

June 2023

Profile of Dunedin's arts and culture sector – 2022 data update



Credit: DunedinNZ

Prepared for: Dunedin City Council

Prepared by: Benje Patterson
Benje Patterson | People & Places
www.benjepatterson.co.nz
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2. Executive summary

This report has been prepared for Dunedin City Council. The report has been designed to give a detailed understanding of recent trends in Dunedin's arts and culture sector.

Data goes to 2022 and is an update of an earlier report¹ published in 2020 that contained data to 2019. This update can help shed light on the experience of Dunedin's arts and culture sector during the Covid-19 pandemic. Due to limited data availability, the report's focus is on employment, GDP, and businesses.

2.1. Defining the arts

For consistency with central government, this report relies on a definition identified by Manatū Taonga – the Ministry of Culture and Heritage (MCH) in a 2020 report it commissioned². This definition expands on one used in an earlier 2015 report for MCH and Creative New Zealand³.

MCH's definition includes people employed within organisations in a range of arts and culture-related industries, as well as people with occupations identified as being creative. The full list of industries and occupations that feed into the definition are found in 'Appendix – sector definition'.

There are a number of subsectors within the broader definition of the arts and culture sector, including: performing arts, museum/library/archives, publishing, design, screen production and radio, and visual arts, crafts and photography. The report focuses on the overall arts and culture sector, but some outcomes related to employment and value added have been split into the subsectors where possible.

2.2. Data sources

Several data sources were used to model trends in Dunedin's arts and culture sector to 2022, including:

- Statistics New Zealand business demography, Census, and LEED taxation data.
- Manatū Taonga – Ministry for Culture and Heritage (MCH), 2023, Impacts Report 2021/22.
- Benje Patterson's 2020 report on Dunedin's arts and culture sector, which drew heavily on Infometrics data, was used to establish pre-Covid baseline understandings to 2019.

2.3. Key findings

- Dunedin's arts and culture sector employment grew strongly up until Covid-19, peaking at 2,578 jobs in March 2020. There was a small decline in employment during the pandemic, with employment falling to 2,440 jobs in 2022.
- The arts and culture sector accounted for 3.7% of Dunedin's employment in 2022.
- The largest subsectors of employment were design, followed by museum/library/archives, screen production and radio, visual arts, performing arts, and publishing.
- Approximately 55% of employment was directly within the listed arts and culture subsectors, while the remainder were people with arts and culture occupations within other industries.
- Dunedin's arts and culture sector is estimated to have generated \$247 million of GDP in 2022. GDP recovered by 3.2%pa in 2022 from its pandemic low of \$239 million in 2021.
- GDP per full job in Dunedin's arts and culture sector was \$101,110 in 2022, up from \$92,404 in 2019, and has grown at an average growth rate 3.0%pa over the past three years.

¹ Profile of Dunedin's arts and culture sector, December 2020, by Benje Patterson, available here: <https://www.benjepatterson.co.nz/the-arts-and-culture-sector-in-dunedin/>.

² Schorn, A & Whiteford, A (2020), *Impact of COVID-19 on the Arts and Creative Sector*, report prepared for Manatū Taonga – Ministry for Culture and Heritage.

³ Stroombergen, A (2015), *An economic profile of the arts in New Zealand Working Paper*, report prepared for Creative New Zealand and Manatū Taonga – Ministry for Culture and Heritage.

3. Employment

This section describes the jobs available within the arts and culture sector. The analysis considers changes in employment through time, relative to the rest of Dunedin's economy and nationally.

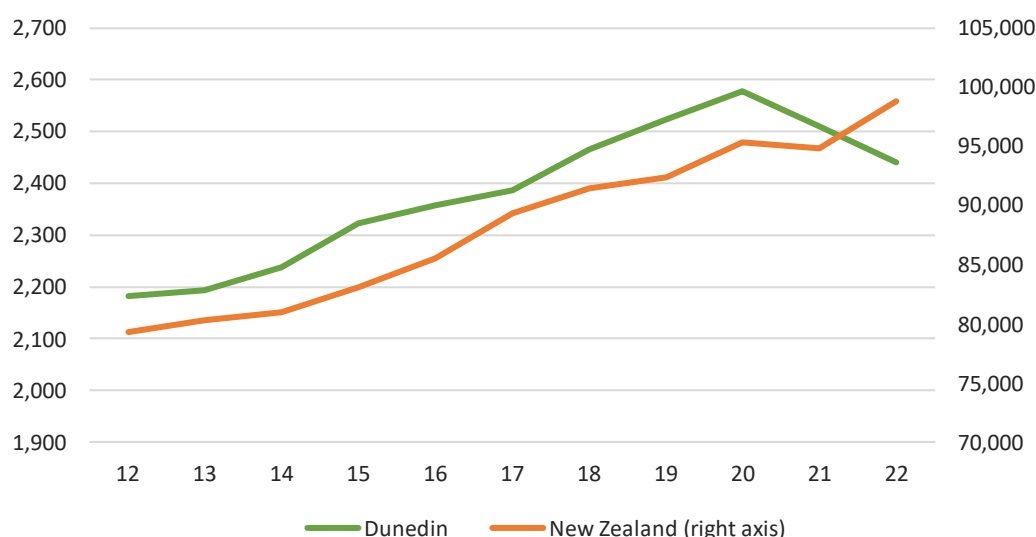
3.1. Employment levels and trends across the sector

Dunedin's arts and culture sector employment grew strongly up until Covid-19, peaking at 2,578 jobs in March 2020. There was a small decline in employment during the pandemic, with employment falling to 2,440 jobs in 2022. Arts and culture sector employment nationally eased off in the early stages of Covid-19 during 2021, but recovered strongly during 2022.

Graph 1

Employment in the arts and culture sector

Filled jobs, source: author modelling, MCH data and Infometrics



The arts and culture sector accounted for 3.9% of employment in Dunedin in early 2020, while by 2022 the sector accounted for 3.7% of employment. Dunedin's arts and culture sector's share of total employment is now similar to the sector's share of employment nationally, which sat at 3.7% in 2022.

Table 1

Arts and culture's share of total employment – pre and post-Covid		
<i>Share of total filled jobs, March year, source: author modelling, MCH data and Infometrics</i>		
Year	Dunedin	New Zealand
2019	3.9%	3.6%
2022	3.7%	3.7%

Arts and culture employment trends were weaker than total employment trends in Dunedin recently.

Table 2

Comparing recent growth in arts and culture jobs with total employment growth in Dunedin		
<i>Total filled jobs, March year, source: author modelling, MCH data and Infometrics</i>		
Year	Arts & culture jobs in Dunedin	Total jobs in Dunedin
2019	2,524	65,159
2022	2,440	66,341
Average growth (pa, 2019-22)	-1.1%	0.6%

3.2. Many people are self-employed

A large number of people in the arts and culture sector don't work for an organisation or business and are classified as being self-employed.

Previous analysis by Infometrics to 2019 showed 25% of arts and culture jobs were held by self-employed people, compared to a self-employment rate of 12% across Dunedin's total job market. This proportion would imply that over 600 people within the arts and culture sector were self-employed in 2022.

3.3. Employment in arts and culture subsectors

There are a number of subsectors within the broader definition of the arts and culture sector, including:

- Performing arts
- Museum/library/archives
- Publishing
- Design
- Screen production and radio
- Visual arts, crafts and photography.

The following table shows that the largest subsectors of arts and culture employment were design, followed by museum/library/archives.

Approximately 55% of employment in 2022 was directly within the listed arts and culture subsectors, while the remainder were people with arts and culture occupations within other industries.

Table 3

Arts and culture sector employment across subsectors and within other industries			
<i>Total filled jobs, March year, source: author modelling and Infometrics</i>			
Subsector	2022	2019	Average growth (pa, 2019-22)
Design	456	493	-2.6%
Museum/library/archives	387	436	-3.9%
Screen production and radio	216	229	-1.9%
Visual arts, crafts and photography	207	186	3.6%
Performing arts	42	56	-9.1%
Publishing	22	24	-2.9%
Total within arts and culture industries	1,330	1,424	-2.3%
Arts/culture employment in other industries	1,110	1,100	0.3%
Total arts and culture sector	2,440	2,524	-1.1%

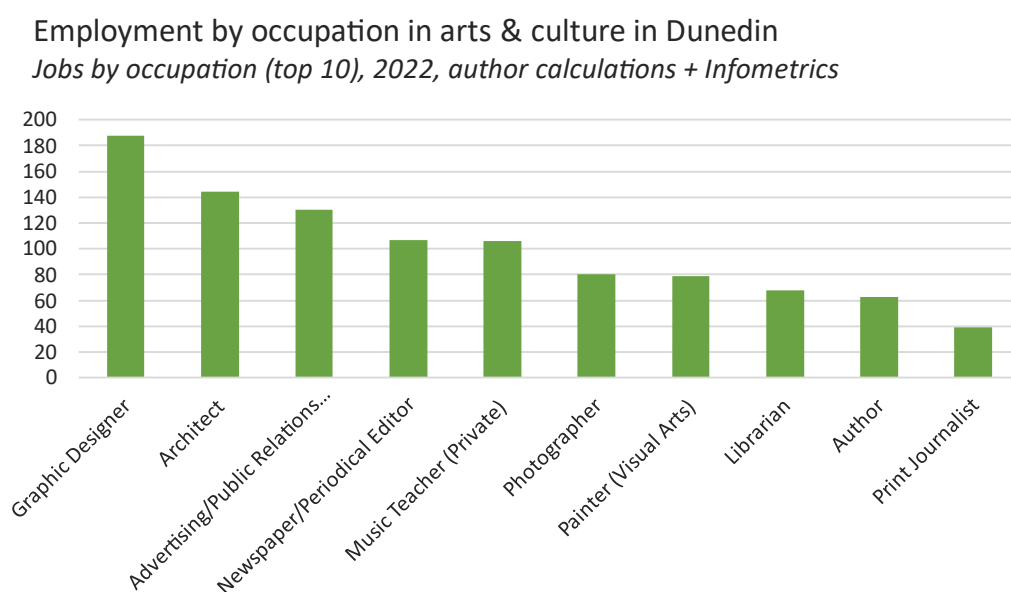
The data shows that people directly employed within arts and culture subsectors were those who struggled the most during recent years, while people with arts and culture occupations employed in other industries fared better. This observation makes sense as Covid-19 restrictions prevented the public from directly experiencing many core arts and culture activities such as festivals, performances and live shows, as well as being able to visit museums, galleries, etc.

3.4. Occupations

This section examines the occupations of people employed within Dunedin's arts and culture sector. Occupational estimates are based on the relationship between industry and occupation observed in population censuses and should be used as indicative only as modelling draws on Census 2018 relationships.

The largest occupations are graphic designers, architects, advertising managers, and newspaper or periodical editors. Rounding out the top 10 are music teachers, photographers, painters, librarians, authors, and print journalists.

Graph 2



Credit: DunedinNZ

The following table provides an overview of all occupations in Dunedin's arts and culture sector that were estimated in 2022 to have at least 20 jobs. These occupations account for about two thirds of arts and culture sector employment.

Table 4

Employment by occupation in Dunedin's arts and culture sector	
<i>Employment for occupations with at least 20 jobs, 2022, source: Author calculations + Infometrics</i>	
Occupation	Jobs in this occupation
Graphic Designer	188
Architect	144
Advertising/Public Relations Manager	130
Newspaper/Periodical Editor	107
Music Teacher (Private)	106
Photographer	80
Painter (Visual Arts)	79
Librarian	68
Author	63
Print Journalist	39
Signwriter	42
Industrial Designer	47
Library Assistant	45
Architectural Draftsperson	44
Gallery or Museum Guide	39
Journalists and Other Writers nec	34
Interior Designer	35
Dance Teacher (Private Tuition)	32
Chief Executive or Managing Director	32
Musician (Instrumental)	28
Jeweller	30
Media Producer (excluding Video)	30
Web Designer	29
Gallery or Museum Curator	24
Landscape Architect	26
Fashion Designer	20
Total of occupations with employment of 20+	1541
All others	899
Total jobs	2,440

4. Economic contribution

This section describes the economic contribution of the arts and culture sector. The analysis considers changes in GDP (value add) through time, relative to the rest of Dunedin's economy and nationally.

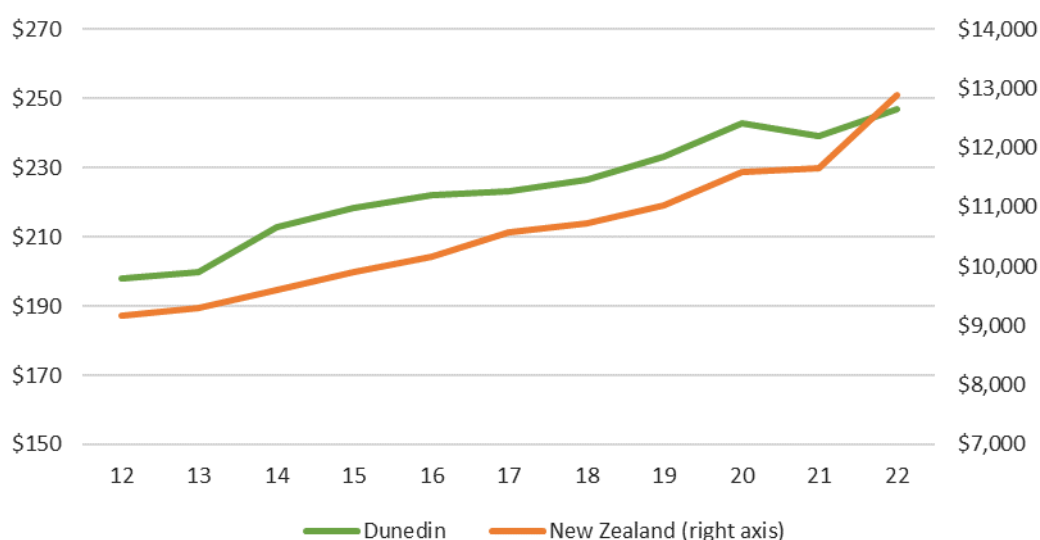
4.1. Value added (GDP) by the sector and trends

Dunedin's arts and culture sector is estimated to have generated \$247 million of GDP (value add) in 2022. GDP recovered by 3.2%pa during 2022 from its pandemic-induced low of \$239 million in 2021.

The recovery of economic activity within Dunedin's arts and culture sector during 2022 was below the sector's recovery nationally. Data modelled by Infometrics for MCH showed that the GDP of the arts and culture sector grew by 10.6%pa nationally in 2022.

Graph 3

GDP in the arts and culture sector
GDP (\$m, 2022 pricing), source: author calculations + Infometrics



The arts and culture sector accounted for 3.3% of Dunedin's GDP in 2022, down from a revised 3.4% in 2019. Dunedin's arts and culture sector's GDP share is below the sector's share nationally (3.6% of GDP).

Table 5

Arts and culture's share of total GDP		
Share of total GDP, March year, author calculations and Infometrics data for MCH		
Year	Dunedin	New Zealand
2019	3.4%	3.3%
2022	3.3%	3.6%

Dunedin's arts and culture GDP has grown slower than total GDP in Dunedin over recent years.

Table 6

Comparing growth in arts and culture GDP with total GDP growth across Dunedin		
GDP (\$ million, 2019 pricing), March year, author calculations and Infometrics		
	Arts & culture GDP in Dunedin	Total GDP in Dunedin
2019	\$233m	\$6,947m
2022	\$247m	\$7,464m
Average growth (pa, 2019-22)	1.9%	2.4%

4.2. Value added (GDP) per job in the arts and culture sector

This section presents GDP per filled job in the arts and culture sector. GDP per job is a proxy for labour productivity, with growth in the measure over time implying an increase in efficiency and competitiveness.

GDP per fill job in Dunedin's arts and culture sector was \$101,110 in 2022, up from \$92,404 in 2019, and has grown at an average rate of 3.0%pa over the past three years. By comparison, GDP per filled job across Dunedin's whole economy has grown by 1.8% over the past three years to reach \$112,516 in 2022.

Table 7

Comparing value added per job in arts and culture and the Dunedin economy as a whole <i>GDP per filled job (\$, 2022 pricing), March year, author calculations and Infometrics</i>		
	Arts & culture in Dunedin	Total economy in Dunedin
2019	\$92,404	\$106,615
2022	\$101,110	\$112,516
Average growth (pa, 2019-22)	3.0%	1.8%

4.3. Considering GDP across arts and culture subsectors

The following table shows that the subsector that accounts for the highest level of GDP is museum/library/archives, closely followed by design.

The subsector with the fastest rate of economic growth over the recent years has been screen production and radio (8.1%pa).

Approximately 63% of arts and culture GDP was directly within the listed arts and culture subsectors, while the remainder was generated by people with arts and culture occupations who work within other industries.

Table 8

Arts and culture sector value added across subsectors and within other industries <i>GDP (\$ million, 2022 pricing), March year, author calculations and Infometrics</i>			
Subsector	2022	2019	Average growth (pa, 2019-22)
Museum/library/archives	\$61.4m	\$61.1m	0.2%
Design	\$53.5m	\$47.0m	4.4%
Screen production and radio	\$21.9m	\$17.4m	8.1%
Visual arts, crafts and photography	\$13.9m	\$12.7m	3.0%
Performing arts	\$3.1m	\$3.3m	-2.2%
Publishing	\$2.2m	\$1.8m	6.9%
Total within arts and culture industries	\$156.0m	\$143.2m	2.9%
Arts/culture value added in other industries	\$90.7m	\$90.0m	0.3%
Total arts and culture sector	\$246.7m	\$233.2m	1.9%

5. Businesses

This section describes the businesses in the arts and culture sector. Earlier analysis showed that 25% of people are self-employed, but that still leaves 75% employed within businesses (a definition which also includes other organisational structures).

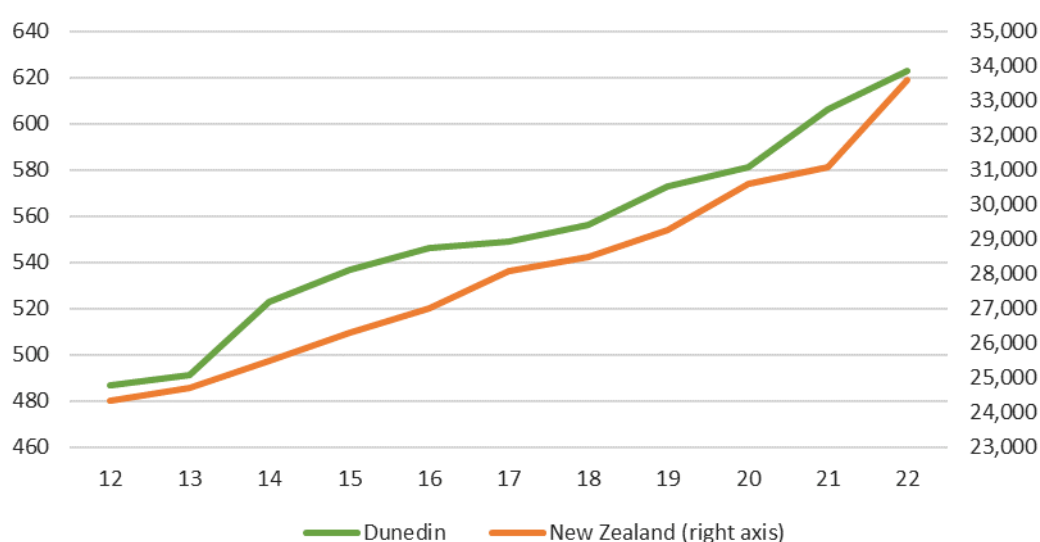
5.1. Business numbers and trends across the sector

There were an estimated 623 businesses in the arts and creative sector in Dunedin in 2022. Businesses have risen from 573 in 2019, at an average growth rate of 2.8%pa. This growth was below the 4.7%pa growth rate nationally.

Graph 4

Businesses in the arts and culture sector

Business units, March years, author calculations and Infometrics



The arts and culture sector accounted for approximately 4.9% of businesses in Dunedin during 2022, just up from 4.8% in 2019. Dunedin's arts and culture sector's share of businesses is just below the sector's share of businesses nationally, which sat at 5.3% in 2022.

Table 9

Arts and culture's share of total businesses		
<i>Share of total business units, March year, author calculations, MCH and Infometrics data</i>		
Year	Dunedin	New Zealand
2019	4.8%	5.0%
2022	4.9%	5.3%

Arts and culture business numbers have grown faster than total businesses in Dunedin in recent years.

Table 10

Comparing growth in arts and culture businesses with total business growth across Dunedin		
<i>Business units, March year, author calculations, MCH and Infometrics data</i>		
	Arts & culture businesses	Total businesses in Dunedin
2019	573	11,991
2022	623	12,693
Average growth (pa, 2019-22)	2.8%	1.9%

6. Appendix – sector definition

The definition of the arts and culture sector used in this report is based on a combination of industries and occupations. Industries used accord to the Australia New Zealand Standard Industrial Classification (ANZSIC) system, while occupations used accord to the Australia New Zealand Standard Classification of Occupations (ANZSCO). The definition is aligned to how the sector was defined in a 2020 report to Manatū Taonga – the Ministry for Culture and Heritage⁴.

6.1. Industries

The arts and culture sector is made up of employment in all occupations in the following industries.

Name	ANZSIC code
Jewellery and Silverware Manufacturing	C259100
Magazine and Other Periodical Publishing	J541200
Book Publishing	J541300
Other Publishing (except Software, Music and Internet)	J541900
Motion Picture and Video Production	J551100
Motion Picture Exhibition	J551300
Postproduction Services and Other Motion Picture and Video Activities	J551400
Music Publishing	J552100
Music and Other Sound Recording Activities	J552200
Libraries and Archives	J601000
Architectural Services	M692100
Other Specialised Design Services	M692400
Advertising Services	M694000
Professional Photographic Services	M699100
Museum Operation	R891000
Performing Arts Operation	R900100
Creative Artists, Musicians, Writers and Performers	R900200

6.2. Occupations

The arts and culture sector is made up of employment in all industries in the following occupations:

Name	ANZSCO code
Advertising and Public Relations Manager	131111
Actor	211111
Dancer or Choreographer	211112
Entertainer or Variety Artist	211113
Actors, Dancers and Other Entertainers nec	211199
Composer	211211
Music Director	211212
Musician (Instrumental)	211213
Singer	211214
Music Professionals nec	211299
Photographer	211311
Painter (Visual Arts)	211411

⁴ Schorn, A & Whiteford, A (2020), *Impact of COVID-19 on the Arts and Creative Sector*, report prepared for Manatū Taonga – Ministry for Culture and Heritage.

Potter or Ceramic Artist	211412
Sculptor	211413
Visual Arts and Crafts Professionals nec	211499
Artistic Director	212111
Media Producer (excluding Video)	212112
Radio Presenter	212113
Television Presenter	212114
Author	212211
Book or Script Editor	212212
Art Director (Film, Television or Stage)	212311
Director (Film, Television, Radio or Stage)	212312
Director of Photography	212313
Film and Video Editor	212314
Program Director (Television or Radio)	212315
Stage Manager	212316
Technical Director	212317
Video Producer	212318
Film, Television, Radio and Stage Directors nec	212399
Copywriter	212411
Newspaper or Periodical Editor	212412
Print Journalist	212413
Radio Journalist	212414
Television Journalist	212416
Journalists and Other Writers nec	212499
Architect	232111
Landscape Architect	232112
Fashion Designer	232311
Industrial Designer	232312
Jewellery Designer	232313
Graphic Designer	232411
Illustrator	232412
Multimedia Designer	232413
Web Designer	232414
Interior Designer	232511
Art Teacher (Private Tuition)	249211
Dance Teacher (Private Tuition)	249212
Drama Teacher (Private Tuition)	249213
Music Teacher (Private Tuition)	249214
Architectural Draftsperson	312111
Jeweller	399411
Broadcast Transmitter Operator	399511
Camera Operator (Film, Television or Video)	399512
Musical Instrument Maker or Repairer	399515
Signwriter	399611
Photographer's Assistant	399915
Model	639111
Motion Picture Projectionist	711912

