spada nz

Election 2026 and Beyond

Screen industry challenges and solutions

Spada is New Zealand's screen producers guild.
We advocate for a robust and sustainable screen sector.

Our mission

Fostering a thriving, dynamic and resilient screen production industry in Aotearoa New Zealand.

Our purpose

Supporting our members to achieve creative, cultural and commercial impact through their film, television and digital productions.

Executive Summary

The New Zealand screen industry is a strategically important sector that generates over $4 billion in annual economic activity, supports approximately 25,000 skilled jobs, and contributes significantly to export earnings, intellectual property creation, and international investment. It also plays a critical role in reflecting and preserving New Zealand's stories, and identity on screen for domestic and global audiences.

The sector spans film, television, digital media, animation, post-production, visual effects, distribution, and exhibition, with important flow-on effects across tourism, hospitality, and transport.

A structurally changing global media environment

The operating environment for the screen sector has undergone significant change over the past decade, accelerating in recent years. These changes are structural rather than cyclical, reflecting a fundamental shift in how screen content is financed, distributed, and consumed.

Audiences and advertising revenue have increasingly migrated to global streaming and digital platforms, reshaping traditional business models that previously underpinned New Zealand content production. At the same time, local broadcasters have reduced investment in domestic production in response to declining advertising revenue, with an estimated reduction of approximately $50 million per annum in local production spend in recent years.

At the same time, international streaming platforms have become a dominant part of the market, operating at scale within New Zealand's digital infrastructure while not being subject to equivalent local content obligations or taxation arrangements applicable to domestic broadcasters.

These shifts have been compounded by broader disruptions in audience behaviour, including the long-tail effects of COVID-19 on cinema attendance and intensified global competition for attention and screen time.

1. NZ's digital advertising market grew 12% to $2.967 billion, with video surging 27% to $653.8 million. But free-to-air TV ad spend fell 27.9% in December 2025 year-on-year, and the full-year media agency market contracted 1.6% to $1.09 billion. The Commerce Commission's 2024 monitoring report confirmed total NZ advertising revenue was $3.592 billion for the year to December 2024, with audiences shifting from traditional broadcasting to digital media and increasing fragmentation consistent with global trends.

A weakening domestic funding and production base

As a result of these structural changes, the domestic funding base that has historically underpinned local production has weakened. This has reduced the sector's ability to consistently finance local content, and retain the full value generated by New Zealand screen stories within the domestic economy.

System-wide risk and strategic implications

Without intervention, New Zealand risks ongoing erosion of production capability, investment, and highly skilled employment within the screen sector.

More broadly, there is a risk that New Zealand will become increasingly unable to consistently tell its own stories, reflect its identity, and ensure New Zealand voices, perspectives, and experiences are visible on screen at home and internationally.

This represents not only an economic challenge, but also a structural risk to cultural sovereignty and long-term sector sustainability.

A need for recalibrated policy settings

The current policy framework is no longer fully aligned with the realities of a globalised, platform-driven screen economy. A recalibration of settings is required to ensure New Zealand's screen sector remains economically sustainable, culturally vibrant, and internationally competitive.

This includes introducing streaming regulation, strengthening the role of public investment, improving access to private capital, increasing retention of intellectual property and the long-term economic value it generates, and ensuring regulatory settings remain fit for emerging technologies.

Policy priorities

To secure the future of New Zealand's screen sector and ensure it continues to deliver economic, cultural, and social value for future generations, reform is required across five interconnected areas:

1. **Modernising regulation for the streaming era —** addressing structural imbalances in domestic market, and ensuring global streaming platforms make an appropriate contribution to the New Zealand screen ecosystem
2. **Sustainable government investment in screen production —** enabling culturally significant New Zealand content and supporting a resilient screen production ecosystem
3. **New Zealand Screen Production Rebate: Enabling local success and global ambition —** maintaining international competitiveness while sustaining domestic production capability and New Zealand-owned screen capacity
4. **Capital base for growth —** enabling private investment, scaling of screen businesses, and stronger domestic ownership and retention of intellectual property and its long-term value
5. **Future technology and AI settings —** ensuring the screen sector can safely adopt and harness emerging technologies while protecting creative rights, intellectual property, and workforce capability

1. Modernising regulation for the streaming era

International streaming platforms are now significant participants in New Zealand's screen industry and derive substantial value from New Zealand audiences. However, unlike traditional broadcasters, they currently face limited obligations to contribute to the sustainability of the local screen ecosystem through investment in local content.

The rapid growth of international streaming services has transformed how New Zealanders access screen content and accelerated a broader shift in audience attention and advertising revenue away from traditional media. This structural change has disrupted the funding models that have historically supported New Zealand content creation and contributed to declining investment in local production.

The result is a structural imbalance in the screen ecosystem, where domestic funding sources have weakened while global platforms continue to grow their market presence. The extent of this shift is reflected in broader sector performance, with the media subsector's GDP contribution declining 3.0% to $5.0 billion in the year to March 2025 and media employment falling 5.3%, the steepest decline of any cultural sector.

New Zealand currently lacks modern regulatory settings that ensure all participants in the screen ecosystem contribute fairly to the creation and sustainability of local content.

Addressing this policy gap is critical to restoring balance, strengthening local production, and ensuring a sustainable future for New Zealand's screen sector.

Priority Actions

- **Develop regulatory settings that create a level playing field between global platforms and domestic broadcasters.**
- **Introduce a revenue-based contribution mechanism for large international streaming services operating in New Zealand, with funding reinvested into local screen production through existing agencies. (A five per cent levy would generate approximately $25 million annually, with a 10 per cent levy generating around $50 million[2].)**

2. Refer to the Streamers' Regulation Explainer in Appendix A

2. Sustainable Government investment for creative ambition

New Zealand screen content is both culturally and economically significant.

Local content reflects who we are, strengthens cultural identity, and delivers broader economic value through employment, skills development, the attraction of international co-production and offshore investment, and the creation of New Zealand-owned intellectual property with long-term export and commercialisation potential.

As commercial investment in local content becomes increasingly constrained, public investment plays an essential role in ensuring New Zealand stories continue to be developed, produced, and shared with audiences.

NZ On Air, the New Zealand Film Commission, and Te Māngai Pāho are central to this ecosystem, supporting culturally significant content, developing creative talent, and leveraging wider economic activity and international investment.

Without adequate and sustainable funding for these agencies, there is a risk of reduced local production, fewer opportunities for creative development, and a diminished presence of New Zealand stories, voices, and perspectives on screen.

Priority Actions

- **Sustain and strengthen funding for NZ On Air, the New Zealand Film Commission, and Te Māngai Pāho, recognising their central role in developing local content, supporting talent, and leveraging international investment.**
- **New Zealand's state-owned broadcaster, TVNZ, remains required to return a dividend to Government, even in a constrained funding environment. We support suspending this dividend requirement and reinvesting those funds back into local production.**

3. New Zealand Screen Production Rebate: Enabling local success and global ambition

The New Zealand Screen Production Rebate is a cornerstone of New Zealand's screen production ecosystem and a critical tool for maintaining international competitiveness.

We acknowledge the continued commitment successive Governments have shown to the Rebate and welcome recent enhancements to its settings, including the removal of above-the-line caps and lower budget thresholds.

International productions bring significant economic benefits, employment opportunities, skills development, and global industry connections. At the same time, domestic productions develop New Zealand intellectual property, build creative capability, and ensure New Zealand stories continue to be created and exported to global audiences.

A strong screen sector depends on both. International production brings scale and investment; domestic production builds the talent, capability, and intellectual property that underpin long-term industry sustainability.

As domestic funding pressures increase, it is important that Rebate settings remain carefully calibrated so that international success strengthens rather than displaces domestic production capability. Current international settings are affecting domestic production capability.

Maintaining the right balance between attracting international investment and supporting New Zealand-owned content and capability is critical to a healthy and sustainable screen ecosystem.

Priority Actions

- **Retain and enhance the New Zealand Screen Production Rebate as a core pillar of sector competitiveness and ecosystem sustainability.**
- **Calibrate rebate settings so domestic production remains strong within an increasingly internationalised production environment, maintaining a healthy balance between attracting international investment and supporting New Zealand-owned content and capability.**

4. Building a capital base for growth and entrepreneurial risk-taking

New Zealand's screen sector has strong potential to grow export earnings, develop valuable intellectual property, and compete more effectively in international markets. However, the sector remains under-capitalised, with relatively limited access to private growth investment compared with other high-potential creative and technology-driven industries.

This under-capitalisation not only constrains the ability of screen businesses to scale but it also limits their capacity to retain ownership and long-term value from the intellectual property they create and fully realise the export value of New Zealand content. As a result, a significant proportion of the long-term value generated by New Zealand screen content is ultimately captured offshore.

It also reflects an investment ecosystem that is not yet sufficiently balanced, with public funding playing a critical and irreplaceable role in enabling New Zealand stories to be told, particularly where market investment is not viable, but with relatively limited participation from private capital in supporting scale, growth, and long-term value creation.

A more mature screen economy requires a stronger investment layer alongside sustained public funding and production incentives – one that supports entrepreneurial risk-taking, business growth, and the development of internationally competitive New Zealand-owned screen companies, while also strengthening the retention of intellectual property and long-term value within New Zealand.

We support initiatives that strengthen the connection between investors and screen businesses and contribute to a more balanced investment ecosystem that enables producers to scale, attract growth capital, and retain greater long-term value from the intellectual property they create in New Zealand.

Priority Actions

- **Explore mechanisms to increase private investment into screen production and screen businesses, including improved pathways for institutional and private capital participation to deepen the overall pool of investment available to the sector.**
- **Develop co-investment and growth capital models that support the scaling of screen enterprises and internationally focused productions, with investment structures that better enable New Zealand producers to retain ownership and long-term value from the intellectual property they create.**
- **Strengthen screen businesses' access to innovation, enterprise development, and wider business support initiatives, enabling them to build commercially resilient companies and retain greater value from the intellectual property they develop.**

5. Getting Future Technology Settings Right

Artificial intelligence and other emerging technologies are influencing how screen content is developed, produced and distributed.

While these technologies offer opportunities to improve efficiency and open new creative possibilities, they also present significant risks for the screen sector. These include the potential displacement or restructuring of creative and technical roles, increased pressure on employment, and the unlicensed use of creative works in the training and deployment of AI systems.

Without robust copyright and AI frameworks, there is a risk that the value generated by screen practitioners – writers, directors, performers, crew, post-production and VFX artists – is increasingly captured without permission or fair remuneration, and that New Zealand's creative IP base is weakened over time. Creative works should not be used to train AI systems without appropriate permission, transparency and compensation.

We must ensure settings keep pace with these changes by protecting the rights and livelihoods of screen practitioners, supporting responsible innovation, and ensuring that the value of screen intellectual property is properly recognised and compensated.

Priority Actions

- **Develop balanced AI policy settings that support innovation in screen production while protecting screen workers, creative rights holders, and production companies from unauthorised use of their work and displacement of skilled roles.**
- **Protect New Zealand creative works to ensure they are not used to train AI systems without permission, transparency and appropriate compensation.**
- **Proceed with a full review of the Copyright Act 1994 to ensure it is fit for purpose in a digital and AI-enabled environment.**

Creative works should not be used to train AI systems without appropriate permission, transparency and compensation.

A shared vision for the screen sector

The choices made over the next parliamentary term will shape the future of New Zealand's screen sector.

Our screen sector is a strategic national asset that delivers significant economic, cultural, and international value – creating jobs, generating export earnings, attracting investment, and ensuring New Zealand stories, voices, and perspectives are seen and heard both at home and around the world.

The sector also contributes to New Zealand's international profile and soft power, helping to build global awareness of our people, culture, and creativity while strengthening our reputation as an innovative and outward-looking nation.

With the right policy settings, the sector can continue to create jobs, attract investment, grow New Zealand-owned intellectual property, and ensure our stories, voices, and perspectives remain visible on screen both at home and abroad.

We invite your support for the actions outlined in this document, so that together we can build a stronger, more resilient, and more globally competitive screen sector for future generations.

Spada | New Zealand Screen Producers Guild
July 2026

Sources

— Ministry for Culture & Heritage 2024, *Amplify: a creative and cultural strategy for New Zealand 2025-2030*
— NZIER and Verian, 2025, *Lights, Camera, Impact: the role of screen production in shaping New Zealand's economy and culture*
— Olsberg SPI, 2022, *Economic Impact of the New Zealand Aotearoa Screen Production Sector*

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Screen Producers New Zealand

STREAMING REGULATION FOR NEW ZEALAND

THE PROBLEM

Major international streaming platforms Netflix, Amazon Prime, Apple+ and Disney+ (streamers) earn significant revenue from New Zealand audiences' monthly subscription fees. They pay no company tax here, use our publicly funded broadband infrastructure, and are not required to commission any local content which reflects our culture, place and people. Meanwhile, the local production sector has lost over **$50m a year** in production investment because of the devastating impact of this on our local broadcasters' advertising revenue. In some countries, international streaming companies have voluntarily invested in local content (including Australia) but that hasn't happened here in New Zealand.

THE SOLUTIONS

→ REVENUE LEVY
(Spada's Preference)

HOW IT WORKS
A percentage of a streamer's New Zealand revenue is paid as a fee to operate in Aotearoa. That money is reinvested into local production via the existing screen funding agencies NZOA, NZFC, and TMP.

EXAMPLE
A 10% levy on NZ streamer revenue could generate approximately $50m per year for the local screen industry.

PROS
- Simple to administer.
- Doesn't require platforms to commission directly.
- Funds flow through established agencies.
- New IP owned by producers.

CONS
- Requires robust revenue reporting to enforce.

FAQ
Concern streamers may pass cost on to consumers via price increases, however this has rarely happened in countries that have enacted this model.

USED IN
Denmark, Poland, Germany, Greece, Portugal, Canada

→ DIRECT INVESTMENT (QUOTA)
(Australia's New Model)

HOW IT WORKS
Streamers are required to spend a set percentage of their revenue directly on commissioning local content, or to ensure a minimum share of their catalogue is local.

EXAMPLE
Australia requires platforms with more than one million subscribers to commission Australian content, with annual reporting to the ACMA regulator.

PROS
- Directly produces local content where the eye balls are going.
- Streamers become commissioners - creating new relationships for producers and talent.

CONS
- More complex to define and enforce.
- Spend may go to acquisitions rather than new commissions.
- New IP owned by streamers.

FAQ
Need to work around GAT trade agreements. Could the requirement have to also apply to local streamers?

USED IN
Australia, France, Italy, many EU member states

STREAMING REGULATION FOR NEW ZEALAND

A HYBRID APPROACH IS ALSO POSSIBLE

Some countries use both tools together - a baseline levy that funds the broader sector, combined with direct spend requirements for larger platforms. Australia's framework, in place from January 2026, offers platforms a choice between an expenditure or revenue mechanism, with strong anti-avoidance and reporting rules.

COUNTRIES ALREADY ACTING

Australia, Canada, France, Germany, Italy, Spain, Denmark, Netherlands, Switzerland, Portugal, Romania, Poland, Croatia, Belgium, Greece, Czech Republic, Norway, Sweden, Estonia, Slovenia, Ireland, and many more.

SPADA'S POSITION

Spada supports a simple percentage levy on streamers' New Zealand revenue, reinvested through our existing screen funding agencies.

We are not asking for a hand-out - we are asking for a level playing field. With our local industry contracting due to the impact of the streamers, the cultural and economic stakes are real.

WHAT'S AT STAKE?

- **A sustainable domestic production industry, with jobs for writers, directors, producers, crew, editors and performers.**
- **New Zealand's stories - told by New Zealanders.**
- **Feature films and television series. Documentaries. Māori and Pasifika storytelling.**

Australia has acted.
New Zealand must act now.

Tell the Government: *It's time to regulate the streamers.*

- Contact your MP
- Share on social media and via email
- Discuss with your screen industry networks

New Zealand stories deserve to be told by New Zealanders.

#NZScreenIndustry #StreamerLevy #LoveLocal

Thank you

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