANAKETANGA

New Zealand music now competes with an increasingly vast and instantly accessible international catalogue, both at home and abroad. In the new digital environment, the domestic market alone no longer supports local artists – they require larger scale success in order to sustain careers. We need to embrace the global view, grow our networks and invest in pathways for our artists' work. New Zealand already enjoys an excellent creative reputation and profile. We want to be a market leader and net exporter of renowned, world-leading music.



A THRIVING
& SUSTAINABLE
CONTEMPORARY
MUSIC
INDUSTRY



APRA
AMCOS

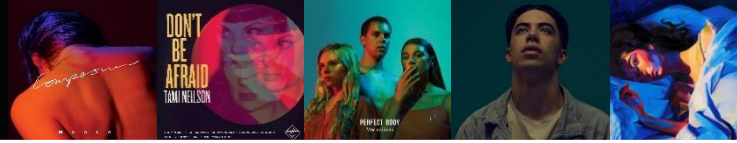
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THE VALUE OF OUR MUSIC NGĀ UARATANGA-Ā-PŪORO

The New Zealand Music Industry is a creative environment of immense cultural value. It's also an innovative business leader that made a total contribution of \$472 million dollars to New Zealand's economy in 2015, generated exports worth \$25 million dollars and supported 4,295 full time equivalent jobs.

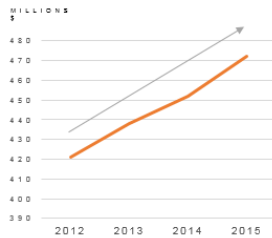
After technology disrupted the creative content industries, music was the first to fully embrace the new digital marketplace. Music in New Zealand has a very high level of digital market penetration compared with other media industries and music is being digitally consumed at record levels around the world.

Recorded Music NZ notes that the volume of music streams in NZ rose 118% to 1.3 billion in 2015 and a further 102% to 2.7 billion in 2016; digital music consumption accounted for 68% of all music sales in 2015 growing to 75% in 2016; and total recorded music consumption grew 12% to more than \$74 million in 2015 – growing a further 16% to \$86 million in 2016. APRA AMCOS NZ reports that their gross revenue reached \$40 million for the first time in 2015, growing to almost \$44 million in 2016 with streaming revenue increasing by 108%.

However, while overall music revenue continues to grow, only approximately 12% of that revenue is being generated by NZ music creators here at home. If we want our local industry to be sustainable and respond positively to growing market demand, we need to empower our music creators to capitalise on global growth, and incentivise the ongoing creation of excellent artistic work.

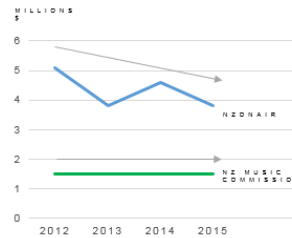
The contemporary popular music industry is growing. We need to ensure our creators can capitalise on this growth.

NZ MUSIC'S CONTRIBUTION TO THE NZ ECONOMY



Compiled from PWC Reports on the Economic Contribution of the NZ Music Industry

INVESTMENT RECEIVED FROM THE NZ GOVERNMENT



Compiled from NZ On Air and NZ Music Commission Annual Reports

- In 2015, film, television and music made a combined contribution of \$3.3 billion dollars to New Zealand's economy. Of this, music contributed \$472 million – 14.3%.
- In 2015 the Ministry of Culture and Heritage, the New Zealand Film Commission, NZ On Air and Creative New Zealand invested a total of \$146,876,307 in film, television and music. Of this amount, contemporary popular music received just \$6,803,996 – 5%.
- Of the approximately \$31 million dollars invested in all forms of music, classical music received almost \$24 million – 77% of the available resources. Yet, of the \$472 million dollars that music contributed to the NZ economy in 2015, we estimate that just \$15 million of that total was contributed by classical music (3%).

We understand that classical music in New Zealand requires a high level of support and we want to be very clear that we have no wish to see this important investment, or the support for film and television, eroded.

What we do want to see is the level of investment in the popular music sector increased to reflect its contribution and value to the economy, and its potential to excel in a growth environment.

The contemporary popular music industry is working hard and generating strong returns. With greater support, we can do better.

WHAT WE NEED NGĀ HIAHIATANGA

Music **EDUCATION** improves memory, literacy, numeracy and fine-motor coordination in children. Children who study music are more likely to excel, collaborate and think critically. They have larger vocabularies, a greater capacity for abstract reasoning and enhanced creative abilities.

Not only does our music industry need high quality talent (both commercial and non-commercial) to be discovered and nurtured at school and fed through into the professional sphere – our entire population needs the academic and creative benefits that music education can offer as we enter an economic environment where creativity and innovation are fundamental to success.

We need to ensure our valuable creative work is protected so that our creators can sustain themselves and their careers, and benefit from their success. Giving the work of New Zealand creators the **PROTECTION** it deserves will generate returns for the NZ economy. Our creative artists, and the people who invest in them, need to be fairly remunerated for their work and rewarded for their success, or their success will be disincentivised and their ability to create will be compromised.

Once we've identified, nurtured and protected our emerging talent we need to develop it with strategic **INVESTMENT** in an environment where risk is rewarded, so that our creators can anticipate and lead rather than follow. We then need to foster **EXPANSION** into the global market through strong commercial networks and a mindset that reflects the fact that local is now global and the broadcast environment is now online

Finally, we need our culture to **VALUE** and engage with creativity.

Creativity and innovation are the keys to our future. Music teaches, demonstrates, enhances and embodies these qualities.



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