



Audience Atlas Aotearoa 2020 – Pasifika audiences and the market for Pacific arts

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Audience Atlas Aotearoa 2020 – summary of Pasifika audiences and the market for Pacific arts

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Research method

This is the fourth edition of Audience Atlas Aotearoa. The first edition took place in 2011 followed by 2014 and 2017.

Audience Atlas Aotearoa 2020 is based on 6,743 responses collected between 11 December 2020 to 21 January 2021, from people aged 16 years and over. The survey sample was provided by the online panel provider Consumer Link (a Colmar Brunton company), Panelbase, Pureprofile and Prime research.

Please note that figures may not always total 100% due to rounding. In several places throughout the report we use population estimates to convert percentages into real figure estimates.

Please refer to the research parameters at the end of this report for more detailed information on sampling, methodology and confidence intervals.

Audience Atlas and Culture Segments are © Morris Hargreaves McIntyre, 2021.

Cover image: Tautai, Tā Ina o le Tatau, Photograph by: Isoa Kavakimotu, courtesy of Tautai Contemporary Pacific Arts Trust.



Robust methodology

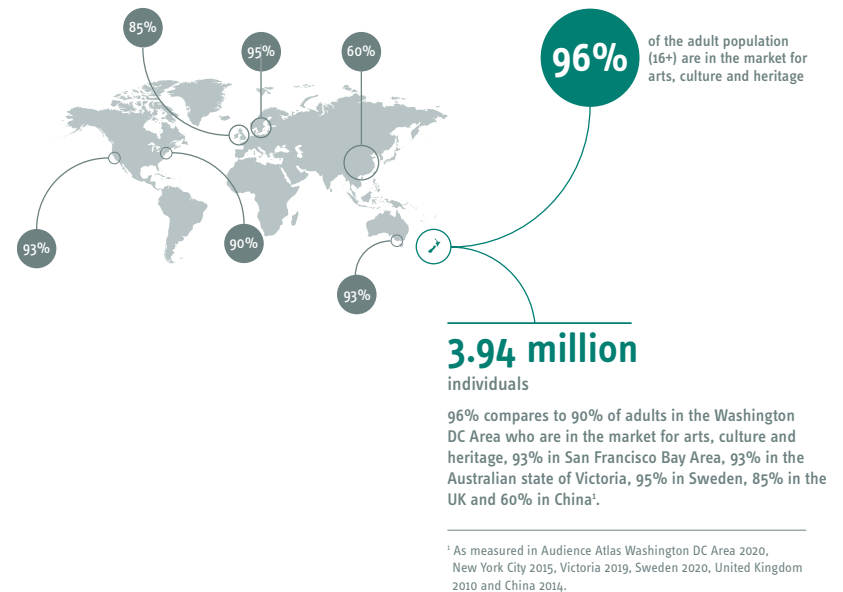
The fourth Audience Atlas study for Aotearoa

Audience Atlas is a unique way of understanding the market for arts and culture. While Audience Atlas studies have taken place across the globe, New Zealand is the first country to invest in a regular series of studies, with *Audience Atlas Aotearoa 2020*, the fourth iteration.

The full Audience Atlas 2020 study represents responses from a sample of 6,743 people nationally, representative of the population's demographics of people aged 16 years and over, including those who identified as having a lived experience of disability. The study includes a sample of 432 people nationally who identified as Pasifika. The increased number of Pasifika responses ensures we can report on results with confidence.

Any results reported as real numbers are estimates based on the weighted proportions applied to population estimates from Census data.

Please refer to the research parameters at the end of this summary report for more detailed information on sampling, methodology and confidence intervals. The full [Audience Atlas Aotearoa 2020](#) report is available via Creative New Zealand's website.



Understanding the culture market

324k adults in the Aotearoa arts and culture market identify as Pasifika

3.9 million

adults in Aotearoa New Zealand are in the market for arts and culture

324k

identify as Pasifika

Culture market: defined as adults aged 16 or over who've engaged with at least one arts, cultural or heritage activity within the past three years. The overall definition is inclusive; from attending Pasifika theatre to going to a movie.



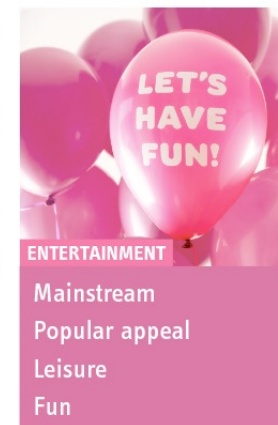
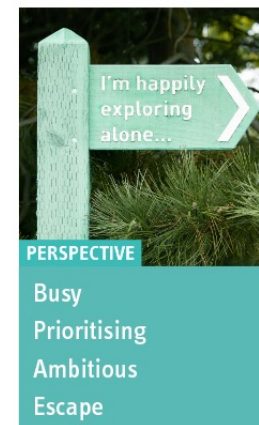
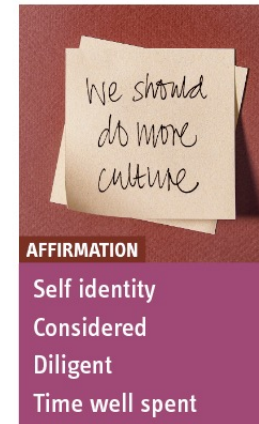
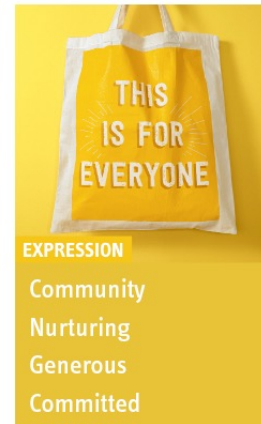
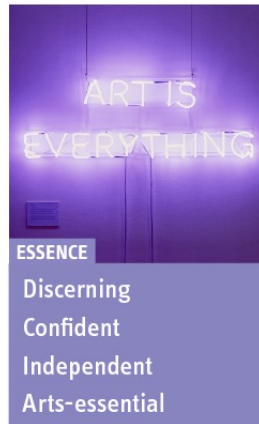
Photograph: David St George. Courtesy of Auckland Art Gallery Toi o Tāmaki.

Culture Segments your tool for retention and growth



Culture Segments is a psychographic segmentation system clustering people based on their deep-seated values towards arts and culture. These values frame a person's attitudes, lifestyle choices and ultimately, cultural consumption. Culture Segments gives you real insight into what motivates your audience and the tools to not only predict but influence future behaviour; perhaps to visit for the first time, attend more frequently, or even donate to your cause. Through Culture Segments, you can grow audiences, encourage repeat attendance, and develop long-lasting, mutually beneficial relationships.

There are eight Culture Segment clusters (represented to the right), each centring around a set of shared values. The segments are named to reflect the kind of experiences they value from culture.



The Culture Segment profile of Pasifika audiences in Aotearoa

Culture Segment profile

		Culture market	Pasifika
Essence	'in pursuit of self-actualisation'	10%	▼ 6%
Expression	'people people'	20%	▲ 30%
Affirmation	'do the right thing'	18%	16%
Enrichment	'through the lens of the past'	10%	▼ 7%
Stimulation	'all about the big idea'	12%	13%
Release	'say they're too busy'	12%	▲ 17%
Perspective	'happy in their own bubble'	9%	▼ 3%
Entertainment	'looking for fun'	9%	▼ 5%

Base

[6743]

[432]

▼▲ % for Pasifika is significantly different from the culture market average.

The mindsets behind Culture Segments are universal, based on deep-seated human values. That being said, other factors can have an influence within different demographic cohorts, and the manifestation of this is some subtle variance in the Culture Segment profile for Pacific Peoples within the culture market.

Proportionally, there are significantly higher levels of Expression (30%) and Release (17%) among the Pasifika cohort compared to the culture market average (20% and 12%, respectively). Conversely, Essence (6%), Enrichment (7%), Perspective (3%) and Entertainment (5%) are all less common.

Discover your segment here:

<https://mhminsight.com/culture-segments/survey>

Culture Segment pen portraits: for a deeper dive into Culture Segments, see Appendix 1 in the full *Audience Atlas Aotearoa 2020* report where there's a comprehensive summary of each of the eight segments, including how to reach them through marketing communications.

The Culture Segment profile of Pasifika audiences in Aotearoa

3 in 10 Pasifika in the culture market are Expression – the ‘people people’

Expression is the largest segment among Pasifika audiences (30%) and nationally (20%). The Expression segment is defined by its close connection to community. It is likely that higher levels of Expression amongst Pacific Peoples is correlated to Pasifika social structures and the migrant experience, where having a community identity, mixing with similar populations, living in inter-generational households, with family at the heart, is likely to be more commonplace.

Expression is one of the segments most likely to engage with arts and culture regularly. They are also likely to join in and share their experiences with others, making them great advocates.

Busy Release is the next largest segment

Compared to the culture market average, Pacific Peoples in the culture market are significantly more likely to be Release (12% and 17%, respectively). Although not defined by it, the Release segment can be aligned with life stage, and a number of lifestyle factors, for example, busy work, study and children, can compete for time.

Like the over-representation of Expression, the prominence of Release is likely correlated with Pasifika social structures and the migrant experience, where arts and cultural consumption may be seen as something difficult to fit into everyday life.

Release are the segment most likely to say ‘they’re too busy’ to engage with arts and culture. This segment are often people who feel unable to prioritise the arts as much as they’d like. Release prioritise seeking relaxation on their days off and can be difficult for the sector to mobilise into action.

Affirmation seek self-development

Affirmation closely follows Release in its size (16% of Pasifika in the culture market). Affirmation is a segment keen on learning and self-improvement. They are conscientious and keen to grow through their engagement with arts and culture. They are cautious consumers and often engage with more mainstream artforms, perceived as lower-risk, as they often lack the confidence to try new things.



The Culture Segment profile of Pasifika audiences in Aotearoa

Adventure loving Stimulation as common among Pasifika audiences as they are in the wider market

Two key traits characterise Stimulation; their desire for something new and unique (and to discover this themselves) as well as being exposed to 'big ideas' in their arts and cultural consumption. Stimulation (13%) are equally common among Pasifika audiences as they are in the wider market (12%).

6% of Pasifika audiences are Essence; core cultural attenders

While not as large as some other segments, Essence are core cultural attenders, typically engaging in higher frequency than others. Essence seek peak experiences from their cultural consumption and are looking for deep, emotional connections. Essence is an important segment to the culture market, however among Pasifika audiences, this segment is significantly under-represented (6% compared to 10% overall).

Enrichment, Perspective and Entertainment round out the market

The remaining 16% of Pasifika in the culture market are made up of Enrichment (7%), Perspective (3%) and Entertainment (5%).

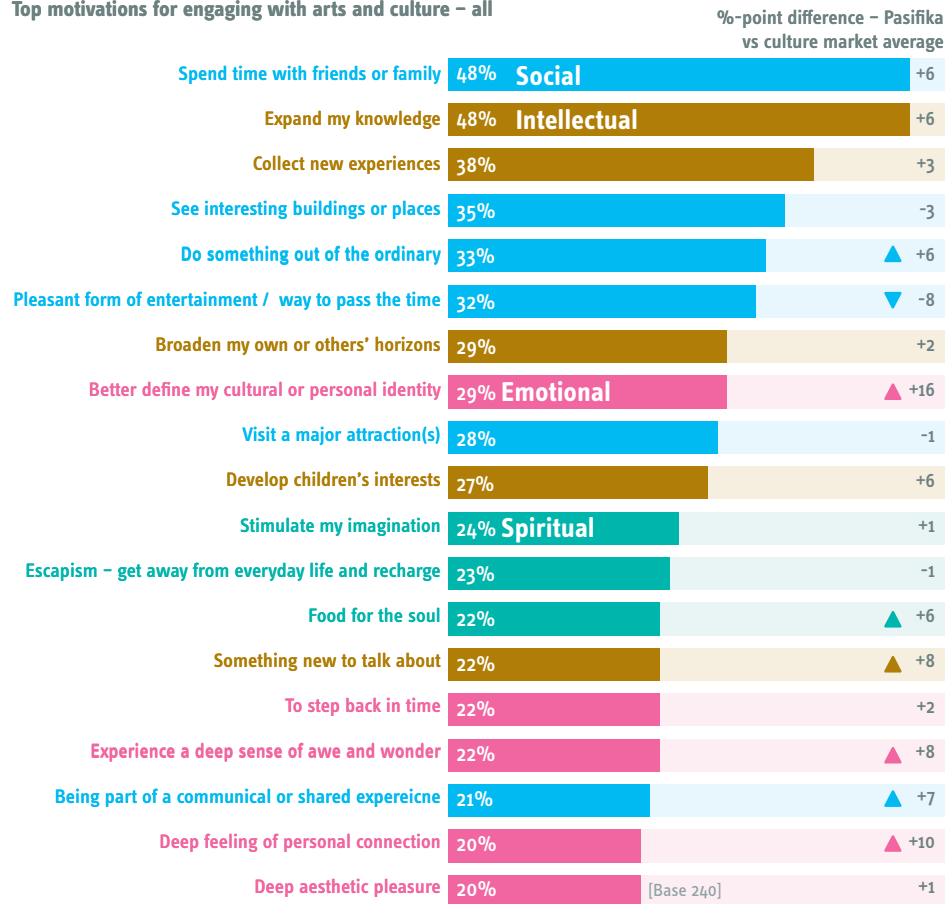
- Perspective is a more narrowly focused and introverted Essence; however, they lack the ardent appetite for the arts and are typically focused on their own personal areas of interest.
- Enrichment tends to be cautious with established tastes and less motivated by being up-to-date. Enrichment knows what they will enjoy and veer towards things they believe in having stood the test of time.
- Arts and culture are on the periphery of Entertainment's lives. They are looking for mainstream events or days out that will be fun.



Motivations and barriers to arts engagement for Pasifika audiences

Pasifika audiences are more likely to be seeking personal connection and identity development

Top motivations for engaging with arts and culture – all



The culture market has a range of motivations for engaging with the arts and these are likely to vary for individuals, across different artforms and within different contexts. Broadly however, motivations for engagement can be clustered into four broad human needs – Social, Intellectual, Emotional and Spiritual. These drivers dictate the benefits people are seeking and ultimately, the expectations and needs they have once through the door.

The most common drivers for Pasifika audiences to engage with arts and culture are a mix of Social – ‘spending time with others’ or ‘going to interesting places’ – and Intellectual – ‘expanding knowledge’ and ‘collecting new experiences’. These four drivers are universal, being as common in the wider culture market. Some motivations, however, are significantly more prominent amongst Pasifika audiences than the market overall:

- 33% of Pasifika audiences are seeking to ‘do something out of the ordinary’ (compared to 26% overall).
- 29% of Pasifika audiences are looking to ‘better define cultural or personal identity’ (compared to 12% overall).
- 22% of Pasifika audiences want ‘food for the soul’ or have ‘something new to talk about’ (compared to average: 16% and 14%, respectively).
- 22% of Pasifika audiences are looking to experience a ‘deep sense of awe and wonder’ (compared to 14% overall).
- 21% of Pasifika audiences are looking to be part of a ‘communal or shared experience’ (compared to 13% overall).
- 20% of Pasifika audiences are looking for a ‘deep feeling of personal connection’ (compared to 9% overall).



▲ ▼ % for Pasifika audiences is significantly different from the culture market average.

Different segments have distinct drivers to engage

Motivations paint a picture of the benefits people are seeking through their arts and cultural engagement. If we look at motivations by Culture Segments, we can see clear patterns which align with what we know about the segments. For example, in the **wider culture market**:¹

- Essence are often seeking ‘food for the soul’ or to have their ‘imagination stimulated’.
- A key driver for Expression is to be to ‘be part of a communal or shared experience or to ‘define their cultural or personal identity’.
- ‘Collecting new experiences’ is a key feature for Expression and Affirmation.
- ‘Doing something out of the ordinary’ is something that the Stimulation and Affirmation segments are more likely to look for from their arts experiences.

¹ Motivations in *Audience Atlas Aotearoa 2020*, was asked of half the sample. Therefore, analysis of Pasifika audiences on a granular level isn’t possible for all sub-groups. For more detail on motivations by Culture Segment see full *Audience Atlas Aotearoa 2020* report.



How does the Pasifika audiences Culture Segment profile connect with motivations?

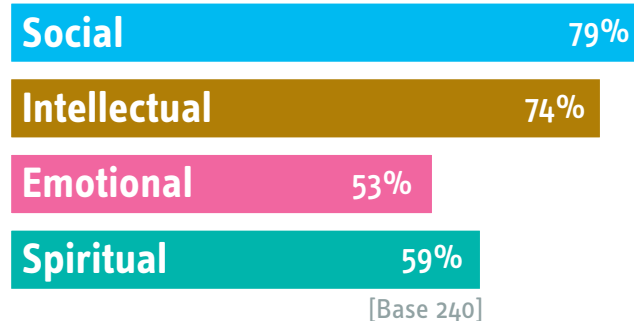
Pasifika audiences are significantly more likely to be in the Release segment (17%, compared to 12% overall), which explains why ‘passing time in a pleasant way’, is a significantly lower driver for this cohort (32%, compared to 41% overall). Release often feel time-poor. Therefore, it is unsurprising that they are less likely to be looking for arts engagement to ‘pass the time’.

Meanwhile, Expression enjoy activities that help them connect with and share experiences with others. Expression are significantly over-represented amongst Pasifika audiences compared to the wider market, which correlates with this cohort seeking a ‘shared communal experience’ at significantly higher rates than the overall market (21%, compared to 13% overall).

Social motivations as a gateway to deeper reward

All motivations to engage with arts and culture

Pasifika in the culture market



Main motivation to engage with arts and culture

Pasifika in the culture market



Culture market average



Overall, 79% of Pasifika audiences have at least one Social motivation for engaging with arts and culture, while 74% have Intellectual, 53% Emotional and 59% at least one Spiritual reason for engaging.

Looking at the **main** drivers to engage (lower chart), Pasifika audiences are significantly more likely than the market overall to be mainly Emotionally driven (15% compared to 9% overall). This is largely due to a larger proportion of Pasifika audiences saying they wish 'to define their cultural or personal identity' through their arts and cultural engagement, compared to the wider market. Conversely, they are significantly less likely to have a main Social driver (35%, compared to 42% overall). A main Intellectual motivation is as common as a main Social driver among Pasifika audiences (both 35%). An even larger proportion are seeking an extension of a purely social encounter through an Intellectual, Emotional or Spiritual return on investment for their time and money. Among Pacific Peoples in the culture market, 65% seek an extension of the Social experience, a significantly higher level than average (58% overall).

To successfully deliver what is being sought by Pasifika audiences and the market more broadly, the sector needs to ensure that the artistic or cultural offer is at the centre of the social experience, acting as a catalyst for connection and an entry point for deeper engagement.



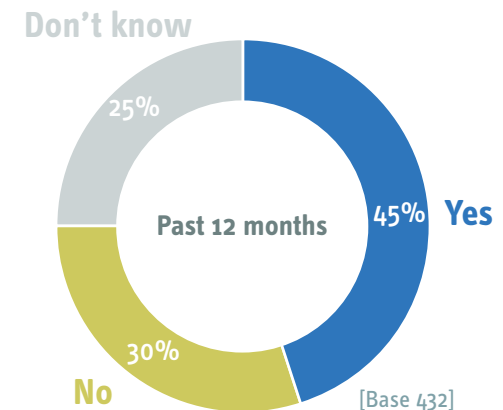
Pasifika audiences are more likely to have been prevented from cultural engagement

45% / 147k

of Pasifika audiences recall at least one occasion in past 12 months when they had wanted to attend an arts or cultural organisation or event, but were prevented from doing so.

Compared to the wider culture market, Pacific Peoples are significantly more likely to have been prevented from arts engagement in the last 12 months (45%, compared to 36% overall). This equates to a minimum estimated 147k missed opportunities for Pasifika engagement.¹

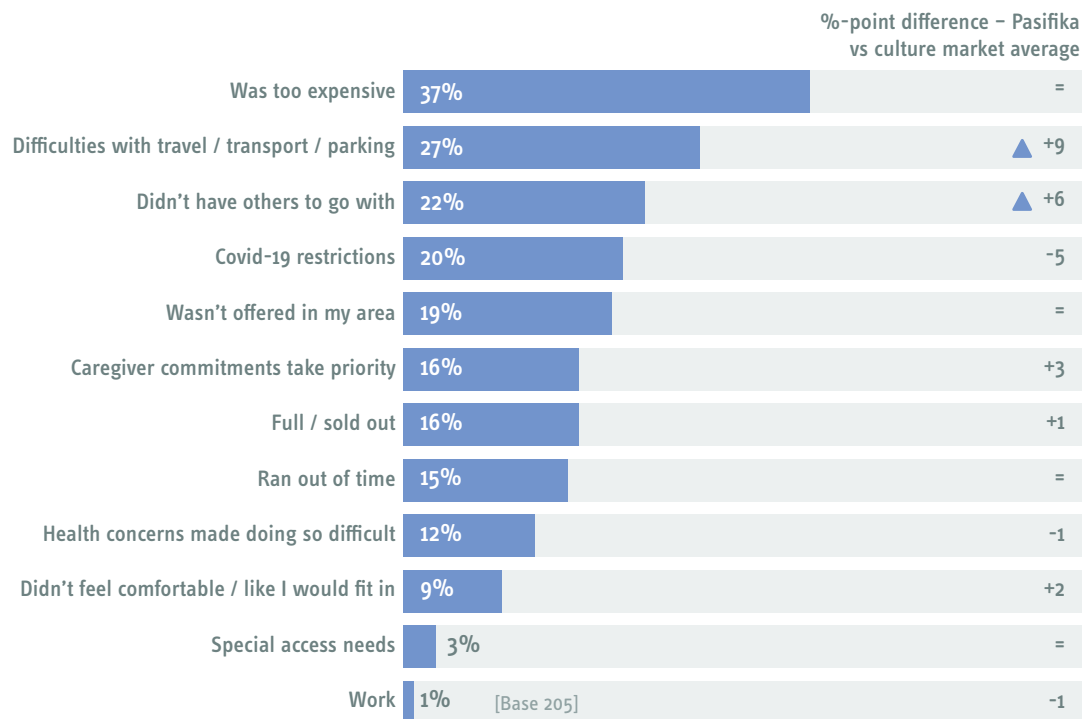
Was there an occasion you wanted to attend an arts, cultural or heritage organisation or event, and something prevented you from doing so?



¹ Assuming that there was only one occurrence and does not account for groups, so the number is likely to be higher.

Expense is a universal barrier to arts engagement

Top reasons preventing attendance at a specific arts organisation or event in past 12 months



▼▲ % for Pasifika audiences is significantly different from the culture market average.

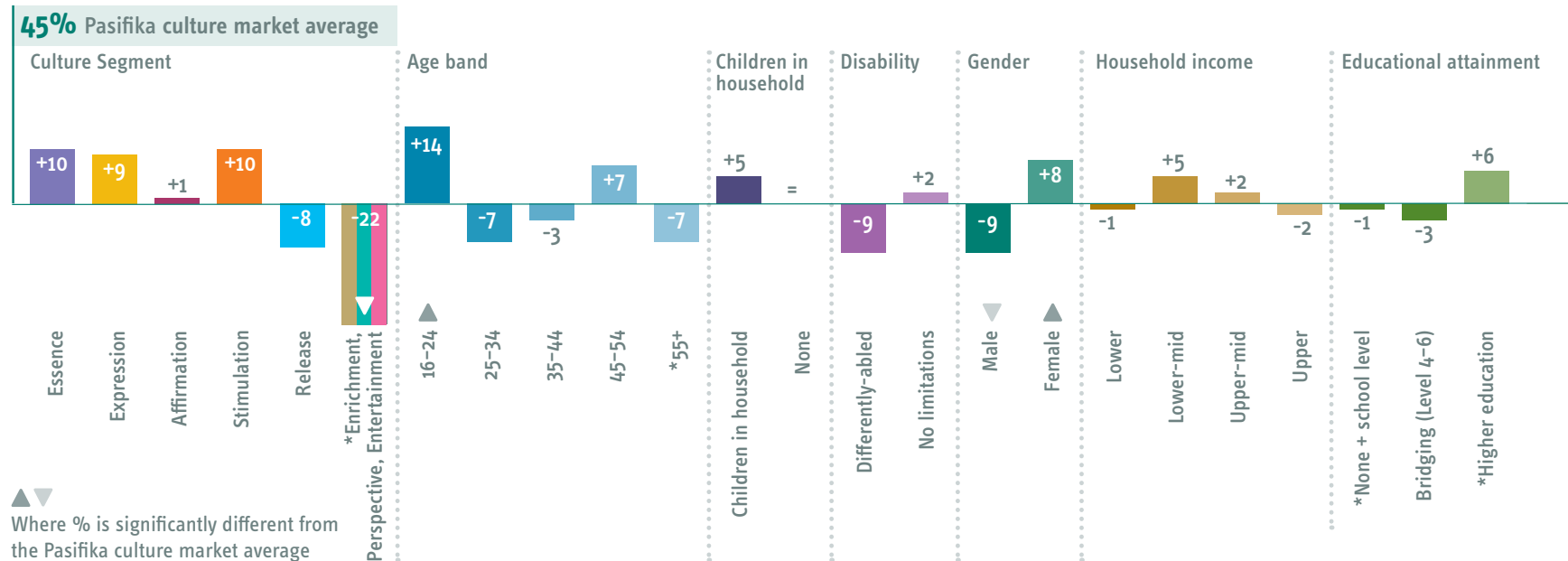
Among those who could recall being prevented from arts engagement in the last 12 months, expense was the most commonly cited reason. Expense is a universal barrier, and results for Pasifika audiences mirror the wider culture market (37% and 36%, respectively).

- Nearly 3 in 10 Pasifika audiences cited difficulties with travel in preventing engagement, a significantly higher level than seen in the market overall (18%).
- Pacific Peoples in the culture market are also significantly more likely to 'not have others to go with'. Within the wider market, younger adults (16-24) are significantly more likely to cite this reason (24%, compared to 16% overall). This pattern is also true for younger Pasifika audiences, with around 3 in 10 citing this as a barrier.



Younger Pasifika more likely to recall occasions of prevention

Pasifika audiences prevented from attending an arts, cultural or heritage organisation or event – %-point difference compared to Pasifika culture market average



Within the Pacific Peoples cohort, younger adults and those identifying as female were significantly more likely to recall an occasion of being prevented from arts engagement. Otherwise, on a demographic level, there no other statistically significant differences.

As demonstrated by Culture Segments, the importance placed on the arts plays a role. While not a statistically significant difference, Pasifika

audiences in the more culturally active Essence, Expression and Stimulation segments, are more likely than average to recall an occasion of prevention. Conversely, Pasifika audiences in the less culturally active segments (Enrichment, Perspective and Entertainment), are significantly less likely to have done so.

*Due to size limitations of sample at a sub-group level for Pasifika audiences, the less culturally active segments Enrichment, Perspective and Entertainment have been grouped, as have age bands above 55 years, those with no qualification and school level only, and bachelor with post-graduate qualifications.



Online arts engagement among Pasifika audiences

Pasifika audiences more open to engaging with the arts online

Online engagement remains niche...

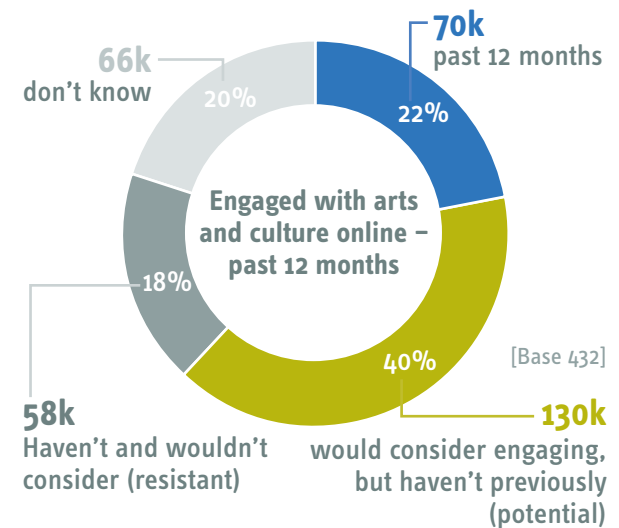
Just over 1 in 5 Pasifika audiences engaged with arts and culture online in the 12 months prior to the study (22%).¹ This is broadly comparable to the culture market overall (18%).

... but 4 in 10 open to online arts engagement

While just 22% or an estimated 70k Pasifika audiences engaged with arts and culture online in the 12 months prior to the study, a larger number (an estimated 130k) would consider this form of engagement in the future.

Pasifika audiences are less resistant to online than the market overall

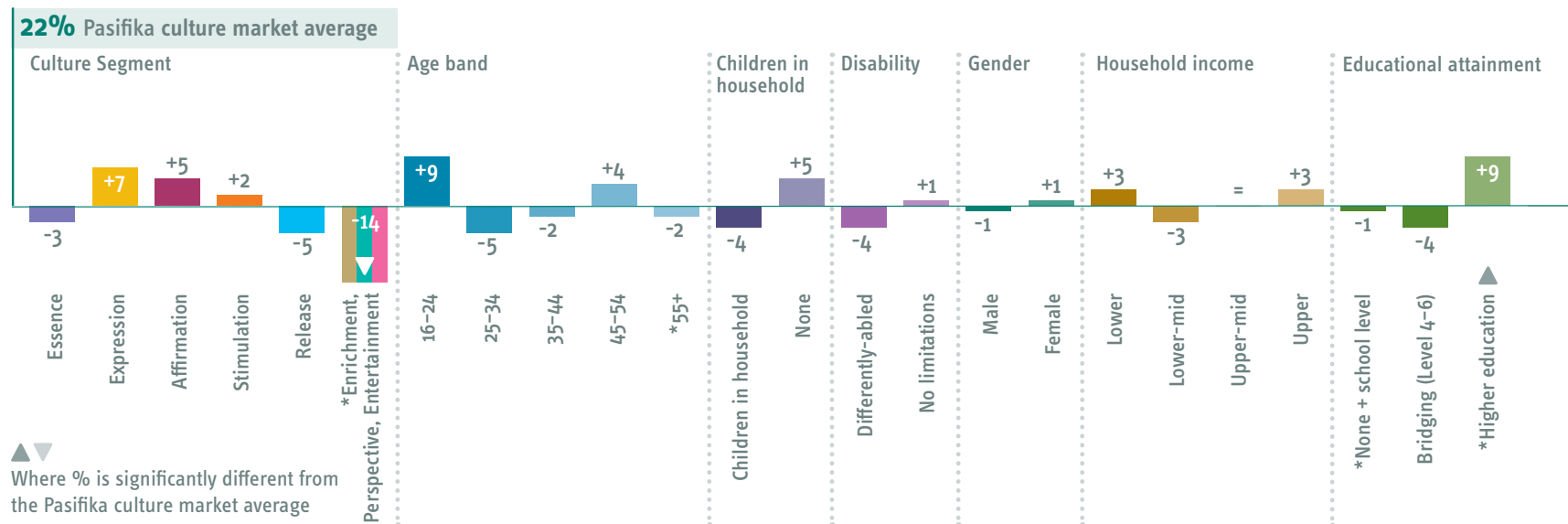
Nearly 1 in 5 have no interest in engaging with arts and culture online (18% resistant). However, among Pasifika audiences, resistance to this form of engagement is significantly below average (30%).



¹ Audiences Atlas Aotearoa 2020 survey was in field in December 2020. Therefore, 'the 12 months prior' broadly refers to the 2020 calendar year.

Younger Pasifika audiences more likely to have recently engaged with arts online than peers

Pasifika audiences who have engaged with arts and culture online in past 12 months – %-point difference compared to Pasifika culture market average



Compared to the Pacific Peoples average, those aged 16-24 are most likely to have recently engaged with the arts online. While not significantly different from the Pacific Peoples average, younger Pasifika (16-24s) are significantly more likely to have recently engaged with the arts online, compared to peers in the wider culture market.

In addition, Pacific Peoples who have completed higher education are significantly more likely than average to have engaged with the arts online. The pattern of online arts engagement amongst Pasifika sub-groups broadly mirrors the picture of the wider culture market.

*Due to size limitations of sample at a sub-group level for Pasifika audiences, the less culturally active segments Enrichment, Perspective and Entertainment have been grouped, as have age bands above 55 years, those with no qualification and school level only, and bachelor with post-graduate qualifications.



Pasifika audiences more likely to have paid for online arts content

15% / 48k

Have paid or donated to access arts and cultural content online

While most Pacific Peoples in the culture market expect to pay for online arts content (64%), few (15%) had done so in the 12 months prior to the study. Although proportionally small at 15%, this is significantly higher recent online arts engagement for Pasifika audiences than seen in the wider market (10%).

It is also worth noting, that 21% of those who had recently paid or donated to access arts and cultural content online (an estimated 10k), wouldn't do so again. This picture isn't unique to Pasifika audiences, with results mirroring those for the wider culture market.

Meanwhile, nearly 4 in 10 Pasifika in the culture market haven't, but would consider paying to access arts content online, significantly above the overall market average (38% and 28%, respectively).

This means there are an estimated 124k Pacific Peoples in the potential market for paid online arts engagement, close to three times the number who have paid for online arts content previously.

In the past 12 months have you paid or donated money to access arts and cultural content online?

	Culture market	Pasifika audiences	
	%	%	Estimate #
Yes, would pay again	8%	▲ 12%	38k
Yes, wouldn't do again	2%	3%	10k
Haven't but would consider (potential)	28%	▲ 38%	124k
Haven't and wouldn't consider (resistant)	51%	▼ 31%	102k
Don't know	11%	▲ 15%	50k

Base

[6743]

[432]

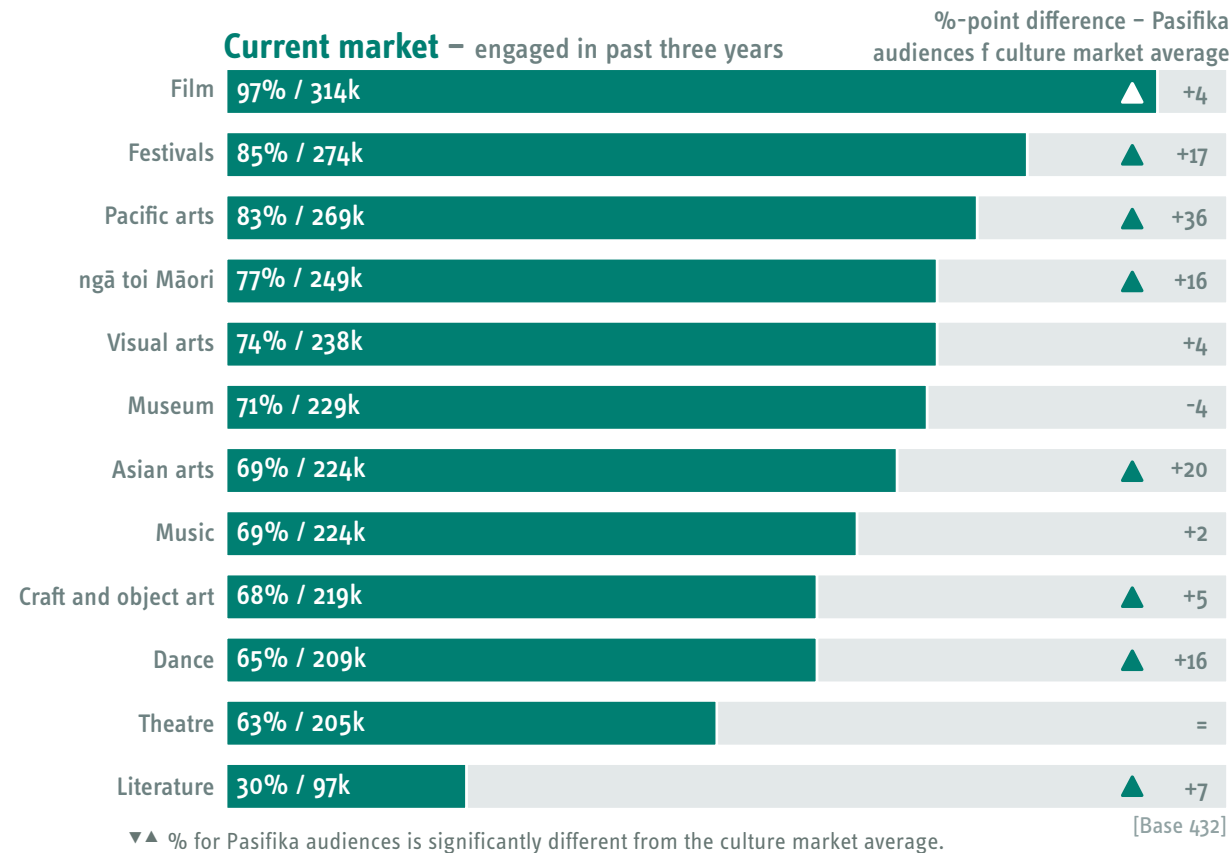
▼ ▲ % for Pasifika audiences is significantly different from the culture market average.



Engagement with individual artforms among Pasifika audiences

Pasifika audiences are more active across 8 of 12 core artforms

Current artform markets – % and real figure estimates for Pasifika audiences



Pasifika audiences are more active across the core artforms. In fact, they are significantly more likely than the market overall to have engaged with 8 of the 12 core artforms in the past three years (current market).

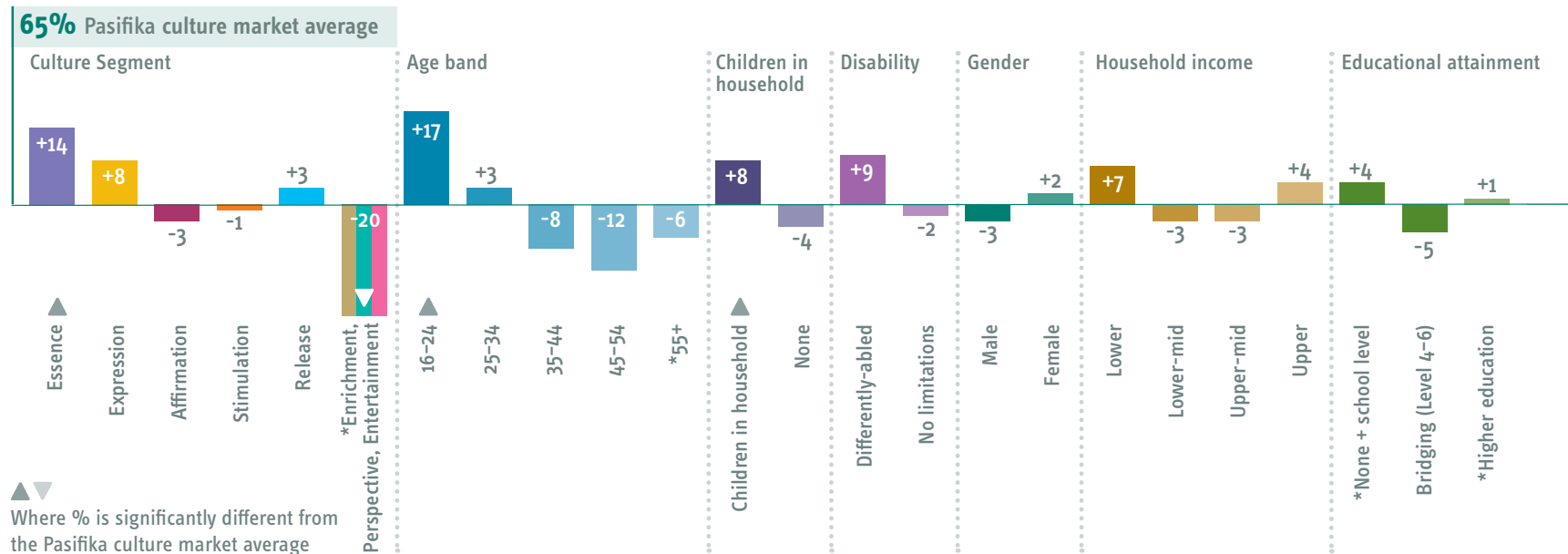
Engagement with film (at a cinema or another venue, including film festival venues) is near-universal and has the largest current market of the core 12 artforms. Overall, 97% of Pasifika audiences have engaged with film in the past three years, which is a higher level than the **culture market** overall (92%).

- Behind film, Pasifika audiences are most likely to have engaged with Festivals in the past three years (85%) and Pacific arts (83%).
- In addition, Pasifika audiences are also significantly more likely than average to be in the current market for ngā toi Māori, Asian arts, craft and object art, dance and literature.



Younger Pasifika audiences driving high engagement

Pasifika audiences in the current market for **dance** – %-point difference compared to Pasifika culture market average



Compared to the market overall, Pasifika audiences are significantly more likely to be in the current market for 8 of 12 core artforms, most notably, Pacific arts, Asian arts, festivals, ngā toi Māori and dance.

Looking across the sub-groups for Pasifika audiences reveals it is largely younger adults (aged 16-24) driving this uplift in engagement.

Similarly, Pasifika audiences with children in the household are significantly more likely to be in the current market for dance than the

Pasifika average. At the same time, Pacific Peoples with higher educational attainment are significantly more likely to be in the current market for Pacific arts and craft and object art.

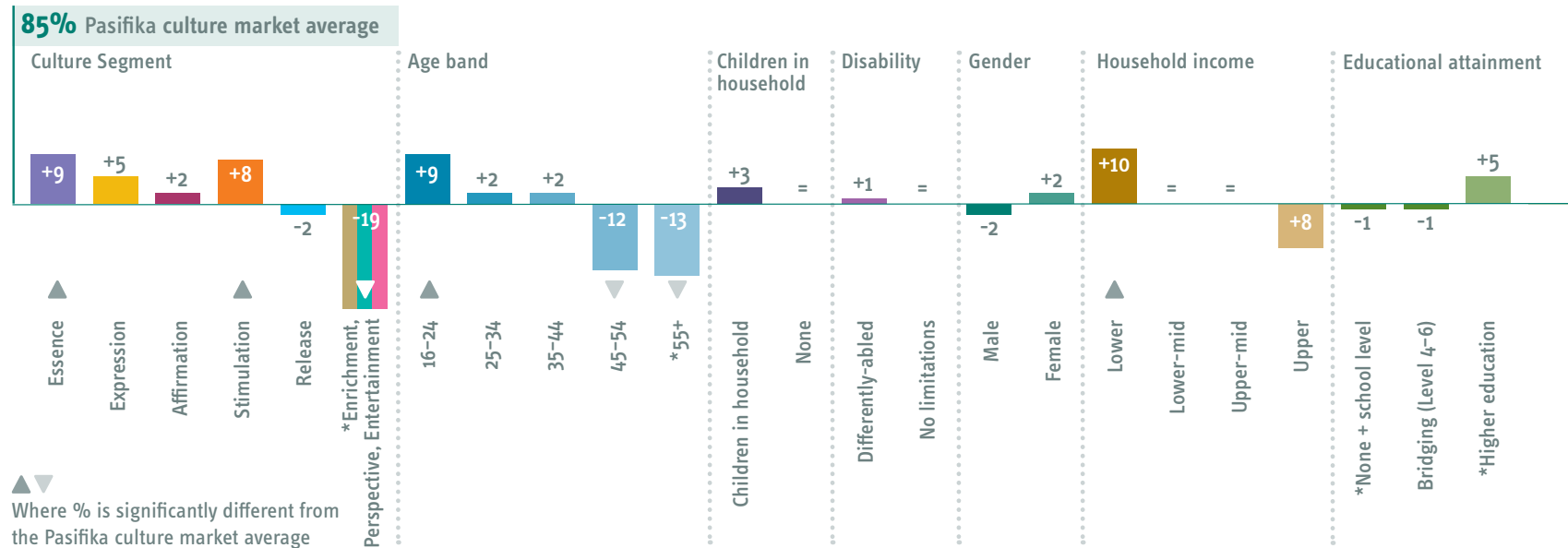
The model above looks at Pasifika audiences in the current market for dance, as an example. The pattern is broadly similar for Pacific arts, Asian arts, ngā toi Māori and festivals (festivals is illustrated on the following page).

*Due to size limitations of sample at a sub-group level for Pasifika audiences, the less culturally active segments Enrichment, Perspective and Entertainment have been grouped, as have age bands above 55 years, those with no qualification and school level only, and bachelor with post-graduate qualifications.



Younger Pasifika audiences driving high engagement

Pasifika audiences in the current market for **festivals** – %-point difference compared to Pasifika culture market average



Pasifika audiences who have engaged with festivals in the past three years (current market) are significantly more likely to be Essence or Stimulation than average. Similar, to the Pasifika audiences engagement with dance, it is the younger cohort who are driving Pasifika audiences' engagement with festivals.

Pasifika audiences in lower household income bands are slightly more likely to be in the current market for most core artforms than the Pasifika

audiences average, and are significantly more likely to have engaged with a festival in the past three years (current market).

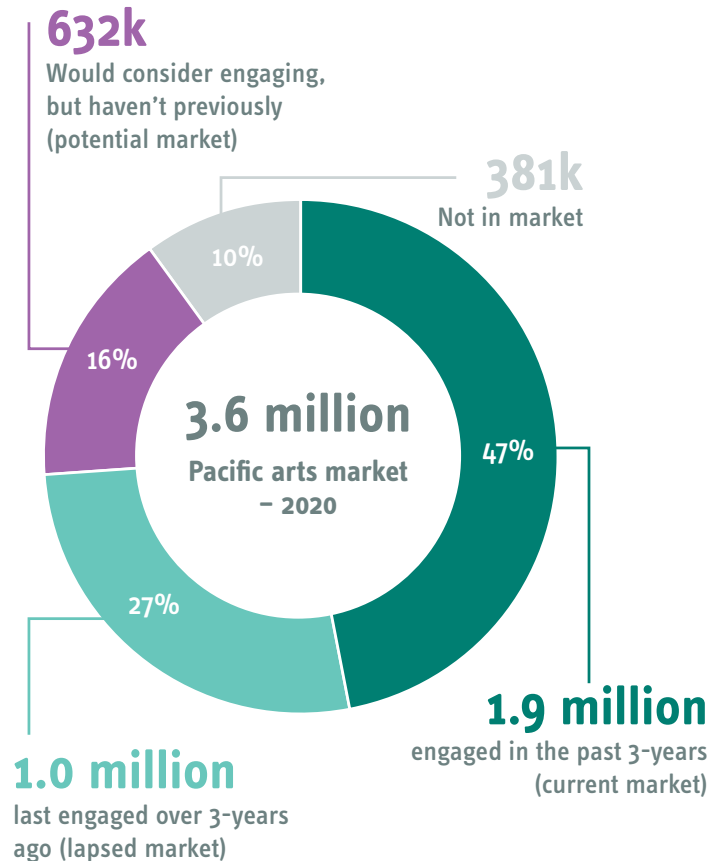
The model above looks at Pasifika audiences in the current market for festivals, as an example. The pattern is broadly similar for Pacific arts, Asian arts, ngā toi Māori and dance (dance is illustrated on the previous page).

*Due to size limitations of sample at a sub-group level for Pasifika audiences, the less culturally active segments Enrichment, Perspective and Entertainment have been grouped, as have age bands above 55 years, those with no qualification and school level only, and bachelor with post-graduate qualifications.



The culture market's engagement with Pacific arts

3.6 million adults in Aotearoa New Zealand are interested in Pacific arts



[Base 6743]

This section explores the whole culture market in Aotearoa, as opposed to those identifying as Pasifika, seen in the earlier part of the report.

The culture market is defined as adults aged 16 or over who've engaged with at least one arts, cultural or heritage activity within the past three years. The overall definition is inclusive; from attending Pasifika theatre to going to a movie.

Most in the culture market are interested in Pacific arts.

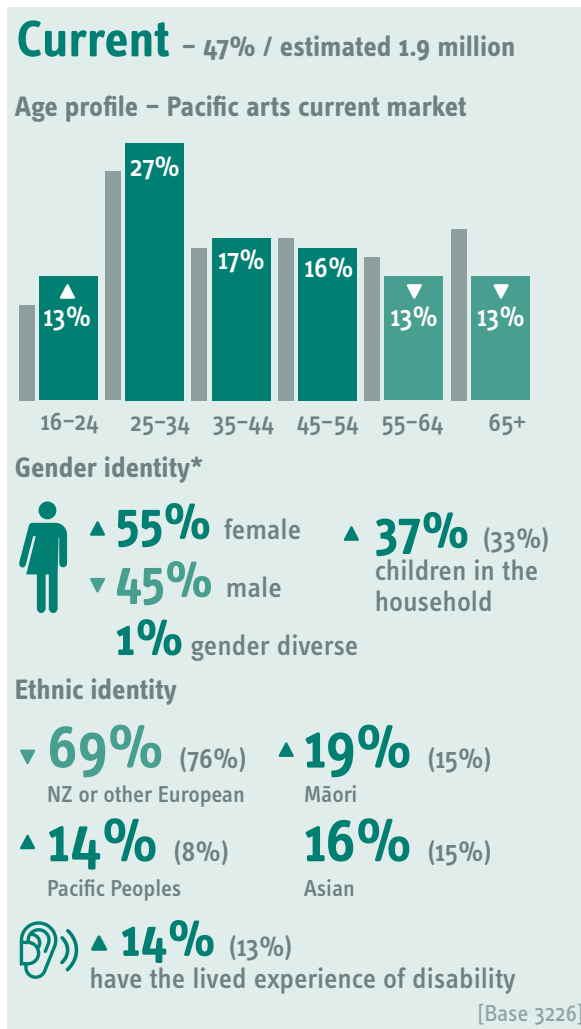
90% or an estimated 3.6 million adults have either engaged with this artform in the past, or would consider doing so in the future.

Taking a more granular look at the market, there is a healthy current market with an estimated 1.9 million having engaged in the past three years,

Meanwhile, the lapsed market, defined as those who last engaged over three years ago, is also sizeable, at an estimated 1 million adults.

A further 632k would consider engaging but haven't previously.

The Pacific arts market is defined as anyone in the culture market who has ever engaged with Pacific arts or would consider engaging but haven't previously, including: a Pasifika film, Pasifika theatre, Pasifika craft / object art exhibition, Pasifika art exhibition or digital or video art event, Pasifika dance, music concert or event showcasing Pasifika artists, a Pasifika literature event, Pacific cultural festival, or another Pacific art, cultural event, or celebration.



Current market for Pacific arts

The current market for Pacific arts – those who've engaged in the past three years – are younger and more diverse than the culture market average.

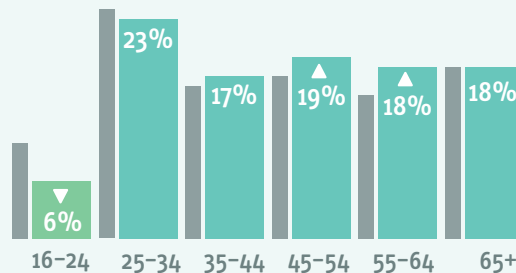
- 40% of those in the Pacific arts current market are aged under 35, a significantly higher level than average (34%). Around 27% are aged 55+, significantly below the culture market average (33%).
- Skews female (55%, compared to 51% overall).
- Is more ethnically diverse, with a significantly larger proportion identifying as Māori (19%, compared to 15% overall) or Pacific Peoples (14%, compared to 8%). Conversely, there are significantly fewer in the current market for Pacific arts identifying as New Zealand or other European.
- More likely to have children in the household (37%, compared to 33% overall).
- More likely to have completed higher education (32%, compared to 28% overall).
- More likely to have the lived experience of disability (14%, compared to 13% overall).
- Essence (13%), Expression (25%) and Stimulation (14%) are over-represented compared to market overall (10%, 20% and 12% respectively).

▲▼ where % is significantly different from the culture market average.

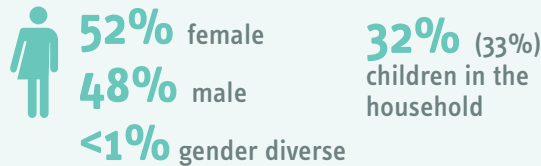
The culture market average is represented as either a grey bar or a % in brackets.

Lapsed – 27% / estimated 1.0 million

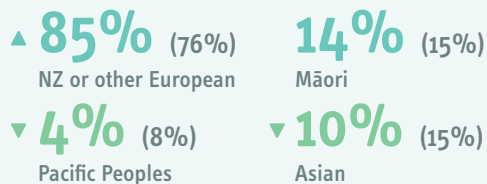
Age profile – Pacific arts lapsed market



Gender identity*



Ethnic identity



[Base 1805]

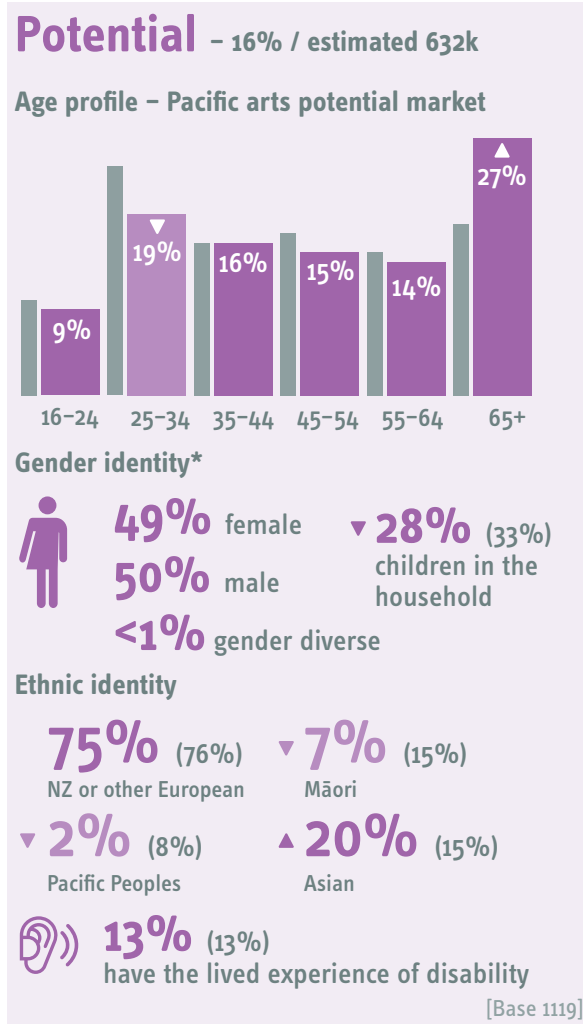
Lapsed market for Pacific arts

The lapsed market for Pacific arts – those who last engaged over three years ago – are older and less diverse than average.

- 55% are aged 45+, a significantly higher level than average (50%). Conversely, younger adults (16-24s) are significantly under-represented (6%, compared to 10% overall).
- Less ethnically diverse, with a significantly larger proportion identifying as New Zealand or other European (85%, compared to 76% overall). Conversely, the proportion identifying as Pacific Peoples (4%) or Asian (10%) are significantly below average.
- Less likely to have the lived experience of disability (9%, compared to 13% overall).
- Less likely to have completed higher education (25%, compared to 28% overall).
- Expression (16%) is under-represented compared to the wider market (20%, respectively). Conversely, the less culturally active segments of Enrichment (12%) and Entertainment (12%) are all over-represented compared to the wider market (10% and 9%, respectively).

▲▼ where % is significantly different from the culture market average.

The culture market average is represented as either a grey bar or a % in brackets.



Potential market for Pacific arts

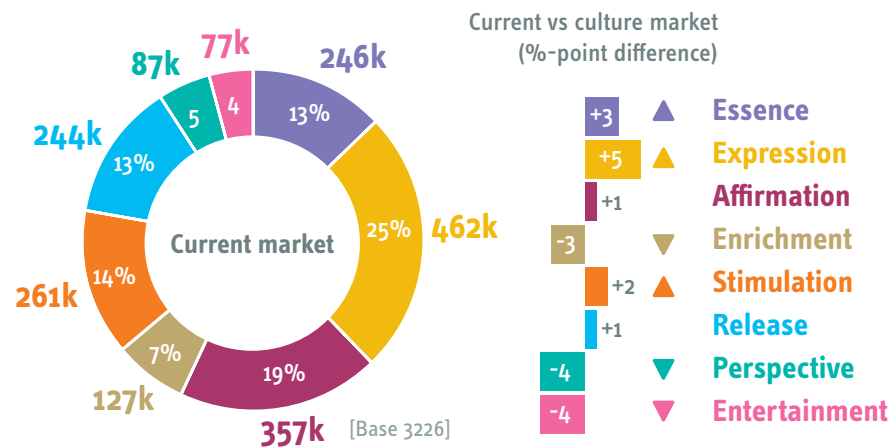
The potential market for Pacific arts – those who would consider engaging but haven't previously – are more likely to be older or identify as Asian than the culture market average.

- 27% of those in the Pacific arts potential market are aged 65+, a significantly higher level than average (18%). Around 28% are aged under 35, significantly below the culture market average (34%).
- More likely to be retired (24%, compared to 16% overall).
- More likely to identify as Asian (20%, compared to 15% overall). Conversely, are less likely to identify as Māori (7%) or Pacific Peoples (2%) than average.
- Less likely to have children in the household (28%, compared to 33% overall).
- The less culturally active segments of Enrichment (13%) and Perspective (12%) are significantly over-represented compared to the wider culture market. However, the shift in balance is due to the absence of the more active Essence and Expression rather than larger numbers of the less active segments. See real figure estimates explored on the following pages.

▲▼ where % is significantly different from the culture market average.
The culture market average is represented as either a grey bar or a % in brackets.

Expression, Essence and Stimulation are over-represented in the current market for Pacific arts

Culture Segment profile and real figure estimates – Pacific arts



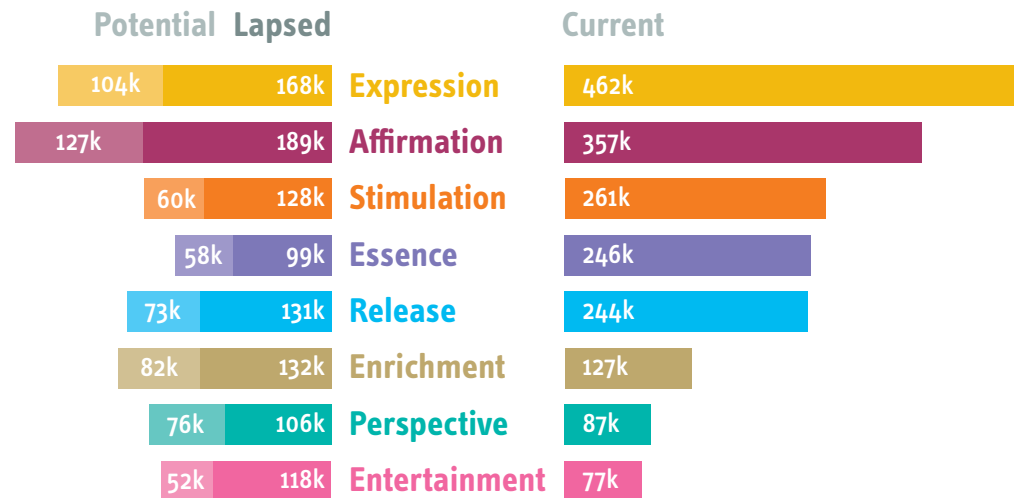
Expression makes up one-quarter of the Pacific arts current market. Compared to all other segments, they are more likely to have engaged with a Pacific art exhibition, Pacific craft or object art exhibition or cultural festivals within the past three years.

Expression's importance to Pacific arts is not just that they are the most numerous, but also the value they bring. Expression enjoy shared experiences and inclusive activities. They want others to join in with them, making them great advocates. They are the segment most likely to give time and money to the causes they support.

In addition to Expression, Essence and Stimulation are over-represented in the current market for Pacific arts. As high-frequency attenders, Essence are an important group. They're a culturally confident segment, valuing quality experiences and depth insight. Meanwhile, Stimulation are highly active and love new, out of the ordinary experiences. They will tell everyone they know about the good experiences they are having.

Affirmation a growth segment for Pacific arts

Culture Segment profile and real figure estimates for the different Pacific arts market groups



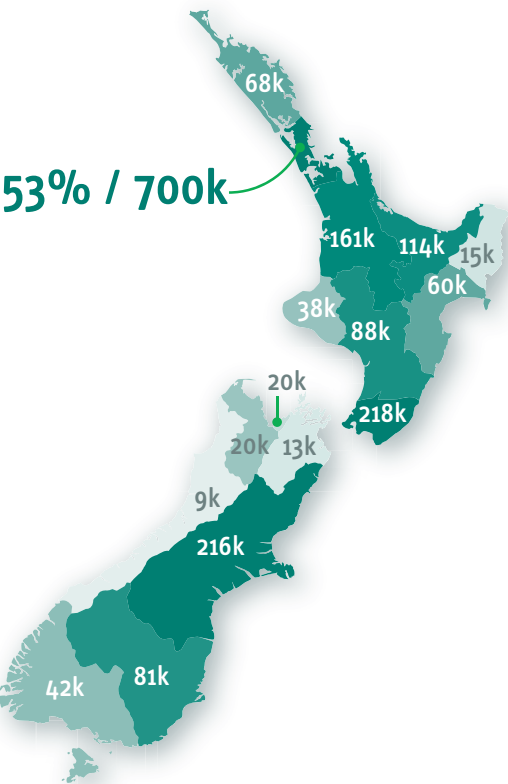
The adjacent chart looks at the Culture Segment breakdown of the Pacific arts current, lapsed and potential markets as real figure estimates.

After Expression, Affirmation is the most numerous segment in the current market for Pacific arts. This segment welcomes cultural engagement as a way of enjoying quality time with others and as a means of doing something worthwhile. They are a cautious segment however, and need convincing that the thing you are offering will be worth their time and money.

Perhaps more interesting than Affirmation's current market size, is the size of the Affirmation lapsed and potential markets. An estimated 189k Affirmation have engaged with Pacific arts before, but need to be reactivated and an additional 127k are open to engaging with this artform, but haven't been convinced to do so yet.

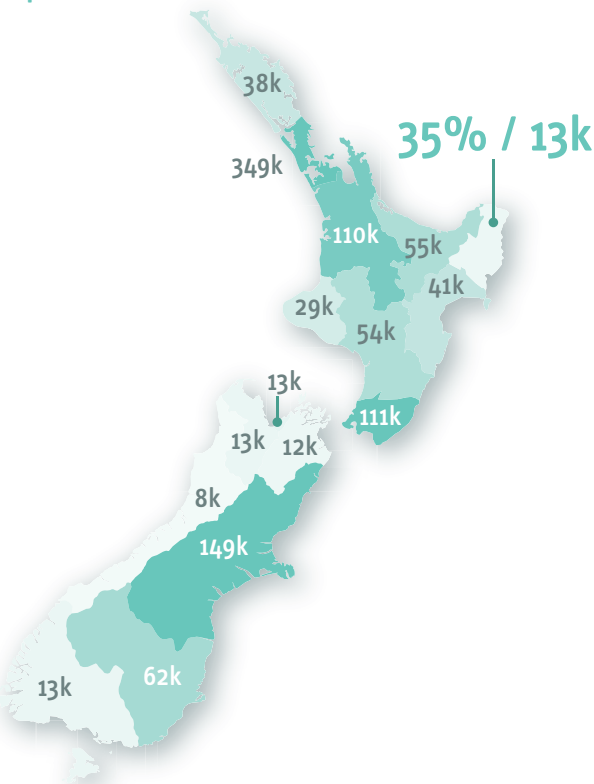
Size of the current, lapsed and potential markets for Pacific arts across Aotearoa New Zealand – real figure estimates

Current



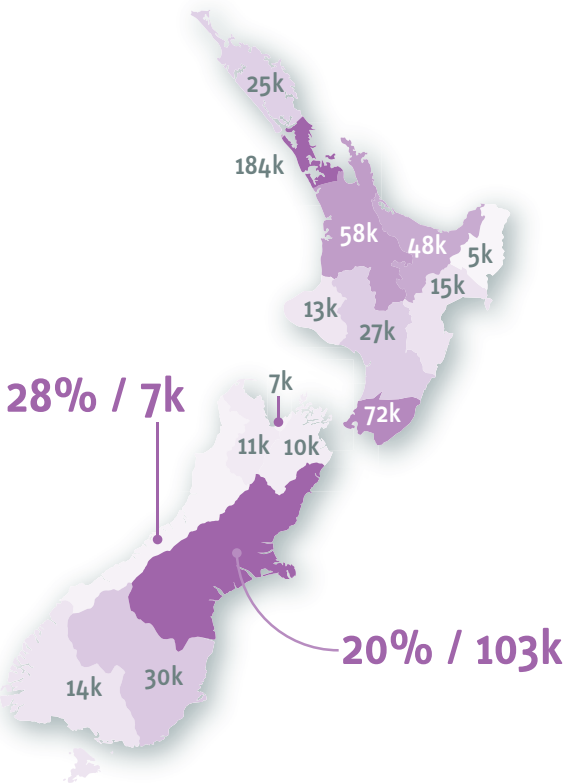
The Pacific arts market is relatively active. At a regional level, the Auckland region (53%) has significantly higher penetration into the current Pacific arts market compared to average (47%).

Lapsed



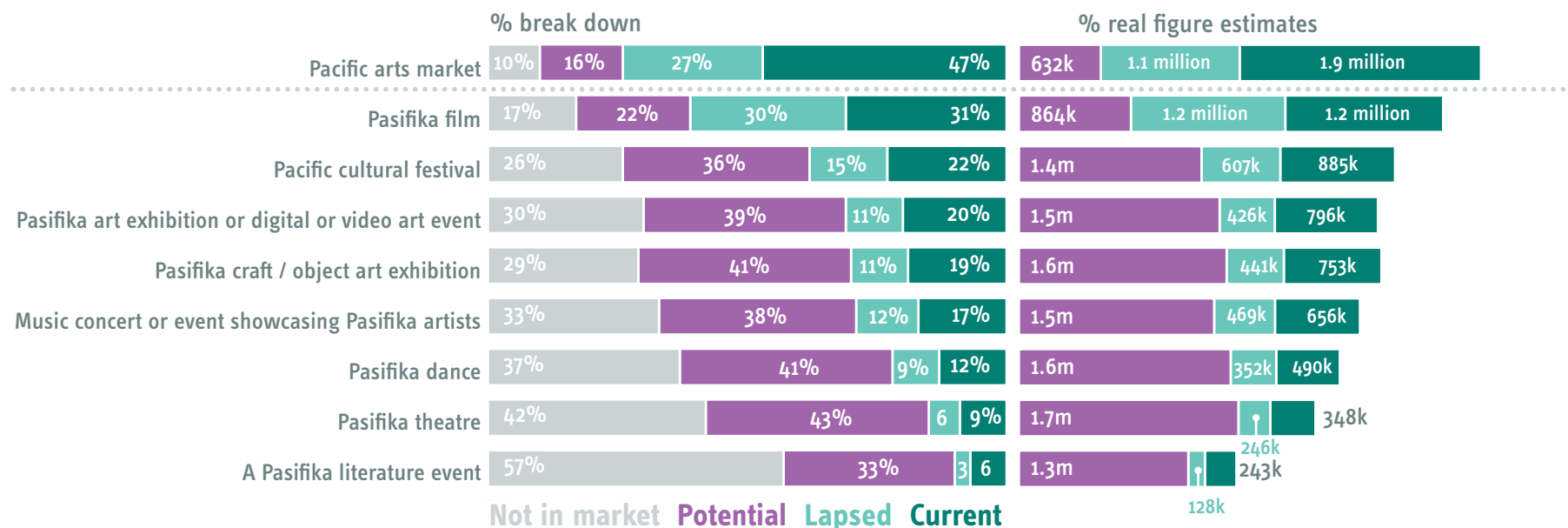
While Gisborne (35%) has the largest proportion of residents in the lapsed market for Pacific arts, this was not a statistically significant difference. The proportion of residents in the Pacific arts lapsed market was broadly comparable to average (27% across all regions).

Potential



A significantly higher proportion of residents in the West Coast (28%) and Canterbury (20%) regions would consider engaging with Pacific arts but haven't previously. This equates to a modest, estimated 7k people in the West Coast and 103k in Canterbury.

Pacific arts market penetration – including artforms within Pacific arts



A large potential market

Pasifika film has the largest level of penetration, with 31% in the current market, and while it could be an issue with provision, a similar proportion of the market has lapsed (30%).

Almost all artforms within Pacific arts have a relatively healthy potential for growth. Pasifika theatre has the largest potential market – 43% would consider engaging but haven't previously – closely followed by the dance and craft / object art (41% are in the potential market for both these artforms).

High level of cross-over

The current market for Pasifika craft / object art exhibitions has significant cross-over with Pasifika art exhibitions, digital or video art events; 88% have engaged with both within the past three years (current). Within the current Pasifika literature event market, 87% have also engaged with a Pacific cultural festival in the past three years.



Research parameters and methods

This study was carried out for Creative New Zealand Toi Aotearoa by Morris Hargreaves McIntyre. It was commissioned in October 2020.

Target group for the research The culture market in Aotearoa New Zealand.

Date of fieldwork: 11 December 2020 to 21 January 2021.

Data collection method Respondents were recruited by Consumer Link, Pureprofile, Prime Research and Panelbase. In order to qualify, respondents had to be aged 16 or over and live in Aotearoa New Zealand. Responses were collected online.

Weighting procedures Responses were weighted to be representative of the population; based on Census data. Data was weighted according to age band, gender, ethnicity, educational attainment and location.

Sample size 6,743 (nationally). Initial regional sampling was based on the 2018 Census. Some organisations opted to boost the sample in certain regions; there were additional national boosts for Māori, Pacific Peoples and Asian. Any imbalance was corrected post-collection, with weighting methods applied to match the demographic breakdown of the population.

Population estimates: For all four editions of Audience Atlas data cited in this report, real figure estimates have been generated using population estimates released by Stats NZ. The source for this data can be found here: <http://nzdotstat.stats.govt.nz/wbos/Index.aspx>. Please note that we deduct children, those not in the culture market and those in areas 'outside regions' before applying these estimates.

Reliability of findings Only a sample of the total 'population' was interviewed so we cannot be certain that the figures obtained are exactly those we would have found had every person been interviewed. However, for any percentage given, we can estimate confidence intervals within which the true values are likely to fall.

The data for the **national culture market** has a confidence interval (margin of error) of **+/-1.19%** at 50% (i.e., where the result is 50%, the actual result may fall between 47.81% and 51.19%).

The sample for **Māori** is 996 and has a confidence interval (margin of error) of **+/-3.10%** at 50% (ie, where the result is 50%, the actual result may fall between 46.90% and 53.10%).

The sample for **Pacific Peoples** is 432 and has a confidence interval (margin of error) of **+/-4.71%** at 50% (ie, where the result is 50%, the actual result may fall between 45.29% and 54.71%).

The sample for **Asian** is 1,127 and has a confidence interval (margin of error) of **+/-2.92%** at 50% (ie, where the result is 50%, the actual result may fall between 47.08% and 52.92%).

The data for those with the **lived experience of disability** has a confidence interval (margin of error) of **+/-3.48%** at 50% (ie, where the result is 50%, the actual result may fall between 46.52% and 53.48%)¹.

¹ Confidence interval for lived experience is an approximate only and based on available data from StatsNZ. The definition of 'disability' is not directly comparable to *Audience Atlas Aotearoa 2020*.
www.stats.govt.nz/information-releases/disability-survey-2013



Morris Hargreaves McIntyre is an international consultancy. We work with charities, heritage and cultural organisations of all sizes.

We're fascinated by what makes people and organisations tick. Our strategic thinking, insight and creativity transform how our clients see their world.

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