Audience Atlas New Zealand 2017

March 2018 report

morris hargreaves mcintyre

A growing wealth of insight

Audience Atlas is a unique way of understanding the market for arts and culture, measuring and **exploring** the **current**, **lapsed** and **potential markets** across **more than 40 artforms** in New Zealand.

Audience Atlas studies have taken place **across the globe** from New York to China. **New Zealand** is the **first country** to invest **in three studies**, with Audience Atlas New Zealand 2017 the third edition. This investment results in a **growing databank** of comprehensive data that helps New Zealand arts **organisations** of all shapes and sizes **better understand their audiences**.

Audience Atlas data is collected with robust samples and is carefully weighted using census data to ensure accuracy. It includes detailed information about audience demographics, behaviours, motivations and attitudes which enables us to accurately determine active, lapsed and potential market sizes for artforms.

Audience Atlas segments the population using Culture Segments, a universal psychographic cultural segmentation system for arts, culture and heritage organisations. There are eight segments (summarised on pages 25–26 and presented in detail in section 6), each differentiated by a deeply-held belief about the role that arts and culture play in people's lives. The system provides a powerful tool to understand and engage audiences by targeting them more accurately, engaging them more deeply and building mutually beneficial relationships.

This report is designed to be a practical, accessible tool that provides a wealth of data at your fingertips to help you put audiences at the heart of your organisation.

Audience Atlas

Culture Segments

Cover image: Seen in Dunedin, Arts Festival Dunedin. Photograph, Chris Sullivan

Audience Atlas New Zealand 2017

This is the third edition of Audience Atlas New Zealand. The first edition took place in 2011 with the second following in 2014.

The 2017 survey is based on 5,014 responses collected between 3 November and 20 December 2017, from people aged 16 years old and over. The survey sample was provided by the online panel provider Consumer Link (a Colmar Brunton company).

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

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 for further information.

Executive summary – the five key stories

The market for arts and culture in New Zealand is increasingly competitive. As always, in order to be **healthy** and **sustainable**, **arts organisations** must **focus on audiences**: how to capture, influence and respond to their changing needs and expectations and, importantly, how to build **deeper** and **more meaningful relationships** with them.

The market is larger than ever before

Not only does New Zealand have an incredibly broad market – with 97% of adults in the market for culture (see page 7 for a definition of the culture market) – this market has seen sustained growth over the past 6 years. Due to an increasing population, we now have more people in the market for arts and culture than ever before.

And we can see they're starting to engage differently with arts and culture, from how they keep up to date with what's on through to how much time and money they invest in attending and how they'd consider supporting arts and culture organisations.

But audiences are being more selective

There might be more people in the market, but they're engaging with a narrower range of art and culture in 2017 than in 2014. This is only a slight shift, but it means that some artforms have had a decline in audience size. Fortunately this isn't consistent across all artorms; for some there is stability or even growth.

We can also see that despite overall growth in market size, the pool of people spending on arts and culture has diminished in real terms. But this is off-set by the fact that those who do spend are spending more.

Taken together, these findings demonstrate that in general the market is being more considered in its arts and culture spending than in previous years.

People seek connections through art

Arts and cultural experiences are highly valued for their social benefits; the majority of the market is motivated to engage with arts and culture to spend quality time with others and be entertained. It's been well documented that increasing leisure options in the home are transforming the way people pass their time. Within the Audience Atlas study we can see a significant uplift in the amount of 'screen time' people have in their daily lives, so it remains positive that museums, galleries, live performances and arts events are still central to New Zealanders' social lives.

Support for the arts is transitioning

People clearly value arts and cultural experiences for delivering a wide range of benefits, but the way they reciprocate with philanthropic support is changing fairly rapidly.

Active members and subscribers to arts organisations often see their membership purchases as a form of support rather than a value-focused transaction, but their numbers are steadily decreasing. Volunteer numbers are following a similar downward trajectory. It may be time to re-assess the traditional subscriber and volunteer models to ensure they continue to fit into the lives of modern arts consumers.

The picture is not, however, completely one of decline: support is increasingly offered through financial donations. Overwhelmingly this is through low-commitment, one-off donations. The potential for longer-term, regular support is also growing. The proportion of regular givers has increased three-fold in three years and the market who would consider legacy giving is significant.

There is clear direction from this research on how to further activate this market. Through pledging support, people want to get closer to individual passions, they want to be part of a collective and they want to know that their contributions make a tangible difference.

Increasing digital interactions

Digital continues to transform how we consume media. It increasingly influences how the market finds out about arts and culture events and a new chapter of arts interactions is evolving.

In just three years, we've seen a significant shift away from traditional media towards online content. While traditional sources of information such as word of mouth, TV and printed newspapers remain the most common ways of finding out about arts and cultural activities, all have seen a significant decrease in influence between 2014 and 2017. Meanwhile, online listings, social networks and e-news from organisations are growing in importance. If trends continue, they are likely to overtake more traditional broadcast media as the market's most common sources to consult when making arts and culture choices.

Meanwhile, consuming arts and culture online is no longer a left-field concept. The market for this type of virtual arts experience is opening up, presenting a format that more than 1 in 5 anticipate spending more time engaging with in future. Rather than cannibalising real-world arts attendance, digital interactions are complementary and can serve to further encourage people to get out and experience the real thing.

How to use this report

This report offers a 'roadmap' of cultural attendance across the country: we both 'zoom out' to talk about the **culture sector** nationally and 'zoom in' by **artform**, audience **segment** and **region**.

The Audience Atlas study supports **deeper understanding** of the arts and culture **market** using segmentation and data that is rich and powerful.

The rest of this report is divided into 6 sections:

Section 1 – New Zealand's culture market (pages 8–29)
This section gives a broad overview of New Zealand's culture market, exploring the overall size and how this has changed over time, both regionally and nationally. We summarise attendance levels across core artform categories, how much people are spending and give an overview of Culture Segments.

Section 2 – Why people engage (pages 30–39)
The market has an array of reasons for attending the arts, as well as reasons they don't go more often. In this section we explore motivations and barriers, offering insights into how these differ within particular market groups.

Section 3 – Support for the arts (pages 40–66)
This section comprises three areas of focus: arts membership and subscriptions, volunteering and donating. For each form of support, we explore trends in engagement over time at both a national and regional level and look at which parts of the market offer greatest potential. As well as data on behaviour, we explore how philanthropic engagement can be further developed through understanding how and why people want to give time and money to the arts.

Section 4 – Reaching your market (pages 67–85)
In this part of the report we cover media consumption habits and how they have changed over time. We then look at how the market keeps up to date with what's on – at a national and regional level and by Culture Segments. We go on to explore the market's appetite for digital arts experiences.

Section 5 – Arts attendance (pages 86–144)
This part of the report covers eleven core artforms in depth, exploring trends in attendance over time, market penetration for different sub-artforms alongside each market's Culture Segments profile. This part of the report is a rich data directory for arts organisations to pinpoint the market data most relevant to them.

Section 6 – Culture Segments in focus (pages 145–186)
The final section is designed to paint a rich picture of Culture Segments. Each of the eight segments is brought to life through a detailed data portrait, drawing mostly from Audience Atlas data but also enhanced by additional data pulled through from the *New Zealanders and the Arts* 2017 study[1]. This section serves as a strategic tool that will help organisations take forward relevant insights presented throughout this report.

1 The New Zealanders and the Arts study reports on attitudes, attendance and participation in the arts. This study has been repeated every three years since 2005, with 2017 the fifth edition.

Key terms

There are a number of key terms used throughout this report:

Artform
The report covers 11 core artforms: craft and object art, visual arts, Ngā toi Māori, Pacific arts, Asian arts, Theatre, Dance, Literature, Music, Museums and Film.

Most artform groups encompass a range of genres / formats, for example, dance includes ballet, contemporary dance and 'other dance events'.

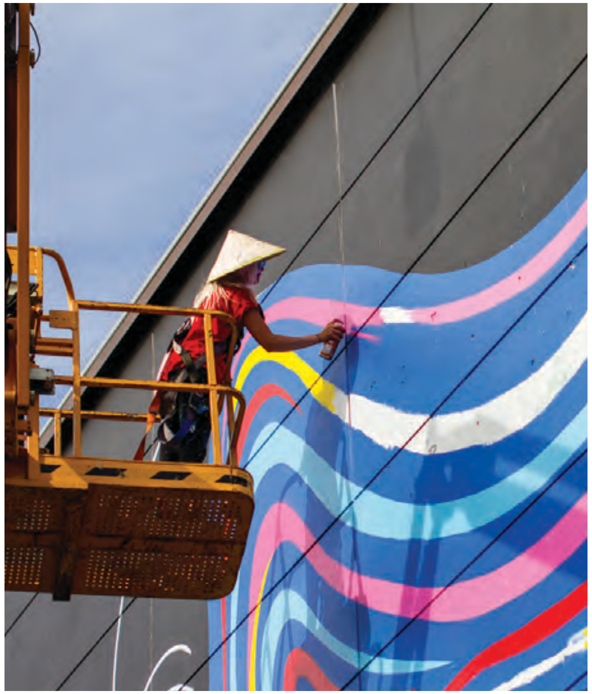
Engagement
Attendance at arts and cultural events (not participation).

Culture market
New Zealand adults aged 16 years old and over who have attended at least one cultural activity within the past three years. The overall definition of the culture market is inclusive. It's defined in its broadest sense, from attending the opera or an art exhibition, to simply going to see a movie or popular music concert.

Current market
Attended an artform in the past three years.

Lapsed market
Last attended an artform over three years ago.

Potential market
Would consider attending in the future, but hasn't previously attended.



Gina Kiel, Boon 2018 Hamilton Street Art Festival. Photo Amanda Ratcliffe

AAF18 Daniel Caesar. Photographer Eu-Lee Teh

Section 1: New Zealand's culture market

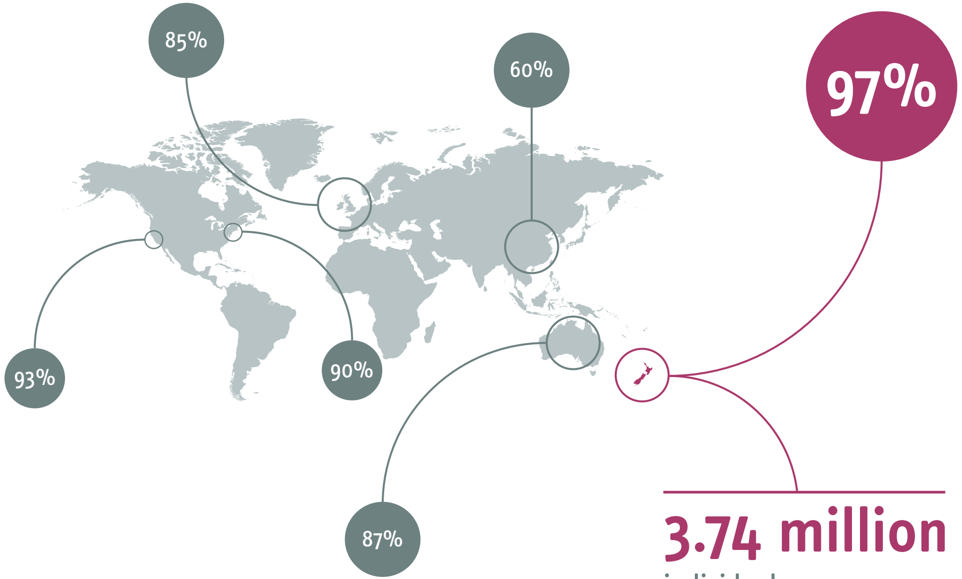
morris hargreaves mcintyre

A large active market

When it comes to an international benchmark, **New Zealand tops the league**, with **more people in the culture market** than anywhere else this study has been replicated, spanning five continents.

97% of adults, or 3.7m people, are in New Zealand's culture market. This market has **grown steadily**, due to a combination of increased activity between 2011 and 2014 and New Zealand's population growth.

Regionally, results **range from 93%** in the culture market in Gisborne up **to 99%** in Nelson.



of New Zealand's adult population (16+) are in the market for arts, culture and heritage

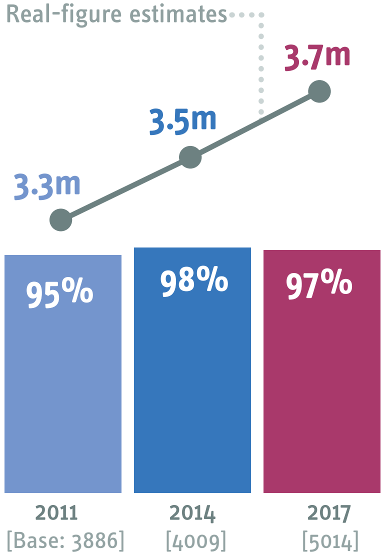
3.74 million

individuals

97% compares to 93% of adults in the San Francisco Bay Area who are in the market for arts culture and heritage, 90% in New York City, 87% in Australia, 85% in the UK and 60% in China[1].

[1] As measured in Audience Atlas San Francisco Bay Area 2017, New York City 2015, Australia 2011, United Kingdom 2010 and China 2014.

Adult population engaging with at least one cultural event / location within last 3 years

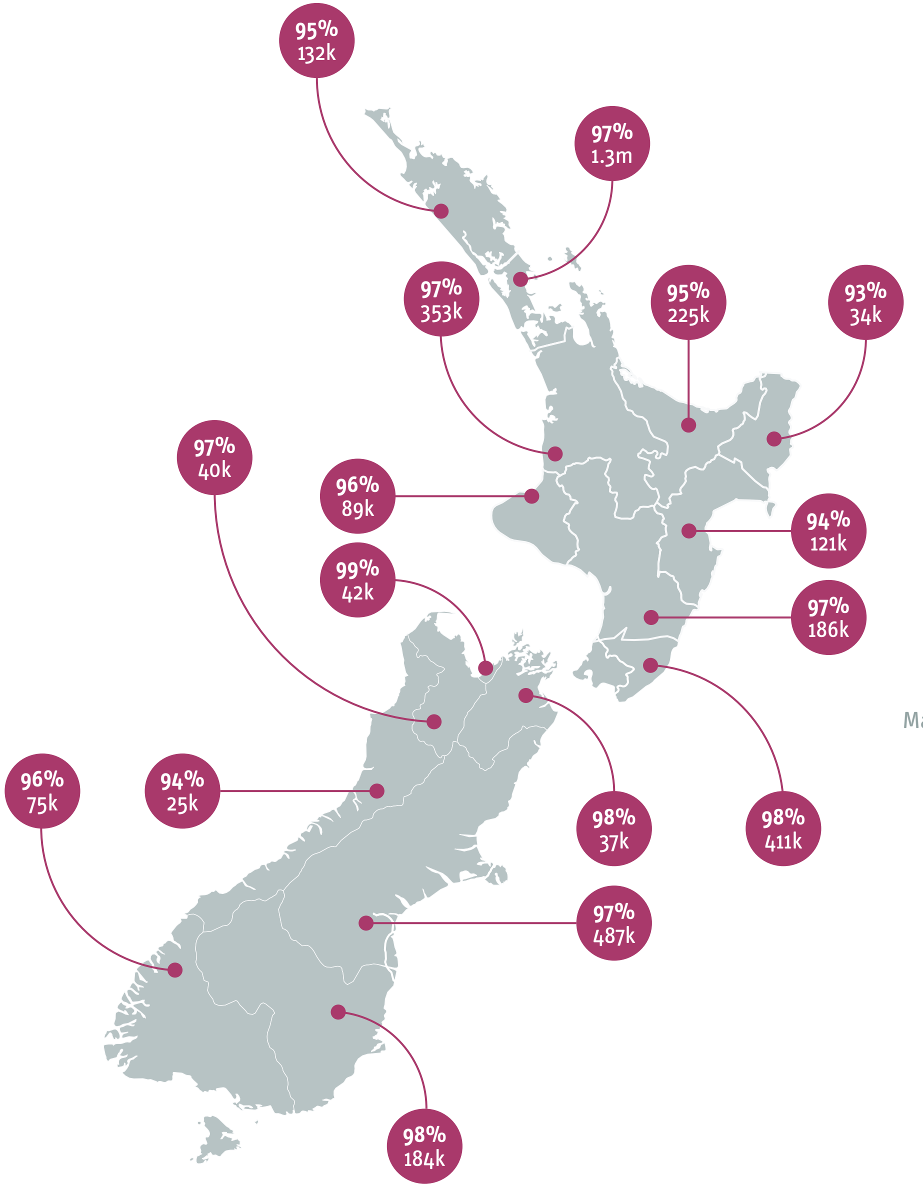


Steady growth in the size of the national culture market

Between 2011 and 2014 the estimated number of people in New Zealand's culture market grew by 6%, boosted by both an increase in activity within the market and New Zealand's population growing by an estimated 4% over this period.

Between 2014 and 2017, the number in the culture market also grew by an estimated 6% from 3.5m in 2014 to reach 3.7m in 2017 – growth that was just below the estimated 7% growth in population over this period.

Culture market by region



	Base
Northland Region	[190]
Auckland Region	[589]
Waikato Region	[668]
Bay of Plenty Region	[287]
Gisborne Region	[93]
Hawke's Bay Region	[186]
Taranaki Region	[189]
Manawatu-Wanganui Region	[287]
Wellington Region	[785]
Tasman Region	[96]
Nelson Region	[98]
Marlborough Region	[97]
West Coast Region	[94]
Canterbury Region	[583]
Otago Region	[584]
Southland Region	[188]
	[Base 5014]

Regional culture market size

	% of adult population in culture market			Estimated real figure			% change 2014 vs. 2017
	2011	2014	2017	2011	2014	2017	
Northland	96%	98%	95%	121k	127k	132k	+4%
Auckland	96%	97%	97%	1.1m	1.2m	1.3m	+10%
Waikato	93%	99%	97%	302k	334k	353k	+6%
Bay of Plenty	97%	95%	95%	210k	211k	225k	+6%
Gisborne	97%	98%	93%	34k	35k	34k	-2%
Hawke's Bay	94%	97%	94%	115k	120k	121k	<1%
Taranaki	94%	94%	96%	83k	85k	89k	+5%
Manawatu-Whanganui	95%	97%	97%	173k	180k	186k	+3%
Wellington	98%	98%	98%	379k	389k	411k	+6%
Tasman	97%	98%	97%	37k	39k	40k	+4%
Nelson	97%	99%	99%	37k	39k	42k	+6%
Marlborough	91%	97%	98%	33k	36k	37k	+5%
West Coast	93%	97%	94%	25k	26k	25k	-3%
Canterbury	91%	99%	97%	413k	463k	487k	+5%
Otago	97%	98%	98%	166k	172k	184k	+7%
Southland	95%	98%	96%	72k	75k	75k	<1%

Please see the Research Parameters on pages 187–188 for more information on population estimates.

Nelson has the highest proportion in the culture market

Regionally, the proportion of the adult population in the market for arts and culture varies from between 93% in Gisborne up to 99% in Nelson.

Canterbury has seen the most fluctuation

2017 results are steady (with no statistically significant change) across all regions with the exception of Canterbury.

In 2011, 91% of the Canterbury adult population was in the culture market, rising significantly to 99% in 2014 and showing a significant decrease (although in line with the national average) to 97% in 2017.

% significantly higher than previous edition's result

% significantly lower than previous edition's result

Because the population of Canterbury increased between 2014 and 2017, the culture market has also grown in size (by an estimated 5%), although at a lower growth rate compared to the region's population as a whole (up by an estimated 7%).

The only other region to see a significant change in the size of the culture market across the three studies is the Waikato region which saw pronounced growth between 2011 and 2014 (from 93% to 99%) compared to a slight decrease in 2017 (by two percentage points to 97%).

Steepest growth has been experienced in the Auckland region, with an estimated 1.3m adults in the culture market in 2017 this is 10% higher than the result for 2014 and in line with population growth in this area (also up by 10%).

Hinepau, Taki Rua © Philip Merry

What is driving New Zealand's population growth?

It's worth exploring New Zealand's population growth in greater depth to understand how this might impact the culture market.

Population growth has accelerated in recent years: between 2015 and 2017 the country experienced over 2% growth annually compared to less than 1% in 2011 and 2012.

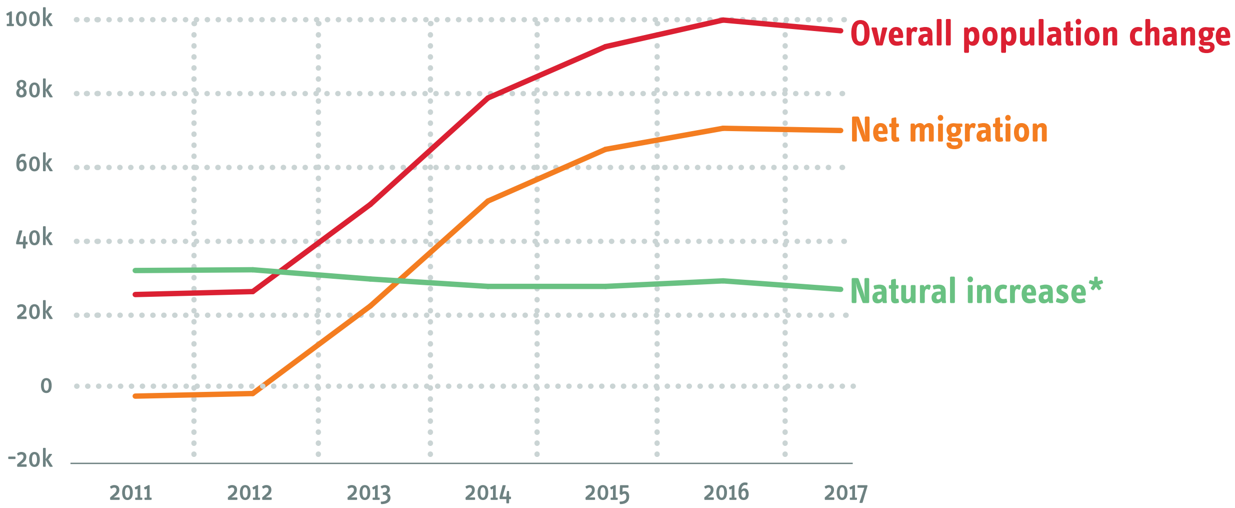
Net migration, rather than a natural increase, has fuelled this growth. In 2017 net migration showed a gain in population of 70k, compared to a deficit of 1.9k in 2011.

This net migration surplus is largely due to immigration to New Zealand. Since 2012 fewer Kiwis left for overseas and more returned home. There is now near parity with these two groups – effectively cancelling each other out – whereas traditionally New Zealand has lost around 20k citizens annually due to emigration[1].

Correspondingly, Census data shows New Zealand's population is becoming increasingly diverse.

1 https://www.stuff.co.nz/national/97684647/fact-check-new-zealand-has-the-fastest-growing-population-in-oecd

How net migration and natural increases have contributed to New Zealand's population growth



[Source Statistics New Zealand: estimated resident population change by component]

*The difference between the number of live births and the number of deaths during the year.

This is particularly pronounced in Auckland, home to over one-third of the country's population. According to the 2015 World Migration Report from the International Organisation for Migration[2], Auckland has the fourth most foreign-born population of any city internationally.

Nationally, between 2006 and 2013 the Asian population increased by 33% compared to 6% growth within the Māori population, 11% within the Pacific Peoples' population and 5% growth across all ethnicities.

2 https://www.iom.int/world-migration-report-2015

Population growth by ethnicity group (Census data)

	2006	2013	% change
All New Zealand	4.0m	4.2m	+5%
Pacific Peoples	267k	296k	+11%
Māori	565k	599k	+6%
Asian	355k	472k	+33%

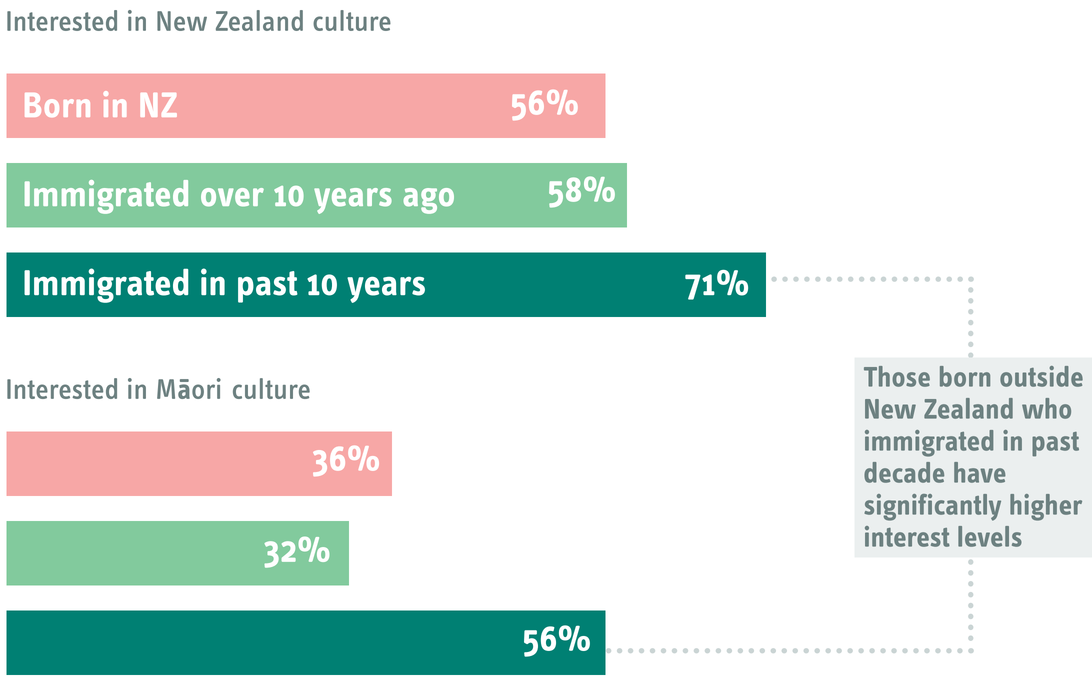
Shifts in population composition may translate into shifts in demand

The growth in New Zealand's population identifying as Asian may, in part, help explain the significant increase in attendance to Asian cultural festivals between 2011 and 2017 (explored on pages 106–109).

It's also worth considering how immigration might impact demand for New Zealand culture. A 2017 study commissioned by Museum of New Zealand Te Papa Tongarewa into the New Zealand population's attitudes and interest towards celebrating Matariki highlighted some key differences between those born in New Zealand and those who immigrated to the country.

Interest levels in New Zealand culture and Māori culture were significantly higher within the population who had immigrated in the past 10 years compared to those who immigrated longer ago or the population born in New Zealand.

Interest in New Zealand culture and Māori culture



Morris Hargreaves McIntyre worked with Museum of New Zealand Te Papa Tongarewa on this study in October 2017 using a nationally representative online survey method.

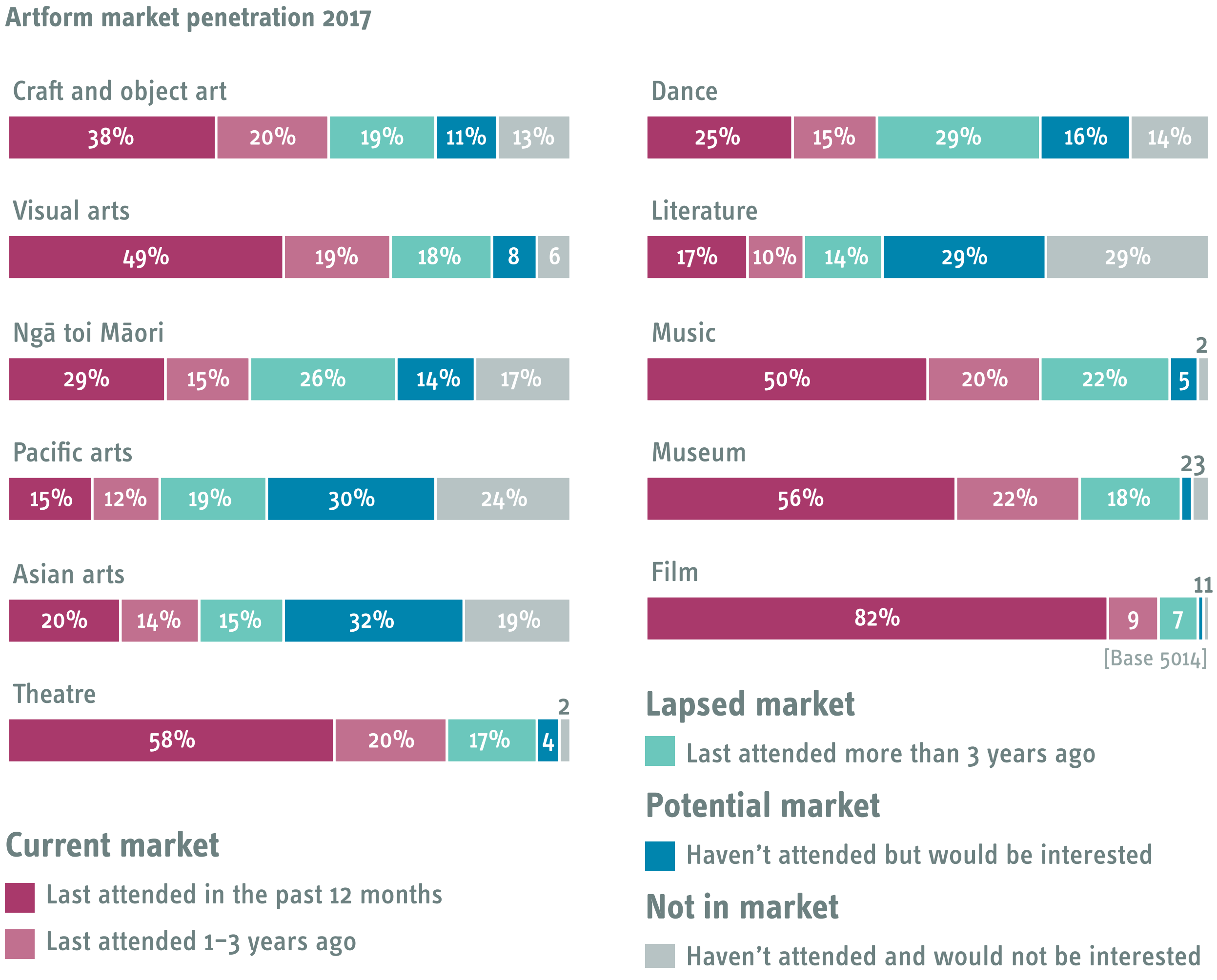
[Base 691, 220, 106]

Growing numbers attending

Between 2011 and **2017**, **all artforms** saw an **increase** in the **number** of people attending in the past three years (the **current market**), although **between 2014 and 2017**, **growth** has **slowed** or occasionally reversed for some artforms.

This **shift** in **cultural attendance** is linked to the **market** having **less breadth in its consumption**: more people are attending a narrower selection of artforms than was the case in 2014.

Coupled with this, people are being more selective in their spending: **fewer people** are **spending but those who do are spending more**, so spend on the whole is actually up.



Film, theatre and museums have highest artform market penetration

The film artform enjoys the largest current market of the 11 artforms included within this study, followed by theatre and museums. The majority of the culture market have attended each of these artforms at least once within the past three years.

A sizeable potential market for literature and Pacific arts

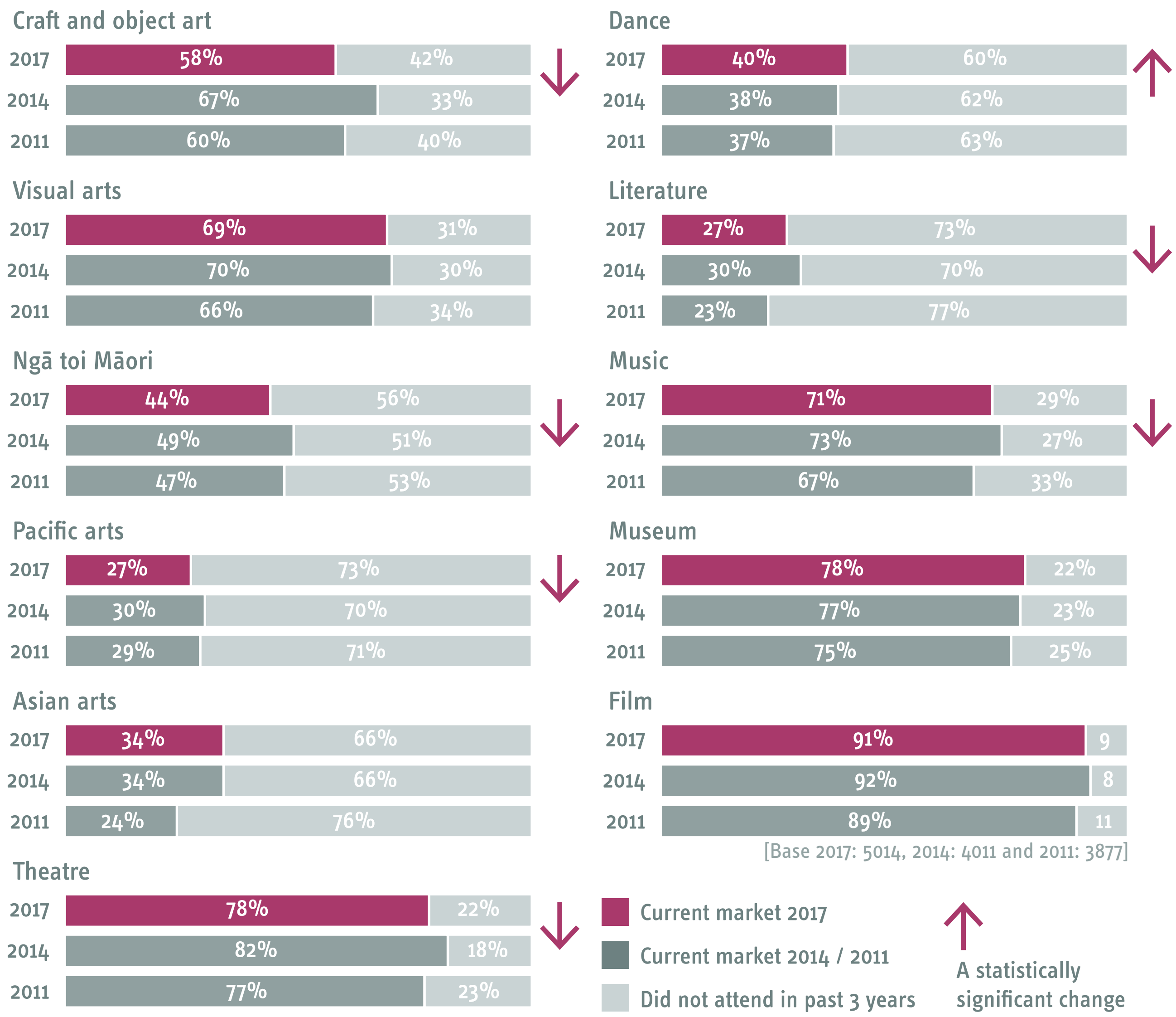
While literature and Pacific arts have the smallest current markets, they also have the largest *potential* markets with around three in ten in the culture market never having attended this type of activity but interested in doing so in future.

Smaller proportions in the current market in 2017 across key artforms...

Exploring the proportion in the current market across artforms over time shows a mixed picture:

- Museums and dance have enjoyed incremental year-on-year growth. For the dance market this is a statistically significant increase in 2017.
- Visual arts, Asian arts and film have seen

Percentage of culture market in current market: trends over time



stability in 2017 following significant increases in the proportion in the current market in 2014.

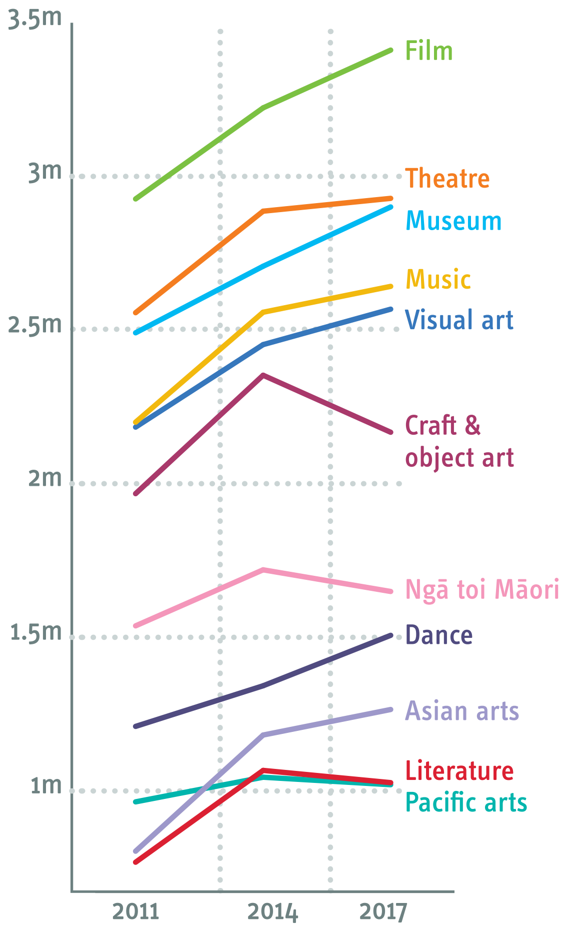
- Craft and object art, Ngā toi Māori, Pacific arts, theatre, literature and music have all seen a significant decrease in the proportion in the current market in 2017.
- For craft and object art, Ngā toi Māori and Pacific arts, the proportions in the current market in 2017 are lower than both 2014 and 2011, while theatre, literature and music results are higher in 2017 than six years ago.

... But all artforms experienced growth in real terms over the past six years

When we consider this data in real terms using population estimates, we can see that due to the increased size of the population and therefore the market for culture, there are more people in each artform's current market in 2017 than was the case in 2011. In addition, only for craft and object art, literature, Ngā toi Māori and Pacific arts is the estimated number in the current market smaller in 2017 than 2014.

Compared to 2014, dance saw the steepest rate of growth in the estimated number of people in the current market (up 12%).

Estimated number in current market



Estimated number in current market: change over time

	Estimated no. of adults in current market (millions)			% change	
	2011	2014	2017	2014 vs 2017	2011 vs 2017
Film	2.93	3.22	3.41	6%	17%
Theatre	2.56	2.89	2.93	1%	15%
Museum	2.49	2.71	2.90	7%	16%
Music	2.20	2.56	2.64	3%	20%
Visual art	2.18	2.45	2.57	5%	18%
Craft and object art	1.97	2.35	2.17	-8%	10%
Ngā toi Māori	1.54	1.72	1.65	-4%	7%
Dance	1.20	1.34	1.51	12%	24%
Asian arts	0.80	1.18	1.27	7%	57%
Literature	0.77	1.07	1.03	-4%	34%
Pacific arts	0.97	1.05	1.02	-2%	6%

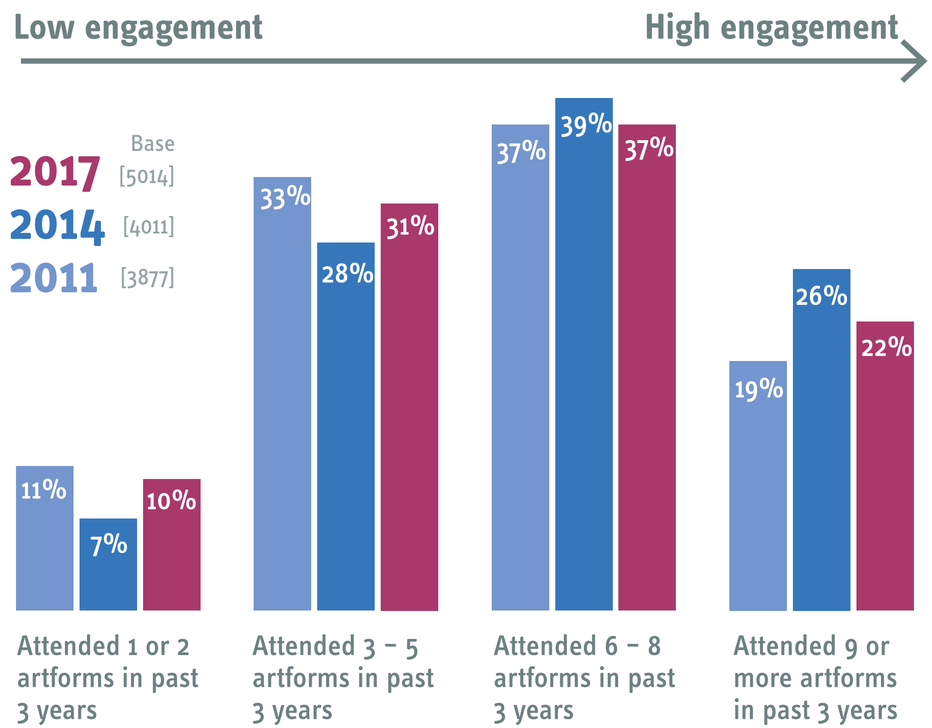
When we take a longer view, comparing 2017 to 2011, we can see that Asian arts have seen the highest level of overall growth in the size of the current market (up by 57%). Meanwhile Ngā toi Māori and Pacific arts have seen the lowest growth rates (7% and 6% respectively), both below the rate of growth in the culture market overall during this period (13%).

More people, narrower engagement

The shifts described above effectively paint a picture of a larger pool of people attending a slightly narrower range of artforms than was the case in 2014.

When we explore how many different artforms the market has attended in the past three years, we can see that in 2017 the proportion of the market attending one or two artforms in a three-year period has significantly increased (10%, compared to 7% in 2014) while the proportion who are highly engaged, attending nine or more artforms in a three-year period, has significantly decreased (22%, compared to 26% in 2014). The 2017 'range in attendance' results have returned to a similar landscape as revealed in 2011 data.

Range of artforms engaged with in past 3 years



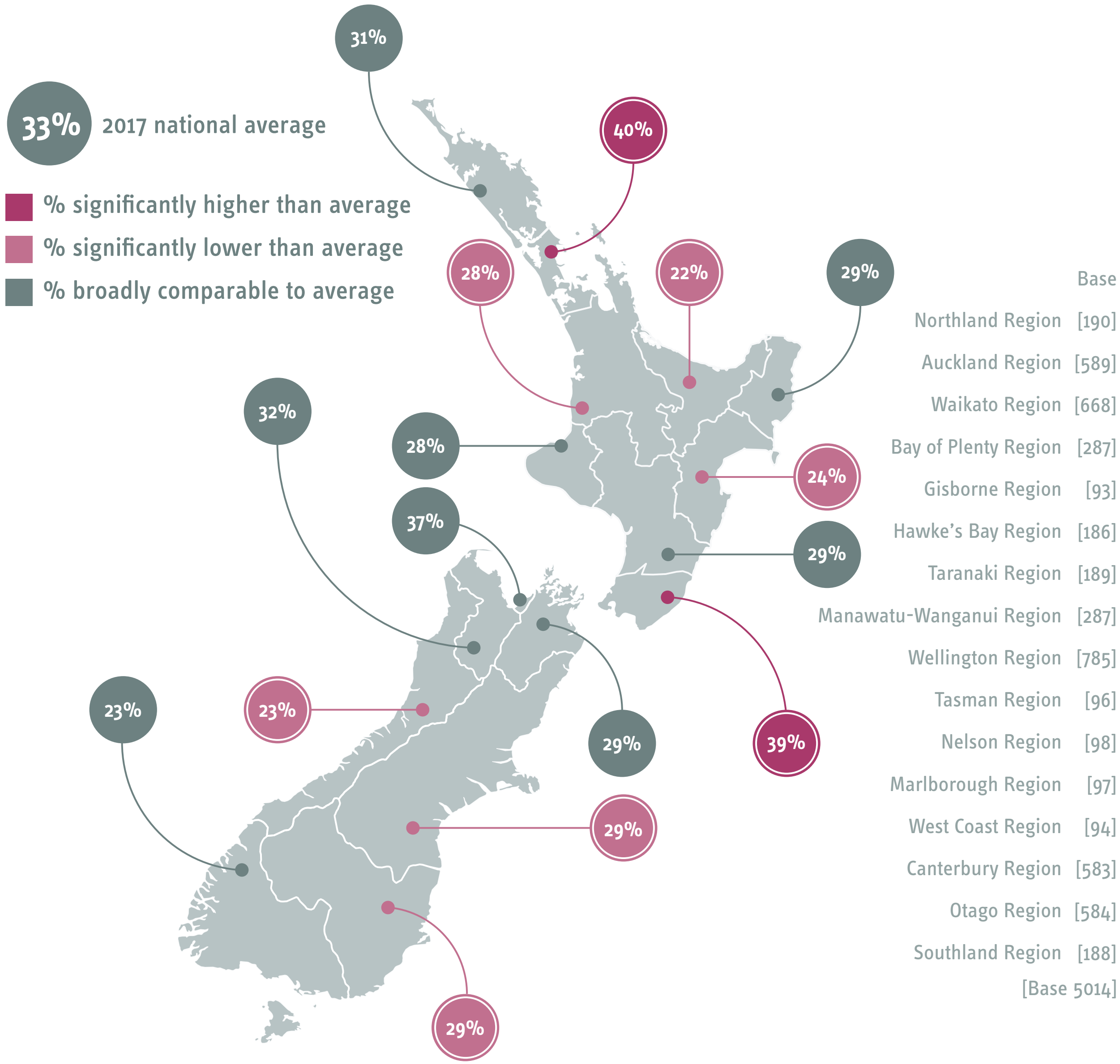
Spending less frequently

If people are engaging with fewer artforms, it makes sense that they're spending money less frequently. In 2017, one-third of the market had spent money on arts and culture activities in the previous four weeks, a significant decrease on the equivalent result of 39% in 2014 and 40% in 2011.

Auckland and Wellington markets most likely to spend

The Auckland and Wellington markets are significantly more likely to spend in a given month than the national average, while the Waikato, Bay of Plenty, Hawke's Bay, Canterbury, West Coast and Otago regional markets are significantly less likely to spend. Higher propensity to spend corresponds with higher earnings. In 2017, average weekly wages in Auckland are 10% above the national average and 12% higher in Wellington[1].

Percentage who have spent on arts and culture in the past 4 weeks by region



1 New Zealand Stats. https://www.stats.govt.nz

Asian audiences spend more on attending

Those identifying as Asian are significantly more likely than average in 2017 to spend in a given month: nearly half have (48%), taking average monthly spend per person within this group to around $30 more than the national average ($43).

Those who identify as having a disability spend less often

Another group where spend is significantly different is those identifying as having a disability who are significantly less likely than average to spend in a given month (27% compared to 33%).

Propensity to spend on cultural activities in a given month is fairly consistent across other demographic groups; there are no significant differences here when it comes to children in the household or age.

The current literature market and those who actively support the arts spend more

Nearly 6 in 10 (59%) in the current literature market spend money on culture and arts activities in a given month, some way ahead of Pacific arts in second place with half of this artform's current market spending in a given month.

Those who actively support the arts through volunteering, subscribing or donating are around twice as likely to spend in a given month than those who don't support in these ways.

Fewer people spending more

In 2017 we've seen a decrease in the number of people spending in real terms: 33% equates to 1.2 million people, 10% fewer spenders than in 2014 (see detail overleaf). But the amount per spender is up by 44%, averaging $153 in a typical month and giving a total estimated spend on cultural activities as $2.5 billion annually.

-10%

Estimated decrease in number of people spending on arts and culture in a given month between 2014 and 2017

$2.5 billion

Estimated total annual spend in 2017 on arts and culture by New Zealand's culture market

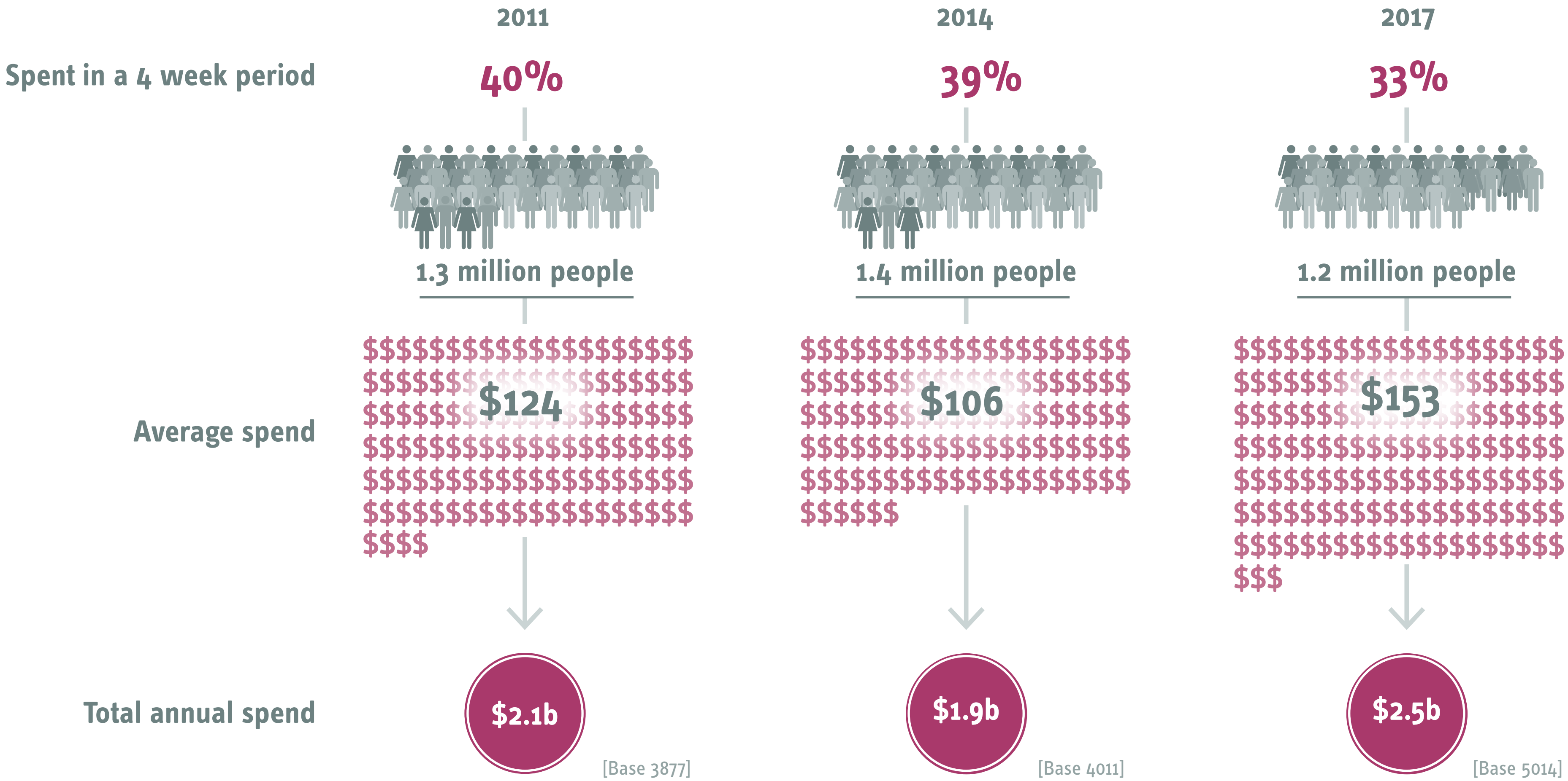
+27%

Increase in estimated total spend by the market in 2017 compared to 2014

Despite there being fewer people spending compared to previous years, the higher average amount in 2017 means that even after we adjust for inflation, total spend in 2017 is 27% higher than 2014 and 9% higher than 2011.

While this landscape may lead to an assumption that arts and culture in New Zealand is becoming more exclusive, it may equally reveal an increase in the supply of free-to-access arts and culture, meaning that people don't need to spend as much.

Spend on arts and culture activities



Per capita spend within culture market on attending culture and arts activities in past 4 weeks

Per capita spend not yet recovered to 2011 levels

2017 spend on admissions and tickets is stable compared to 2014 ($29) but lower than in 2011 ($35). Secondary spend on refreshments, programmes and souvenirs is up on 2014, but again has not recovered to 2011 levels.

Highest spend for the Auckland market

Looking at regional differences, Auckland is by far the biggest spender: on average $63 per person. This is more than three times the average amount spent in the lowest spending regions of the West Coast and Southland.

Average regional spend per capita within culture market (ranked highest to lowest)

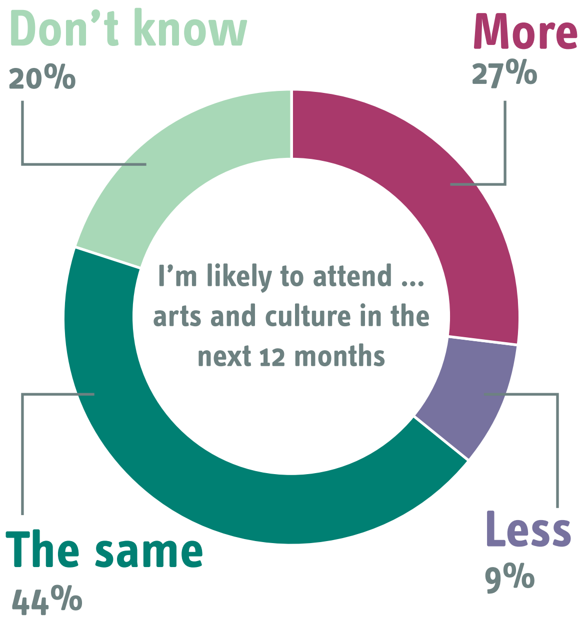
	Average spend
Auckland	$63
Marlborough	$46
Wellington	$43
Nelson	$39
Hawke's Bay	$38
Manawatu-Whanganui	$33
Northland	$31
Waikato	$31
Bay of Plenty	$30
Gisborne	$28
Canterbury	$28
Taranaki	$25
Tasman	$22
Southland	$21
West Coast	$20

An appetite for more

If future intention is anything to go by then New Zealand's culture market has healthy potential: three times the proportion anticipate attending more arts and culture in the year ahead (27%) than the proportion anticipating doing less (9%).

It's encouraging that, despite having the smallest proportion in the culture market, Gisborne had the highest proportion of people intending to do more in future (37%, see detail overleaf).

Results across different demographic groups are fairly consistent, although those who identify as having a disability were significantly more likely than average to expect to do less in the year ahead (12% compared to 9% for the market as a whole).



[Base 5,014]

Performers at Pacific Day Out 2016.
Photography by Grant Apiata, courtesy of Auckland Council.

Future attendance at arts and culture activities and events

'I'm likely to attend … arts and culture in the next 12 months'

	2017 national average	North Island – by region								
		Northland	Auckland	Waikato	Bay of Plenty	Gisborne	Hawke's Bay	Taranaki	Manawatu-Whanganui	Wellington
More	27%	30%	30%	22%	22%	37%	21%	25%	31%	28%
Less	9%	7%	9%	10%	11%	2%	12%	10%	11%	8%
The same	44%	44%	45%	40%	47%	32%	40%	45%	39%	45%
Not sure	20%	19%	16%	28%	20%	29%	27%	21%	19%	19%
Base	[5014]	[190]	[589]	[668]	[287]	[93]	[186]	[189]	[287]	[785]

	2017 national average	South Island – by region						
		Tasman	Nelson	Marlborough	West Coast	Canterbury	Otago	Southland
More	27%	19%	28%	26%	16%	25%	28%	23%
Less	9%	15%	11%	15%	7%	7%	8%	8%
The same	44%	50%	44%	37%	39%	48%	44%	38%
Not sure	20%	17%	17%	22%	39%	20%	20%	31%
Base	[5014]	[96]	[98]	[97]	[94]	[583]	[584]	[188]

% significantly higher than national average in 2017

% significantly lower than national average in 2017

Segmenting New Zealand's culture market

Culture Segments is an international, sector specific **segmentation system** for arts, culture and heritage organisations. The main aim of Culture Segments is to provide arts organisations with a shared language for understanding audiences, helping **target** them **more accurately**, **engage** them **more deeply** and build **stronger relationships**.

Through enhanced understanding of audience needs, Culture Segments helps organisations design appropriate programming, craft combinations of products and services, make bespoke offers and transmit differentiated messaging. It helps profile current and potential markets to identify opportunities for growth.

Culture Segments spans all demographics and behaviours, but it takes understanding further: by exploring why audiences attend, what their expectations are and their core values and needs, organisations can make confident, informed strategic decisions. The ultimate aim is to increase audience engagement.

The defining characteristics of the eight Culture Segments are:

Essence

Discerning, Confident, Independent, Arts essential

Essence consider the arts and culture essential to their very being. They're confident and knowledgeable and look for deeply emotional connections. High quality culture is their primary concern and they veer away from the mainstream, considering it unsophisticated.

Expression

Community, Nurturing, Generous, Committed

Expression are open and full of enthusiasm with varied and eclectic tastes. They enjoy activities that help them connect with and share experiences with others. They like to be sure that everyone is welcome to join in and enjoy things, and as such put a high price on inclusivity.

Affirmation

Self identity, Considered and Diligent, Time well spent

Affirmation make considered, measured decisions, seeking endorsement before making choices. One of many leisure options, they embrace culture as important and worthwhile – it's part of their commitment to personal wellbeing. They recognise opportunity for self improvement as well as quality time with others and like to build memories of these special experiences.

Enrichment

Tradition, History and heritage, Nostalgic, Learning

Enrichment tend to be lovers of history – things that have stood the test of time command their respect. They know what they enjoy, are independently minded and exert their right to be cautious. It's not that new things hold no worth, but Enrichment will look for the thread that links them to what went before.

Stimulation

Active, Experimental, Ideas, Social

Stimulation are an active group who love adventure and live for the moment. They seek out new experiences to live a varied life and keep ahead of the curve. They are all about big ideas and are looking for something 'out of the ordinary'. But they also attend cultural events for the social experience.

Release

Busy, Prioritising, Ambitious, Escape

Release are looking to escape and unwind from the stresses of everyday life. They can feel a little under siege from different pressures on their time. These conflicts may be reality, but often it is the feeling of being time poor rather than the actual reality of not having any time. They'd like to go to more, but it isn't always easy.

Perspective

Self-sufficient, Focused, Reflective, Fulfilled

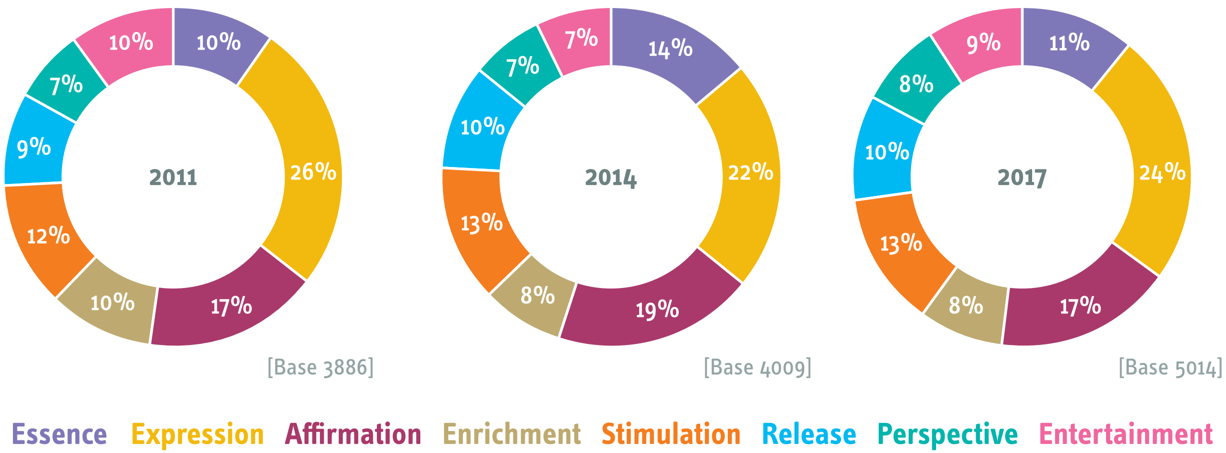
Perspective are very self-sufficient and don't rely on others for fulfilment. They prefer to make their own discoveries and are happy doing their own thing, driven by their own agenda. They focus on one or two existing interests they find satisfying and rewarding and have a low appetite for expanding this repertoire.

Entertainment

Mainstream, Popularist, Leisure, Fun

Entertainment tend to see culture as being on the periphery of their lives. Their occasional visits are likely to be for mainstream events or days out. Leisure time is for fun, entertainment and escapism not intellectual stretch. If they do attend it will be socially motivated but their engagement is typically among the lowest of all segments.

Culture Segment profile of New Zealand adults in the market for arts, culture and heritage



Culture Segments are a running theme throughout this report, helping arts organisations understand which segments are most valuable for relevant artforms or which offer most return on investment when it comes to fundraising and membership development.

For a deeper dive into Culture Segments, see section 6 where there's a comprehensive summary of each of the eight segments, including how to reach them through marketing communications.

A relatively stable Culture Segments profile nationally

In 2017 the Expression segment represents the largest portion of the market, with around one-quarter of people in the New Zealand culture market.

The 'shape' of the profile has remained similar over time, with Expression consistently the largest segment nationally followed by the Affirmation and Stimulation segments.

Because Culture Segments is based on people's deep-seated values, which are typically slow to change and stable in different contexts over time, it's unlikely that a person's segment will change, so a similar national profile across the three studies is to be expected.

There have, however, been changes for some segments when 2017 data is compared to 2014, with most of these shifts bringing the 2017 profile closer to the one captured in 2011. Compared to 2014, the proportion of Expression, Perspective and Entertainment increased in 2017 while the proportion of Essence and Affirmation decreased.

Regional differences consistent

The tables overleaf highlight where regional differences are significant compared to the national profile. Reflecting the national picture, Expression is also the largest segment at a regional level – only Southland is the exception to this rule with equal proportions of Expression and Affirmation.

Several regional patterns have persisted in 2017. As was the case in 2014, the Auckland region has a significantly higher proportion of Expression compared to the national average; Canterbury has a significantly lower proportion, while the Otago region continues to have significantly higher proportions of Perspective. In most cases the differences highlighted overleaf were also detected previously, although were not statistically significant in 2014. For example, Auckland also had a lower than average proportion of Entertainment in 2014, Manawatu-Whanganui had a higher proportion of Entertainment, Stimulation was also underrepresented in Marlborough and overrepresented in Wellington, while the Waikato also had higher proportions of Release.

Regional Culture Segments profiles

	2017 national average	North Island – by region								
		Northland	Auckland	Waikato	Bay of Plenty	Gisborne	Hawke's Bay	Taranaki	Manawatu-Whanganui	Wellington
Essence	11%	19%	10%	8%	11%	9%	12%	15%	9%	12%
Expression	24%	25%	28%	21%	26%	22%	24%	17%	27%	22%
Affirmation	17%	14%	19%	15%	14%	19%	17%	15%	14%	16%
Enrichment	8%	11%	7%	8%	8%	9%	11%	7%	9%	7%
Stimulation	13%	10%	13%	15%	12%	9%	8%	15%	12%	17%
Release	10%	7%	9%	13%	11%	13%	8%	9%	7%	10%
Perspective	8%	8%	7%	9%	7%	5%	9%	11%	9%	7%
Entertainment	9%	7%	6%	11%	12%	13%	11%	11%	13%	9%
Base	[5014]	[190]	[589]	[668]	[287]	[93]	[186]	[189]	[287]	[785]

% significantly higher than national average in 2017

% significantly lower than national average in 2017

Regional Culture Segments profiles

	2017 national average	South Island – by region						
		Tasman	Nelson	Marlborough	West Coast	Canterbury	Otago	Southland
Essence	11%	17%	15%	10%	15%	11%	11%	11%
Expression	24%	30%	18%	23%	23%	18%	23%	18%
Affirmation	17%	11%	12%	14%	19%	16%	16%	18%
Enrichment	8%	9%	11%	14%	6%	9%	9%	9%
Stimulation	13%	10%	12%	5%	11%	15%	13%	14%
Release	10%	3%	15%	14%	6%	11%	7%	10%
Perspective	8%	11%	6%	15%	11%	11%	12%	8%
Entertainment	9%	9%	10%	6%	10%	9%	8%	11%
Base	[5014]	[96]	[98]	[97]	[94]	[583]	[584]	[188]

% significantly higher than national average in 2017

% significantly lower than national average in 2017

Pataka Māori Court © Auckland War Memorial Museum Tamaki Paenga Hira

Section 2: Why people engage

morris hargreaves mcintyre

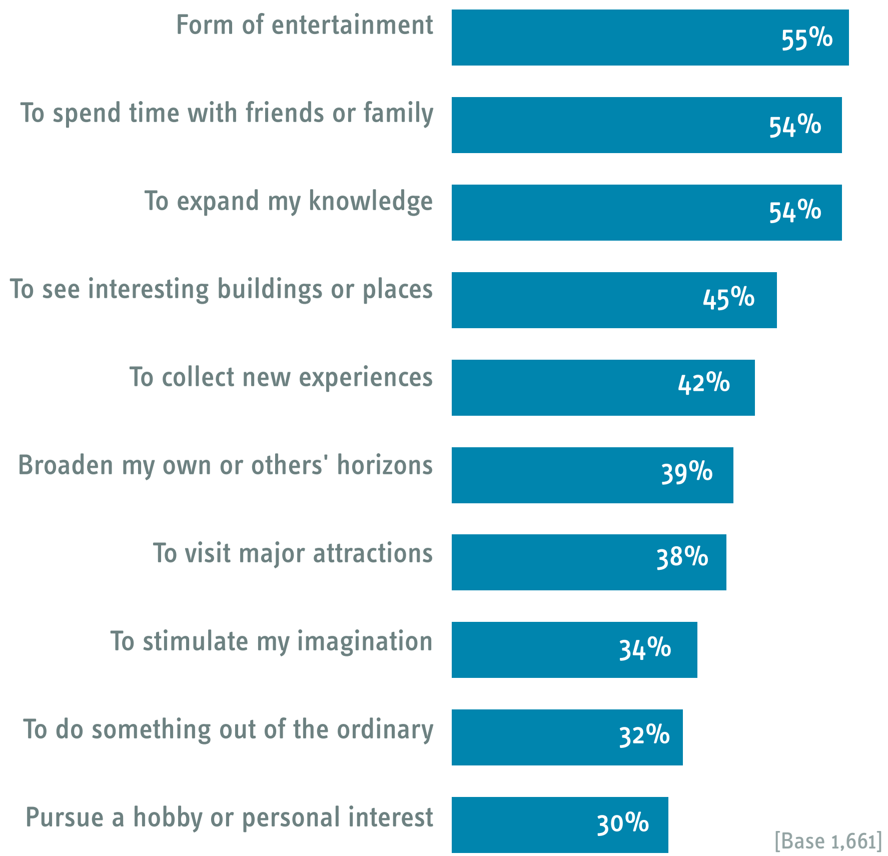
Informative and social experiences

The market has an **array** of **motivations for attending the arts**. While there are some universal perceived benefits - informative and social experiences being the primary ones – understanding **underlying variations** when it comes to different market groups is a **cornerstone** to **effective audience development**. The same can be said for **barriers**. Once we understand how these manifest differently across the market, we can develop **targeted strategies** to **reduce** these barriers accordingly.

Entertaining, informative, social experiences

Passing the time in a pleasant way, spending quality time with others and expanding knowledge are key reasons behind cultural engagement, motivating over half of the market to attend.

Most common reasons for engaging with arts and culture



Other popular reasons, for around four in ten, include seeing interesting places, collecting new experiences and broadening horizons.

A more complex set of motivations for less mainstream artforms

The prominence of certain motivations and how they are distinct across different artform markets is an important consideration when communicating the benefits of attending.

In particular there is a pattern of those in the current market for less mainstream artforms – namely literature, Pacific arts, dance and Ngā toi Māori – having a wider and perhaps more complex range of underlying motivations.

- The current **literature market** is the most likely of any other artform market to be made up of people seeking a communal or shared experience (34%) or to fulfil professional interests or involvement (22%).
- Those in the current market for **Pacific arts** are the most likely to want their imagination stimulated through attending the arts (42%), reflection and contemplation (35%) or to want to better define their own cultural or personal identity (27%).
- Developing children's interest (35%) and spending time with friends and family (61%) play more of a role in motivating the current audience for **Ngā toi Māori** to engage with culture than other artform audiences.
- The current market for **dance**, on the other hand, is more likely than any other artform market to be motivated to collect new experiences (51%), escapism (33%) and to get 'food for the soul' (34%).

Different segments have distinct motivational drivers to engage

If we look at this data through the lens of Culture Segments, we see that each segment has a distinct set of drivers for engaging. These drivers dictate the benefits that they seek and, ultimately, their expectations and needs once through the door. Understanding these differences is therefore a key tactic for fully developing an artform or organisation's market.

The table overleaf ranks the top five main motivations for engaging with arts, heritage and culture across the eight segments. There are some commonalities: spending time with friends or family and / or finding a pleasant or entertaining way to pass the time are more or less universal drivers across the different segments.

Once we go beyond these more social motivations, we see some distinct differences:

- Escapism is something that is most likely sought by members of the Essence and Stimulation segments.
- Most segments see value in the arts and culture for developing their own knowledge, however for the Enrichment segment it's less about gaining new knowledge and more about broadening horizons. Broadening horizons is also key for encouraging Essence and Expression to attend.
- Doing something out of the ordinary is something that the Affirmation group is more likely to look for from their arts experiences.
- Collecting new experiences is a key feature among reasons to attend for Expression, Stimulation and Affirmation.
- Taking in interesting buildings and spaces is a main reason to attend for Enrichment, Release and Perspective. Perspective, alongside

Ranking of top five main drivers for cultural engagement by Culture Segment

	Essence	Expression	Affirmation	Enrichment	Stimulation	Release	Perspective	Entertainment
To spend time with friends or family	1	1	1	1	3	2	1	2
For a pleasant form of entertainment or way to pass the time	2	2	2	2	1	1	2	1
To expand my knowledge	3	3	3		2	5	3	5
To develop children's interests				4		3		3
To broaden my own or others' horizons	4	5		3				
To see interesting buildings or places				5		4	4	
To collect new experiences		4	4		5			
For escapism – to get away from everyday life and recharge my batteries	5				4			
To visit major attractions							5	4
To do something out of the ordinary			5					

Entertainment, are also motivated to attend the arts by the prospect of visiting major attractions.

- Enrichment, Release and Entertainment are more likely to be encouraged to attend by the benefits the arts can offer for younger audiences. All three of these segments have lower than average arts engagement and perhaps 'displace' the benefits onto others, rather than always seeing personal gain in engaging.

See page 146 onwards for more detail on Culture Segments and why they choose to attend arts and culture events.

Younger adults have narrower motivations

Those aged 16–34 have a narrower range of reasons for attending the arts than older audiences. For example, 48% would be motivated to attend by the prospect of expanding their knowledge, compared to 56% of those aged 35–64 and 64% of those aged 65 or over.

Another example of older audiences seeing more value in culture is the importance those aged 65 and over place in culture as a way to feel part of a community, motivating one-third compared to 18% within younger audiences.

Māori audiences are particularly motivated to attend

Those in the culture market identifying as Māori typically see a wide range of benefits to engaging and are often more likely to have selected each motivation than other ethnicity groups. Those identifying as Asian, on the other hand, have a much narrower set of motivations driving their attendance.

For example, attending the arts for a pleasant form of entertainment or way to pass the time motivates 60% of those identifying as Māori compared to 31% of those identifying as Asian. Or seeking reflection and contemplation through attending the arts, a driver for 37% of those identifying as Māori compared to 19% of those identifying as Asian.

Distinct differences by region

There are also some key differences by region. For example, the Northland market is more than twice as likely as the Canterbury market to see the benefit of communal arts experiences (32% compared to 13%); the Waikato market is generally less motivated to engage, often significantly less likely to have selected each statement than average; while those in Auckland are significantly more likely to seek ‘food for the soul’ from attending.

Understanding barriers to attendance is crucial for developing audiences

Understanding motivations for attending the arts only tells half the story. Exploring why people *don’t* go (or don’t go more often) is also a crucial foundation to developing audiences and understanding the value they place in arts experiences.

This insight helps reveal the myths or narratives that organisations or artforms need to dispel. It helps illuminate the strategies they need to develop in order for people to unquestioningly understand the value of attending and how this outweighs any obstacles to their engagement.

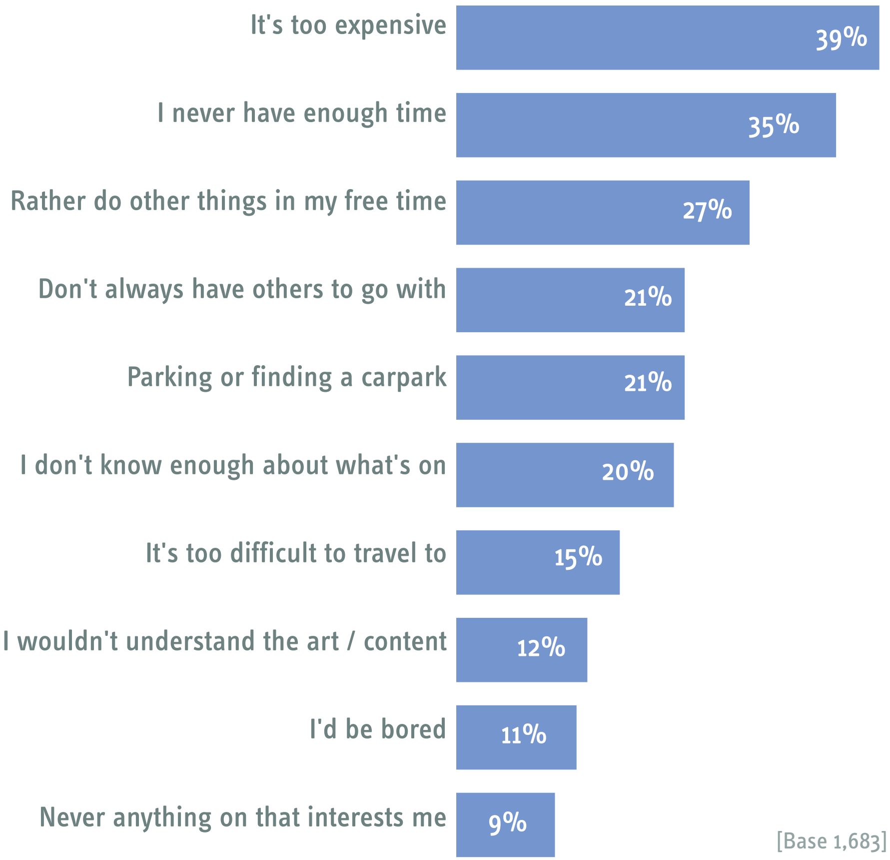
Barriers to attending centre on cost, time and lack of relevance

Around four in ten in the culture market cite cost as a reason for not doing more (39%). Time is also a key barrier, given as a reason for over one-third (35%).

A preference for other leisure activities is a barrier for over one-quarter (27%) of the market.

Other common reasons – affecting around one-fifth of the market – include not having others to go with, parking or simply not knowing enough about what's on.

Most common reasons for not engaging more with arts and culture



Time and cost are nearly always the most common reasons for not doing more. In reality, most people have both the necessary leisure time and disposable income to attend the arts. And most of those people with leisure time and disposable income choose to spend their time and money doing things that take just as long or longer and cost just as much or more than attending the arts. A meal in a restaurant, a night in the pub, ten pin bowling, a rugby match are all preferred by many over arts and culture. It is often untrue that they lack the time or money. Instead they choose all of these other activities over the arts. The question is why do they do that? The answer is that they perceive that these things will offer them better or more guaranteed *value* for their time and money than the arts. They need convincing that the arts offers them better value for their time and money than what they are currently spending it on.

Audience Atlas data shows that 98% of the culture market have eaten out in the past 3 years, 88% have shopped for leisure, 53% have attended a live sports event as a paying spectator, 56% have been to rural shows or fairs and 51% have attended food and drinks festivals – all clearly offering strong competition for the arts.

Barriers within different artform markets vary significantly

As with motivations for attending the arts, barriers manifest differently across different artform markets. It is useful for arts organisations to consider how to vary activities or messages designed to develop new audiences accordingly.

For example, the most common barrier of expense is more prominent within the current market for **Māori performance / kapa haka** (45%), **musical theatre** (44%) and **literature festivals** (45%). Whereas cost is of lowest concern within the current market for a **rock or pop music festival** (33%) and **hip hop** concerts (24%).

A worry that they wouldn't understand the art or content was the most prominent barrier within the current market for **museums**, **films, cabaret, street performance** and **circus** (all 12%), whereas those in the current **literature** and **Pacific arts** markets were less likely to cite this (both 8%).

Not having other people to go with was a greater barrier for those in the current market for **'other' types of dance event, contemporary electronic music / sound art events** and **hip hop** concerts (all between 26% and 27%), while those in the **jazz / blues** current markets were least likely to feel that this prevents them from engaging more often (17%).

Reasons not to engage further enhance our understanding of Culture Segments

As with motivations, exploring results by Culture Segments reveals distinct differences that can be factored into any targeted development strategies.

- A preference for doing other things in their free time is more of a barrier for the Perspective and Entertainment segments than other groups.
- Not always having others to go with features in the top main barriers for most of the segments, but is absent from the Essence group. This makes sense for a culturally confident and independent audience that will often rather go alone than miss out.
- Affirmation reveals itself as one of the most price sensitive segments, with price being the number one barrier, whereas lack of time is more common as the key barrier elsewhere.
- Keeping on top of everything that's on prevents Essence, Affirmation and Stimulation from doing more.
- A concern that they wouldn't understand the art or content (a key barrier for Release and Entertainment), that they'd be bored (Entertainment), or simply that they're not a creative person (Perspective), are features within groups that typically attend the least.

Ranking of top five main barriers for cultural engagement by Culture Segment

	Essence	Expression	Affirmation	Enrichment	Stimulation	Release	Perspective	Entertainment
I never have enough time	1	1	2	1	1	1	3	2
I'd rather do other things with my free time	3	2	4	2	2	2	1	1
It's too expensive	2	3	1	3	3	3	2	4
I don't know enough about what's on	4		3		4			
I don't always have other people to go with		5	5	4	5		4	
Parking or finding a carpark		4				4		
It's too difficult to travel to	5							
I wouldn't understand the art / content						5		5
I'd be bored								3
I have physical / special access needs that make visiting difficult				5				
I'm not a creative person							5	

Fewer perceived barriers for those identifying as Māori

Nearly one in five people in the culture market identifying as Māori did not relate to any of the barriers for engaging with culture and the arts presented in the survey, around double the average, suggesting there are fewer perceived barriers to attending within this audience.

Families are time-pushed

Those with children in the household were significantly more likely to state that they never have enough time for the arts and culture (44% compared to 29% among those without children at home). Lack of time is actually more of a barrier than expense for families.

Parking a particular problem for the Auckland market

Over one-third (34%) of the Auckland culture market cited problems parking their car as a reason for not attending more often, significantly higher than average (21%).

Younger adults more likely to worry they wouldn't understand the art or not have others to go with

Feeling 'out of place' at arts and culture experiences is more of a barrier for younger adults aged 16–34 who are significantly more likely than average to feel that they wouldn't understand the content (17%), that 'these types of places' aren't for them (9%) or simply that they wouldn't have others to go with (26%).

Time constraints and parking are more of a concern for older audiences

Not having enough time is a particular barrier for those aged 35 –64 (38%), while the most common barrier for the more senior audience aged over 65 is parking (30%).

One in five of those identifying as having a disability cite physical access

Among those identifying as having a disability, 21% state that physical / special access needs prevent them from attending more often. Elsewhere this group is generally less likely than average to perceive other barriers.

Cinema: Lady Mayor © Ngā Taonga, 2018

Getting closer to the art

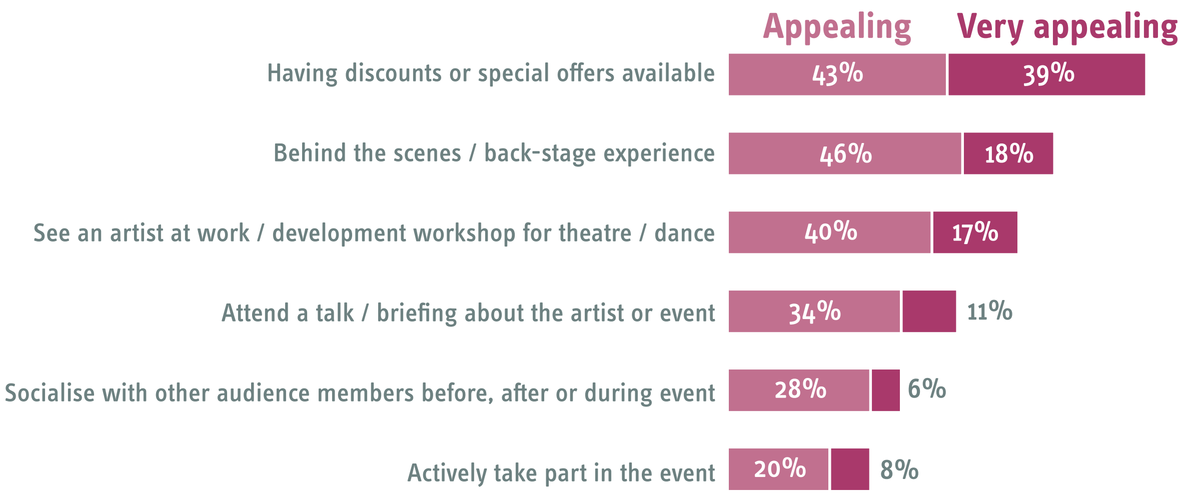
With cost a primary barrier to attending arts and culture more, it's unsurprising that over eight in ten in the culture market find discounts or special offers appealing.

Beyond this more transactional offer, getting behind the scenes or more involved in artistic processes generates high interest. The majority of the culture market find this type of offer appealing, and this aligns to the common motivation of audiences seeking to expand their knowledge through their arts and culture attendance.

Audience participation has more niche appeal. In fact more of the market finds this unappealing than they do appealing, so this type of offer will need to be carefully positioned and targeted in order to find the right market.

The current **literature** market has a particularly strong appetite for wrap-around events programming, in most cases showing strongest interest in these types of offers. The only exception here is with seeing behind the scenes / back-stage, where it's the current **dance** market which has strongest interest.

Appeal of different event formats as part of a cultural experience



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Younger audiences are more likely to want to actively take part

Actively taking part in an arts event has higher appeal for younger adults aged 16-34 who are more than twice as likely to be interested in this event format (37%) than those aged 65 or over (16%). Going behind the scenes also has stronger appeal for the younger market, appealing to 68% compared to 57% among the more senior audience.

Asian audiences are particularly keen on events that get them closer to art

In all cases, those identifying as Asian are more likely than average to find wrap-around events appealing. For example, 44% find actively taking part in an event or socialising with other audience members at an event appealing, significantly higher than the market as a whole (28% and 34% respectively).

Knee Dance choreographed by Douglas Wright for Limbs@40, Tempo Dance Festival 2017. Photographer Amanda Billing

Section 3: Support for the arts

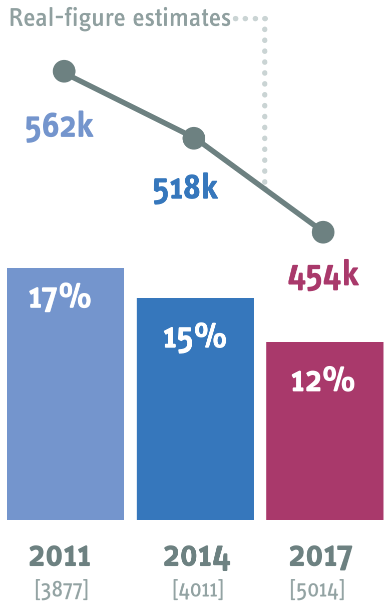
morris hargreaves mcintyre

Joining and subscribing continues to fall

Compared to 2014, fewer people in the national culture market in 2017 have an **active membership** or **subscription** to an arts organisation, continuing a **downward trend**. This is not, however, the case in all regions. The main centres, for example, Auckland and Wellington show stability while memberships in Canterbury saw one of the steepest declines.

The Essence, Expression and Stimulation segments are consistently over-represented in the active membership group, however both **Essence** and **Stimulation** are the segments where the **drop-off** has been **most pronounced**, perhaps suggesting membership packages are less aligned to their needs in recent years.

Current friend or subscriber of arts / cultural organisation



An estimated 19% decrease in current members or subscribers

The number of adults in the culture market with at least one current membership or subscription to an arts, cultural or heritage organisation is at a 6-year low. In 2017, 12% of the culture market held an active membership compared to 17% in 2011. This equates to an estimated 19% decrease in real terms.

-12%

Estimated decrease in people in the culture market with at least one current membership / subscription between 2014 and 2017

-19%

Estimated decrease in people in the culture market with at least one current membership / subscription between 2011 and 2017

The literature, dance and Pacific arts current markets most likely to be members

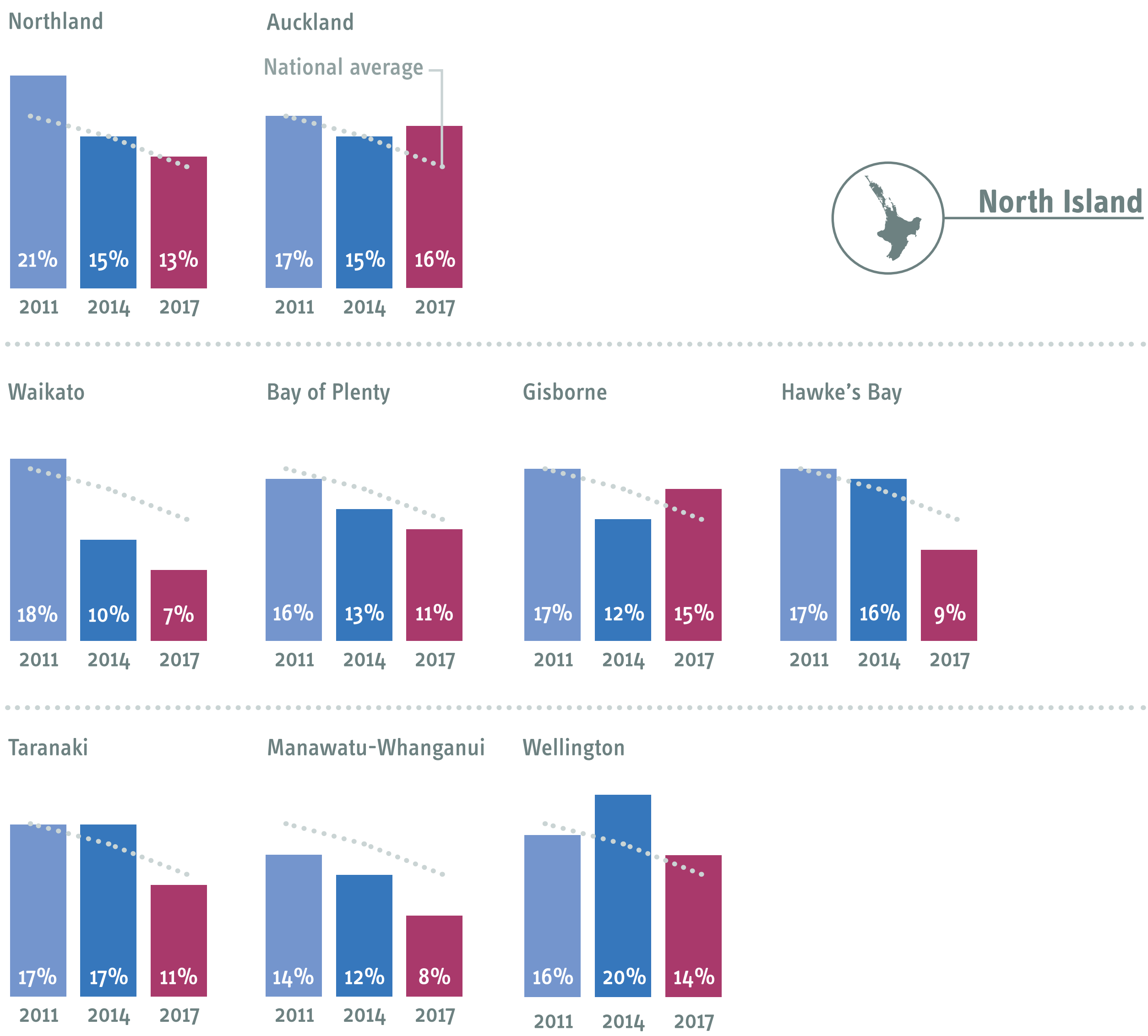
Those in the current market for **literature** events are the most likely to have an active membership or subscription to an arts, cultural or heritage organisation (26%), followed by the **Pacific arts** and **dance** current markets (both 19%). These artform markets are also more active when it comes to other forms of support (see the following chapters for more detail).

> **Those with a current membership or subscription are more likely to…**
>
> **Be older**: 20% of those aged 65 or over have a current membership, more than double the proportion of under 35s (9%).
>
> **Have a disability**: 17% of those identifying as having a disability have a current membership compared to 12% of those with no reported disability.
>
> **Be Asian**: 17% of those identifying as Asian have a current membership, significantly above the national average.
>
> **Be in Auckland**: At 16%, Auckland has a significantly higher than average proportion of the market identifying as a current member-subscriber.

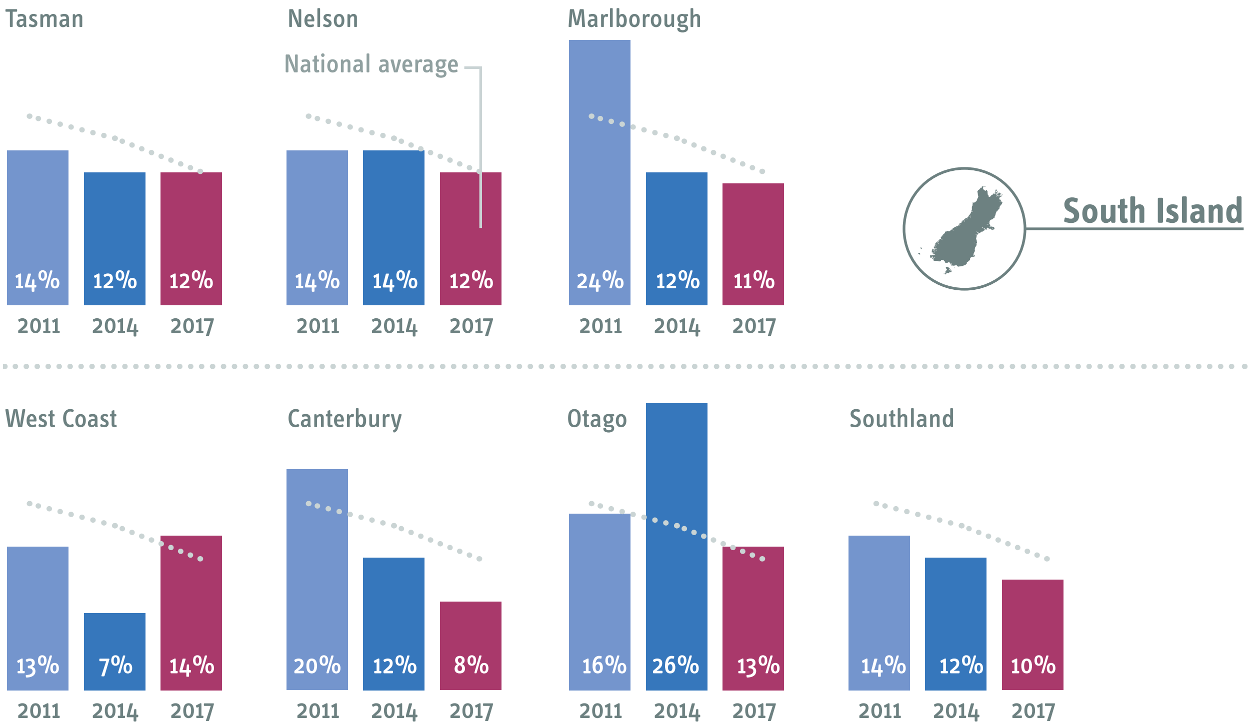
A mixed picture regionally

Despite a downward trend nationally, the regional picture is mixed. While a downturn has been felt in most regions, compared to 2011, subscription levels in 2017 are fairly stable in Auckland, Nelson and Tasman and have returned to 2011 levels following a significant change in 2014 for Wellington and the West Coast.

Current subscriber, member or friend to an arts, cultural or heritage organisation – by region over time



Current subscriber, member or friend to an arts, cultural or heritage organisation – by region over time



Essence and Expression are core to the member-subscriber market

Compared to the culture market as a whole (shown overleaf), the Essence, Expression and, to a lesser degree, Stimulation segments are all over-represented within the current member-subscriber group. This makes sense: these three segments engage more frequently and with a broader range of artforms than other segments.

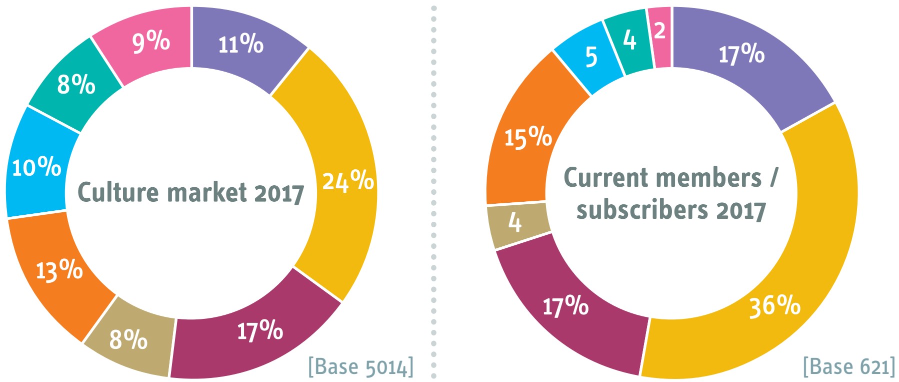
Representation from the Affirmation segment mirrors levels within the wider culture market (both 17%). For the other segments, half the proportion or less are represented within the current member group compared to the wider market.

Essence and Stimulation have seen a stronger downturn

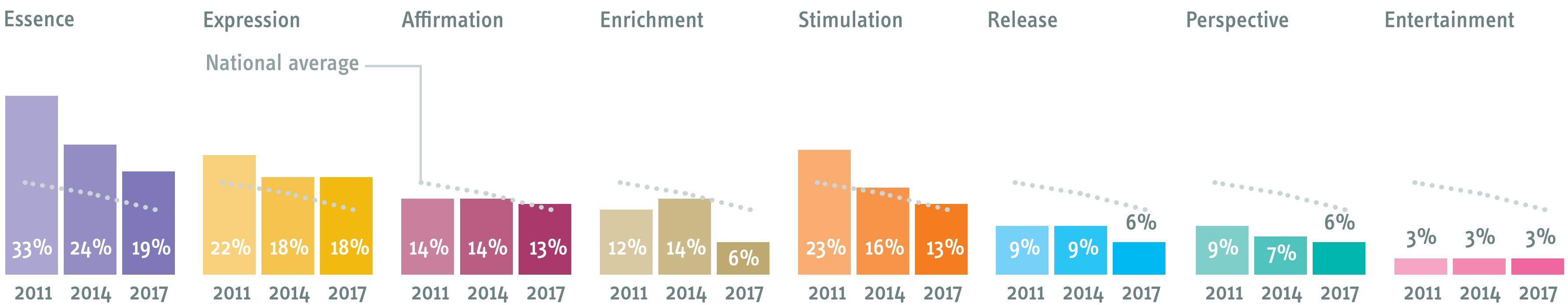
Despite Essence being the segment most likely to have a current membership, there has been a particularly pronounced downward trend within this part of the market: 19% of Essence holds a current membership in 2017 compared to 33% in 2011. A similar, although less extreme pattern, is seen within the Stimulation segment.

Elsewhere, the market is more steady. The proportion holding active memberships within the Expression segment, for example, has decreased to a lesser degree by four-percentage points between 2011 and 2017, while levels within Affirmation have been consistent over the three studies. It's worth highlighting that the Essence and Stimulation segments are both at the head of the 'curve of innovation' – we can describe them as innovators or early-adopters who are relatively open to risk in their arts and culture consumption. The downturn within these particular groups may set the scene for a more gradual move away from member and subscriber models.

Culture Segment profile



Current member, subscriber or friend of an arts, cultural or heritage organisation – by Culture Segment



A shift away from traditional subscription models

Internationally there is certainly evidence to support a general downward trend in subscription models within the performing arts. A 2015 Oliver Wyman report for the League of American Orchestras '*Reimagining the orchestra subscription model*' reveals that between 2004 and 2014, subscription packages decreased by 24% across 45 orchestras in the USA[1]. This fall has only partially been offset by a recovery in single ticket purchases and increased revenue per subscription package.

A similar picture is reported in the Theatre Communications Group's annual '*Theatre Facts*' report, with the number of subscription packages decreasing by 10% between 2013 and 2016 across 131 theatres in the USA[2].

Although the Audience Atlas survey does not get to the granular level of detail to ask what artform subscriptions and memberships relate to, it is perhaps telling that between 2011 and 2017, the drop off is more pronounced within the current markets for dance, theatre and music than it is for the museums and visual arts markets. The 2015 Wyman report points to three key considerations that put these shifts into context:

Shorter attention spans

'As more entertainment options emerge to compete for everyone's attention, consumers are becoming increasingly reluctant to commit to any single option ... [they] are increasingly demanding a variety of content and flexibility in scheduling – the move toward an "on-demand" world.'[3]

Customisation

'... consumers are becoming used to vendors learning from their choices and responding with personalised products and tailored recommendations.'[4]

Higher reward expectations for loyalty

'To counteract consumer "snacking" behaviour ... vendors have been moving away from transaction-orientated approaches to relational strategies ... as a result, consumers have begun to expect more perks and a better experience in exchange for their loyalty.'[5]

Taking members on a journey

In the context of declining members and subscribers in the New Zealand market, it's useful to better understand *why* people join in the first place. This can then inform enhancing member offers, positioning and audience relationship strategies.

If we compare perceived benefits of membership between non-members alongside current members, this provides clues on how to both attract and retain members, which may well require different approaches.

Saving and flexibility attract new members ...

The top perceived benefits for joining or subscribing among non-members are all transactional in focus: saving money (32% felt this could persuade them to join), gaining flexibility (31%) and access to exclusive offers and events (26%).

1 Wyman, Oliver (2015): http://www.oliverwyman.com/content/dam/oliver-wyman/global/en/2015/nov/Reimagining-the-Orchestra-Subscription-Model-Fall-2015.pdf
2 http://www.tcg.org/pdfs/tools/TCG_TheatreFacts_2016.pdf

3 Wyman, Oliver (2015: 20)
4 *ibid*
5 *ibid*

The aforementioned *Reimagining the orchestra subscription model* report concludes that although orchestras have reasons to be concerned about a decline in traditional subscribers, there is an optimistic outlook for those organisations that can evolve and respond to changes in consumer behaviour and preference. The report recommends a tiered 'relational' membership engagement model that emphasises a sense of belonging and provides experience-related perks that aren't necessarily linked to how often people attend.

… But organisations should concentrate on more community-minded benefits in order to retain them

While transactional-focused benefits are also important to the current member group, a significantly higher proportion place value in memberships as a vehicle for supporting arts / culture generally (55%) or a specific organisation (52%). Many also value communal benefits through the opportunity to meet like-minded people (37%).

So while saving money might be the hook into a membership or subscription scheme, ensuring members and subscribers feel valued as part of a community and that they're clear how their fees support an organisation should help retain them.

Perceived benefits in joining / subscribing to arts, culture or heritage organisation

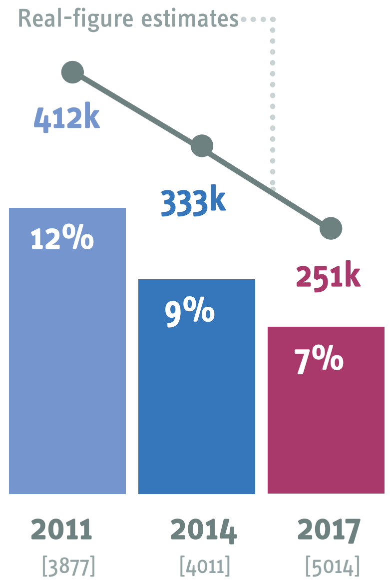
Gifts of time decrease

The number of people in the market who have recently **volunteered** in support of the arts has **decreased significantly** over the past six years.

The market's **interest** in this form of support is, however, **fairly strong**. More people would consider volunteering for the arts for the first time than would rule out ever doing so.

It may simply be the case that arts, culture and heritage organisations need to **re-adjust volunteer opportunities** to meet increasing demands for **specific**, **flexible** and **shorter** forms of support.

Volunteered for the arts in past 12 months



Steady drop in the number of people volunteering

Levels of recent volunteering have seen a steep, steady decline over the three studies. In 2017, 7% of the culture market indicated that they had volunteered time in support of an arts, cultural or heritage organisation in the previous 12 months, equivalent to 251k individuals. This is estimated to be 39% fewer recent arts volunteers than in 2011.

-25%

Estimated decrease in people in the culture market who've volunteered in support of arts, culture or heritage between 2014 and 2017

-39%

Estimated decrease in people in the culture market who've volunteered in support of arts, culture or heritage between 2011 and 2017

A sector that traditionally relies on volunteers

This steep downward trend is concerning in the context of a sector that has traditionally relied on volunteers. It's estimated that volunteers more than double the arts, culture and heritage sector's workforce on a FTE basis.[1]

1 https://www.jbwere.co.nz/assets/Uploads/JBWereNZCauseReport- March2017-DigitalVersion.pdf

It's therefore increasingly important to understand which groups in the market are most likely to support through volunteering and where this downward trend has been most pronounced.

The artform markets where joining and donating are more common also attract more arts-volunteers

When we look at which current artform markets have the highest proportion of people who have recently volunteered in support of the arts, we see a similar pattern to other forms of support, with the current market for **literature** events (17%), **Pacific arts** (13%) and **dance** (11%) all containing a higher proportion of recent arts volunteers.

This makes sense given the level of crossover between ways of supporting organisations: one-third of current member-subscribers have volunteered for the arts in the past year. This also helps explain the similarities in profiles when it comes to demographics, summarised below.

Those who've volunteered for arts, culture and heritage recently are more likely to…

Be older: 10% of those aged 65 or over have volunteered recently, double the proportion of under 35s (5%).

Have a disability: 11% of those identifying as having a disability have volunteered recently compared to 6% of those with no reported disability.

Be Asian: 9% of those identifying as Asian have supported the arts in this way in the past 12 months compared to 7% of those identifying as Māori, 7% among Pākehā and 2% for those identifying as a Pacific Islander.

Live in Otago: the culture market in the Otago region is significantly more likely than the national average to have volunteered recently (11%, compared to 7% respectively).

Northland, Taranaki and Canterbury experienced steepest decline

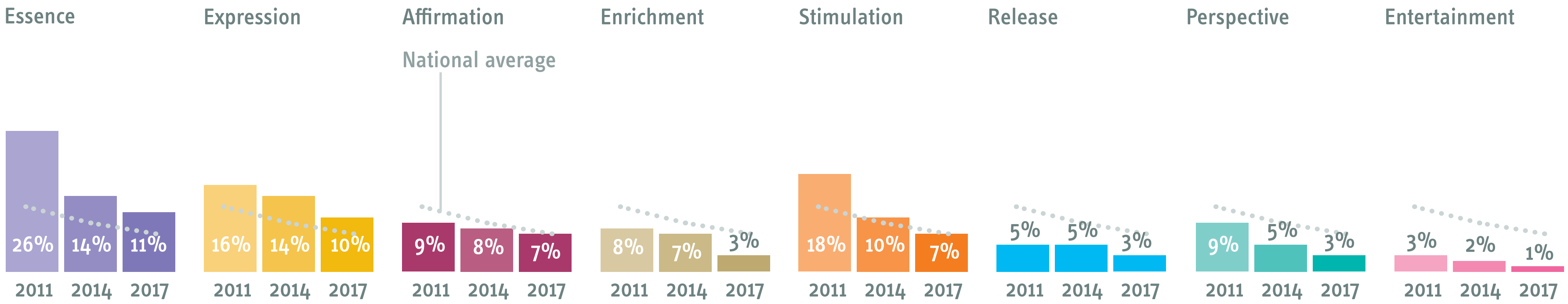
Compared to six years ago, the proportion of the market who have recently volunteered decreased most in the Northland, Taranaki and Canterbury regions – less than half the proportion had recently volunteered in 2017 compared to 2011.

For some regions, however, this type of support is more consistent. In the Wellington region, for example, there has been no change across the three studies – traditionally volunteer levels have been below the national average in Wellington, while in 2017 they now match the figure for New Zealand overall (7%).

The Tasman and West Coat regions have also enjoyed stability here, and both have higher proportions of recent arts volunteering than average in 2017 (11% and 12% respectively).

Volunteered time to an arts, cultural or heritage organisation in past 12 months – by region over time

Volunteered time at an arts, cultural and heritage organisation in past 12 months – by Culture Segment



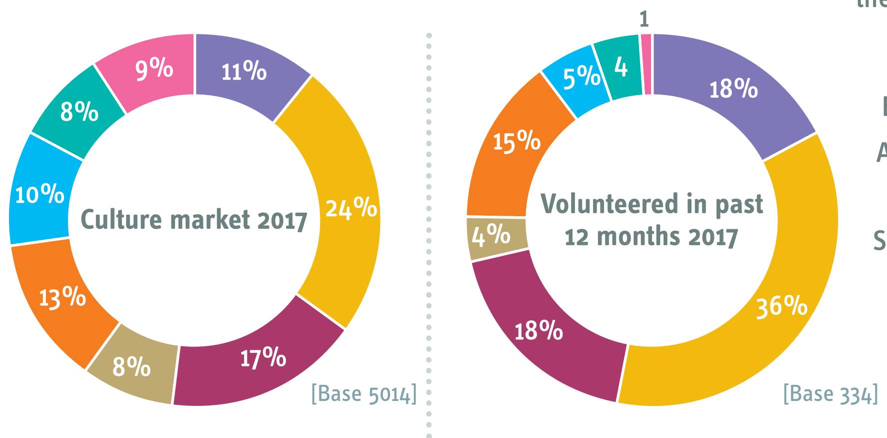
Recent volunteering most common among Essence and Expression

Across all three editions of the Audience Atlas study, members of the Essence and Expression segments are more likely than average to have volunteered in support of the arts. This consistency gives strong direction on where arts organisations are best to direct their volunteer recruitment efforts.

However no segments escaped the downward trend: recent volunteering was at an all-time low across all eight groups.

Following a similar pattern as the results for membership, the decrease in recent volunteering is most pronounced within the Essence and Stimulation segments: less than half the proportion have recently volunteered in 2017 compared to six years ago.

Culture Segment profile



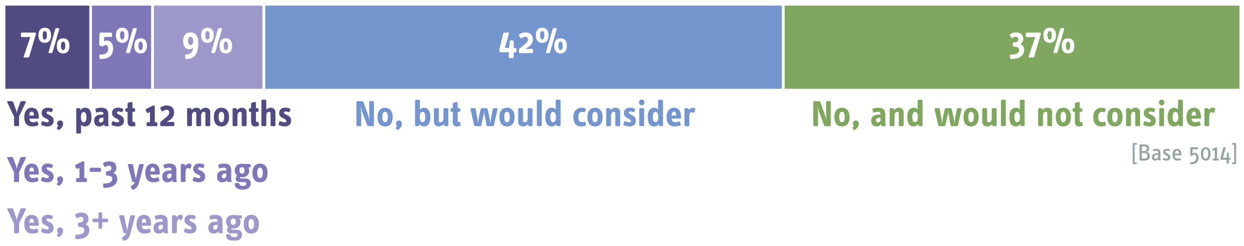
Percentage point difference volunteered in past year vs. the culture market

A strong foundation for development

While the downward trend is perhaps concerning, New Zealand does traditionally have a strong ethos of volunteering. In 2016, the Charities Aid Foundation ranked New Zealand as having the sixth highest engagement level in volunteering globally[1].

We can also see that interest in volunteering for arts, culture and heritage is fairly high. In fact, people are more likely to consider volunteering for the arts than they are to rule themselves out of doing this in future.

Volunteered time to help arts, cultural or heritage organisations



The rise of micro-volunteering

Wider trends point to a rise in demand for 'micro' or 'episodic' volunteering opportunities. If arts and culture organisations can increasingly meet this demand, this may help unlock latent interest in giving support in this way and potentially even reverse the downward trend. There is evidence that increasingly New Zealanders are becoming more selective in the volunteer work that they do; they want to volunteer for shorter amounts of time and seek specific roles that align to their personal strengths and interests. A 2017 report into the state of volunteering in New Zealand by Volunteer New Zealand summarises this trend:

'There is much competition for leisure time and the community benefits of volunteering are not always understood. The needs and expectations of volunteers are changing, particularly among the younger generation. While lack of time is often given as a reason for not volunteering, probably more important is a change in priorities. People appear to be less willing or able to give a long-term commitment to volunteering, and are constantly looking for new and meaningful experiences.'[2]

These conclusions chime with some of the core motivations people have for supporting the arts (explored in more depth on pages 62–63) which suggest that in order to secure more volunteers, organisations should:

- Put effort into finding out what audience members' personal passions are and offer a range of opportunities to align to these.
- Ensure that any 'call to action' for volunteers highlights a communal spirit.
- Celebrate the impact their volunteers have through clearly communicating how they do, or could, make a difference.

1 https://www.cafonline.org/docs/default-source/about-uspublications/ 1950a_wgi_2016_report_web_v2_241016.pdf

2 http://www.volunteeringnz.org.nz/wp-content/uploads/Overview-Paper-on-the-State-of-Volunteering.pdf

Those who've never volunteered for arts, culture and heritage but are interested are more likely to...

Be Pacific Islander: Just 2% of those in the culture market who identify as Pacific Islander have volunteered for the arts recently. However there's significant potential here, 56% have never at any stage done this but express interest.

Be younger: Nearly half (46%) of those aged 16 –35 have never volunteered for the arts in the past but would consider it.

Have children at home: 45% of those with children under 16 living at home have never volunteered for the arts but express interest, significantly higher than those from adult-only households (40%).

WORD Christchurch © Photographer John Collie

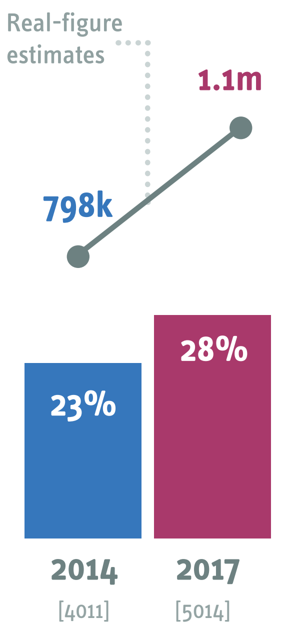
Growth in financial support

While volunteering has decreased, in nearly all regions **more people** are choosing to **support** the **arts financially** as a **charitable cause**.

Over one million people have donated money to the arts over the past three years, offering an **estimated $95 million**.

Most frequently this is given via **one-off donations**, with in-venue collection boxes a particularly effective method at reaching people. **Regular giving** is a less common but **growing** form of support, while there is **significant scope** to **develop legacy giving** in the market.

Supported arts financially in past 3 years



Please note that due to changes in the way this question is asked, data from 2011 is not comparable.

+32%

Estimated increase between 2014 and 2017 in people donating money to the arts, culture or heritage in the past three years

Increasing individual giving for the arts

In 2017, 28% of people in the culture market donated money to arts, cultural or heritage organisations through regular giving or one-off donations in the past three years. This represents a significant increase on the equivalent result of 23% in 2014 and means we can estimate that the number of arts donators has increased by 32% in real terms.

The arts are an increasingly established cause to support

The number of arts, culture and heritage charities grew by nearly 25% between 2000 and 2017, double the rate of growth in charities as a whole across New Zealand[1].

Philanthropic support is core to the sector's sustainability. Compared to other charitable cause sectors, New Zealand's arts, culture and heritage sector has a high reliance on philanthropy in its income mix, accounting for

1 https://www.jbwere.co.nz/assets/Uploads/JBWereNZCauseReport- March2017-DigitalVersion.pdf

over 30% of income which is more than double the average for the overall charity sector[2].

Literature, dance and Pacific arts markets are most likely to put their hands in their pocket

Certain artform markets consistently have higher propensity to support: those in the current **literature events** market were the most likely to have made a donation to the arts in the past three years (46%), followed by those in the **Pacific arts** (42%) and **dance** (40%) current markets.

Most regions have seen an upward trend

In 2017, 12 of New Zealand's 16 regions saw growth in individual giving activity within the culture market compared to 2014. For the Auckland, Waikato, Bay of Plenty, Manawatu-Whanganui and West Coast regions, 2017 results showed a statistically significant increase.

Fewer predictors by demographic group

Unlike volunteering and joining arts organisations, where there are clear demographic groups that have higher propensity to offer this type of support, making financial donations to the arts is more of a universal activity with much less variation across different parts of the market.

For example, those in the market aged 16–35 are only slightly less likely to have donated in the past three years (27%) than those aged 65 or over (30%).

Those with children at home are as likely as those without to offer this form of support, and there are no significant differences based on ethnicity.

There is, however a difference when it comes to educational attainment: those with a bachelor's degree or higher were significantly more likely to have donated within the past three years (32% had compared to 25% among those with no university qualification).

In addition, there are some key differences based on demographics when it comes to the *form* of financial giving, explored in more depth on page 58.

2 *ibid*

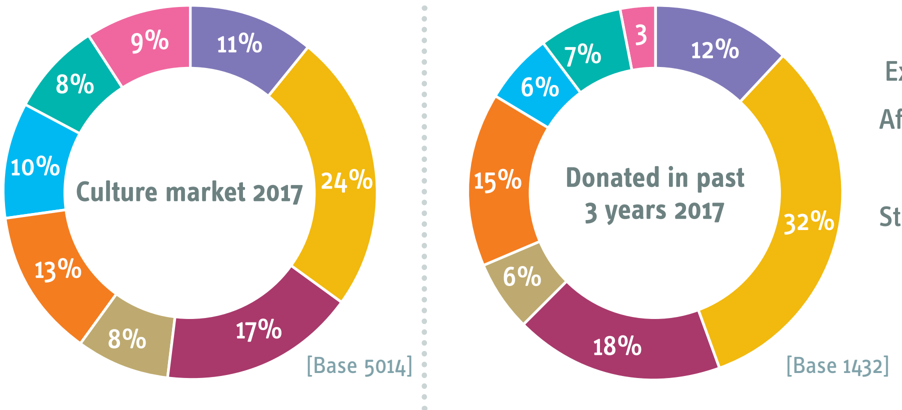
Donated money to an arts, cultural or heritage organisation in past 3 years – by region over time

Expression leads the way with donating

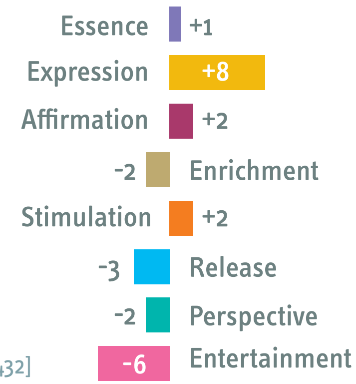
While Essence is highlighted as the segment most likely to have current member-subscriber status or to have recently volunteered, it is Expression that leads with highest propensity to have supported the arts financially in the past three years; 38% have (see bar chart below).

Expression form 30% of all donors (shown in the pie chart to the right). The Essence, Affirmation and Stimulation segments all follow closely, with above-average likelihood of offering this form of support.

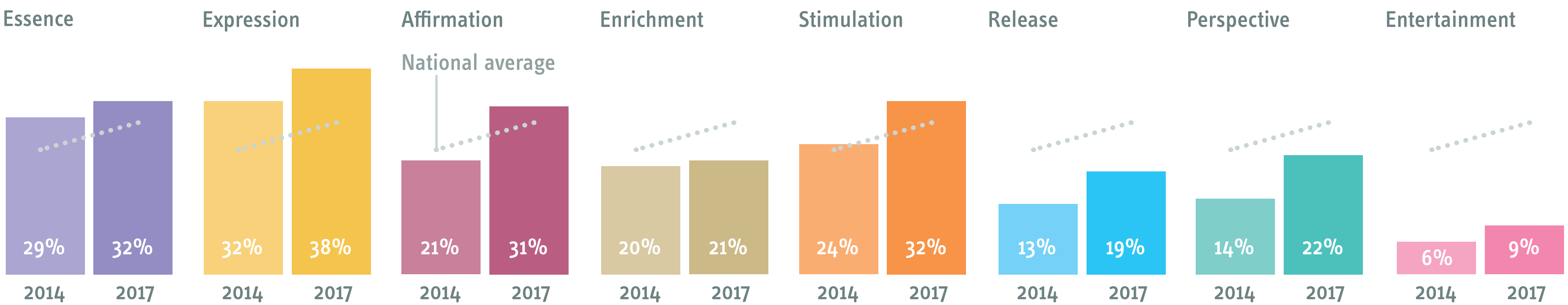
Culture Segment profile



Percentage point difference donated past 3 years vs. the culture market



Donated money to an arts, cultural and heritage organisation in past 3 years – by Culture Segment

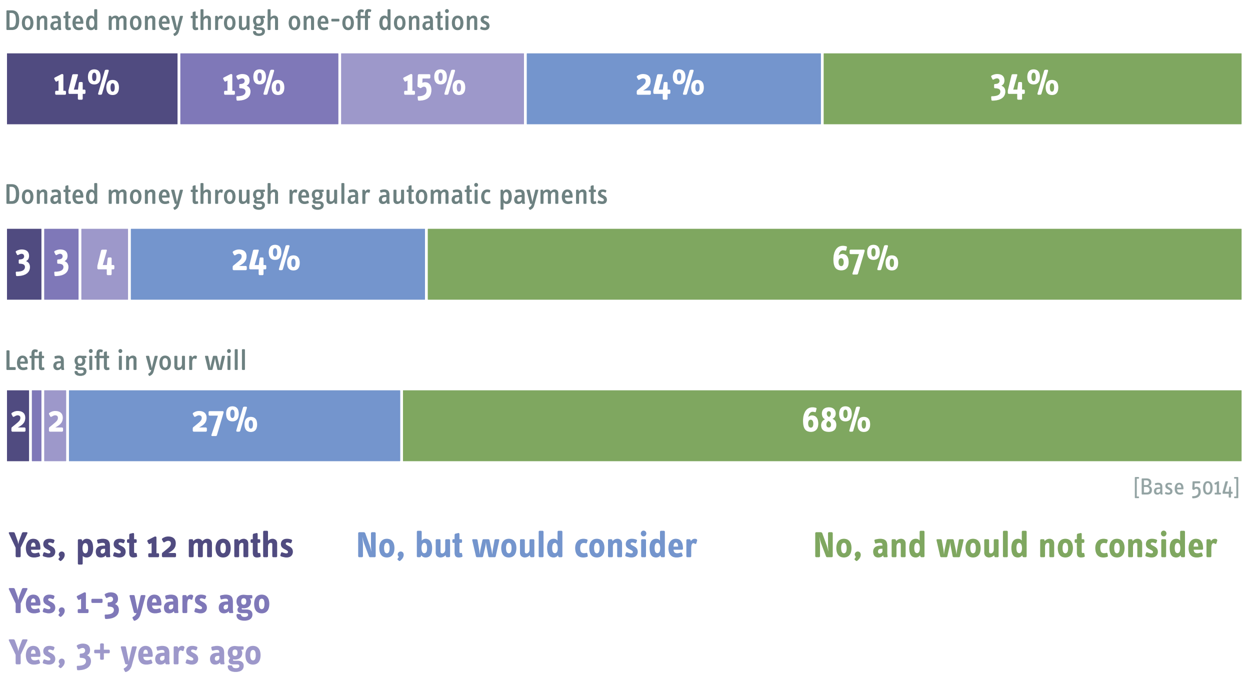


One-off donations yield highest value

Around four in ten people in the culture market (42%) report donating to the arts through a one-off donation at some point in the past, for example, through a collection box, add-ons when purchasing a ticket, crowd-funding campaigns etc. By far the most common form of giving, this yields the highest value amount, totalling an estimated $68m annually. Despite relatively high activity via this form of giving, there is still room to convert more in the market here: nearly one-quarter have never supported the arts in this way but would consider it.

One in 10 in the market have financially supported the arts through regular giving in the past. Although a much less common giving format, amounts are typically larger and this form of giving results in an estimated $26m for the sector in a 12 month period.

Donating behaviour in 2017



$68m

Estimated amount donated to the arts by one-off donations in a 12 month period

$26m

Estimated amount donated to the arts by regular giving in a 12 month period

Regular giving is on the up

Regular giving is clearly a highly desirable form of support for arts organisations, and it's encouraging to see that the proportion of the market carrying out this form of support in the past three years has risen three-fold between 2014 (2%) and 2017 (6%).

$95bn equates to an estimated 7% of Kiwis' individual charitable giving

Nielsen's Consumer & Media Insights Survey identifies that New Zealanders pledge around $1.4bn in personal donations to charities and charitable organisations each year[1]. Combined with the $95m[2] estimation from this study, we can estimate that around 7% of individual giving to charity in New Zealand goes towards arts and culture.

This is in line with Nielsen's estimation that 19% of personal donations (equivalent to $265.4m) goes to culture and recreation (which unlike Audience Atlas includes sports)[3]. Using this broad category, culture and recreation is second only to religious activities as a most popular cause and ahead of health and medical causes.

Significant development potential when it comes to legacy giving

One in 20 claim to have pledged a gift in their will to an arts, culture or heritage organisation. The potential market for this form of support is, however, much larger – over five times larger in fact, with 27% of the market stating that they would consider this form of support in future.

Younger audiences are more open to legacy giving

While there are few variations within different age groups when it comes to regular and one-off giving, there is a marked difference concerning legacy giving, with those aged 16–34 around twice as likely as those aged 65 or over to either be open to or to have already pledged in this way.

Māori and Pacific Islanders are most likely to have given one-off donations

Just under half of the market identifying as Māori (48%) or Pacific Islander (49%) has made a one-off donation in support of the arts at some stage in the past, compared to 42% across the market as a whole.

Recent one-off donating in this form was significantly higher within the Māori market (19% have done this in the past 12 months) compared to the market average (14%).

Regular and legacy giving is significantly more common within Asian audiences

Those identifying as Asian were over three times more likely than average to have left a gift in their will (16%) and more likely than average to consider this if they hadn't already (31%). Asian audiences were also twice as likely as average to have committed to a regular donation to the arts in the past (20% have at some stage compared to 10% across the market as a whole).

1 http://philanthropy.org.nz/wp-content/uploads/2016/03/Giving-New-Zealand-2014-1.pdf
2 $95m is the sum of both regular ($26m) and one-off donations ($68m). $95m is reached using data from our study and extrapolated up to the latest population estimates.

3 http://philanthropy.org.nz/wp-content/uploads/2016/03/Giving-New-Zealand-2014-1.pdf

Format of one-off giving among those who have donated within the past three years

Format of one-off giving	Total	Essence	Expression	Affirmation	Enrichment	Stimulation	Release	Perspective	Entertainment
In-person donations via collection boxes when visiting a venue	75%	82%	77%	81%	73%	77%	61%	54%	58%
In-person donations when attending a special fundraising event	40%	46%	44%	37%	38%	42%	31%	31%	17%
Donation add-on when purchasing a ticket (either in person or online)	25%	31%	32%	19%	24%	21%	18%	22%	17%
Online donation (via organisation's website / crowdfunding site)	20%	24%	21%	26%	12%	18%	14%	18%	8%
Via bank transfer / cheque	10%	15%	10%	8%	9%	12%	4%	11%	6%
Via text / SMS	7%	5%	10%	8%	1%	7%	9%	2%	7%
Other	5%	3%	5%	7%	8%	1%	5%	11%	23%
Base	[1381]	[171]	[442	[251]	[84]	[207	[92]	[92]	[40*]

% significantly higher than national average in 2017

% significantly lower than national average in 2017

*due to sample size the % for Entertainment should be seen as indicative only

Collection boxes are the most popular method of one-off giving

Three-quarters of those who had made a one-off donation to an arts, culture or heritage organisation within the past three years recalled doing so via collection boxes during a general visit.

Certain segments are predisposed to particular one-off giving formats

In-venue collection box donations are particularly popular among Essence and Affirmation donors. Meanwhile members of the Expression segment are significantly more likely than average to opt into an add-on donation when purchasing a ticket – something that, in contrast, the Affirmation segment is relatively unlikely to do. Instead this group is more likely to respond to online / crowd-funding campaigns.

Adapting format to adapting consumers

It's worth considering how people's shifting transaction habits may impact on donating behaviour. Donating via collection boxes is the most common format of giving, yet according to a 2017 Mastercard survey, half of New Zealanders don't think we'll be using cash in ten years' time and Mastercard predicts that cash transactions will continue to decline[1].

Arts organisations will need to adapt to these shifts. As an example, in October 2016, the UK's National Gallery installed contactless donation terminals in the Gallery. By the end of 2017, between 3–7% of donations were made by card and the value of donations has also increased, on average £1 more when using a card compared to cash[2].

In March 2018, City Gallery Wellington adopted a PayWave donation system. Following this introduction, as well as the option of donating via text or add-on donations when booking for events, donations more than doubled in a 6-week period in 2018 compared to the same period in 2017. Not only did 'tap to donate' PayWave contributions account for over one-quarter of donations in the 2018 time period, engagement with the Gallery's koha box also increased generally. This is likely a result of several factors including increased prominence from adding the PayWave option, a particular popular series of public programme and late events, the Gallery's redeveloped entrance increasing visibility and staff being more proactive in approaching people with requests to donate.

1 https://www.newsroom.co.nz/2017/11/26/63531/so-much-cash-in-a-cashless-society#

2 https://www.theguardian.com/business/2018/feb/19/people-dont-carry-cash-uk-firms-adapting

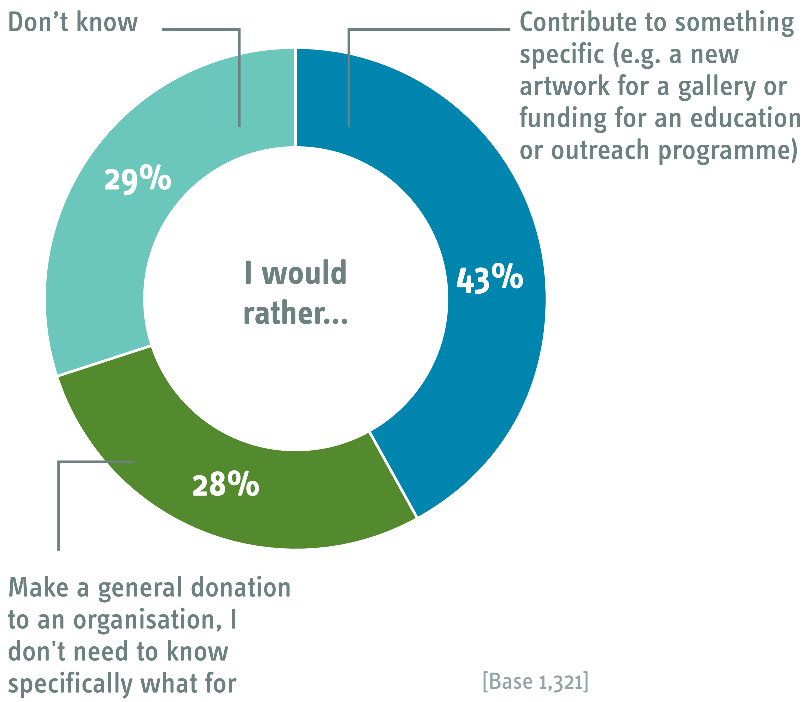
Behind the Curtain, NZTrio and composer Claire Cowan. Image courtesy of NZTrio and The Festival of Colour, Wanaka

Specific support for the next generation

In an increasingly competitive market, and a drive towards **sustainable financial models**, it's ever important for arts organisations to **understand** the market's **motivations and preferences** when it comes to **charitable support**.

Although some people are happy to make general donations, it's more common to want to contribute to something **tangible and specific**. In particular, **enabling young people to access the arts** is the most **compelling** cause to support.

Often people are motivated to help by contributing to things they're **personally passionate** about, taking part in something **collectively** and **making a real difference**.



[Base 1,321]

Specific support is more appealing

Most frequently people are more likely to envisage making a donation towards something tangible and specific in support of the arts, rather than a general, 'unrestricted' form of giving. This was both true of active donors (who have donated in the past three years) and lapsed or non-donors, although active donors were warmer to general donations (35% would prefer this compared to 23% within lapsed or non-donors).

Enabling access for young people is the most compelling cause

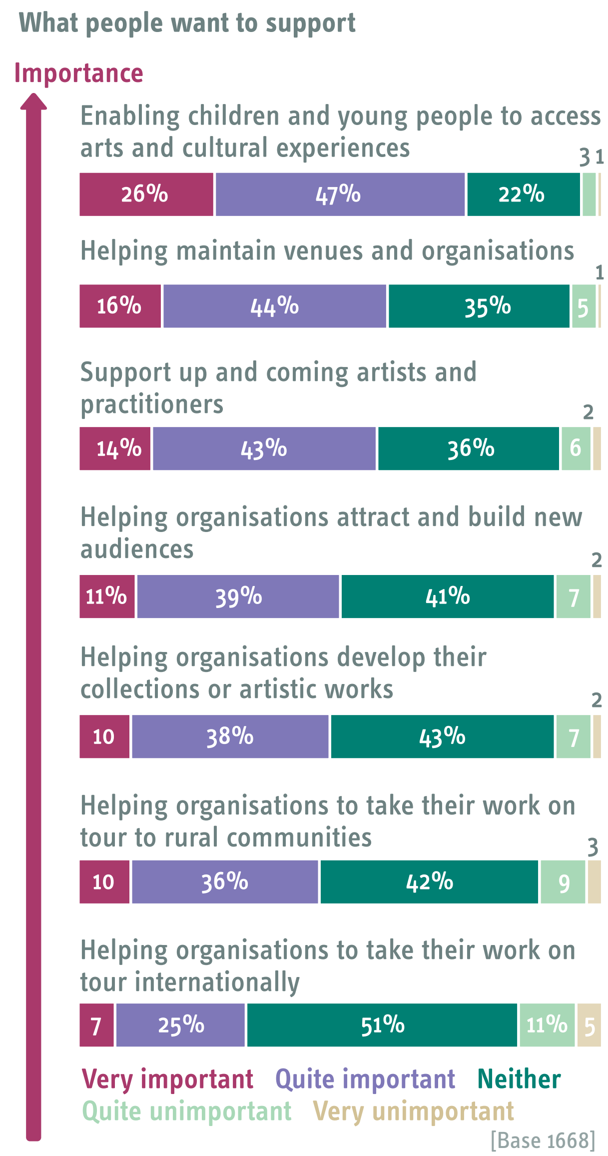
When it comes to specific causes that the market feels are most important to support, enabling children and young people to access arts and cultural experiences tops the list: 73% agree that this is important. This is consistently the highest importance rating across different artform, demographic and segment groups. Those with children at home are significantly more likely than those without to place importance in this (80% compared to 70%), but it remains the highest ranking cause among those without children too.

The second most important cause for the market as a whole was helping maintain venues and organisations which 60% feel is important, closely followed by helping support up-and-coming artists and practitioners (57%). Of lower importance to the market is supporting organisations to take their work on tour, particularly overseas.

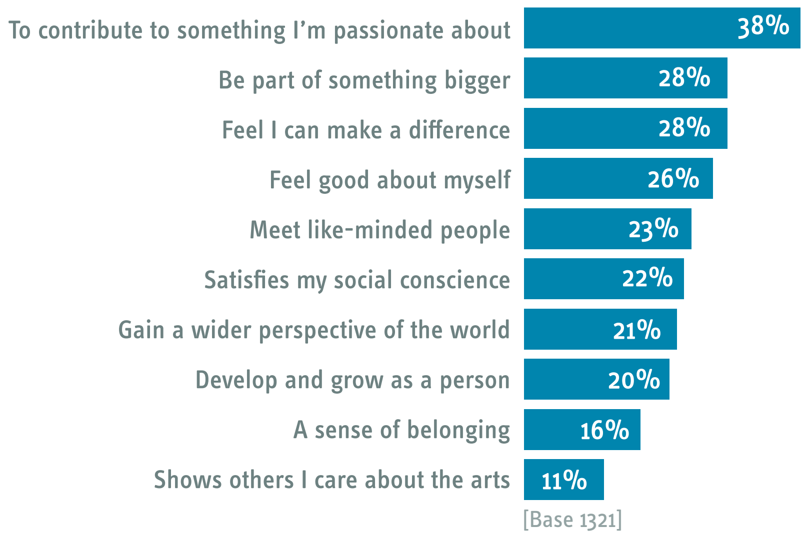
Essence and Expression have different cause alignments

Given how valuable the Essence and Expression segments are when it comes to philanthropy, it's useful to understand how to target and appeal to these two segments. This insight will help organisations craft differentiated fundraising messages that support a diverse range of activities, and increase return on investment:

- Essence places the highest level of importance on children and young people accessing the arts (89% see this as important).
- Essence also place high importance (77%) in supporting up-and-coming artists, and this is actually a more compelling cause for Essence than maintaining venues.
- Expression, on the other hand, place higher importance than other groups in maintaining buildings and venues: 71% agree this is important.
- Reflecting the value Expression place in inclusivity and community, they also place highest importance in helping organisations attract and build new audiences (62% feel this is important) and helping to take work on tour to rural communities (65%).



Top 10 motivations to volunteer time or money to support the arts



Support built on personal, collective passions that make a difference

When asked what could motivate – or already does motivate – support of the arts, the top reason given by the market was being able to contribute to something they feel personally passionate about. This would motivate nearly 4 in 10 to consider supporting (38%).

Other key motivations include being part of something bigger than themselves (28%), feeling that they can make a difference (28%) and feeling good about themselves (26%).

Motivation(s) to volunteer time or money to support arts, cultural or heritage organisations

	Total	In past three years...	
		Volunteered	Donated
It allows me to contribute to something that I am personally passionate about	38%	56%	44%
It lets me be part of something bigger than myself	28%	37%	35%
It makes me feel that I can make a difference	28%	40%	36%
It makes me feel good about myself	26%	28%	28%
It enables me to socialise and meet with other like-minded people	23%	38%	29%
It satisfies my social conscience / responsibility	22%	30%	28%
It helps me gain a wider perspective of the world	21%	26%	21%
It helps me develop and grow as a person	20%	31%	25%
It gives me a sense of belonging	16%	26%	19%
It allows me to show people that I care about the arts	11%	18%	13%
It helps me be true to my philosophical / political values	10%	15%	11%
It makes me feel at one with humanity	9%	11%	12%
It helps me achieve a sense of inner-peace	9%	10%	11%
It makes me feel less guilty about my fortunate position	3%	4%	4%
None of these	21%	11%	16%
Base	[1321]	[397]	[527]

Those who had supported in the past were more likely to be motivated by a wider range of motivations than those lapsed or non-supporters. Within this active supporter group, in most cases volunteers showed stronger motivations for supporting than those who have supported financially.

Any messaging and campaigns aimed at increasing support should consider these primary motivations. Messages that clearly articulate how their support will allow them to get closer to their passions should help secure support. Beyond this, focusing on the supporter journey through keeping supporters personally up-to-date on how their contribution helps and ensuring that they feel part of a community is key to maintaining support.

Raising support requires different tactics for different segments

For organisations that have significant development activity, targeting different Culture Segments should help further develop the supporter market across the whole portfolio of philanthropic activity.

Ranking of top five motivations for supporting arts and culture by Culture Segment

	Essence	Expression	Affirmation	Enrichment	Stimulation	Release	Perspective	Entertainment
It allows me to contribute to something that I am personally passionate about	1	1	1	1	1	1	1	3
Lets me be part of something bigger than myself	2	3	3	5	2		3	4
It makes me feel that I can make a difference		2	4		3	2	2	5
It makes me feel good about myself		4	2	4	4	3	5	1
It enables me to socialise and meet with other like-minded people	3	5	5		5			2
Satisfies my social conscience / responsibility				2		4	4	
Helps gain a wider perspective of the world	4			3		5		
It helps me develop and grow as a person	5							

With the exception of the Entertainment segment, contributing to personal passions is the key driver to support across all segments. Beyond this, distinct differences emerge:

- The social opportunities provided by support through being able to socialise with like-minded people all feature in the top five motivations for the four most active segments: Essence, Expression, Affirmation and Stimulation. Other segments are more likely to feel that support helps satisfy their social conscience, particularly for Enrichment.
- Feeling they can make a difference is particularly important for Expression, and also likely to influence Stimulation and Affirmation but has much less of an impact in encouraging Essence to support.
- Essence is more likely to be motivated by self-development, gaining a wider perspective on the world and developing as a person.
- Supporting as a way of feeling good about themselves is a core motivator for Affirmation.

This is New Zealand © City Gallery Wellington

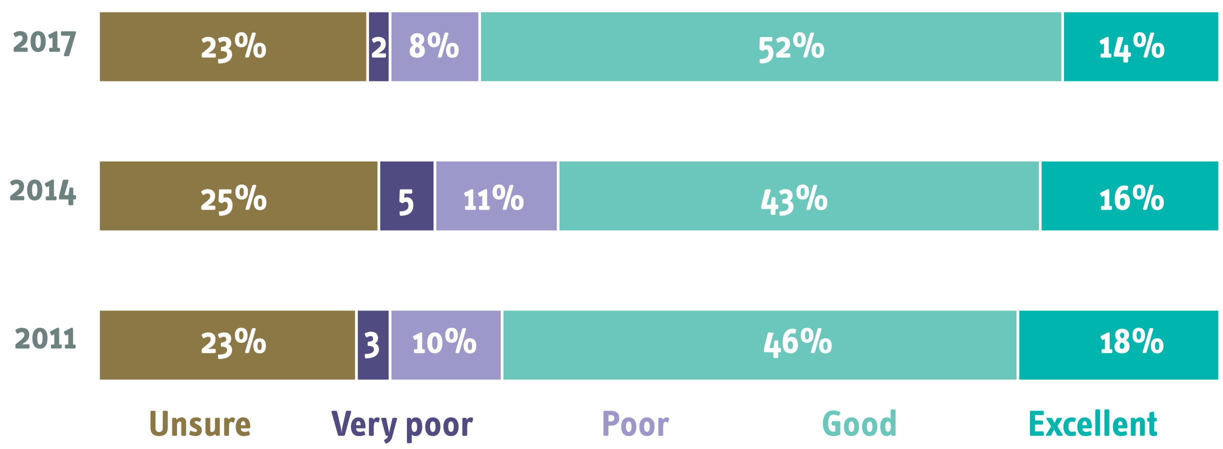
Supporting Creative New Zealand's work

Around 3 in 10 in the culture market have heard of Creative New Zealand. Once made aware and informed of **Creative New Zealand's investment in the arts** per capita, the **majority feel** this is **excellent or good value for money**, with positive perceptions increasing.

Highest level of positive perceptions towards Creative New Zealand's investment

In 2017, two-thirds of the market felt that Creative New Zealand's investment of $40.4 million (or $11 per adult in New Zealand) into opportunities for New Zealanders to experience the arts was either 'excellent' or 'good' value for money. While there has been a significant downward trend in the proportion of the market rating this as 'excellent', overall positive perceptions are at the highest ever level: 66% 'excellent' or 'good' compares to 64% in 2011 and 59% in 2014.

Perception of the value for money from Creative New Zealand investment in the arts



Ballet and literature markets, Essence, those identifying as Māori or Pacific Islanders are all more supportive

Those in the current market for **ballet** (24%), **literature festivals** (24%) and **poetry events** (25%) were more likely to rate Creative New Zealand's investment as 'excellent' value for money, as were those in the Essence segment (21%) and those identifying as Māori or Pacific Islander (both also 21%).

31%

of the culture market aware of Creative New Zealand

Section 4: Reaching your market

Sunset Symphony, Hamilton Gardens Festival 2018. Image courtesy of Mark Hamilton Photography

morris hargreaves mcintyre

Increasing power of digital

Trends show that an increasing proportion of the New Zealand culture market is **consuming digital media at the expense of traditional media**, and the **amount of time** they spend doing this is on **the rise**.

This shift has implications for how the market is finding out about the arts. Use of **online listings**, **social networking** sites and **email newsletters** are all **increasing in popularity**.

Each **region** and **Culture Segment** has a **distinct media profile** and this will help organisations consider what works best in their **context** and where to place targeted messages to get the best **return on investment**.

A shift away from more traditional media sources

Compared to 2014, in 2017 there have been a number of changes in media consumption behaviours among the New Zealand cultural market. While newspapers are still the most consumed media there has been a significant decrease in the proportion of the market reading newspapers in a typical week (from 92% in 2014 down to 90% in 2017). Similarly, there has been a significant decrease in the proportion who listened to the radio (from 89% in 2014 down to 74% in 2017).

With regards to television viewing, there has been a shift away from free-to-air viewing (from 88% in 2014 to 79% in 2017) towards on-demand and subscription television viewing (up from 70% in 2014 to 82% in 2017).

More people, spending more time engaging with new media

Emailing and instant messaging

While the vast majority of the culture market continue to spend time emailing and instant messaging in a typical week (99% in 2014 and

Media consumption trends: Done in a typical week[1]

	2014	2017
Newspaper	92%	90%
Television (on-demand and subscription)	70%	82%
Television (free to air)	88%	79%
Radio	89%	74%
Magazine[2]	51%	54%
Base	[4008]	[2518]

% significantly higher than 2014

% significantly lower than 2014

1 Please note that the way this question was asked differed in 2017. As such, individual categories from the 2014 data and the 2017 data have been grouped to allow for comparability. This should be considered when interpreting results.

2 The 2014 survey did not specify online magazines whereas the 2017 survey did. This likely explains the increase in reported magazine readership across time.

2017), the amount of time that people spend doing this has increased significantly. In 2014, 19% of the market spent seven or more hours per week doing this, increasing to 27% in 2017.

Reading articles

With just over nine in ten (92%) adults in the New Zealand culture market spending time each week reading articles online, this is the second most popular online activity. While this proportion is consistent with results from 2014, there has been a significant increase in the proportion who said they spent three or more hours per week doing this (from 39% in 2014 to 47% in 2017).

Social media

New Zealanders in the culture market who engage with social media continues to grow with 84% saying they do this in a typical week in 2017 compared to 78% in 2014. Not only are more people engaging with social media but they are also spending more time doing so. In 2014, 15% said they spent seven or more hours per week doing this compared to 23% in 2017.

Increasingly mobile, increasingly connected

Growth in digital, mobile and social media continues to impact our behaviour. Worldwide, mobile users reached 4.92 billion in 2017 (a 5% increase on 2016) and social media users reached 2.27 billion (21% increase)[1]. Globally, the proportion of internet use on a mobile device has grown rapidly, 40% in 2012, 68% in 2016 and is expected to reach 79% in 2018.

Eight in ten New Zealanders (aged 10+) own a smartphone and ownership continues to grow.[2] People are now expecting connectivity and social media is becoming increasingly about conversations.[3]

1 https://wearesocial.com/special-reports/digital-in-2017-global-overview
2 Nielsen New Zealand media trends 2016
3 wearesocial.com/uk/special-reports/digital-in-2016

Right place, right time

The increase in smartphone use and connectivity has facilitated greater spontaneity, particularly in how people spend their leisure time – we can make snap decisions, find out about options and access practical information to make it happen.[4] Evidencing this trend, over the course of 2017, the number of Google searches made in New Zealand that used the term ‘near me’ more than doubled.[5]

4 www.crafted.co.uk
5 https://trends.google.com/trends/explore?date=2017-01-01%20 2017-12-31&geo=NZ&q=%22near%20me%22

Online shopping

Compared to all other forms of online engagement, online shopping has experienced the largest growth (by eight-percentage points). In 2014, 71% said they did this each week whereas in 2017, 79% did this. Time spent doing this each week increased from 3% who spent five or more hours a week doing this in 2014 to 5% in 2017.

Streaming or downloading video content

Nearly three in five (59%) in the culture market said they streamed or downloaded video content in a typical week in 2017, up from 55% in 2014. Just over two in five (42%) spent an hour or more each week doing this in 2017, up significantly from 2014 when a third (34%) did this.

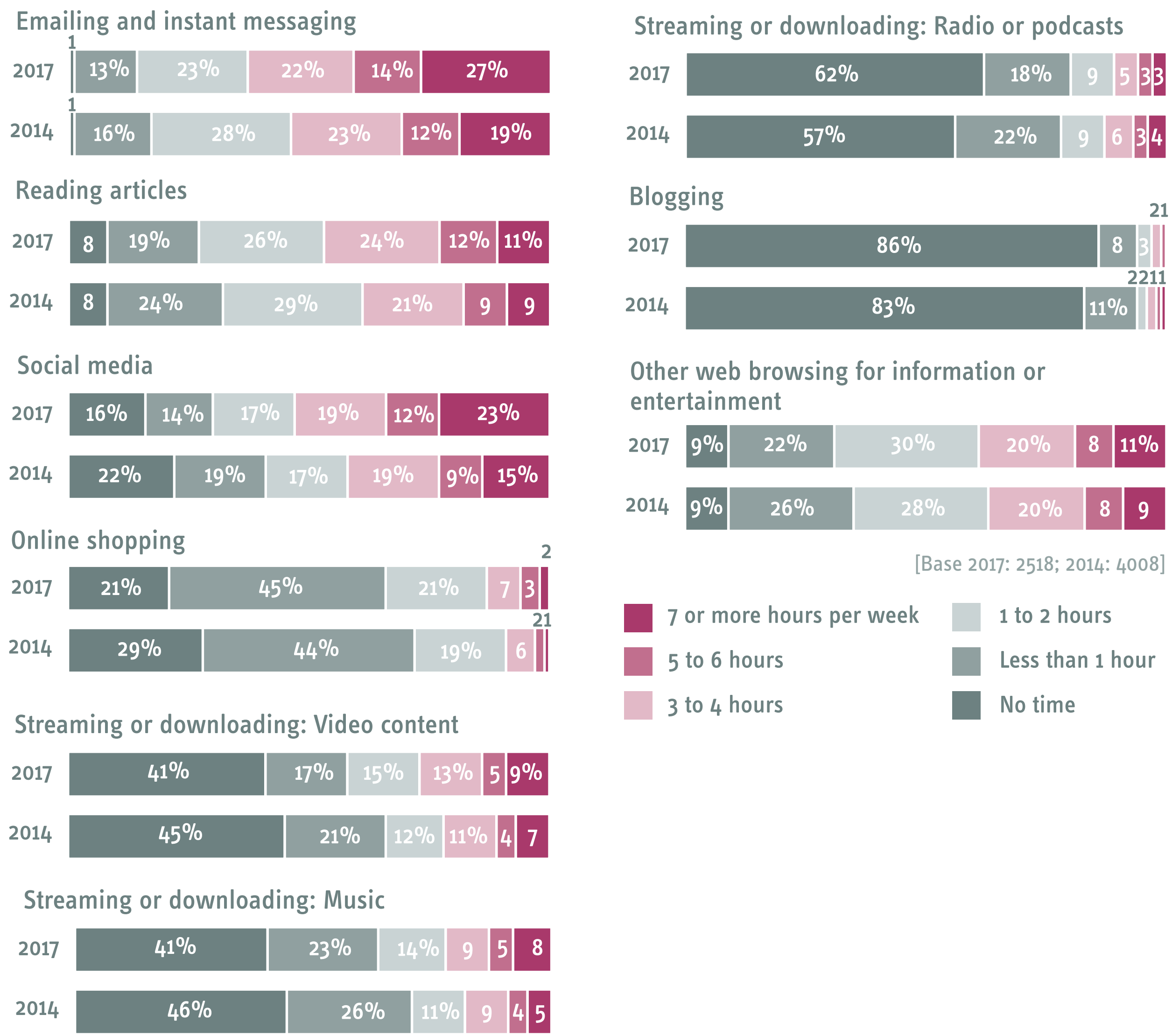
Streaming or downloading music

There has also been a significant increase in the proportion of the market who stream or download music from 54% in 2014 to 59% in 2017 and significantly more time is being spent doing this. In 2014, 8% said they spent five or more hours per week doing this, rising to 13% in 2017.

Just two online activities have seen a decrease in engagement

Streaming or downloading radio or podcasts is one of only two online interactions where the proportion of the market who said they are doing this each week has significantly decreased. In 2014, 43% said they did this while in 2017, 38% said they did this. Meanwhile blogging saw a fall from 17% doing this in a typical week in 2014 to 14% in 2017.

Online habit trends: Amount of time spent in a typical week



Understanding media profiles by segments will help get the right messages to the right audiences

The two tables that follow show media consumption and online habits by Culture Segment.

Overall, Expression, Affirmation and Stimulation tend to be more engaged with the media both on and offline. Whereas Enrichment, Release, Perspective and Entertainment tend to be less engaged.

- Media consumption within the Essence segment is often similar to the market average, with a couple of key exceptions. They gravitate to platforms that provide 'infotainment' – for example international magazines that allow them to keep abreast of current affairs and radio or podcast content available online.
- The Expression segment has a wide and varied media consumption, often being the segment most likely to engage with a particular format in a given week – this spans both offline and online sources. As an example, in a typical week they're the segment most likely to engage with blogging, social media and the printed press (locally, nationally and through magazines). This makes sense within a group who is inherently networked, is outward looking and has a wide range of interests.
- Members of the Affirmation segment are particularly active online. For them the internet is a source of self-development, discovery and entertainment: a primary place to go when it comes to leisure. They're the group most likely to spend time reading articles online, taking in content from national newspapers or do a spot of online shopping.
- Enrichment can be harder to reach. They tend to have lower engagement across most media. An exception here, however, is with regional printed newspapers, marking this media outlet as a prime way to target them.
- On-demand and subscription television has greater engagement from Stimulation and less from Enrichment. Although not a particularly new platform, this makes sense if we consider Stimulation's early-adopter nature when it comes to newer technologies, whereas something has to be fairly well-established for Enrichment to engage. Often being digital natives (or enthusiastic digital adopters) it's no surprise that members of the Stimulation segment are also the most likely to consume newspaper content through an app or stream / download video or music online.
- Time-pressed Release has significantly lower than average consumption across a range of media platforms. They're the segment least likely to read newspapers and magazines or listen to the radio.
- Typically with a narrow range of interests, it makes sense that Perspective have fairly low media consumption. They're among the least likely to engage with newspapers and magazines, or to spend time consuming rich content online.
- Entertainment too have general low consumption across most media platforms. Their engagement online is, however, more similar to the market average.

Media consumption by Culture Segment: done in a typical week

	Total	Essence	Expression	Affirmation	Enrichment	Stimulation	Release	Perspective	Entertainment
TV (free to air)	79%	72%	77%	81%	84%	79%	79%	79%	79%
TV (on demand)	55%	56%	58%	55%	33%	62%	62%	51%	47%
TV (subscription)	65%	63%	66%	67%	55%	74%	68%	59%	65%
Radio	74%	74%	76%	75%	73%	78%	66%	74%	75%
Newspaper: National (print)	43%	40%	59%	44%	42%	35%	29%	31%	39%
Newspaper: National (online)	63%	65%	66%	69%	60%	68%	59%	53%	53%
Newspaper: National (app)	38%	35%	41%	42%	25%	44%	35%	38%	37%
Newspaper: Regional (print)	49%	49%	60%	48%	59%	44%	34%	42%	43%
Newspaper: Regional (online)	30%	36%	39%	31%	30%	25%	26%	17%	24%
Newspaper: Regional (app)	15%	9%	19%	17%	11%	13%	15%	13%	11%
Magazine: NZ (print)	42%	44%	53%	47%	40%	40%	28%	36%	29%
Magazine: NZ (online)	13%	11%	21%	17%	4%	12%	9%	6%	9%
Magazine: International (print)	24%	19%	35%	26%	23%	23%	15%	16%	19%
Magazine: International (online)	18%	24%	23%	20%	12%	19%	12%	16%	8%
Base	[2518]	[257]	[549]	[426]	[249]	[304]	[251]	[233]	[249]

2017 average

% significantly higher than average

% significantly lower than average

Online habits by Culture Segment: done in a typical week

	Total	Essence	Expression	Affirmation	Enrichment	Stimulation	Release	Perspective	Entertainment
Emailing and instant messaging	99%	100%	100%	100%	100%	100%	98%	99%	99%
Reading articles	92%	94%	92%	96%	89%	95%	89%	86%	90%
Social media	84%	85%	88%	86%	74%	87%	84%	79%	81%
Online shopping	79%	80%	83%	84%	67%	83%	73%	74%	77%
Streaming or downloading: video content	59%	57%	59%	65%	46%	65%	57%	53%	59%
Streaming or downloading: music	59%	58%	65%	61%	40%	68%	55%	53%	57%
Streaming or downloading: radio or podcasts	38%	45%	43%	44%	23%	44%	38%	28%	20%
Blogging	14%	14%	21%	20%	6%	7%	13%	6%	8%
Other web browsing for information or entertainment	91%	94%	93%	95%	86%	93%	84%	87%	88%
Base	[2518]	[257]	[549]	[426]	[249]	[304]	[251]	[233]	[249]

2017 average

% significantly higher than average

% significantly lower than average

Increasing use of online media for how people find out about the arts

Word-of-mouth is still the most popular way for people to find out about arts and culture events (42%); followed by television (36%), radio (35%) and print newspaper (35%). However, all of these, with the exception of radio, have experienced significant decreases when compared to 2014. In addition, there has also been a significant decrease in the proportion who use online newspapers as a source of information.

In the space of just three years there has been a significant shift towards increasingly consulting digital sources to find out what's on. For example, usage of social networking sites has increased significantly from 31% in 2014 to 33% in 2017 and email newsletters / promotions / listings increased from 29% to 32%.

Keeping up to date via online listings (for example, Eventfinda or Ticketmaster) also appears to have increased significantly, used by one third of the market. When considering this particular source, please note the changes in question text noted in the table which may account for some of the uplift here.

Top 10 sources of information for cultural activities (trends)

	2014	2017
Recommendation / word-of-mouth[1]	51%	42%
Television	43%	36%
Radio	36%	35%
Newspapers (print)	50%	35%
Online listings[2]	2%	34%
Brochures / flyers / posters	n/a[3]	33%
Social networking sites	31%	33%
Email newsletters / promotions / listings[4]	29%	32%
Newspapers (online)	25%	21%
Magazines (print)	11%	14%
Base	[4008]	[5014]

% significantly higher than 2014 (2017: Online listings, Social networking sites, Email newsletters / promotions / listings, Magazines (print))

% significantly lower than 2014 (2017: Recommendation / word-of-mouth, Television, Newspapers (print), Newspapers (online))

1 In 2017 the response option was 'recommendation / word-of-mouth' and in 2014 it was 'word of mouth'. This should be considered when interpreting results.

2 In 2017 the response option was 'online listings, e.g. Eventfinda or Ticketmaster' and in 2014 it was 'listings magazines (online)'. This should be considered when interpreting results.

3 Not asked in 2014.

4 In 2017 the response option was 'email newsletters / promotions / listings' and in 2014 it was 'email newsletters'. This should be considered when interpreting results.

Half the culture market book online

Just under half the culture market had booked tickets online for an arts or cultural event in the past 12 months (48%). Levels were highest in the Auckland and Wellington regions (54% and 55% respectively). At the other end of the scale, 35% of those in Northland had done so, the lowest of the regions.

The Auckland and Wellington markets are particularly proactive at keeping up to date

The tables that follow show the sources of information used regionally broken down by online and offline information sources.

Overall, Auckland (86%) and Wellington (86%) are significantly more likely than average to have used at least one of the information sources listed to keep up-to-date with arts and culture activities (compared to 83% on average). While Northland (76%), Waikato (79%) and Hawke's Bay (76%) are significantly less likely than average to have used at least one of the information sources listed.

While this data can help distinguish differences within an organisation's regional or touring markets, it becomes even more useful when applying Culture Segments. Organisations can consider both regional context as well as preferences of target Culture Segments, meaning marketing resource can be used more strategically and efficiently. The main aim here is getting effective messages on optimum platforms to increase return on investment.

Some other regional differences that will help organisations better target local markets include:

- The market in Nelson, Tasman, Wellington and Canterbury is significantly more likely to be influenced by brochures and flyers.
- Printed newspapers have greater influence outside the main centres, particularly in the West Coast, Gisborne, Taranaki and Otago regions. Conversely, in Auckland printed newspapers hold relatively low influence, with this market instead being more likely than average to consult online newspaper sites.
- Radio has greater influence on the South Island, particularly in the Nelson, West Coast and Canterbury regions.
- The Wellington market is particularly responsive to word-of-mouth, online magazines, listings and e-news.

A segment's use of media reveals how proactive they are keeping up to date

When it comes to different Culture Segments' usage of sources of information for finding out what's on, it's unsurprising that the more culturally active segments consult a wider range of sources. The tables on pages 77–82 highlight Essence, Expression, Affirmation and Stimulation as having average or higher likelihood of consulting sources while Enrichment, Release, Perspective and Entertainment have lower likelihood of doing this, often significantly so.

Word-of-mouth is a key source for **Essence**, although it's worth considering how discerning this segment is when applying this insight. They won't simply act on word-of-mouth from anyone; it has to be a reputable source. Print is also a key way of getting their attention and they're the segment most likely to collect up brochures and flyers to keep on top of what's on. For those organisations they admire and value, Essence will make sure they are across the latest programming by signing up to e-news, e-listings and consulting venue websites. Social media is also a key information source for them.

Members of the **Expression** segment are fairly non-discriminatory when it comes to sources of information: you can find them via all avenues since they are so receptive to learning what arts organisations are doing and value marketing for helping them choose what to do next. Any way that they can be kept up to date by being part of an organisation's community (e-news and social media) will be particularly effective for targeting them.

Above-the-line[1] marketing investments will likely get the attention of **Affirmation**. Once an arts event is elevated to this position they'll be reassured that it's worth their time and money. It follows that they're also more likely than average to be influenced by both critic and online peer reviews. Reflecting their general high engagement with the internet, online listings and newspapers are also a key way to reach this group.

Members of the **Stimulation** segment typically have a lot going on. They're always on the hunt for something new to do. Loyalty can be harder to achieve given their cultural promiscuity, so peer-to-peer and organic social media content is more likely to influence them than relying on them to follow an organisation or sign up to e-news. Listing websites that give them 'short and sweet' menus of relevant, new and different things to do will work well for reaching this group.

The 2014 Audience Atlas study contains more detail on which specific publications and outlets different Culture Segments consult.

While this data is now over three years old, it is still useful – loyalty to particular publications and outlets is slow to change. Instead it may be that the format is changing in line with a move towards more digital media consumption (explored on page 68). See pages 95–105 of the 2014 Audience Atlas New Zealand report available here.

Image courtesy of the Museum of New Zealand Te Papa Tongarewa

1 Marketing to a wide spread of audiences through 'mass media' for example, through television, radio or print advertising, but also internet based advertising.

Sources of information for cultural activities: North Island (offline information sources)

Offline information sources	2017 national average	North Island – by region								
		Northland	Auckland	Waikato	Bay of Plenty	Gisborne	Hawke's Bay	Taranaki	Manawatu-Whanganui	Wellington
Recommendation / word-of-mouth	42%	46%	41%	38%	38%	44%	37%	42%	37%	47%
Television	36%	37%	38%	34%	37%	38%	31%	30%	34%	37%
Radio	35%	33%	34%	31%	33%	39%	37%	30%	32%	36%
Newspapers (print)	35%	33%	31%	29%	40%	50%	37%	43%	34%	35%
Brochures / flyers / posters	33%	28%	31%	25%	32%	34%	32%	33%	36%	39%
Magazines (print)	14%	16%	13%	10%	16%	14%	16%	9%	15%	13%
Critic review: Newspaper / magazine (print)	13%	13%	14%	8%	9%	16%	12%	8%	12%	15%
Tourist information centres	9%	8%	7%	8%	13%	13%	14%	13%	12%	8%
Guidebooks	4%	5%	4%	4%	4%	3%	4%	5%	2%	6%
Listings magazines (print)	3%	2%	4%	2%	2%	3%	5%	4%	3%	4%
Base	[5014]	[190]	[589]	[668]	[287]	[93]	[186]	[189]	[287]	[785]

2017 average

% significantly higher than average

% significantly lower than average

Please note that the response categories 'other' and 'none of these' are not displayed in the table above.

Sources of information for cultural activities: South Island (offline information sources)

Offline information sources	2017 national average	South Island – by region						
		Tasman	Nelson	Marlborough	West Coast	Canterbury	Otago	Southland
Recommendation / word-of-mouth	42%	52%	46%	48%	39%	42%	44%	34%
Television	36%	29%	30%	33%	46%	37%	39%	33%
Radio	35%	38%	47%	42%	50%	40%	38%	35%
Newspapers (print)	35%	39%	36%	42%	55%	38%	43%	37%
Brochures / flyers / posters	33%	48%	55%	38%	32%	38%	36%	29%
Magazines (print)	14%	18%	17%	17%	13%	17%	15%	10%
Critic review: Newspaper / magazine (print)	13%	19%	11%	20%	13%	14%	15%	8%
Tourist information centres	9%	15%	12%	17%	25%	9%	12%	13%
Guidebooks	4%	9%	6%	7%	4%	3%	5%	5%
Listings magazines (print)	3%	1%	4%	6%	3%	4%	3%	1%
Base	[5014]	[96]	[98]	[97]	[94]	[583]	[584]	[188]

2017 average % significantly higher than average % significantly lower than average

Please note that the response categories ‘other’ and ‘none of these’ are not displayed in the table above.

Sources of information for cultural activities: North Island (online information sources)

Online information sources	2017 national average	North Island – by region								
		Northland	Auckland	Waikato	Bay of Plenty	Gisborne	Hawke's Bay	Taranaki	Manawatu-Whanganui	Wellington
Online listings	34%	25%	40%	29%	28%	35%	32%	29%	28%	39%
Social networking sites	33%	33%	33%	32%	29%	39%	34%	29%	38%	38%
Email newsletters / listings	32%	31%	34%	27%	29%	26%	31%	30%	25%	38%
Newspapers (online)	21%	21%	25%	15%	16%	26%	19%	18%	16%	22%
Online user reviews	12%	11%	13%	10%	14%	14%	11%	12%	13%	13%
Organisation websites	11%	11%	13%	7%	10%	10%	9%	9%	10%	12%
Magazines (online)	10%	6%	10%	8%	9%	6%	14%	11%	8%	13%
Organisation mailing lists	10%	9%	11%	6%	8%	14%	9%	8%	7%	12%
Mobile apps	7%	4%	8%	8%	5%	4%	7%	5%	7%	10%
Online critic reviews	6%	3%	8%	3%	5%	5%	4%	3%	3%	8%
Artist websites	5%	4%	5%	4%	3%	3%	4%	4%	2%	5%
Blogs	3%	5%	4%	2%	1%	<1%	4%	1%	1%	4%
Recommendations from on-demand services	3%	<1%	3%	1%	2%	2%	1%	1%	2%	3%
Base	[5014]	[190]	[589]	[668]	[287]	[93]	[186]	[189]	[287]	[785]

2017 average

% significantly higher than average

% significantly lower than average

Please note that the response categories 'other' and 'none of these' are not displayed in the table above.

Sources of information for cultural activities: South Island (online information sources)

Online information sources	2017 national average	South Island – by region						
		Tasman	Nelson	Marlborough	West Coast	Canterbury	Otago	Southland
Online listings	34%	37%	22%	24%	26%	30%	29%	23%
Social networking sites	33%	30%	27%	26%	34%	32%	38%	26%
Email newsletters / listings	32%	31%	33%	32%	37%	33%	32%	21%
Newspapers (online)	21%	29%	18%	28%	13%	19%	21%	16%
Online user reviews	12%	15%	16%	18%	11%	11%	15%	6%
Organisation websites	11%	12%	14%	22%	8%	12%	11%	4%
Magazines (online)	10%	17%	9%	9%	11%	9%	10%	8%
Organisation mailing lists	10%	13%	10%	14%	4%	11%	13%	4%
Mobile apps	7%	7%	13%	10%	6%	8%	7%	3%
Online critic reviews	6%	5%	4%	4%	3%	5%	8%	5%
Artist websites	5%	9%	5%	8%	4%	5%	5%	<1%
Blogs	3%	-	2%	5%	1%	2%	3%	1%
Recommendations from on-demand services	3%	5%	5%	5%	3%	3%	3%	2%
Base	[5014]	[96]	[98]	[97]	[94]	[583]	[584]	[188]

2017 average　　% significantly higher than average　　% significantly lower than average

Please note that the response categories 'other' and 'none of these' are not displayed in the table above.

Sources of information for cultural activities by Culture Segment (offline information sources)

Offline information sources	2017 national average	Essence	Expression	Affirmation	Enrichment	Stimulation	Release	Perspective	Entertainment
Recommendation	42%	53%	48%	44%	39%	46%	33%	28%	24%
Television	36%	37%	44%	41%	29%	39%	30%	26%	24%
Radio	35%	38%	40%	37%	33%	44%	27%	22%	24%
Newspapers (print)	35%	38%	44%	40%	38%	36%	20%	25%	17%
Brochures / flyers / posters	33%	44%	41%	37%	29%	34%	23%	25%	17%
Magazines (print)	14%	18%	20%	15%	10%	15%	7%	7%	6%
Critic review (print)	13%	17%	19%	16%	9%	15%	4%	5%	4%
Tourist information centres	9%	9%	14%	10%	8%	10%	6%	3%	4%
Guidebooks	4%	5%	7%	5%	4%	4%	2%	3%	2%
Listings magazines (print)	3%	4%	6%	4%	<1%	3%	1%	2%	2%
Base	[5014]	[534]	[1140]	[795]	[458]	[687]	[452]	[461]	[487]

2017 average

% significantly higher than average

% significantly lower than average

Please note that the response categories 'other' and 'none of these' are not displayed in the table above.

Sources of information for cultural activities by Culture Segment (online information sources)

Online information sources	2017 national average	Essence	Expression	Affirmation	Enrichment	Stimulation	Release	Perspective	Entertainment
Online listings	34%	38%	36%	41%	26%	42%	25%	22%	21%
Social networking sites	33%	40%	39%	36%	21%	43%	26%	19%	21%
Email newsletters / listings	32%	40%	40%	39%	23%	34%	21%	20%	18%
Newspapers (online)	21%	21%	26%	26%	20%	24%	15%	10%	10%
Online user reviews	12%	13%	17%	15%	7%	14%	7%	5%	8%
Organisation websites	11%	20%	17%	12%	4%	13%	6%	4%	2%
Magazines (online)	10%	11%	16%	10%	8%	11%	4%	5%	4%
Organisation mailing lists	10%	14%	16%	9%	8%	11%	5%	4%	2%
Mobile apps	7%	11%	10%	8%	4%	8%	6%	2%	3%
Online critic reviews	6%	6%	11%	7%	3%	6%	3%	3%	2%
Artist websites	5%	7%	7%	4%	3%	4%	2%	2%	2%
Blogs	3%	4%	5%	2%	1%	3%	2%	3%	1%
Recommendations from on-demand services	3%	2%	5%	1%	<1%	5%	2%	2%	<1%
Base	[5014]	[534]	[1140]	[795]	[458]	[687]	[452]	[461]	[487]

2017 average

% significantly higher than average

% significantly lower than average

Please note that the response categories 'other' and 'none of these' are not displayed in the table above.

Rise in digital arts experience

Online arts and culture experiences are becoming **increasingly more common** and there is great **opportunity to develop** this part of the sector. Around 1 in 5 anticipate spending more time consuming the arts digitally in the future and for some artforms – particularly film, music and books – **a pay-to-access** model is **viable**.

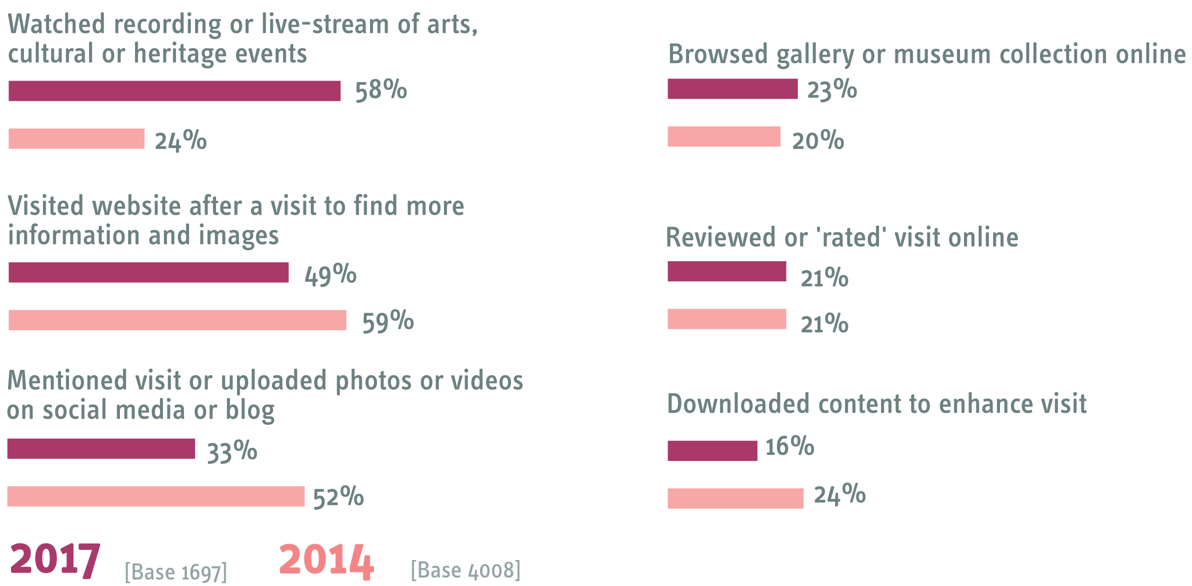
Engagement with the arts online is **not** a **substitute** for in-person experiences but **rather complementary**, these online experiences **inspire people** to have **real life cultural encounters**.

Online performances are a growing way to consume culture

The vast majority of the New Zealand culture market is engaging with the arts online and there is some evidence to suggest that online and offline interactions with the arts is converging.

Engagement with the arts virtually through rich content is on the rise with browsing gallery and museum collections online growing significantly from 20% in 2014 to 23% in 2017. Additionally, viewing performances online is becoming an increasingly popular way for the market to

% that have ever engaged with arts and culture online



Please note that the way these questions were asked differed in 2017. This should be considered when interpreting results.

consume culture having more than doubled in proportion since 2014 (from 24% to 58% in 2017).

More specifically in 2017:

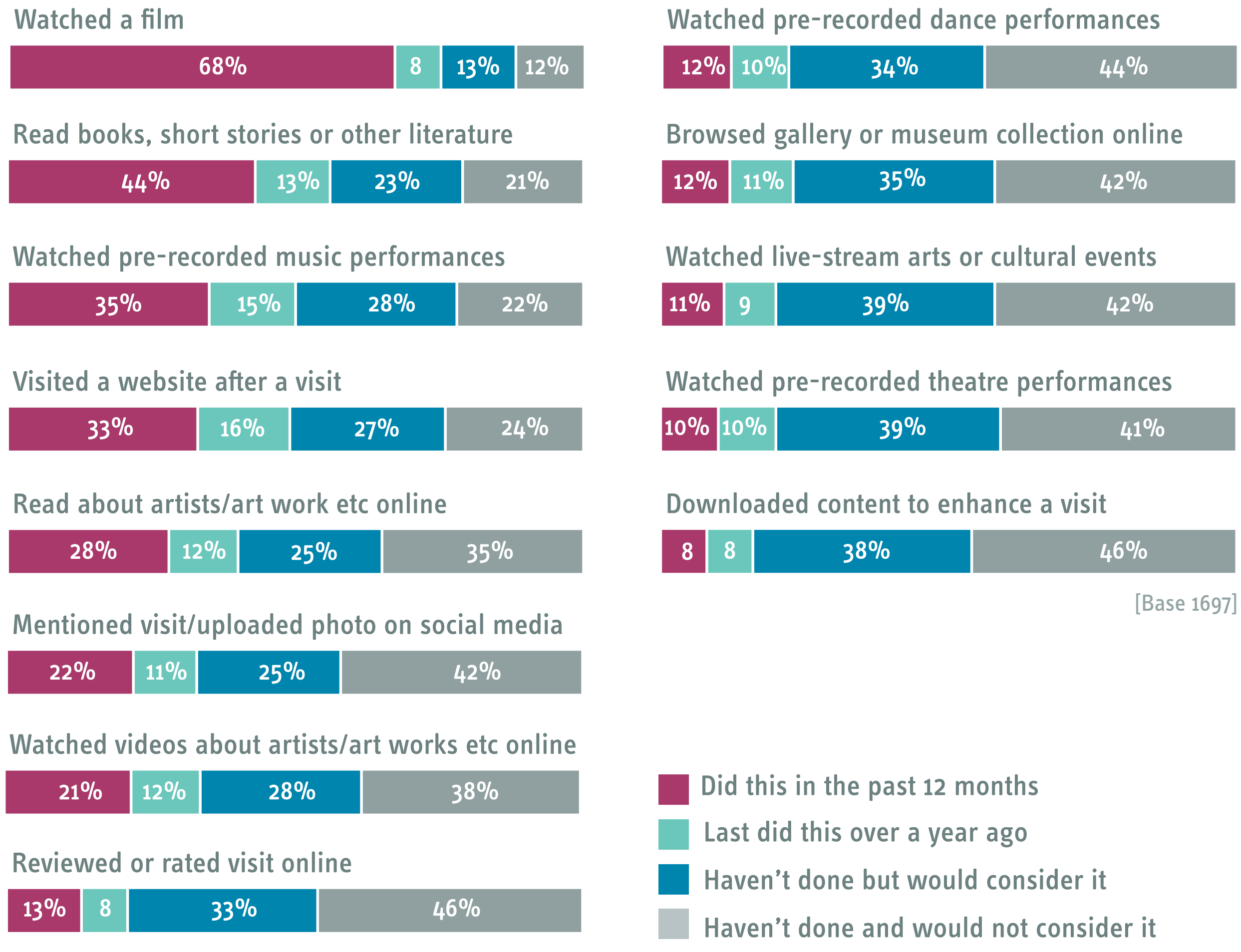
- 50% have watched pre-recorded music performances or concerts at some point in the past
- 34% have watched videos about artists, companies, performances or artworks online
- 23% have watched pre-recorded dance performances
- 20% have watched pre-recorded theatre performances
- 19% have watched a live-stream event.

Expression (73%) and Affirmation (64%) were more likely than average to have viewed a performance online whereas Release (47%), Enrichment (44%), Perspective (44%) and Entertainment (44%) were less likely than average.

Arts online has potential for growth

For most forms of online arts engagement, the proportion who are interested in a particular activity is similar, if not larger, than the proportion who have recently engaged in this way.

Engagement with arts and culture online



For example, in the past 12 months, around one in ten have recently reviewed or rated a visit, watched pre-recorded dance and theatre performances, live-streamed events, browsed gallery or museum collections or downloaded content to enhance a visit experience (proportions range from 8% to 13%). However, a third or more of the market (ranging from 33% to 39%) expressed interest in doing these things in the future.

Nearly a quarter or more would be willing to pay for online experiences

Among those who have engaged with the arts online or would consider it, just under a quarter to just over half would be willing to pay for their online experience if the price was right. The online experiences with the highest levels of those willing to pay include watching a film online (56% would be willing to pay), reading books online (40%) and watching pre-recorded music performances (35%). The online experiences with lowest willingness to pay include browsing a gallery or museum collection, watching videos about artists, companies or art work and watching pre-recorded dance performances.

Virtual experiences don't replace the real thing

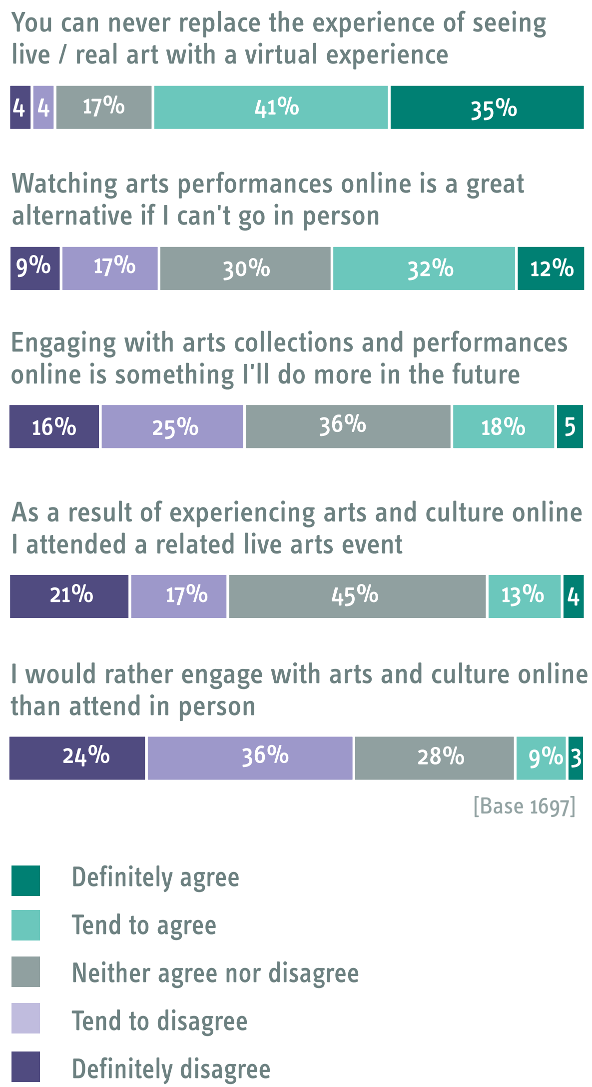
Just over three quarters of the market (76%) agree that online experiences don't replace in-person experiences (35% strongly agree and 41% tend to agree). In fact, the cross-over between offline and online engagement is noteworthy – 17% agreed that their online experiences influenced them to attend a live event.

For many (44%), online experiences provide an opportunity to engage with the arts when they otherwise aren't able to in-person. And just over one in five (22%) intend to have more engagement with the arts online in the future.

Online-only audience is the minority

Just over one in ten (12%) said they would prefer online experiences over in-person experiences (60% said they wouldn't). Convenience, cost, and low levels of commitment are the main reasons people give for preferring online over in-person experiences.

Perception of arts and culture online



Photography David St George. Courtesy Auckland Art Gallery Toi o Tāmaki

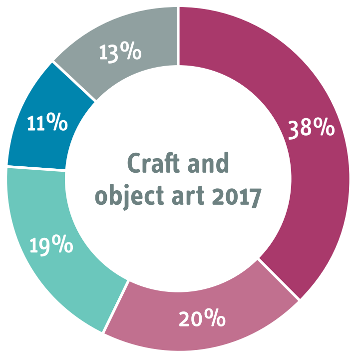
Section 5: Arts attendance

Craft and object art

There's been a **dip in the number** of people **attending** a craft or object exhibition in the **past three years**, down by an estimated **8%** in real terms between 2014 and 2017.

In particular, the proportion of the market who have attended in the past 12 months has seen a steep decrease, from 48% in 2014 to 38% in 2017. However, there is **scope to regrow** the audience through focused efforts on **encouraging** the **lapsed audience** to **come back sooner**.

There's a general pattern of higher attendance in some of the less populated regions and the market in Nelson is particularly strong with nearly seven in ten in the current market. Auckland was the only region to see a growth in the number in the current market between 2014 and 2017, boosted by steep population growth in this region. Canterbury saw the steepest decline in real terms.



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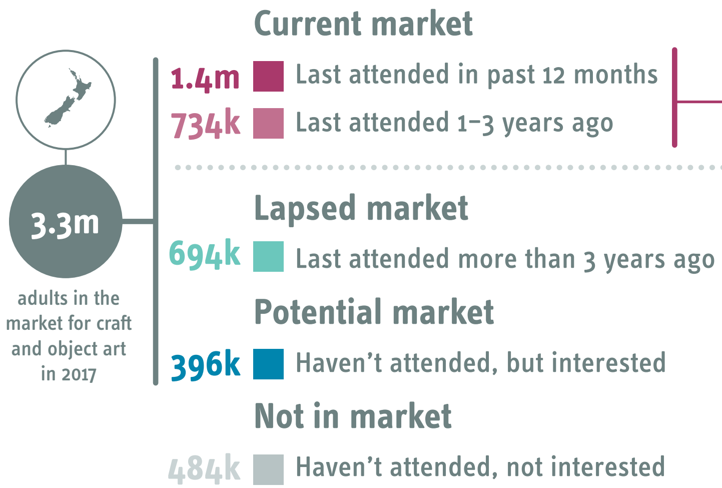
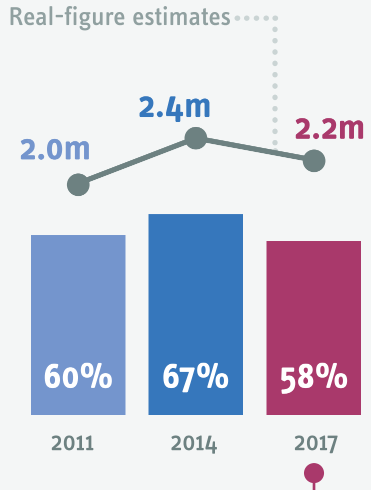


New Zealand current craft and object art market over time



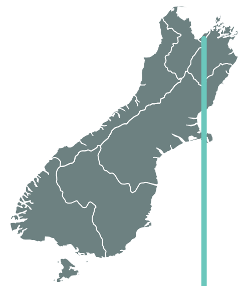
In 2017, 58% of New Zealand's culture market had attended a craft or object art exhibition in the past three years. This equates to 2.2 million adults, 8% fewer than in 2014.

Current craft and object art market by region over time

Regional craft and object art market

	2017 national average	North Island – by region								
		Northland	Auckland	Waikato	Bay of Plenty	Gisborne	Hawke's Bay	Taranaki	Manawatu-Wanganui	Wellington
Current	58%	57%	56%	54%	59%	64%	55%	65%	60%	62%
Lapsed	19%	19%	20%	20%	17%	27%	15%	12%	17%	17%
Potential	11%	10%	11%	13%	7%	8%	16%	14%	13%	9%
Base	[5014]	[190]	[589]	[668]	[287]	[93]	[186]	[189]	[287]	[785]

	2017 national average	South Island – by region						
		Tasman	Nelson	Marlborough	West Coast	Canterbury	Otago	Southland
Current	58%	65%	69%	49%	64%	57%	60%	64%
Lapsed	19%	21%	16%	23%	10%	19%	17%	15%
Potential	11%	6%	3%	10%	11%	9%	12%	7%
Base	[5014]	[96]	[98]	[97]	[94]	[583]	[584]	[188]



2017 average | % significantly higher than average | % significantly lower than average

What's the profile of the current craft and object art exhibition market?

Those in the current market for craft and object art are significantly older: 54% are aged 45 or over compared to 50% in the culture market overall. Females are also over-represented (59%, compared to 54% overall).

What else do they do?

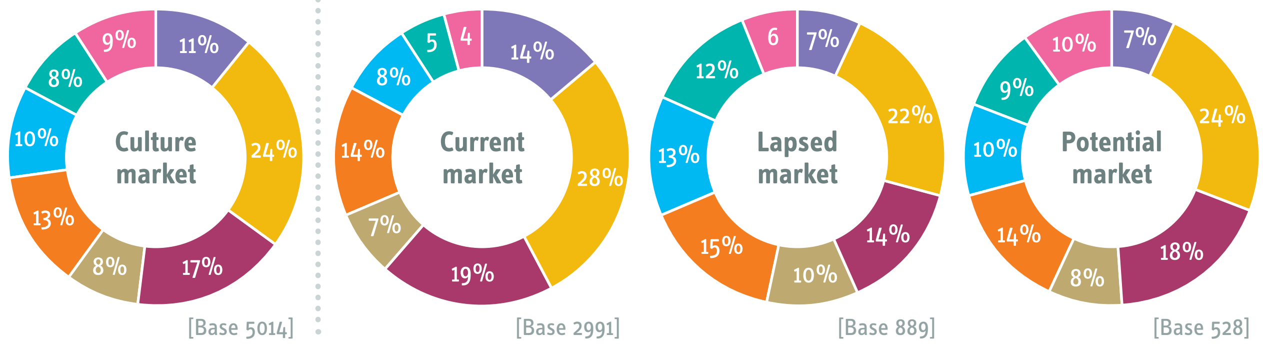
This market has a relatively strong appetite for a broad range of artforms. Just over one-third (35%) of the current market had engaged with nine or more different artform types in the past three years, significantly higher than average (22%). Cross-over is higher than average with the visual arts market, film festivals, museums, New Zealand films, plays and drama and street performance.

Essence at the core, Expression and Affirmation secondary targets

The Essence segment is core to the craft and object art market: 77% have attended within the past three years, significantly higher than average and some way ahead of other segments. The Expression and Affirmation segments should be considered secondary targets, with both also over-represented in the current market.

Enrichment and Stimulation can be considered development segments – the majority of people in these groups have attended in the past three years, but are more likely than average to lapse.

Craft and object art market by Culture Segment



Craft and object art market by Culture Segment

	2017 average	Essence	Expression	Affirmation	Enrichment	Stimulation	Release	Perspective	Entertainment
Current	58%	77%	68%	67%	51%	60%	48%	37%	25%
Lapsed	19%	12%	17%	16%	23%	20%	25%	27%	13%
Potential	11%	7%	11%	11%	10%	11%	11%	12%	13%
Not in market	13%	5%	5%	6%	15%	9%	16%	24%	50%
Base	[5014]	[534]	[1140]	[795]	[458]	[687]	[452]	[461]	[487]

2017 average   % significantly higher than average   % significantly lower than average

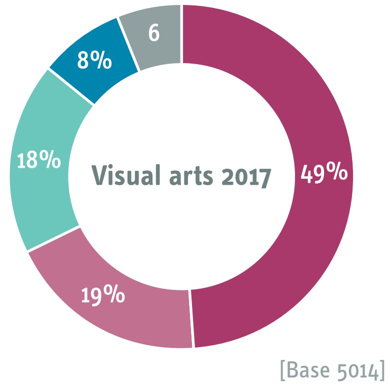
Essence Expression Affirmation Enrichment Stimulation Release Perspective Entertainment

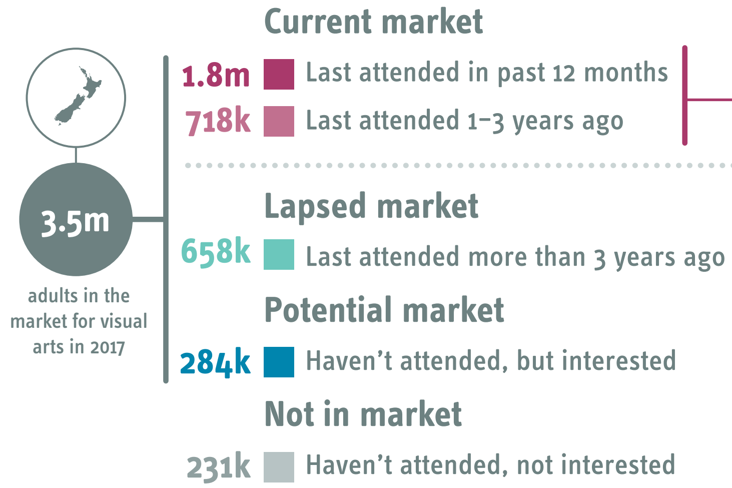
Visual arts

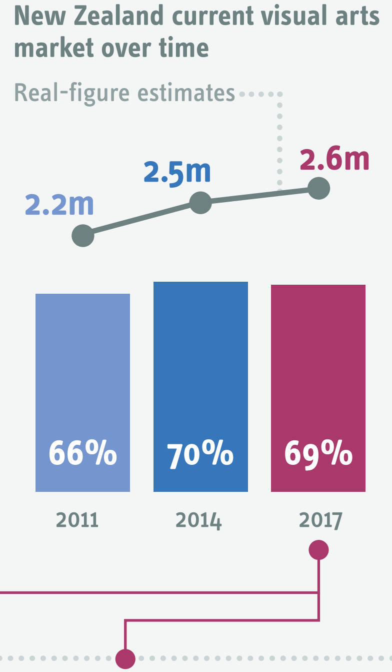
Nearly **seven in ten** people in the culture market attended a **visual arts** event in the **past three years**, equating to 2.6m people. In real terms, the size of this market has grown steadily over the past three years.

The visual arts market is **relatively active**: most are open to attending and nearly half the market has done so in the past year. **Retaining audiences**, keeping them up-to-date with programming and encouraging people to try new types of visual arts experiences are **key strategies**. There is also **potential** to introduce new audiences to **digital or video** arts events.

Wellington and **Otago** have particularly active visual arts markets while the **Waikato** region shows significant development potential.







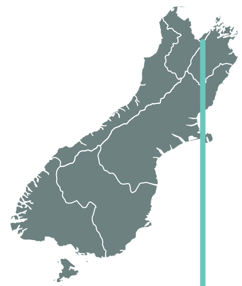
In 2017, 69% of New Zealand's culture market had attended an art gallery or exhibition and or a digital or video arts event in the past three years. This equates to 2.6 million adults, 5% more than in 2014.

Current visual arts market by region over time

Regional visual arts market

	2017 national average	North Island – by region								
		Northland	Auckland	Waikato	Bay of Plenty	Gisborne	Hawke's Bay	Taranaki	Manawatu-Whanganui	Wellington
Current	69%	61%	72%	57%	68%	69%	62%	74%	63%	76%
Lapsed	18%	23%	16%	24%	18%	16%	15%	11%	18%	12%
Potential	8%	5%	7%	12%	6%	10%	12%	8%	12%	6%
Base	[5014]	[190]	[589]	[668]	[287]	[93]	[186]	[189]	[287]	[785]

	2017 national average	South Island – by region						
		Tasman	Nelson	Marlborough	West Coast	Canterbury	Otago	Southland
Current	69%	75%	67%	60%	62%	66%	78%	63%
Lapsed	18%	14%	27%	25%	21%	21%	13%	19%
Potential	8%	3%	1%	8%	13%	6%	5%	9%
Base	[5014]	[96]	[98]	[97]	[94]	[583]	[584]	[188]



2017 average   % significantly higher than average   % significantly lower than average

What's the profile of the current visual arts market?

Those in the current visual arts market have a broadly similar age profile to the overall market, with those in the 25–34 age band representing the single largest group (24%).

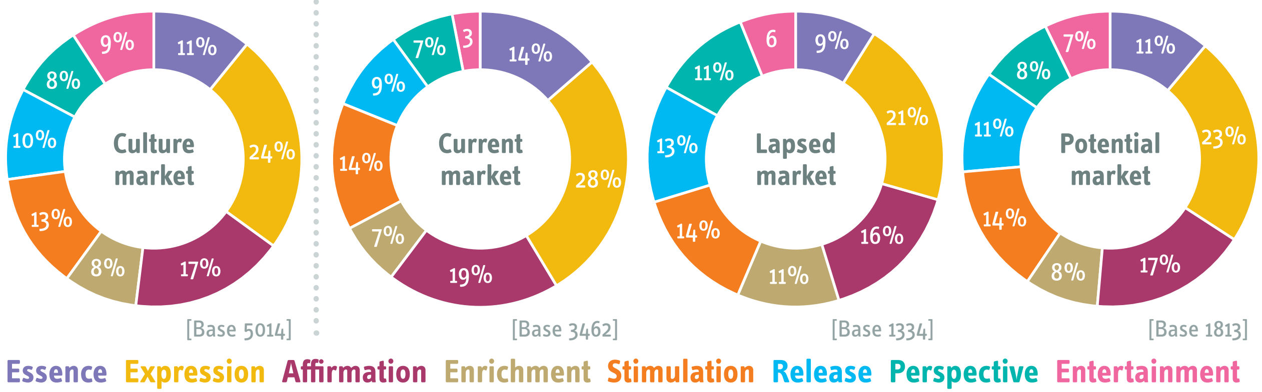
Comparable to the culture market average, 54% identify as female, and 80% identify as Pākehā. The current visual arts market is, however, more highly educated and significantly more likely to have a post-graduate, masters or post-doctorate qualification than average (24% compared to 21% overall).

What else do they do?

The current visual art market engages with a fairly broad range of different artforms: nearly eight in ten (78%) have attended at least six different artforms in the past three years, compared to 59% for the market as a whole. In particular they are more likely than average to have attended craft and object art, museums, film festivals and plays or drama.

Overleaf we present tables that break this data down in a different way. Taking a more granular view of the artform, we look at the percentage of each segment in the four market groups (current, lapsed, potential and not in market).

Visual arts market by Culture Segment



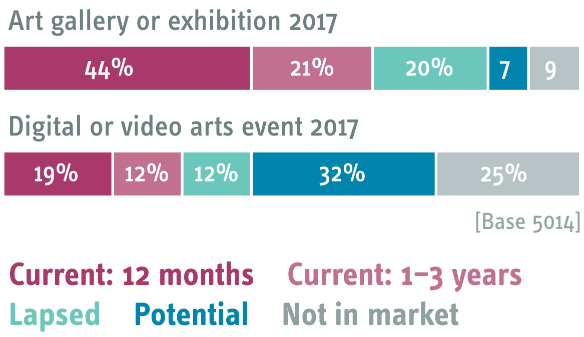
Broad potential across most segments for art galleries

Essence, Expression, Affirmation and Stimulation are over-represented in the current market for both sub-artforms. Enrichment, Release and Perspective are typically open to going to art galleries and exhibitions, although they visit less frequently, being significantly more likely to have lapsed, last visiting over three years ago.

A narrower set of target segments for digital art

The less mainstream activity of attending digital or video art events has a narrower set of segments where most potential lies. Essence, Expression, Affirmation and Stimulation are all significantly more likely than average to be in the current market while Enrichment, Perspective and Entertainment are most likely to have never attended this form of art and not be interested in doing so in future.

Visual arts sub-artform



Current gallery market twice that of digital art

Nearly two-thirds (64%) of the culture market is in the current market for art gallery exhibitions, around twice the size of the current market for a digital or video art event (31%). For the latter, the proportion of the market who have never attended but would consider going is actually larger (32%) than the current market, highlighting particular market penetration potential for this type of arts experience.

Around four in ten (41%) of those in the current art gallery exhibition market had also attended a digital or video art event in the past three years. Looking at this the other way, nearly nine in ten (86%) of those in the current digital arts audience had attended an art gallery or exhibition.

Art gallery or art exhibition

Current	64%	83%	76%	74%	54%	69%	55%	50%	17%
Lapsed	20%	12%	16%	16%	30%	22%	30%	29%	14%
Potential	7%	5%	6%	8%	10%	7%	9%	8%	4%
Not in market	9%	-	2%	2%	6%	2%	6%	13%	65%

Digital or video art event

Current	31%	38%	43%	36%	14%	38%	25%	14%	8%
Lapsed	12%	12%	12%	15%	13%	11%	14%	11%	6%
Potential	32%	34%	30%	34%	30%	34%	35%	30%	25%
Not in market	25%	16%	15%	15%	43%	17%	26%	45%	61%
Base	[5014]	[534]	[1140]	[795]	[458]	[687]	[452]	[461]	[487]

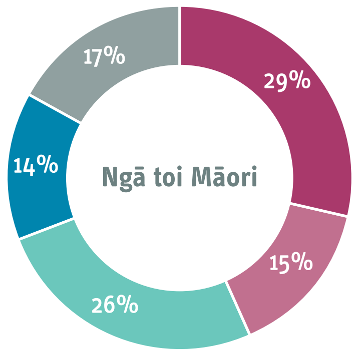
2017 average — % significantly higher than average — % significantly lower than average

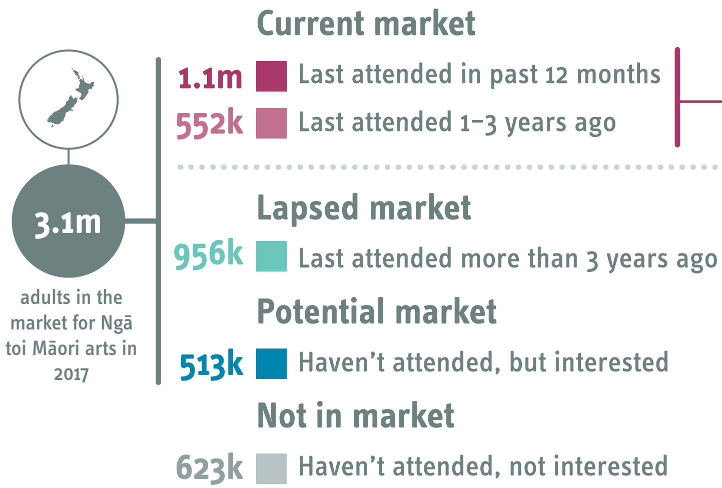
Essence Expression Affirmation Enrichment Stimulation Release Perspective Entertainment

Ngā toi Māori

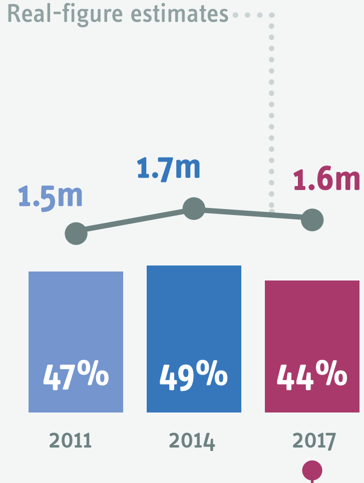
The market for Ngā toi Māori is showing **signs of decline**: the proportion in the **current market** in 2017 (44%) was lower than previous studies, an estimated **4% decrease** in real terms since 2014. Most people are interested in this artform, but attendance is becoming **less frequent**; in 2017, 26% of the culture market last attended three years ago, compared to 19% in 2014. Market **development efforts** should focus on **reactivating** the **lapsed** audience, particularly through targeting the **Stimulation** segment.

In 2017, Gisborne had highest attendance of the regions, with 65% in the current market for Ngā toi Māori, although this is lower than 2014. Marlborough was the only region to see a proportional increase in 2017. One of the steepest decreases was in Canterbury, although there is clear development potential in this region with nearly one in five in the potential market for this artform.





New Zealand current Ngā toi Māori market over time



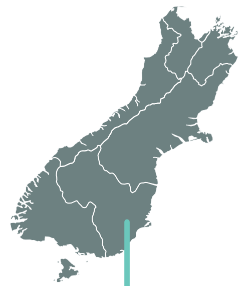
In 2017, 44% of New Zealand's culture market had attended a Māori performance, cultural festival, arts exhibition or another Māori arts or cultural event in the past three years. This equates to 1.6 million adults, 4% fewer than in 2014.

Ngā toi Māori current market by region over time

Regional Ngā toi Māori market

	2017 national average	North Island – by region								
		Northland	Auckland	Waikato	Bay of Plenty	Gisborne	Hawke's Bay	Taranaki	Manawatu-Whanganui	Wellington
Current	44%	52%	46%	43%	47%	65%	46%	43%	40%	46%
Lapsed	26%	25%	27%	23%	28%	11%	22%	27%	22%	25%
Potential	14%	13%	12%	16%	9%	15%	13%	9%	15%	12%
Base	[5014]	[190]	[589]	[668]	[287]	[93]	[186]	[189]	[287]	[785]

	2017 national average	South Island – by region						
		Tasman	Nelson	Marlborough	West Coast	Canterbury	Otago	Southland
Current	44%	43%	31%	47%	42%	35%	44%	39%
Lapsed	26%	31%	32%	28%	25%	26%	21%	26%
Potential	14%	13%	17%	9%	14%	19%	17%	19%
Base	[5014]	[96]	[98]	[97]	[94]	[583]	[584]	[188]



2017 average

% significantly higher than average

% significantly lower than average

What's the profile of the current Ngā toi Māori market?

The current Ngā toi Māori audience is more diverse compared to the national culture market. Just over three-quarters identify Pākehā, 13% as Asian and unsurprisingly, those identifying as Māori were over-represented compared to average (20% and 13% respectively).

The current Ngā toi Māori audience is also more likely to be female (58% compared to 54% for the national culture market) and have children in the household (37% compared to 30% overall).

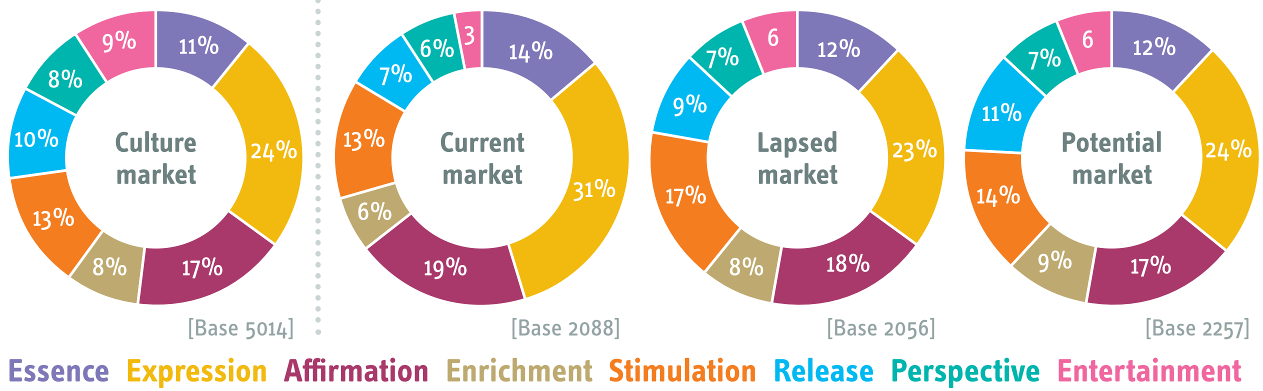
What else do they do?

This is an active market with double the proportion attending at least nine different artforms in the past three years (45%) compared to average (22%).

Cross-over with Pacific arts, street performance, Asian arts festivals, digital or video art events and craft and object exhibitions is, in particular, higher than average.

Overleaf we present a series of tables that break this data down in a different way. Taking a more granular view of the artform, we look at the percentage of each segment in the four market groups (current, lapsed, potential and not in market).

Ngā toi Māori market by Culture Segment



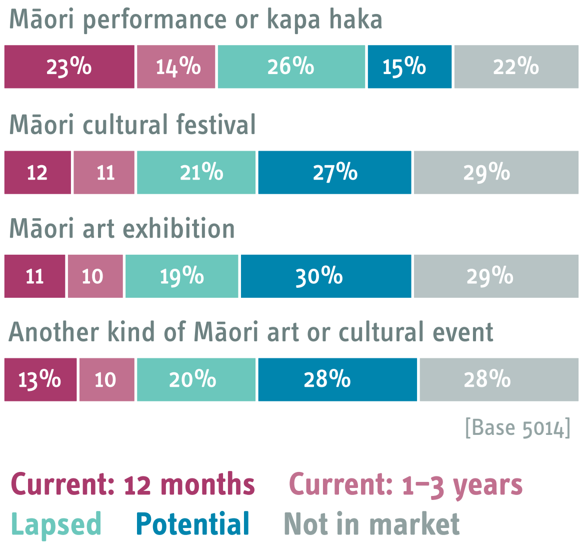
Expression and Essence are the core segments

Essence and Expression are over-represented in the current market for Ngā toi Māori across all types of activity: performances, festivals and art exhibitions (shown overleaf). The Affirmation segment is also a core market for this artform, accounting for nearly 1 in 5 in the current market.

Stimulation is a key development segment

The Stimulation segment can be considered a development segment. Representation in the current market is around average or lower (in the case of art exhibitions, shown overleaf) and this group is significantly more likely than average to lapse. Ensuring that Ngā toi Māori is positioned as fresh, contemporary and relevant will help maintain their attention.

Ngā toi Māori sub-artforms



Potential market for Ngā toi Māori exhibitions

The potential market for Ngā toi Māori overall is strong, with most scope to further market penetration via completely new audiences through cultural festivals or Ngā toi Māori exhibitions.

Kapa haka has the largest current market of the sub-artforms, but around a quarter of the culture market have lapsed in their attendance, highlighting that retaining rather than introducing audiences to this artform is the key growth strategy.

Māori performance or kapa haka

Current	37%	47%	48%	45%	26%	35%	28%	25%	13%
Lapsed	26%	28%	22%	28%	25%	31%	28%	23%	22%
Potential	15%	14%	15%	16%	18%	15%	18%	12%	14%
Not in market	22%	11%	15%	12%	31%	19%	26%	39%	52%
Māori cultural festival									
Current	23%	34%	34%	26%	13%	21%	17%	12%	5%
Lapsed	21%	23%	23%	23%	16%	25%	20%	15%	11%
Potential	27%	29%	26%	29%	30%	29%	31%	23%	22%
Not in market	29%	14%	18%	21%	40%	25%	33%	50%	62%
Māori art exhibition									
Current	21%	32%	32%	25%	14%	17%	14%	11%	5%
Lapsed	19%	23%	20%	21%	14%	26%	19%	11%	9%
Potential	30%	32%	29%	34%	31%	32%	36%	27%	20%
Not in market	29%	13%	19%	20%	41%	25%	31%	50%	66%
Base	[5014]	[534]	[1140]	[795]	[458]	[687]	[452]	[461]	[487]

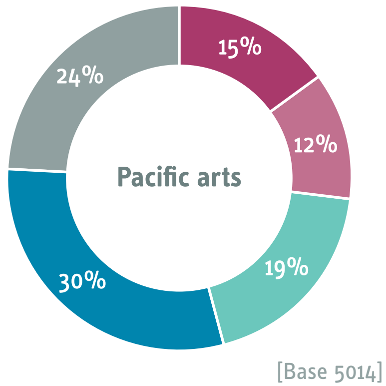
2017 average   % significantly higher than average   % significantly lower than average

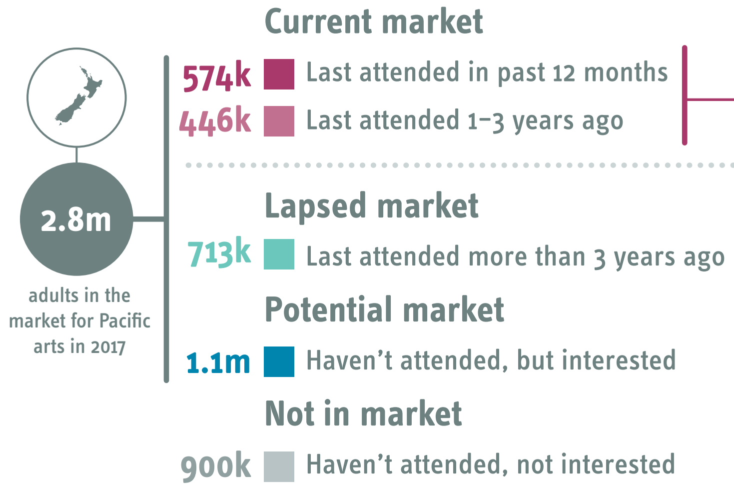
Essence Expression Affirmation Enrichment Stimulation Release Perspective Entertainment

Pacific arts

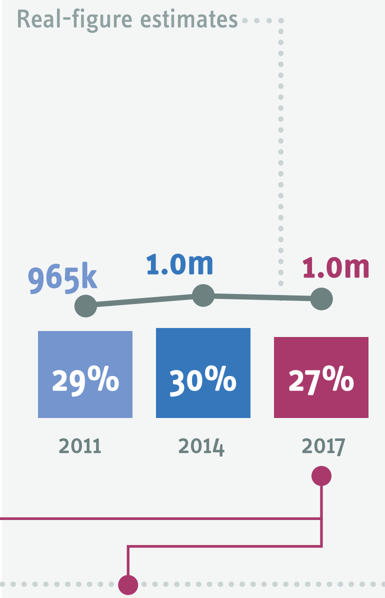
At a national level, Pacific arts has not seen growth over the past six years with the size of the **current market** actually **receding** in 2017. Regionally the picture is mixed. While the **Auckland** and **Wellington** culture markets are more familiar with this artform and have a **stable** market – **Northland**, **Waikato** and **Southland** all saw a significant **drop** on 2014.

There is **significant development potential**. The number of people in the culture market new to this artform and interested is actually larger than the number who have attended in the past three years. **Conversion** is therefore a **key strategy**, with the **Waikato**, **Northland**, **Bay of Plenty** and **Canterbury** markets particularly **ripe for development**.





New Zealand current Pacific arts market over time



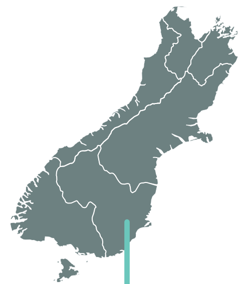
In 2017, 27% of New Zealand's culture market had attended a Pacific performance, cultural festival, arts exhibition or another Pacific arts or cultural event in the past three years. This equates to 1 million adults, 2% fewer than in 2014.

Pacific arts current market by region over time

Regional Pacific arts market

	2017 national average	North Island – by region								
		Northland	Auckland	Waikato	Bay of Plenty	Gisborne	Hawke's Bay	Taranaki	Manawatu-Whanganui	Wellington
Current	27%	17%	36%	17%	19%	25%	25%	23%	26%	28%
Lapsed	19%	25%	21%	14%	21%	27%	18%	24%	16%	23%
Potential	30%	37%	22%	39%	36%	31%	28%	24%	31%	26%
Base	[5014]	[190]	[589]	[668]	[287]	[93]	[186]	[189]	[287]	[785]

	2017 national average	South Island – by region						
		Tasman	Nelson	Marlborough	West Coast	Canterbury	Otago	Southland
Current	27%	24%	18%	27%	16%	22%	27%	24%
Lapsed	19%	15%	12%	14%	19%	14%	14%	15%
Potential	30%	34%	38%	34%	39%	38%	31%	32%
Base	[5014]	[96]	[98]	[97]	[94]	[583]	[584]	[188]



2017 average   % significantly higher than average   % significantly lower than average

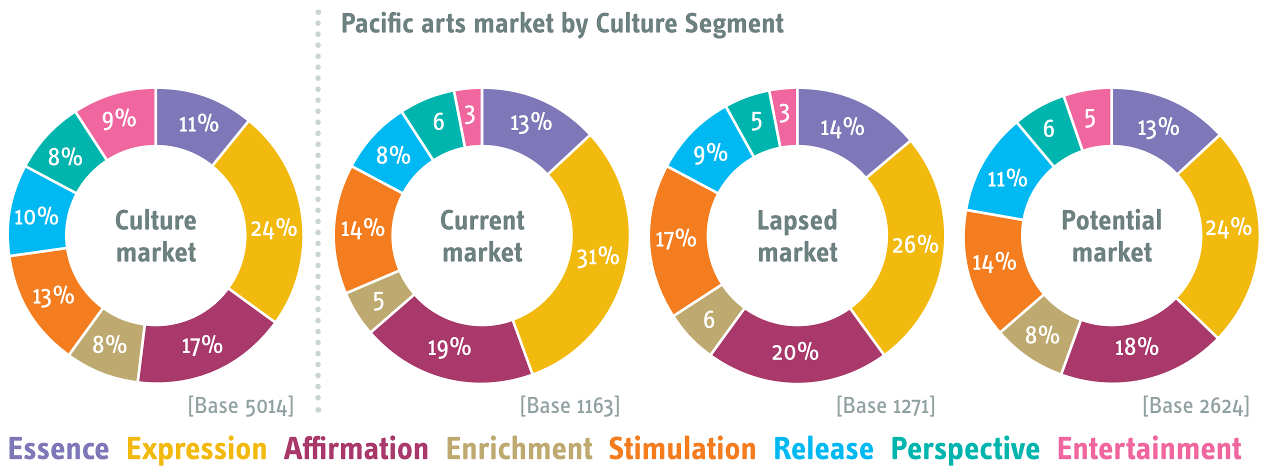
What's the profile of the current Pacific arts market?

Those in the current Pacific arts market are ethnically diverse, being significantly less likely to identify as Pākehā (73%) than the national culture market (80%), and more likely to identify as Māori (19%, compared to 13% overall) or Pacific People (6%, compared to 2% overall).

While the gender split within this audience is similar to the culture market overall (55% female), they're typically more highly educated and younger with 38% aged under 35 compared to 33% for the culture market as a whole.

What else do they do?

When it comes to the range of artforms that they attend, the Pacific arts current audience is the most adventurous. Nearly six in ten have engaged with nine or more different artforms in the past three years, showing a higher breadth of attendance than any other artform. They're particularly active in the current Ngā toi Māori, Asian arts festival, digital arts events and dance markets compared to the national culture market overall. They're also one of the artform markets most likely to be a current member or subscriber to an arts organisation and show strong philanthropic support for the arts.



Expression is the core audience

Expression makes up 31% of this artform's current market. Compared to all other segments, they're more likely to have engaged with Pacific performances, cultural festivals and art exhibitions within the past three years.

Essence and Affirmation are development segments

Although both Essence and Affirmation do have strong representation in the current market for Pacific arts overall, if we look at a more granular level (shown overleaf) we see there is significant potential to engage those new to the artform, particularly through Pacific art exhibitions and festivals.

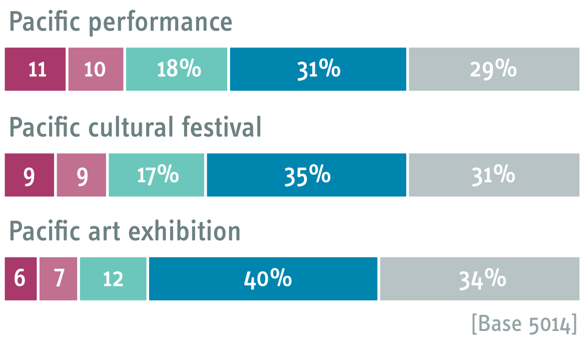
Stimulation need reactivating

Stimulation are significantly more likely than average to lapse in attendance: more people in this group last attended the Pacific arts over three years ago than did in the past three years.

Given the high level of cultural appetite and crossover with other artforms that exists within the current Pacific arts audience, a cross-artform approach to market development should be a core growth strategy.

Overleaf we present a series of tables that break this data down in a different way. Taking a more granular view of the artform, we look at the percentage of each segment in the four market groups (current, lapsed, potential and not in market).

Pacific arts sub-artforms



Current: 12 months Current: 1–3 years
Lapsed Potential Not in market

Pacific art exhibitions have greatest potential to introduce more people to the artform

When we explore market penetration at an activity level, we see that there's growth potential across all. In particular, Pacific art exhibitions have strong potential to introduce a completely new audience to Pacific arts: four in ten in the culture market are interested in this but have never knowingly experienced this type of art.

Pacific performance

Current	22%	24%	30%	25%	11%	21%	19%	17%	8%
Lapsed	18%	25%	19%	24%	14%	22%	16%	10%	7%
Potential	31%	36%	31%	34%	32%	32%	35%	21%	20%
Not in market	29%	15%	20%	17%	42%	25%	30%	52%	65%

Pacific cultural festival

Current	18%	18%	25 %	22%	9%	17%	13%	13%	6%
Lapsed	17%	22%	20%	20%	12%	20%	13%	9%	5%
Potential	35%	44%	34%	39%	34%	37%	40%	24%	22%
Not in market	31%	17%	21%	20%	45%	26%	34%	54%	66%

Pacific art exhibition

Current	13%	18%	22%	17%	5%	13%	7%	6%	1%
Lapsed	12%	16%	14%	15%	8%	16%	13%	3%	3%
Potential	40%	50%	41%	45%	40%	42%	43%	33%	21%
Not in market	34%	16%	24%	24%	48%	29%	37%	58%	75%
Base	[5014]	[534]	[1140]	[795]	[458]	[687]	[452]	[461]	[487]

2017 average % significantly higher than average % significantly lower than average

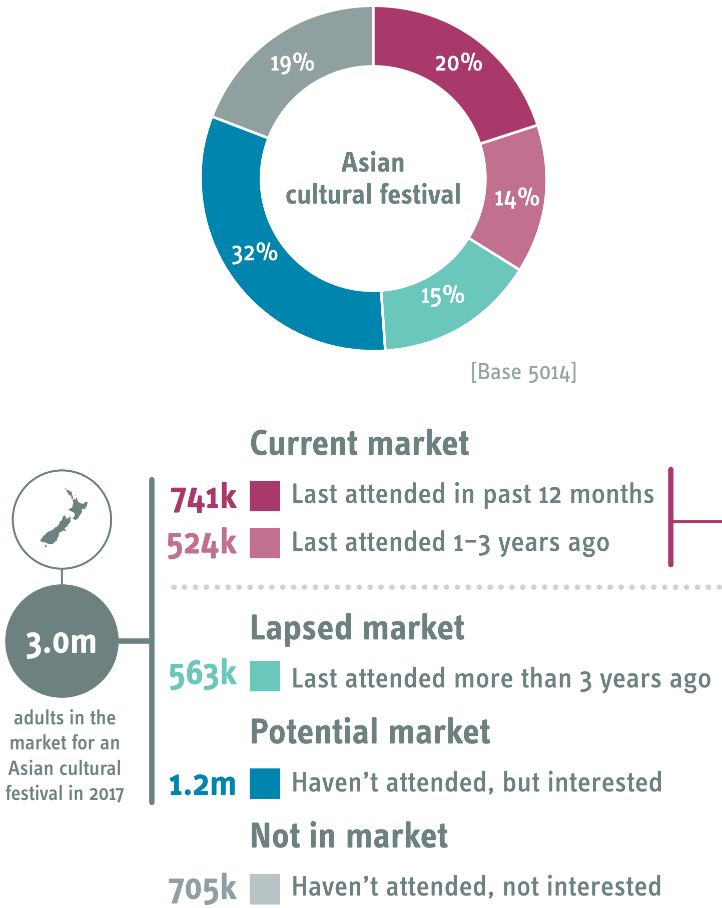
Essence Expression Affirmation Enrichment Stimulation Release Perspective Entertainment

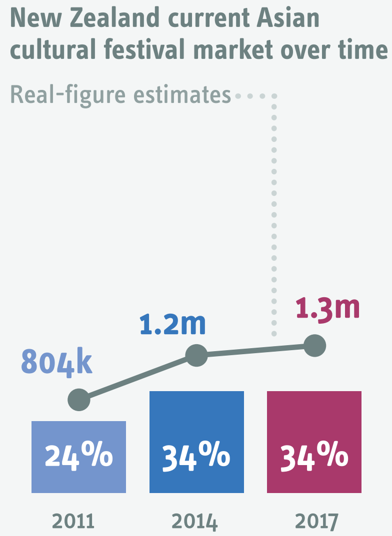
Asian cultural festivals

After substantial growth between 2011 and 2014, the current market for **Asian cultural festivals** has **plateaued**, with the number in this market increasing in line with population growth between 2014 and 2017.

There's significant **room to grow the market further**. Nearly one-third are new to this artform and interested, equating to 1.2m people. **Development** potential is sizeable **outside the main centres**, particularly in the Tasman, Waikato and Marlborough regions.

Similar to other artforms, the more culturally active segments offer greatest potential, but there is **more scope than normal** to engage members of the **Release** segment through Asian cultural festivals.





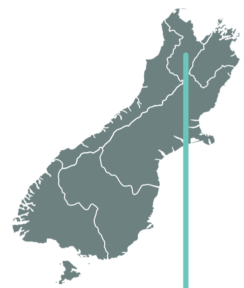
In 2017, 34% of New Zealand's culture market had attended an Asian cultural festival in the past three years. This equates to 1.3 million adults, 7% more than in 2014.

Asian arts current market by region over time

Regional Asian arts market

	2017 national average	North Island – by region								
		Northland	Auckland	Waikato	Bay of Plenty	Gisborne	Hawke's Bay	Taranaki	Manawatu-Whanganui	Wellington
Current	34%	17%	49%	17%	17%	25%	21%	17%	25%	39%
Lapsed	15%	15%	19%	11%	13%	17%	11%	16%	11%	15%
Potential	32%	43%	21%	44%	43%	37%	42%	39%	41%	29%
Base	[5014]	[190]	[589]	[668]	[287]	[93]	[186]	[189]	[287]	[785]

	2017 national average	South Island – by region						
		Tasman	Nelson	Marlborough	West Coast	Canterbury	Otago	Southland
Current	34%	19%	22%	14%	19%	36%	26%	14%
Lapsed	15%	13%	15%	12%	12%	13%	12%	16%
Potential	32%	50%	32%	49%	38%	34%	36%	40%
Base	[5014]	[96]	[98]	[97]	[94]	[583]	[584]	[188]



2017 average   % significantly higher than average   % significantly lower than average

What's the profile of the current Asian cultural festival market?

The current Asian cultural festival market is relatively ethnically diverse. While those identifying as New Zealand Māori are under-represented, there are significantly higher than average proportions of people identifying as Pacific People and Asian in the current market. This market is one of the most highly educated artform markets and has a more balanced gender profile than other artforms, with a significantly higher than average proportion of men in the current audience (49% compared to 46% for the market overall). It's also a young market: 43% are aged under 35 compared to 33% overall.

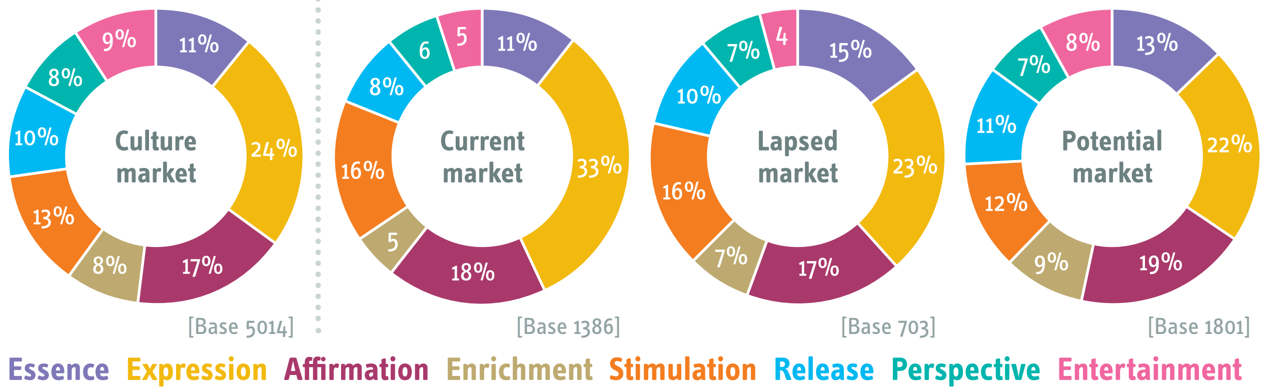
What else do they do?

After the Pacific arts and Literature artform markets, the current market for Asian arts has the highest range of artform engagement, with nearly half attending at least nine artforms within the past three years. In particular they are more likely than average to have attended street performances, Pacific arts, digital visual arts, film festivals and Māori performances or festivals.

Expression and Stimulation are the core markets; Essence, Affirmation and Release are ripe for developing

Expression and Stimulation were the segments mostly likely to have attended an Asian Cultural festival in the past three years.

Asian cultural festival market by Culture Segment



Asian Arts Festival by Culture Segment

Current	34%	33%	46%	36%	22%	39%	26%	23%	18%
Lapsed	15%	21%	14%	16%	14%	18%	16%	13%	7%
Potential	32%	37%	29%	37%	34%	29%	38%	27%	28%
Not in market	19%	9%	11%	11%	30%	14%	20%	37%	47%
Base	[5014]	[534]	[1140]	[795]	[458]	[687]	[452]	[461]	[487]

2017 average   % significantly higher than average   % significantly lower than average

The segment most likely to be open to this artform is, however, Essence: only 9% rule themselves 'out of market'.

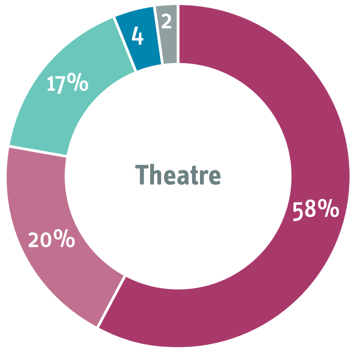
Nearly 4 in 10 members of the Essence, Affirmation and Release segments have never attended an Asian cultural festival but would be interested.

Theatre

Theatre enjoys one of the **larger current artform markets**. At 78%, the proportion in the current market has, however, decreased significantly in 2017, although population growth means that the actual number of people in the current market has nominally increased.

Frequency of attendance is falling: the decrease in the proportion in the current market came largely from a **diminishing recent audience** who last attended in the past year (58% compared to 65% in 2014).

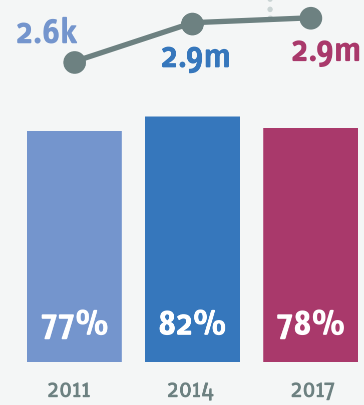
Although there was modest real-term growth in the number in the current theatre market in 2017 (up 1% nationally), this was predominantly seen in the Auckland region. Some regions saw significant decline in the number in the current market: Northland, the Waikato, Hawke's Bay and Taranaki.

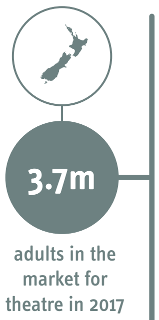


[Base 5014]

New Zealand current theatre market over time

Real-figure estimates





Current market

2.2m Last attended in past 12 months

755k Last attended 1–3 years ago

Lapsed market

620k Last attended more than 3 years ago

Potential market

147k Haven't attended, but interested

Not in market

68k Haven't attended, not interested

In 2017, 78% of New Zealand's culture market had attended a play, musical theatre, a pantomime, street, cabaret or burlesque peformance, a circus, comedy or another theatre event in the past three years. This equates to 2.9 million adults, 1% more than in 2014.

Current theatre market by region over time

Regional theatre market

	2017 national average	North Island – by region								
		Northland	Auckland	Waikato	Bay of Plenty	Gisborne	Hawke's Bay	Taranaki	Manawatu-Whanganui	Wellington
Current	78%	68%	81%	72%	75%	80%	71%	78%	79%	82%
Lapsed	17%	28%	14%	22%	20%	14%	23%	15%	14%	14%
Potential	4%	3%	4%	5%	2%	5%	5%	8%	5%	2%
Base	[5014]	[190]	[589]	[668]	[287]	[93]	[186]	[189]	[287]	[785]

	2017 national average	South Island – by region						
		Tasman	Nelson	Marlborough	West Coast	Canterbury	Otago	Southland
Current	78%	79%	84%	81%	69%	80%	77%	78%
Lapsed	17%	17%	16%	15%	22%	16%	18%	17%
Potential	4%	3%	-	4%	6%	5%	4%	4%
Base	[5014]	[96]	[98]	[97]	[94]	[583]	[584]	[188]

2017 average

% significantly higher than average

% significantly lower than average

What's the profile of the current theatre market?

In terms of demographics, there are no notable differences between the current theatre market and the New Zealand culture market as a whole, reflecting the fact that most people have attended at least one form of theatre in the past three years.

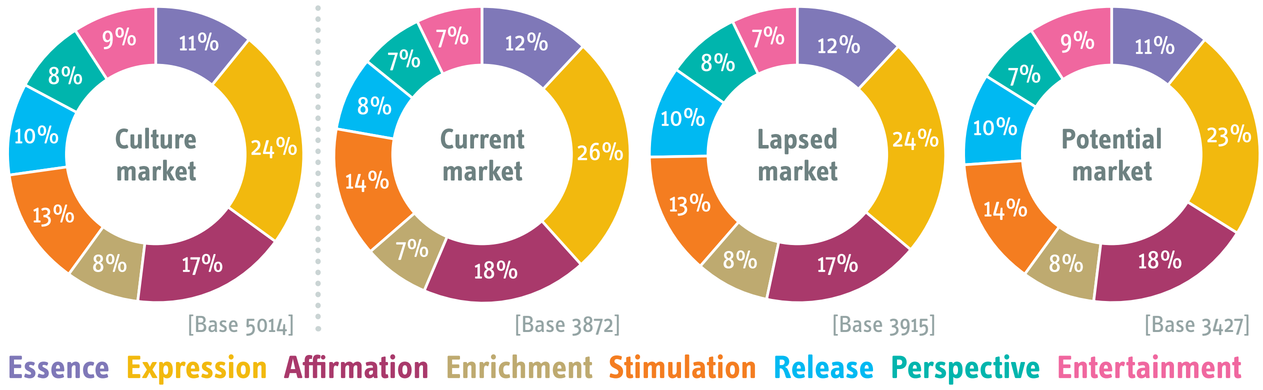
At a sub-genre level, however, there are some core differences. For example, the comedy market is significantly younger than average, the musicals market more likely to be female and the circus and street performance markets more ethnically diverse.

What else do they do?

The current theatre market is relatively active within other artforms and, in particular, has higher than average cross-over with the current market for New Zealand films at the cinema, rock or pop concerts, film festivals and the visual arts.

Overleaf we present a series of tables that break this data down in a different way. Taking a more granular view of the artform, we look at the percentage of each segment in the four market groups (current, lapsed, potential and not in market).

Theatre market by Culture Segment



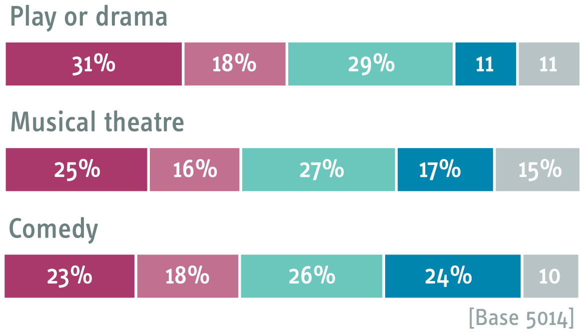
Potential for sophisticated targeting by genre

The diversity of genres within the theatre artform means that organisations that produce or show a range of work can do fairly sophisticated targeting by Culture Segments.

While at an artform level, the overall profile is similar to the market as a whole and shows the patterns we would expect (with the more culturally active segments of Essence, Expression, Affirmation and Stimulation all more likely than average to be in the current market), at a genre level there are distinct differences.

Essence, for example, is core in the current market for plays and drama, with similar likelihood to have attended within the past three years as those in the Expression, Affirmation and Stimulation segments. But, when it comes to musical theatre, comedy or burlesque, target segments can be narrowed: Essence offers lower return on investment, while Expression and Stimulation are where most development potential lies.

Similarly, within the pantomime and circus markets, while Expression remains one of the core audiences, Affirmation should also be considered one of the primary audiences, while there is less development potential with other segments.



Current: 12 months Current: 1–3 years
Lapsed Potential Not in market

Plays or drama have the largest current market

Just over three in ten people in the culture market have attended a play or drama performance in the past year making this the largest recent market within the theatre artform.

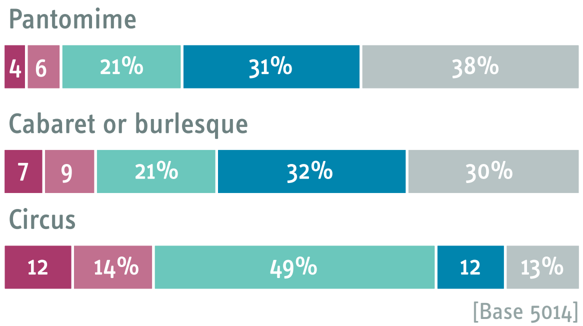
Comedy has more potential for growth

Half of the culture market are either lapsed in their attendance for comedy or are in the potential market. While some other genres within the theatre artform have larger potential markets (for example cabaret and pantomime, demonstrated overleaf), comedy has a small portion of the market who are resistant: just one in ten have never been and are not interested.

Play or drama									
Current	49%	57%	60%	57%	37%	57%	37%	27%	24%
Lapsed	29%	32%	26%	28%	35%	27%	36%	36%	24%
Potential	11%	9%	9%	10%	12%	9%	16%	15%	16%
Not in market	11%	2%	5%	5%	16%	7%	10%	22%	36%
Musical theatre									
Current	42%	43%	52%	51%	26%	52%	32%	24%	20%
Lapsed	27%	35%	23%	24%	35%	25%	31%	32%	18%
Potential	17%	15%	16%	18%	18%	13%	23%	14%	17%
Not in market	15%	7%	9%	7%	20%	9%	14%	30%	45%
Comedy									
Current	40%	41%	50%	44%	24%	49%	33%	32%	29%
Lapsed	26%	31%	24%	26%	27%	24%	30%	27%	24%
Potential	24%	21%	21%	25%	32%	21%	29%	22%	25%
Not in market	10%	7%	5%	6%	17%	6%	9%	19%	23%
Base	[5014]	[534]	[1140]	[795]	[458]	[687]	[452]	[461]	[487]

2017 average % significantly higher than average % significantly lower than average

Essence Expression Affirmation Enrichment Stimulation Release Perspective Entertainment



Smaller markets for pantomime and cabaret

Pantomimes and cabaret or burlesque have the smallest markets within the theatre artform. Considering this alongside the proportion in the market resistant to each (38% and 30% respectively), they can both be considered more niche. There is, however, potential to re-engage those who have lapsed (which out number those in the current market) and to reach out to completely new audiences. Around one in three in the culture market is new to these types of performances but would consider attending.

The circus genre enjoys high market penetration, but has a very large lapsed audience, suggesting the market needs to be convinced to re-attend in order to grow this particular part of the market.

Pantomime									
Current	11%	9%	16%	13%	6%	12%	9%	4%	3%
Lapsed	21%	28%	25%	20%	17%	23%	15%	19%	9%
Potential	31%	38%	31%	38%	28%	32%	34%	17%	19%
Not in market	38%	26%	28%	28%	49%	33%	43%	59%	69%
Cabaret or burlesque									
Current	16%	14%	24%	18%	8%	23%	12%	6%	3%
Lapsed	21%	29%	24%	21%	15%	25%	19%	17%	13%
Potential	32%	38%	30%	38%	29%	34%	38%	21%	28%
Not in market	30%	20%	22%	23%	48%	18%	31%	56%	56%
Circus									
Current	26%	27%	32%	30%	18%	28%	20%	17%	16%
Lapsed	49%	51%	47%	51%	50%	49%	51%	51%	42%
Potential	12%	9%	12%	11%	12%	11%	16%	8%	16%
Not in market	13%	13%	8%	7%	20%	12%	13%	24%	26%
Base	[5014]	[534]	[1140]	[795]	[458]	[687]	[452]	[461]	[487]

2017 average   % significantly higher than average   % significantly lower than average

Essence Expression Affirmation Enrichment Stimulation Release Perspective Entertainment

Street performance

Current: 12 months Current: 1–3 years
Lapsed Potential Not in market

Street performance has high engagement

After plays and drama, street performance has the highest attendance levels, with just under half of the culture market having seen a form of street performance within the past three years. There is still room to grow this market, however, with relatively low levels of resistance and around one in five in the market completely new but open to this form of cultural experience.

Street performance

Current	48%	59%	59%	55%	35%	52%	37%	36%	28%
Lapsed	21%	19%	22%	19%	21%	20%	25%	25%	17%
Potential	18%	17%	13%	19%	22%	19%	23%	15%	20%
Not in market	13%	5%	6%	7%	22%	9%	15%	24%	35%
Base	[5014]	[534]	[1140]	[795]	[458]	[687]	[452]	[461]	[487]

2017 average % significantly higher than average % significantly lower than average

Essence Expression Affirmation Enrichment Stimulation Release Perspective Entertainment

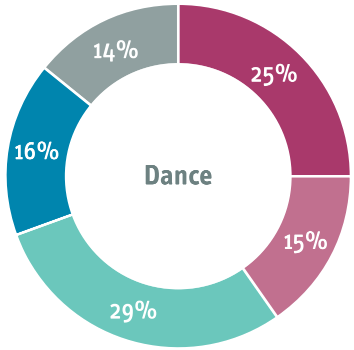
Dance

The current **dance** market has seen an **upward trend** over the past six years. Between 2014 and 2017, dance saw a steeper rate of growth than other artforms, with an estimated **12%** more people in the current market in 2017 than three years ago.

Not only are **more people** going, they're **going more frequently**. In 2017 the market is more likely to have visited in the past 12 months (25%) compared to 2014 (21%).

Across the regions, the main centres have all seen real-term growth in dance attendance as well as the Waikato, Bay of Plenty, Manawatu-Whanganui.

Southland and Tasman were two regions which saw a drop in dance attendance. Perhaps reflecting issues of access, some of the lower populated regions have highest proportions of people new to dance and open to trying the artform (West Coast and Southland).



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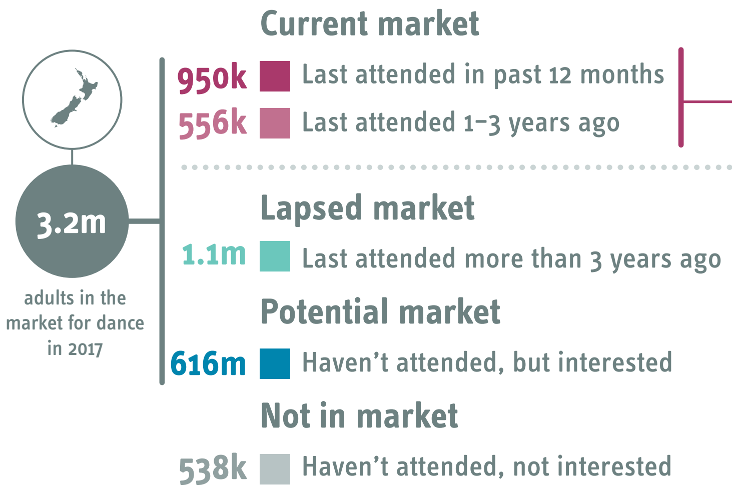
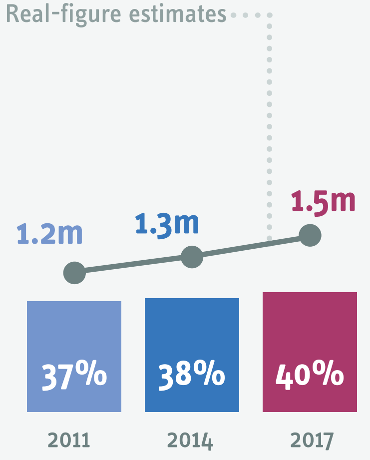


New Zealand current dance market over time



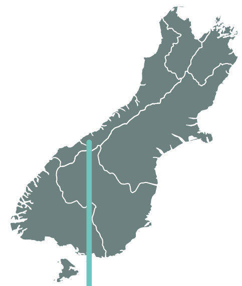
In 2017, 40% of New Zealand's culture market had attended a contemporary dance, ballet or another dance event in the past three years. This equates to 1.5 million adults, 12% more than in 2014.

Current dance market by region over time

Regional dance market

	2017 national average	North Island – by region								
		Northland	Auckland	Waikato	Bay of Plenty	Gisborne	Hawke's Bay	Taranaki	Manawatu-Wanganui	Wellington
Current	40%	34%	44%	32%	40%	39%	40%	34%	41%	48%
Lapsed	29%	33%	30%	30%	27%	46%	30%	27%	24%	26%
Potential	16%	18%	14%	22%	18%	10%	15%	19%	23%	13%
Base	[5014]	[190]	[589]	[668]	[287]	[93]	[186]	[189]	[287]	[785]

	2017 national average	South Island – by region						
		Tasman	Nelson	Marlborough	West Coast	Canterbury	Otago	Southland
Current	40%	36%	37%	37%	28%	38%	39%	31%
Lapsed	29%	32%	35%	35%	27%	30%	24%	28%
Potential	16%	17%	14%	15%	27%	18%	15%	24%
Base	[5014]	[96]	[98]	[97]	[94]	[583]	[584]	[188]



2017 average | % significantly higher than average | % significantly lower than average

What's the profile of the current dance market?

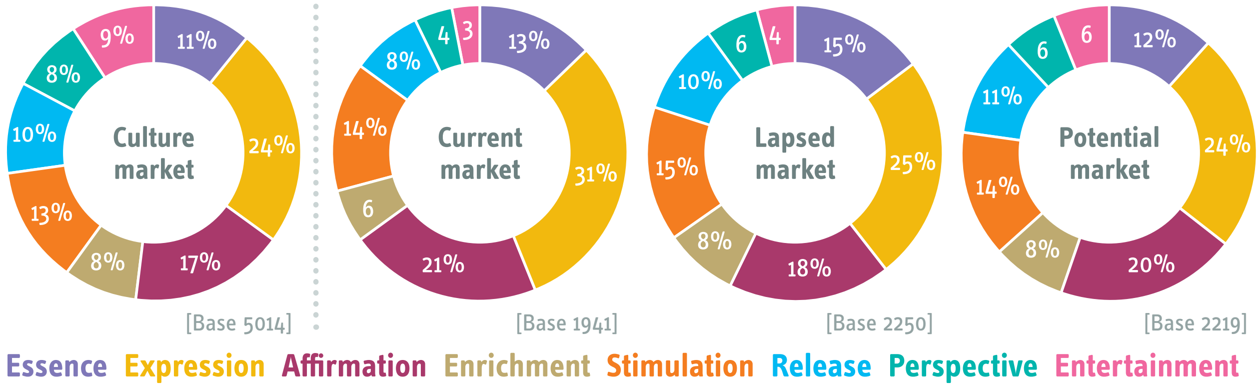
The current dance market is significantly more likely than average to be female (60%, compared to 54% overall) and are more highly educated. This is a diverse market with around three-quarters identifying as Pākehā, while those identifying as Māori, Pacific People and Asian are over-represented.

What else do they do?

Dance attracts a fairly active audience with broad cultural engagement. Nearly half (47%) have engaged with at least nine different artforms within the past three years. In particular, cross-over was higher than average for several performing arts genres including play or drama, musicals, classical concerts, comedy and contemporary classical / electronic music / sound art events.

Overleaf we present a series of tables that break this data down in a different way. Taking a more granular view of the artform, we look at the percentage of each segment in the four market groups (current, lapsed, potential and not in market).

Dance market by Culture Segment



Essence, Expression and Affirmation are core markets

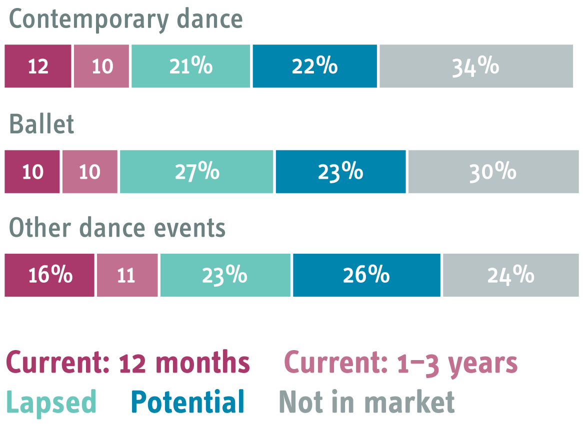
The Essence segment is the most open to the dance artform. They're the segment most likely to have attended ballet or contemporary dance at some point in the past and very few are resistant to this artform (shown in the tables overleaf).

The Affirmation segment closely follows: around six in ten within this segment have engaged at some stage in the past, and they're also significantly more likely than average to be new to the artform and interested in attending in the future.

As with other artforms, Expression are also a key target segment, with a high volume across the current and lapsed dance markets.

Stimulation is a development segment

For the contemporary dance market in particular, Stimulation should be seen as a development segment with both higher than average representation in the current and potential markets.



Similar market penetration across ballet and contemporary dance

Overall, slightly more people in the culture market have experience of ballet than contemporary dance, and the proportion resistant to ballet is lower than for contemporary dance. However, contemporary dance has a higher proportion in the current market, with this audience less likely to lapse.

Cross-over between the two genres is fairly significant. Nearly six in ten in the current market for ballet have also attended contemporary dance within the past three years. It's even higher within the contemporary dance current market where 65% have also attended ballet in the past three years.

Contemporary dance

Current	23%	29%	33%	32%	14%	26%	15%	3%	1%
Lapsed	21%	36%	22%	28%	13%	23%	20%	4%	4%
Potential	22%	28%	23%	28%	18%	25%	26%	8%	10%
Not in market	34%	7%	22%	13%	56%	26%	39%	85%	84%
Ballet									
Current	20%	27%	26%	29%	11%	23%	15%	8%	3%
Lapsed	27%	36%	29%	29%	30%	30%	22%	17%	14%
Potential	23%	22%	24%	26%	21%	21%	33%	15%	13%
Not in market	30%	15%	21%	16%	37%	26%	30%	60%	70%
Other dance event									
Current	27%	29%	39%	33%	17%	29%	20%	13%	8%
Lapsed	23%	33%	24%	24%	18%	26%	23%	17%	9%
Potential	26%	31%	22%	32%	27%	28%	29%	17%	23%
Not in market	24%	8%	15%	11%	38%	16%	28%	52%	59%
Base	[5014]	[534]	[1140]	[795]	[458]	[687]	[452]	[461]	[487]

2017 average   % significantly higher than average   % significantly lower than average

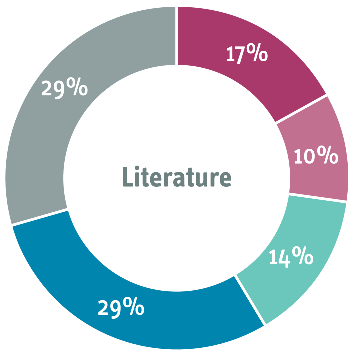
Essence Expression Affirmation Enrichment Stimulation Release Perspective Entertainment

Literature

Literature is one of the **smaller artforms** by market size and current **attendance** at a **literature event** has **fallen** since 2014. With 27% in the current market in 2017, this is an estimated decrease of 4%.

The size of the **potential market** has also **decreased**: 29% new to the artform but interested compares to 35% three years ago, meanwhile the **resistant market has grown**. While this is not an overly positive picture, the literature market does have a **strong foundation** in the sense that its current audience is committed and has strong **philanthropic development** potential.

Essence and **Expression dominate** the current market, while Affirmation is a prime development segment.



[Base 5014]

2.7m adults in the market for literature events in 2017

Current market

639k Last attended in past 12 months

388k Last attended 1–3 years ago

Lapsed market

532k Last attended more than 3 years ago

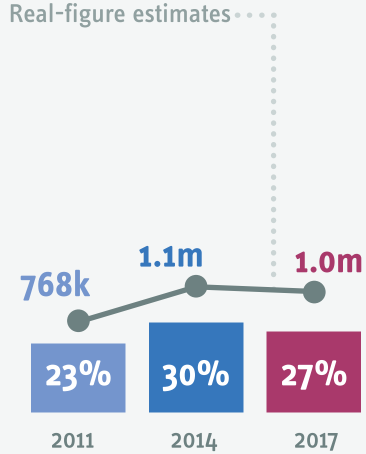
Potential market

1.1m Haven't attended, but interested

Not in market

1.1m Haven't attended, not interested

New Zealand literature event market over time



In 2017, 27% of New Zealand's culture market had attended a literary event at a festival, or a poetry, book or other literature event in the past three years. This equates to 1.0 million adults, 4% fewer than in 2014.

Current literature market by region over time

Regional literature market

	2017 national average	North Island – by region								
		Northland	Auckland	Waikato	Bay of Plenty	Gisborne	Hawke's Bay	Taranaki	Manawatu-Wanganui	Wellington
Current	27%	25%	30%	21%	21%	32%	27%	24%	25%	31%
Lapsed	14%	16%	16%	12%	14%	10%	14%	13%	15%	15%
Potential	29%	30%	29%	32%	33%	28%	31%	27%	27%	27%
Base	[5014]	[190]	[589]	[668]	[287]	[93]	[186]	[189]	[287]	[785]

	2017 national average	South Island – by region						
		Tasman	Nelson	Marlborough	West Coast	Canterbury	Otago	Southland
Current	27%	36%	35%	33%	25%	26%	31%	21%
Lapsed	14%	20%	13%	13%	16%	13%	11%	14%
Potential	29%	26%	22%	33%	33%	32%	26%	31%
Base	[5014]	[96]	[98]	[97]	[94]	[583]	[584]	[188]

2017 average

% significantly higher than average

% significantly lower than average

What's the profile of the current literature event market?

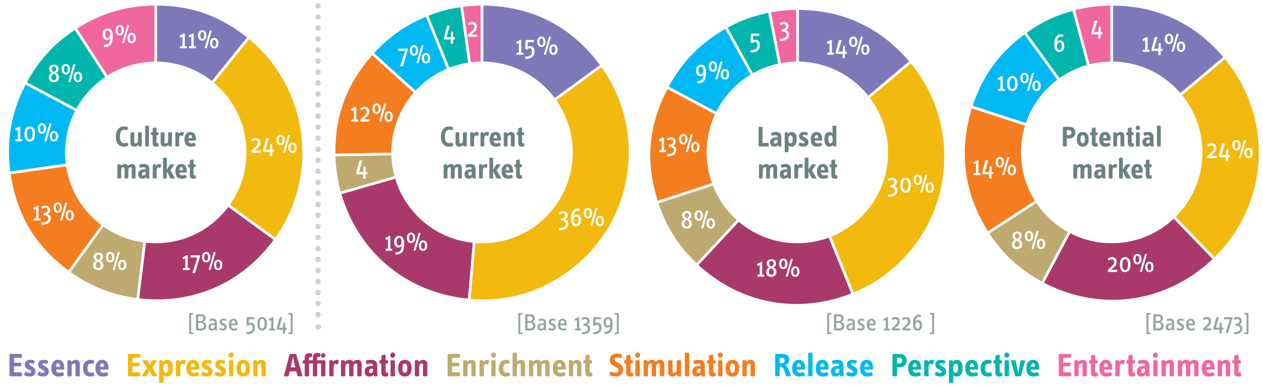
The current literature events market is highly educated with a significantly higher proportion holding a post-graduate qualification or higher compared to the market overall. It's also a diverse market: 76% identified Pākehā and Māori and Asian ethnicities were over-represented against the national culture market and Pacific People under-represented. 57% are female (54% overall) and they're older than average with one in five aged 65 and over (20%, compared to 17% overall).

What else do they do?

Along with Pacific arts, the current literature market is one of the most culturally active of all artforms. Around six in ten people in the current literature events market have engaged with nine or more artforms over the past three years. In particular cross-over was higher than average for film festivals, play or drama, classical concerts, contemporary dance, street performance and New Zealand film festivals.

The market has a high level of arts philanthropy: of all the artform markets it's the literature current market with the highest proportion of members, recent volunteers and arts donors.

Literature market by Culture Segment



Essence, Expression and Affirmation should be the key focus

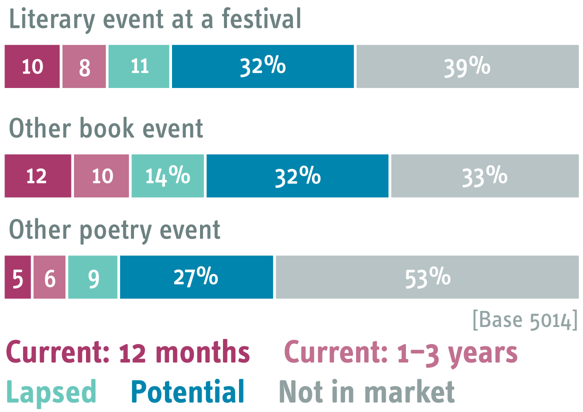
Members of the Essence, Expression and Affirmation segments are all significantly over-represented in the current market for literature events, collectively representing 7 in 10.

Most other segments are more likely than not closed to this form of culture: the majority of those in the Enrichment, Perspective and Entertainment segments are resistant to literature festivals or poetry events.

Stimulation and Release are a secondary priority

Under the right circumstances, members of the Stimulation and Release segments are open to persuasion when it comes to literature events, however they'll likely take a lot more convincing than Essence, Expression or Affirmation so should be considered a secondary priority.

Overleaf we present a series of tables that break this data down in a different way. Taking a more granular view of the artform, we look at the percentage of each segment in the four market groups (current, lapsed, potential and not in market).



Book events outside the festival format have the largest market

Of the literature events tested, 'other book events' had the largest current market at 22% (12% attended in the last 12 months, 10% between 1–3 years ago).

Overall there is potential to grow the literature market across festivals and other book and poetry events. More people are new to this but express interest than have attended in the past three years. So while there's a reasonably strong level of resistance (ranging from 33% for 'other' book events to 53% for poetry events), there remains significant development potential, particularly within the artforms core Essence, Expression and Affirmation markets.

Literary event as part of a festival

Current	18%	27%	28%	21%	6%	19%	11%	5%	4%
Lapsed	11%	10%	15%	12%	8%	10%	11%	5%	3%
Potential	32%	39%	33%	40%	29%	34%	37%	23%	13%
Not in market	39%	23%	24%	27%	56%	36%	41%	67%	81%
Other book event									
Current	22%	28%	35%	24%	12%	19%	12%	11%	4%
Lapsed	14%	19%	15%	15%	13%	12%	15%	10%	5%
Potential	32%	39%	29%	38%	30%	36%	34%	23%	18%
Not in market	33%	15%	21%	23%	45%	33%	38%	55%	73%
Other poetry event									
Current	11%	13%	20%	12%	2%	10%	7%	2%	<1%
Lapsed	9%	14%	13%	10%	8%	10%	8%	3%	1%
Potential	27%	39%	30%	33%	20%	28%	28%	11%	8%
Not in market	53%	34%	36%	45%	70%	52%	57%	84%	90%
Base	[5014]	[534]	[1140]	[795]	[458]	[687]	[452]	[461]	[487]

2017 average — % significantly higher than average — % significantly lower than average

Essence Expression Affirmation Enrichment Stimulation Release Perspective Entertainment

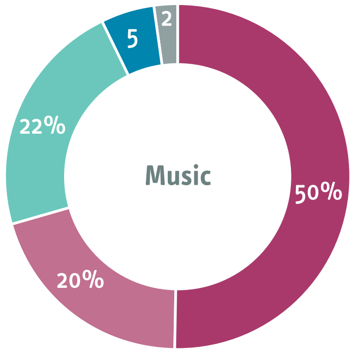
Music

Half the culture market has **experienced** a **music event** in the **past year**, and just over seven in ten have at least once in the past three years, making music one of the larger artform markets. While the number of people in the current market increased in 2017, this was below the country's growth in population.

In **2017** the market was **more likely to have lapsed** (22%) than was the case in 2014 (16%), highlighting **retention** as a **key strategy** for market development.

Auckland is the **only region** to have seen **steady growth** in the proportion in the current market over the past 6 years.

Jazz and blues, rock and pop festivals and country or folk have the largest potential markets nationally.



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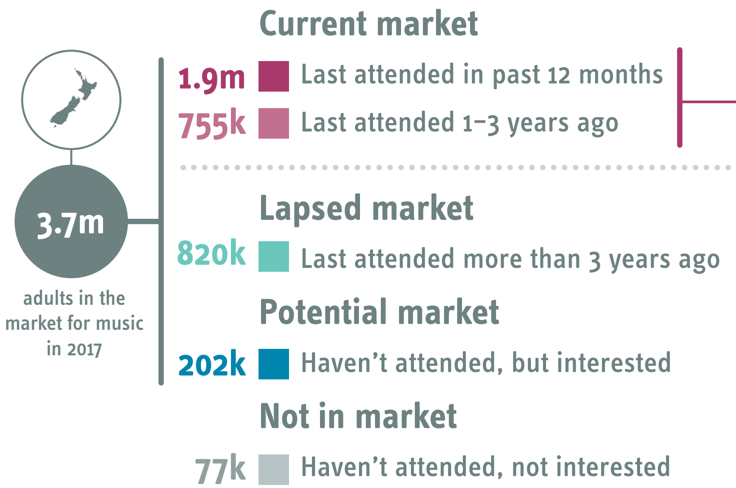
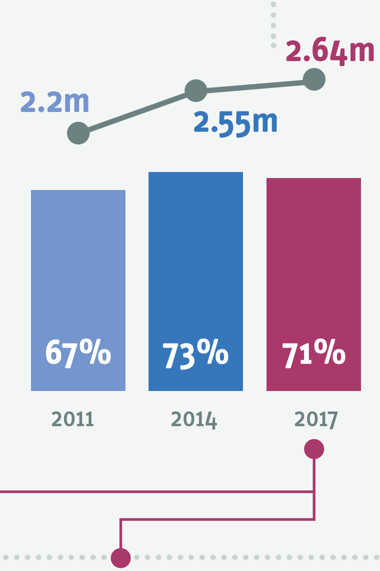


New Zealand current music market over time

Real-figure estimates



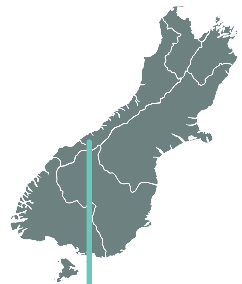
In 2017, 71% of New Zealand's culture market had attended a music event including opera, a classical music, rock or pop, hip hop or jazz concert in the past three years. This equates to 2.64 million adults, 3% more than in 2014.

Current music market by region over time

Regional music market

	2017 national average	North Island – by region								
		Northland	Auckland	Waikato	Bay of Plenty	Gisborne	Hawke's Bay	Taranaki	Manawatu-Wanganui	Wellington
Current	71%	61%	75%	62%	70%	77%	71%	75%	61%	75%
Lapsed	22%	34%	18%	29%	24%	17%	21%	20%	28%	20%
Potential	5%	5%	4%	8%	4%	6%	5%	4%	9%	3%
Base	[5014]	[190]	[589]	[668]	[287]	[93]	[186]	[189]	[287]	[785]

	2017 national average	South Island – by region						
		Tasman	Nelson	Marlborough	West Coast	Canterbury	Otago	Southland
Current	71%	69%	68%	59%	60%	71%	71%	59%
Lapsed	22%	24%	25%	27%	24%	20%	21%	30%
Potential	5%	5%	7%	7%	14%	7%	6%	9%
Base	[5014]	[96]	[98]	[97]	[94]	[583]	[584]	[188]



2017 average

% significantly higher than average

% significantly lower than average

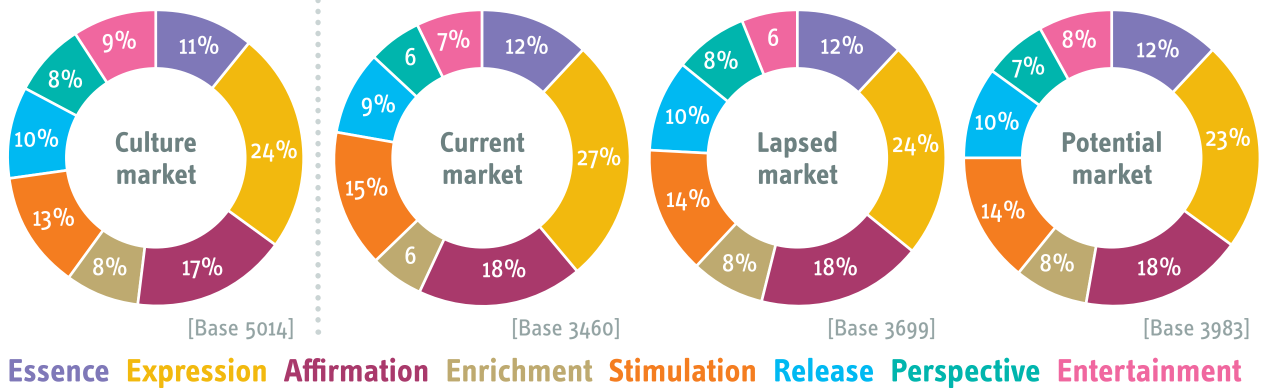
What's the profile of the current music market?

As music is one of the larger artform markets the profile of current attenders is broadly comparable to the national average. If we drill down into specific genres, however, we can see some clear differences. For example, the current market for rock festivals attract a younger market; for choral and classical concerts, the current market is typically older; unlike many other artforms, jazz and blues has more men in the current market (53%) than women (47%); opera has among the highest proportions of people with a post-graduate level qualification or higher; hip hop attracts a particularly ethnically diverse audience with 22% identifying as New Zealand Māori, higher than any other music genre tested.

What else do they do?

The current music market is more likely than average to have attended various forms of theatre in the past three years, including play or drama, musical theatre and comedy. They also have higher than average cross-over with street performance and film festivals.

Music market by Culture Segment



Expression is the core market

The Expression segment is the core segment for the music artform. Reflecting this group's eclectic tastes that span a variety of genres (detailed in the tables overleaf), Expression is significantly more likely than average to be in the current market.

Affirmation a second priority

Affirmation is open to a wide range of music genres. For those genres that have the larger markets, Affirmation is typically over-represented within the current audience, highlighting their tendency to gravitate to accessible and more mainstream arts events. Elsewhere for the more 'niche' genres such as hip hop and jazz or blues, Affirmation are over-represented in the potential market.

Essence and Stimulation are ripe for development

Members of the Essence segment are open to a wide range of types of music but at a sub-artform level, they are typically over-represented in the lapsed and potential groups (choral and contemporary classical are the only exceptions here). This is in contrast to other artforms such as the visual arts, literature and dance where Essence are more often than not over-represented within the current market at a sub-artform level. This reflects their discerning nature and the strong competition that music faces from other artform experiences.

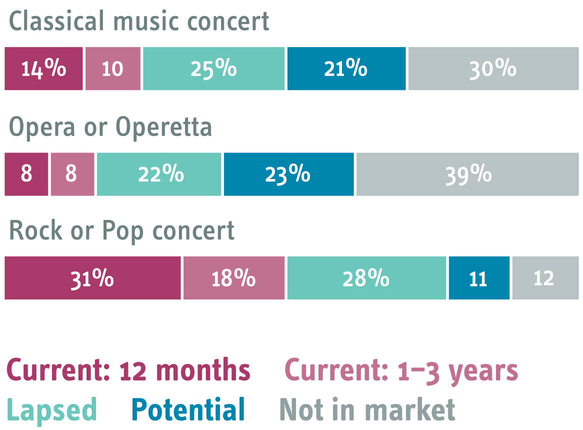
The Stimulation segment is more active than average in the rock or pop concert and festival market and contemporary classical market. Elsewhere, their interest is often latent, so specific campaigns or programming is likely needed to activate this group.

Release a potential audience in the right circumstances

Music is seen as an accessible artform by the Release segment – this type of arts experience can certainly meet their needs of relaxation and escapism. They are, however, more often than not in the potential market – aspiring to attend a specific genre but having not got round to it yet. While this group is unlikely to offer as much reward through targeting as those segments above, in order to reach a broad audience, their needs should be considered when crafting programmes and campaigns.

The tables overleaf take a more granular view of the music artform by looking at the percentage of each segment in the four market groups (current, lapsed, potential and not in market).

© Dunedin Symphony Orchestra



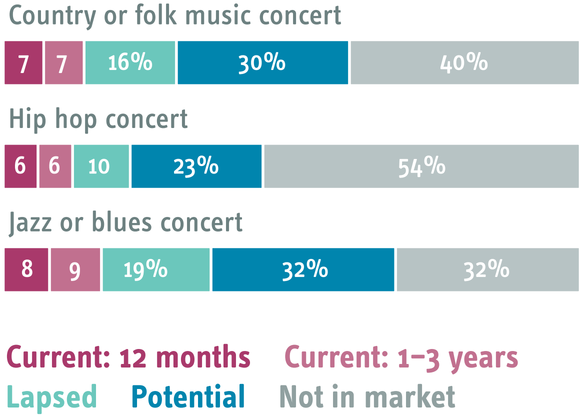
Rock or pop concerts have the largest market

Around three in ten in the culture market have attended a rock or pop concert within the past year and around half within the past three years, marking this genre out as having by far the largest market within the music artform.

	2017 average	Essence	Expression	Affirmation	Enrichment	Stimulation	Release	Perspective	Entertainment
Classical music concert									
Current	24%	27%	35%	28%	18%	24%	17%	14%	4%
Lapsed	25%	33%	26%	28%	25%	26%	23%	21%	12%
Potential	21%	23%	19%	24%	17%	26%	23%	15%	15%
Not in market	30%	17%	20%	20%	39%	24%	36%	50%	68%
Opera or operetta									
Current	16%	15%	25%	19%	12%	16%	11%	8%	3%
Lapsed	22%	28%	23%	24%	23%	24%	20%	16%	9%
Potential	23%	28%	25%	27%	20%	26%	24%	17%	11%
Not in market	39%	28%	28%	31%	45%	35%	45%	59%	77%
Rock or pop concert									
Current	49%	52%	54%	53%	27%	62%	45%	36%	44%
Lapsed	28%	32%	27%	28%	29%	25%	32%	32%	24%
Potential	11%	12%	11%	9%	10%	10%	17%	6%	15%
Not in market	12%	4%	9%	10%	34%	3%	6%	26%	17%
Base	[5014]	[534]	[1140]	[795]	[458]	[687]	[452]	[461]	[487]

2017 average | % significantly higher than average | % significantly lower than average

Essence Expression Affirmation Enrichment Stimulation Release Perspective Entertainment



Those genres with smaller current markets typically have large potential

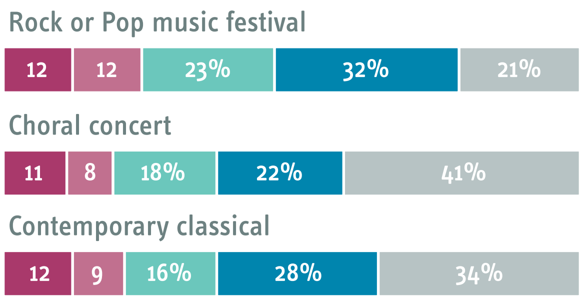
The proportion of the culture market that has experienced country or folk, hip hop or jazz or blues at any point in the past is around the same size as those new to these genres and interested, showing strong development potential across this part of the market.

Country or folk music concert

Current	14%	16%	24%	12%	8%	13%	7%	9%	5%
Lapsed	16%	21%	18%	19%	16%	18%	17%	11%	6%
Potential	30%	34%	30%	33%	28%	27%	35%	25%	26%
Not in market	40%	30%	29%	36%	48%	43%	42%	55%	62%
Hip Hop concert									
Current	12%	9%	20%	13%	6%	11%	10%	7%	6%
Lapsed	10%	14%	12%	11%	3%	10%	13%	10%	4%
Potential	23%	29%	25%	29%	10%	29%	24%	11%	15%
Not in market	54%	47%	43%	46%	81%	50%	54%	73%	75%
Jazz or blues concert									
Current	17%	19%	26%	17%	8%	18%	14%	9%	5%
Lapsed	19%	30%	21%	21%	14%	22%	18%	14%	8%
Potential	32%	32%	31%	38%	29%	34%	37%	25%	25%
Not in market	32%	20%	21%	24%	50%	26%	32%	52%	62%
Base	[5014]	[534]	[1140]	[795]	[458]	[687]	[452]	[461]	[487]

2017 average | % significantly higher than average | % significantly lower than average

Essence Expression Affirmation Enrichment Stimulation Release Perspective Entertainment



Current: 12 months **Current: 1–3 years**
Lapsed **Potential** **Not in market**

Rock and pop festivals has broad market potential

After rock and pop concerts, the festival format within this genre enjoys the largest potential market: only around 1 in 5 are resistant to this type of event and one-third has never attended but are interested in going in future.

Rock or Pop music festival									
Current	24%	24%	33%	25%	8%	31%	22%	12%	15%
Lapsed	23%	32%	22%	28%	7%	29%	28%	20%	12%
Potential	32%	33%	30%	36%	16%	37%	39%	18%	40%
Not in market	21%	11%	15%	12%	69%	2%	12%	50%	33%
Choral concert									
Current	19%	23%	28%	19%	16%	18%	15%	9%	4%
Lapsed	18%	22%	20%	24%	16%	20%	17%	11%	7%
Potential	22%	27%	24%	26%	20%	25%	24%	10%	12%
Not in market	41%	28%	28%	32%	48%	37%	45%	70%	77%
Contemporary classical									
Current	22%	27%	31%	25%	10%	27%	15%	8%	6%
Lapsed	16%	21%	17%	19%	12%	18%	18%	13%	4%
Potential	28%	31%	28%	33%	23%	30%	32%	18%	19%
Not in market	34%	20%	23%	23%	56%	25%	35%	61%	71%
Base	[5014]	[534]	[1140]	[795]	[458]	[687]	[452]	[461]	[487]

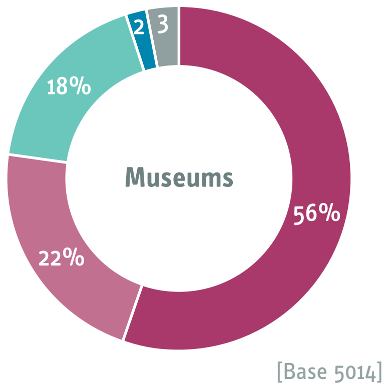
2017 average   % significantly higher than average   % significantly lower than average

Essence Expression Affirmation Enrichment Stimulation Release Perspective Entertainment

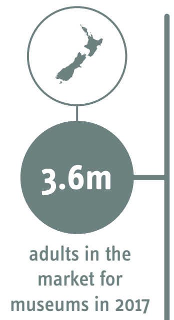
Museums

The **museums** market is one of the **largest artform** markets. There has been an **upward trend** in attendance across the past six years. In 2017, **78%** of the culture market is in the **current market** for museums, equivalent to 2.9m people. **Frequency has increased** too; in 2017 the market is more likely to have visited in the past 12 months (56%) compared to 2014 (54%).

Wellington and **Otago** have the **most active markets**, with nearly nine in ten in the current market. In some regions – particularly Gisborne, Northland and Bay of Plenty– there is scope to increase engagement by re-activating the lapsed market.



[Base 5014]



Current market

- 2.1m Last attended in past 12 months
- 814k Last attended 1–3 years ago

Lapsed market

- 666k Last attended more than 3 years ago

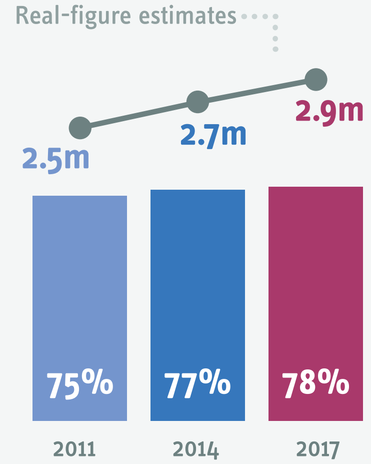
Potential market

- 79k Haven't attended, but interested

Not in market

- 96k Haven't attended, not interested

New Zealand current museums market over time



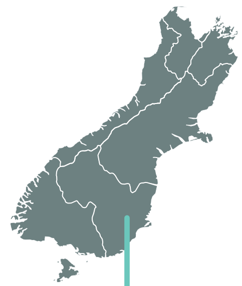
In 2017, 78% of New Zealand's culture market had visited a museum in the past three years. This equates to 2.9 million adults, 7% more than in 2014.

Current museums market by region over time

Regional museums market

	2017 national average	North Island – by region								
		Northland	Auckland	Waikato	Bay of Plenty	Gisborne	Hawke's Bay	Taranaki	Manawatu-Wanganui	Wellington
Current	78%	70%	78%	71%	64%	67%	70%	76%	81%	89%
Lapsed	18%	27%	17%	24%	27%	29%	23%	19%	14%	8%
Potential	2%	2%	1%	3%	3%	2%	4%	2%	4%	2%
Base	[5014]	[190]	[589]	[668]	[287]	[93]	[186]	[189]	[287]	[785]

	2017 national average	South Island – by region						
		Tasman	Nelson	Marlborough	West Coast	Canterbury	Otago	Southland
Current	78%	77%	72%	74%	76%	79%	87%	80%
Lapsed	18%	17%	23%	21%	17%	18%	11%	17%
Potential	2%	5%	3%	2%	4%	2%	1%	2%
Base	[5014]	[96]	[98]	[97]	[94]	[583]	[584]	[188]



2017 average | % significantly higher than average | % significantly lower than average

What's the profile of the current museums market?

With the majority of the culture market in the current market for museums. the overall demographic profile is similar to the market average, with no significant differences based on age, gender, educational attainment or ethnicity.

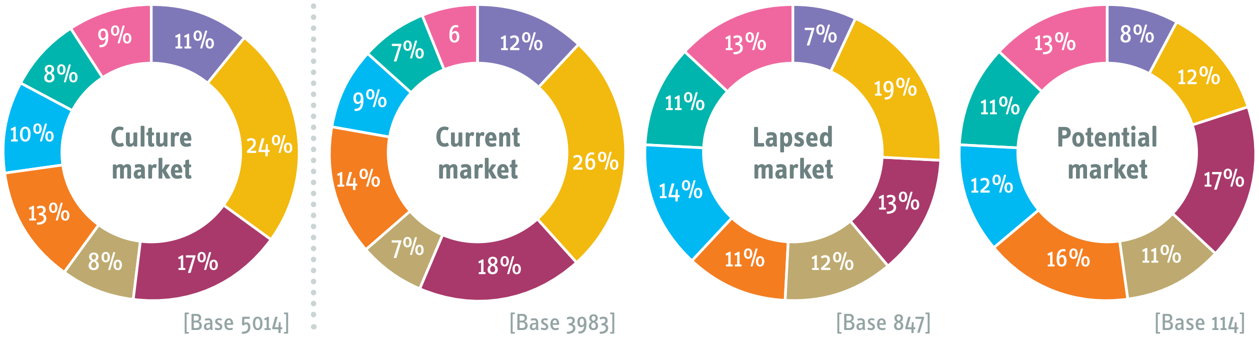
What else do they do?

The visual arts are a core cross-over market for the current museum audience. They're also more likely than average to have attended craft or object art exhibitions, plays or drama within the past three years.

A range of segments to target

Because museums are a fairly mainstream cultural activity, there's potential across most groups in the culture market. Some groups offer more obvious potential than others; the more culturally active segments are all over-represented in the current market. For those organisations who want an inclusive, broad reach, some of the less culturally active segments may be appealing to target. For example, 99% of people in the Enrichment segment are open to going to museums, but over one-quarter haven't done so for three years or more, suggesting re-activation potential with this particular group.

Museums market by Culture Segment



Essence Expression Affirmation Enrichment Stimulation Release Perspective Entertainment

Museums market by Culture Segment

Current	78%	86%	84%	83%	71%	82%	69%	68%	56%
Lapsed	18%	12%	14%	14%	26%	15%	25%	24%	26%
Potential	2%	2%	1%	2%	3%	3%	3%	3%	3%
Not in market	3%	<1%	1%	1%	1%	<1%	3%	6%	15%
Base	[5014]	[534]	[1140]	[795]	[458]	[687]	[452]	[461]	[487]

2017 average

% significantly higher than average

% significantly lower than average

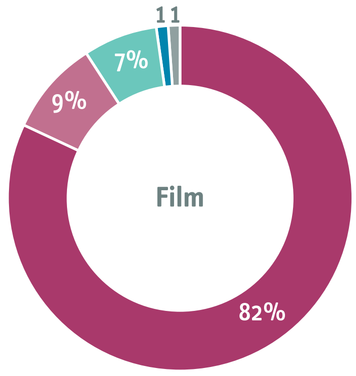
Essence Expression Affirmation Enrichment Stimulation Release Perspective Entertainment

Film

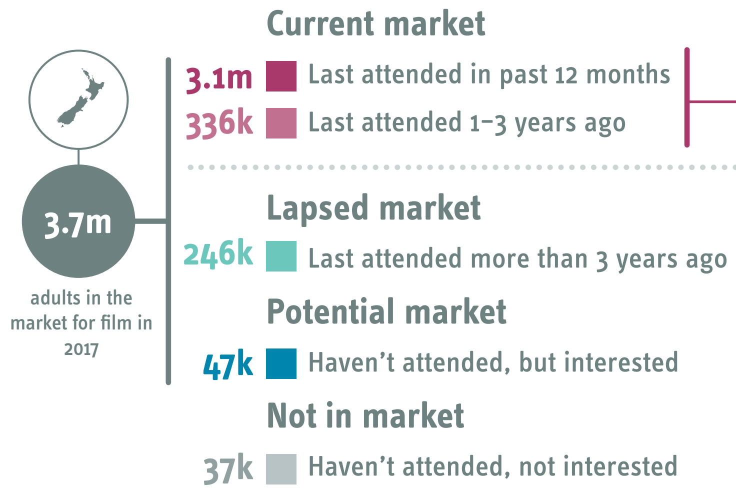
Film consistently has a **large**, **active market**. 91% of New Zealand's culture market has seen at least one film outside the home, or been to a film event in the past three years. The vast majority have done this recently: 82% in the past 12 months.

The **mainstream status** of watching films means there is **significant scope to grow related activities**, in particular tapping into the strong latent interest in seeing **New Zealand-made films at festivals**. Nearly half the market is interested in this, having never experienced this in the past.

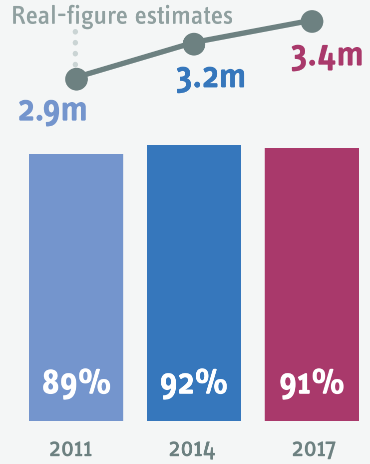
The **Stimulation** and **Affirmation** segments are particularly **core to further growing** the film **festival market**.



[Base 5014]



New Zealand current film market over time



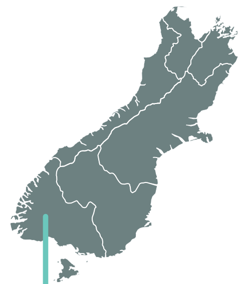
In 2017, 91% of New Zealand's culture market had engaged with film, including New Zealand film either at a cinema or as part of a festival in the past three years. This equates to 3.4 million adults, 6% more than in 2014.

Current film market by region over time

Regional film market

	2017 national average	North Island – by region							
		Northland	Auckland	Waikato	Bay of Plenty	Gisborne	Hawke's Bay	Taranaki	Manawatu-Wanganui	Wellington
Current	91%	85%	94%	89%	91%	91%	88%	85%	89%	95%
Lapsed	7%	10%	5%	8%	9%	6%	10%	10%	8%	3%
Potential	1%	3%	1%	2%	<1%	2%	-	2%	1%	2%
Base	[5014]	[190]	[589]	[668]	[287]	[93]	[186]	[189]	[287]	[785]

	2017 national average	South Island – by region						
		Tasman	Nelson	Marlborough	West Coast	Canterbury	Otago	Southland
Current	91%	96%	91%	88%	84%	90%	88%	82%
Lapsed	7%	2%	7%	10%	11%	8%	9%	14%
Potential	1%	<1%	1%	2%	2%	1%	2%	3%
Base	[5014]	[96]	[98]	[97]	[94]	[583]	[584]	[188]



2017 average
% significantly higher than average
% significantly lower than average

What's the profile of the current film market?

Since around nine in ten in the culture market are in the current market for films, the overall profile is very similar to the market average. If we explore by specific activities, we can see that the film festival market is slightly younger than average, slightly more likely than the cinema-going market to be male and more highly educated.

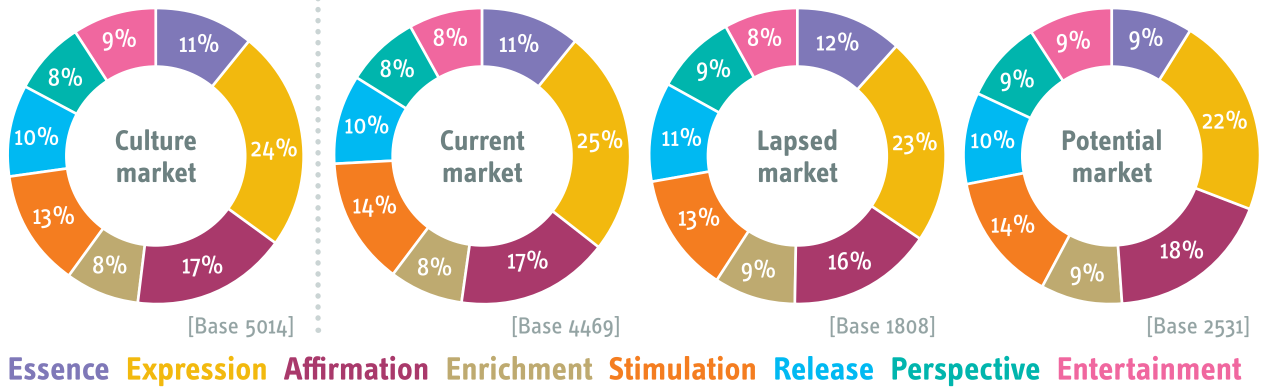
What else do they do?

Compared to other artform markets, the breadth of attendance for the current film market is lower than average. Cross-over with the comedy gig market, play and drama market is, however, higher than average.

If we drill down into the film festival market specifically, cross-over is also higher than average with the visual arts, alongside comedy and theatre.

Overleaf we present a series of tables that break this data down in a different way. Taking a more granular view of the artform, we look at the percentage of each segment in the four market groups (current, lapsed, potential and not in market).

Film market by Culture Segment



Room to grow Affirmation in the film festival market

As with this market's demographic profile, since seeing films is such a mainstream activity, the Culture Segment profile is broadly comparable to the culture market as a whole. When we drill down into the film festival market, however, we can see that Essence and Expression are core to the current market, while Affirmation shows significant development potential as many are in the potential market as the current market with this particular group.

Stimulation is a core market for developing NZ film

When we explore festivals with a particular focus on New Zealand film, the Stimulation segment is revealed as particularly valuable.

Members of this segment are significantly more likely than average to be in the current market for New Zealand film festivals and the segment *most* likely to be in the potential market.

Film at a cinema or other venue

Film at a film festival

Current: 12 months **Current: 1–3 years**
Lapsed **Potential** **Not in market**

One-third of the market open to trying film festivals for the first time ...

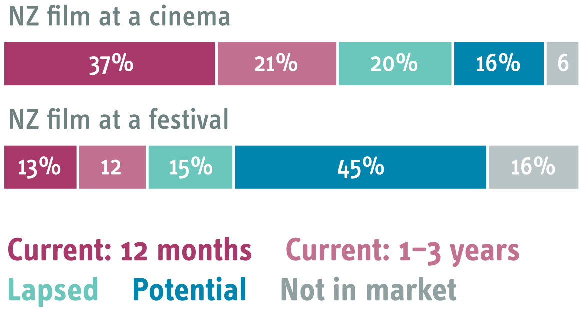
While going to the cinema is a mainstream activity that nearly everyone in the culture market has done recently, only around half the market has been to a film festival in the past, revealing strong growth potential to convert cinema-going audiences to the festival format.

Film at a cinema or other venue

Current	90%	91%	92%	92%	88%	90%	89%	84%	86%
Lapsed	7%	8%	5%	5%	8%	7%	8%	10%	5%
Potential	2%	1%	2%	2%	2%	3%	2%	2%	1%
Not in market	2%	<1%	1%	1%	2%	<1%	2%	3%	7%
Film at a film festival									
Current	35%	44%	46%	38%	19%	37%	30%	23%	12%
Lapsed	16%	22%	17%	16%	14%	16%	18%	13%	12%
Potential	34%	28%	29%	38%	42%	37%	38%	34%	33%
Not in market	15%	6%	8%	8%	25%	10%	14%	29%	44%
Base	[5014]	[534]	[1140]	[795]	[458]	[687]	[452]	[461]	[487]

2017 average % significantly higher than average % significantly lower than average

Essence Expression Affirmation Enrichment Stimulation Release Perspective Entertainment



… Rising to nearly half when the focus of the festival is New Zealand film

When it comes to specifically New Zealand film festivals, the market is less likely to have attended in the past. This means that the proportion of the market who have never been to such a film festival but who are interested is sizeable at 45%.

New Zealand film at a cinema

Current	58%	65%	67%	63%	50%	63%	50%	46%	41%
Lapsed	20%	18%	18%	18%	23%	18%	25%	23%	19%
Potential	16%	14%	11%	16%	17%	15%	18%	19%	22%
Not in market	6%	3%	4%	3%	9%	4%	7%	12%	17%

New Zealand film at a film festival

Current	24%	33%	33%	25%	10%	28%	23%	15%	8%
Lapsed	15%	21%	16%	17%	14%	15%	18%	11%	6%
Potential	45%	40%	41%	47%	48%	48%	44%	46%	45%
Not in market	16%	6%	10%	10%	28%	9%	15%	28%	41%
Base	[5014]	[534]	[1140]	[795]	[458]	[687]	[452]	[461]	[487]

2017 average | % significantly higher than average | % significantly lower than average

Essence Expression Affirmation Enrichment Stimulation Release Perspective Entertainment

Pātea Māori Club performing at Te Korakora on Federal 2016. Photography by Serena Stevenson, courtesy of Auckland Council

Section 6: Culture Segments in focus

morris hargreaves mcintyre

Culture Segments in focus

The final section of this report includes **detailed pen portraits** for each of the eight Culture Segments where we've pulled together **key information** to help you really **get to know each segment in turn**, and use the system for **strategic audience development** activity.

Getting to the heart of why people engage in order to influence them

Culture Segments is defined by people's attitudes to culture. It uses deep, sophisticated, meaningful insight into audiences and potential audiences for arts and culture.

The system is values-based. The segments have distinct mindsets, motivations and approaches to culture – so you can craft messages that will resonate, targeting them more accurately and effectively. Rather than just describing a person (such as in demographic terms), Culture Segments is a tool to influence their engagement.

The system includes everyone in the culture market

Culture Segments considers everyone in the culture market, across all demographics and behaviours, and therefore helps you reach the people who you don't already have – resulting in more diverse audiences.

It includes your current attenders as well as those you haven't yet reached. Using Culture Segments to understand how and why you connect with current audiences helps understand routes to reaching others.

A system designed for practical application

Culture Segments can be used on a daily basis to inform decisions, helping to put audiences at the heart of your organisation's conversations.

The system helps you target more people more accurately, engage them more deeply, build relationships, increase frequency and spend, increase satisfaction and maximise loyalty – ultimately it is designed to help you increase sustainability and return on your efforts.

It provides a common language for different departments to think about audiences holistically – from marketing through to curating and front-of-house. It therefore drives effective audience development and reduces silo working.

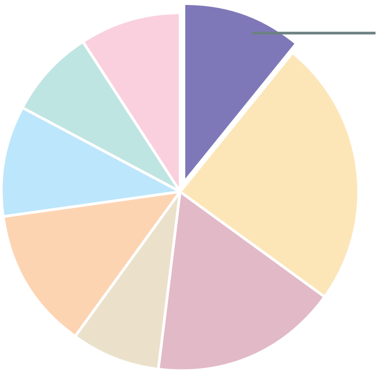
Culture Segments is easily adopted: you can segment yourself and your team[1], use these pen portraits as a daily ready-reckoner to always have your priority audiences in mind, tag your database records affordably, brief your media buyer, optimise your copy. The system uses a small set of Golden Questions, which can easily be included in audience surveys or databases to evaluate the success of campaigns and better understand your existing audiences.

Through embedding the system, you can analyse your brand relationships, survey and profile your audience, identify opportunity in the wider market, identify membership potential, optimise benefits to their needs, grow altruism, understand spending habits and potential, test interpretation and increase engagement, review your digital impacts, increase retail income and more.

1 To segment yourself, answer the short set of questions found here: https://mhminsight.com/culture-segments/survey

Essence

Discerning | Confident | Independent | Arts-essential



11% of New Zealand's culture market

408k adults

Who are they?

Essence consider the arts and culture **essential to their very being**. They are the one segment for whom art and culture isn't just something they do, it's who they are. Culture is a way of **exploring the world** and reflecting on meaning, as well as providing **deep emotional connection**. They will experience it with or without others.

High quality culture is their primary concern. They've seen lots of other art before, they have a context and they have a language. They understand how it works. They're therefore **confident and knowledgeable** and don't see popularity as a signifier of quality, so can be dismissive of things they believe to be too mainstream or unsophisticated.

Think of Essence as...

core cultural attenders

Attitudes & life priorities:

- Exploring
- Arts and culture
- Lifelong learners
- Important experiences

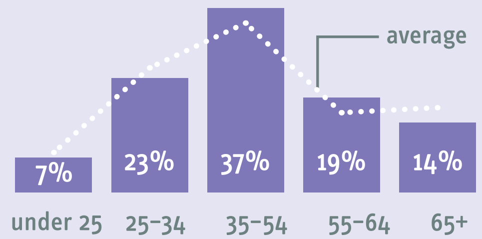
Essence is the segment most likely to say...

'I'll be the judge of that'

... and least likely to say...

'What would you recommend?'

Less diverse, but highly educated



30% (30%) have children in the household

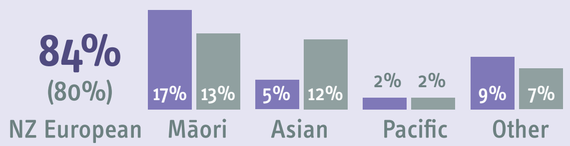
26% (22%) have a post-graduate certificate or higher

10% (15%) are retired

50% (50%) are in full-time employment

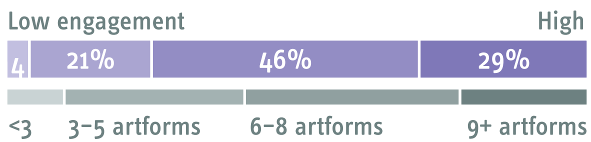
Ethnic identity*

[Base: 5014, Essence 534]



*Ethnic identity was asked as a multi-option question

Artform engagement index



What is culture to them?

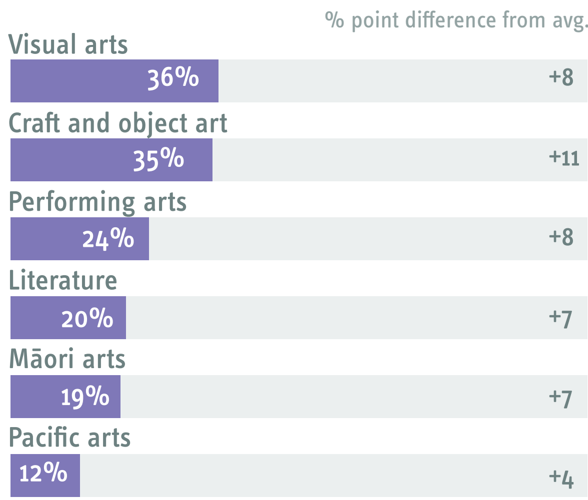
This segment is called Essence because culture is essential to their very being. They're the one segment for whom art and culture isn't just something they do, it's a fundamental part of who they are. It's the very fibre of their very being. If you were to take culture away from them, it would be like taking oxygen away: they can't imagine their life without culture.

29% of Essence have attended nine or more different artforms in the past three years, 7-percentage points higher than average.

How do they approach it?

Essence are typically confident, experienced and knowledgeable. They've seen lots of other art before. They understand how it works. Essence can discern the subtle difference between different things they've seen. They may recognise familiar approaches or be genuinely surprised by the way it's been done. But they have an appreciation for the way the art is made, and they're able to access the underlying ideas and context.

Active participation* (past 12 months) by key artform



[Bases: average 6101 Essence 658]

*active involvement with creating in any way in the past 12 months

67% (43% overall)
of Essence agree the arts are for 'people like me'

67% (41% overall)
of Essence agree that 'the arts improve how I feel about life in general'

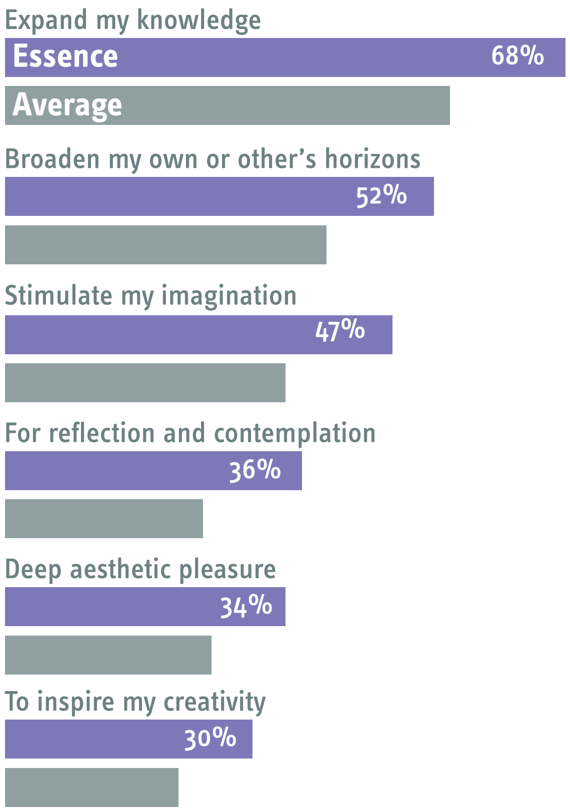
'I don't care if everyone else likes it, I don't't like it'

What do they want from it?

For Essence, culture is a way of exploring the world. Art imitates life. So there is an intellectual aspect in seeing an artist's take on the world, pondering that and responding to it. But the actual experience of art is also deeply emotional, if not spiritual.

Essence want to be moved and ultimately taken to an altered state. Essence feel confident they can access art and culture and achieve deep engagement with it very quickly.

Where motivations for attending differ the most from average



[Bases: average 1661, Essence 189]

And if they don't currently attend?

While Essence prioritise arts and culture for the deep personal benefits it affords them, that is not to say they will have visited every venue or even experienced every artform. There will be Essence audiences who primarily get their fix through museums and galleries and are less frequently found in theatres – and equally those for whom theatre is life itself and galleries a more occasional visit. Because of their strong independence and confidence in where to find their fix they may have given this less thought. However, they understand the intrinsic benefits of a range of artistic expressions, so signposts of quality, sophistication and credentials will increase their likelihood of visiting.

Barriers to attending more often

Where barriers differ most from average:

26% (20% average)
'I never have enough time'

7% (4% average)
'It's too difficult to travel to'

Essence are confident audience members: too much hand-holding intervention can be off-putting for them. If they don't think you're getting it right they're the first to tell you. They don't think they're complaining, they think that they're helping you – being a critical friend. They basically think it's their duty to tell you.

How do they choose?

Essence's primary concern in choosing what to see and do is quality. Based on the credentials of the creative team and approach, they'll discern for themselves whether something is or isn't up to their required standards.

Essence view marketing as for other people who need it more than they do. They are far less likely than the other segments to read marketing copy, so extended prose for their benefit could be wasted effort. Independent, unbiased editorial may be more convincing.

They're so fiercely independent, they almost make a virtue out of not being influenced. They might even quite enjoy not liking something everybody else likes. It's a way of not following the crowd and not succumbing to popularism.

When we asked which sources influenced them the most (which might differ from how regularly they use them), they said: 1. recommendation 2. social media 3. e-news.

Where media types differ most from average – top 10

Media sources used by Essence to find out what arts and culture events are on (past 12 months).

	Average	Essence
Recommendation	42%	53%
Brochures / flyers / posters	33%	44%
Social networking sites	33%	40%
Email newsletters	32%	40%
Online listings	34%	38%
Arts organisations' websites	11%	20%
Magazines (print)	14%	18%
A critic review (print)	13%	17%
Arts organisations' mailing lists	10%	14%
Apps on a mobile device	7%	11%

Engaging with organisations online

20% (13% average)
reviewed or rated a visit to an arts or cultural experience online in past 12-months – one of the segments most likely to have done so

26% (17% average)
mentioned or uploaded content to social media about a visit to an arts or cultural experience in past 12-months – the segment most likely to have done so

48% (44% average)
agree that watching arts performances online is a good alternative if unable to attend in person – a higher level compared to most other segments

83% (76% average)
agree that you can never replace a live with a virtual experience

20% (17% average)
agree that as a result of experiencing arts and culture online they attended a related live arts event

Building relationships with them

Essence may look, to all intents and purposes, to be our core audience. They're our tribe and engage deeply. However, they're not acquiescent or natural joiners. While you might command their respect, they don't particularly feel the need to be communally engaged.

If they do join a scheme it will often be because membership is a pay gate between them and what they need – tickets or early seat selection. Essence have a singular personal agenda.

That's not to say they can't develop a deep affinity and connection. They are also believers of the important societal role arts organisations play. They think it important to allow access to many different kinds of artistic expressions, and to all citizens and this will include involving the community in creative endeavours.

19% (12% overall)

are a current subscriber, member or friend of an arts, culture or heritage organisation

Reasons for donating time or money to the arts

Reason	%	% point difference from avg.
Contribute to something I'm passionate about	47%	+9
Lets me be part of something bigger than myself	35%	+7
Enables me to meet with like-minded people	34%	+11
Helps me gain a wider perspective of the world	30%	+9
Helps me develop and grow as a person	26%	+6
It satisfies my social conscience / responsibility	26%	+4

Philanthropic giving

16% (12% overall)

Essence are one of the segments most likely to have volunteered for an arts or cultural organisation in the past 3 years

32% (28% overall)

have donated money to an arts or cultural organisation in the past 3 years

Essence are the segment most likely to make one-off donations via collection boxes and prefer to contribute to something specific rather than make a general donation.

Perceived importance of arts causes – where Essence differs the most from average

89% (73% overall)

enabling young people to access cultural experiences

77% (57% overall)

support up and coming artists and practitioners

63% (48% overall)

develop collections or artistic works

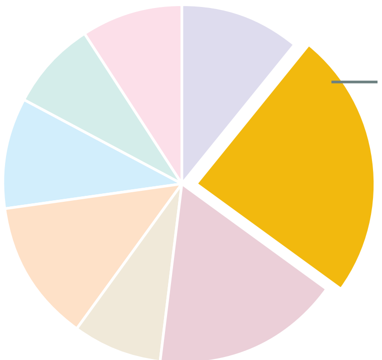
63% (50% overall)

helping organisations build new audiences

While they believe in the transformative power art can have on communities, they themselves have a low tolerance for amateur arts for their own consumption, favouring quality of process and substantial content and rigour. The principal way they would bond with an organisation is through access to the artist, or artistic staff or privileged access to information and booking.

Expression

Receptive | Community | Expressive | Nurturing | Generous | Committed



Who are they?

Expression are 'yes' people – full of enthusiasm with varied and eclectic cultural tastes. Their cultural activity reflects their **wide range of interests** and hobbies, which often feature learning, community and nature. They're in tune with their **creative** side, fun-loving and see culture as a way of **broadening horizons**.

Expression are 'people' people. They enjoy activities that help them connect with and **share experiences** with others. They are **community minded**. They like to be sure that everyone is welcome to enjoy the benefits of engaging and as such, put a high price on inclusivity.

Think of Expression as...

'people' people

Attitudes & life priorities:

- Living life to the full
- Community and family
- Arts, crafts, culture, creativity
- Nature

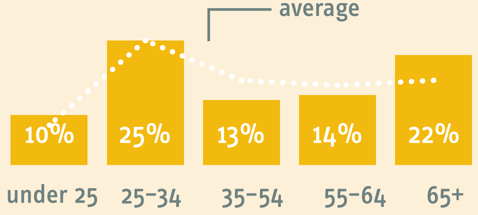
Expression are the segment most likely to say...

'Art's for everyone'

... and least likely to say...

'But what's in it for me?'

More diverse and highly educated



31% (30%) have children in the household

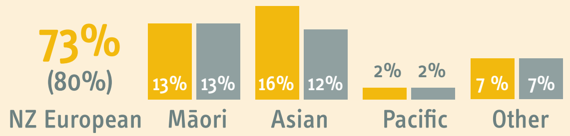
25% (22%) have a post-graduate certificate or higher

19% (15%) are retired

46% (50%) are in full-time employment

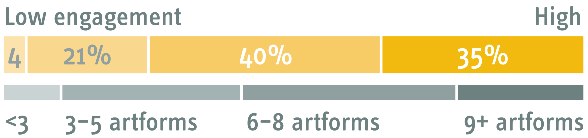
[Base: 5014, Expression 1140]

Ethnic identity*



*Ethnic identity was asked as a multi-option question

Artform engagement index



What is culture to them?

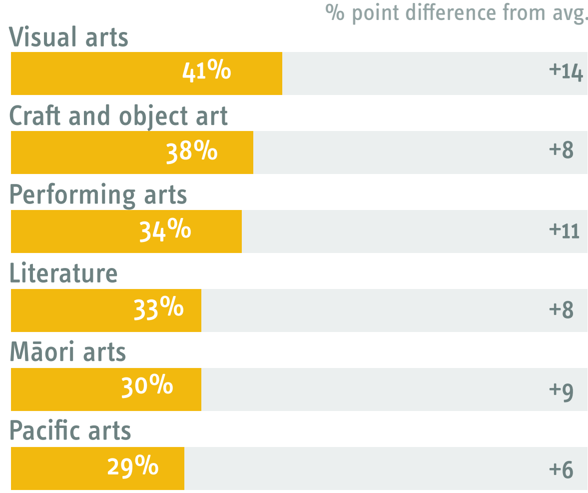
Culture is not a private thing for Expression; it's a communal thing. When they have a really good experience they thrive off other people having that same experience rather than keeping it secret or in a special box. They want the masses to go and enjoy things – to share them and reflect on them together. They really enjoy other people enjoying it.

35% of Expression have attended nine or more different artforms in the past three years, 13-percentage points higher than average.

How do they approach it?

This is the segment that makes the least distinction between professional and amateur art. They'll absolutely appreciate excellence of the professional, and think it's wonderful. But they're not disdainful of community or amateur art – as talent comes in many forms. In fact, they might actually enjoy having a go at it themselves.

Active participation* (past 12 months) by key artform



[Bases: average 6101 Expression 1205]

*active involvement with creating in listed artforms in any way in the past 12 months

80% (66% overall)
of Expression agree the arts should reflect New Zealand's cultural diversity

78% (61% overall)
of Expression agree that the arts should be part of every New Zealander's education

What do they want from it?

They're called Expression and appreciate artistic expression, so when they see an artist doing something, they really get it. They also like the chance to express their own creativity.

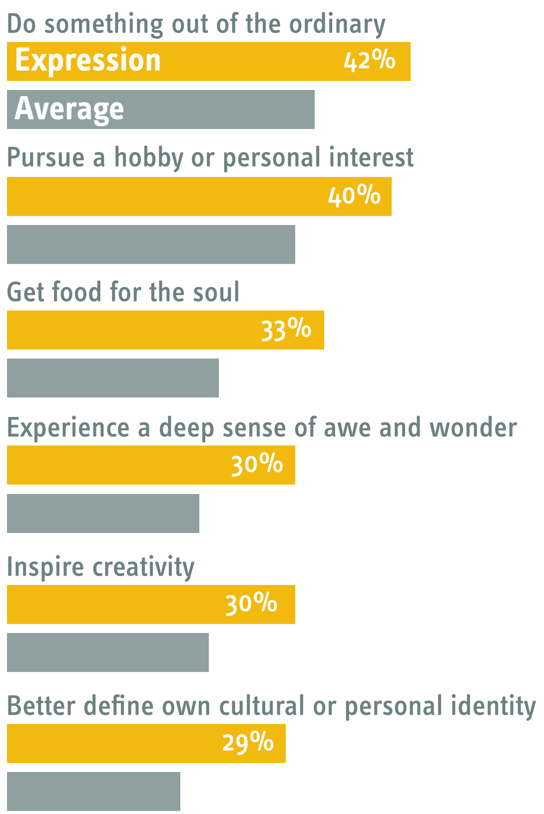
This segment is always thinking about everyone else. They like helping people, they like getting involved in things, they want to do things together. They want everyone to have a great, collective and harmonious time.

44% (28% average)
would find actively taking part in a cultural event appealing

48% (34% average)
would find the chance to socialise with others before, during or after an event appealing

67% (57% average)
would find the chance to see an open rehearsal or development workshop appealing

Where motivations for attending differ the most from average



And if they don't currently attend?

Expression talk about the arts brands they love in terms of their diversity, creativity and inclusivity. They eulogise about live experiences with wonderful artists, shared with others. However, they may be wary of going places or joining in things that appear to be for those 'in the know'. While they are confident and open to a range of experiences, they feel most comfortable in the company of a diverse range of people, all of whom are getting enjoyment. Arts brands who appear to privilege quality over openness and inclusion may not be their first port of call. There are plenty of other opportunities through organisations who are more embedded in the community, go out of their way to offer access points and welcome the less initiated. A poster for a Shakespeare play that carries the title but no clues as to the story will suggest the theatre expects everyone to know what it is about already – they'll see an organisation promoting exclusivity rather than the inclusivity that holds such valuable currency with them.

Barriers to attending more often

Barriers for Expression are broadly comparable to average with the exception of:

8% (5% average)
'parking or finding a carpark'

Expression are often visually-driven. Organisations must make sure marketing has beautiful, natural images. Being 'people' people they also like to see close up faces of artists and are sensitive to (and put off by) pictures of pale, stale and male audiences.

How do they choose?

Expression don't like being marketed to because they want to be inside, and part of the conversation. They don't want to be advertised to, it feels impersonal. They want emotional, personal connections with organisations – more like a friend.

Expression appreciate seeing lots of different potential access points because it allows many people to engage and shows an organisation to be open. It makes them very happy to see everybody together being part of something.

Marketing needs to actively demonstrate a desire to welcome the widest possible audience.

Top three most influential sources for Expression to find out about arts and culture are: 1. social media 2. newspapers 3. recommendation.

Where media types differ most from average – top 10

Media sources used by Expression to find out what arts and culture events are on (past 12 months).

	Average	Expression
Newspapers (print)	35%	44%
TV	36%	44%
Email newsletters	32%	40%
Street press	33%	41%
Magazines (print)	14%	20%
Magazines (online)	10%	16%
Recommendation	42%	48%
Social media	33%	39%
Critic reviews (print)	13%	19%
Organisations' mailing lists	10%	16%

Engaging with organisations online

20% (13% average) reviewed or rated a visit to an arts or cultural experience online in past 12-months – one of the segments most likely to have done so

23% (17% average) mentioned or uploaded content to social media about a visit to an arts or cultural experience in past 12-months – one of the segments most likely to have done so

58% (44% average) agree that watching arts performances online is a good alternative if unable to attend in person – the segment most likely to agree

85% (76% average) agree that you can never replace a live with a virtual experience – the segment most likely to agree

27% (17% average) As a result of experiencing arts and culture online they attended a related live arts event – the segment most likely to have done so

Building relationships with them

Expression have a very strong sense of civic responsibility with a natural in-built predisposition to support non-profit organisations. Whether that's theatres, museums, libraries – even swimming pools – they appreciate these organisations are for public good. They believe we shouldn't take things for granted or be complacent – like independent shops – 'use it or lose it'.

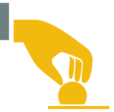
Not only are Expression the segment most likely to say nice things about you, but they're also more likely to join, to donate, to volunteer. There may be a personal motivation, but it's also their civic duty.

They're people who put their hands up for things and do things. They feed off the social nature of such interactions: meeting other volunteers and the people they're helping. They're all about making personal connections, but with a strong element of selflessness. They're always doing the right thing for other people. It is who they are. They're the glue that hold the audience together. They're the network people.

Reasons for donating time or money to the arts

		% point difference from avg.
Makes me feel I can make a difference	41%	+13
Lets me be part of something bigger	38%	+9
Makes me feel good about myself	34%	+7
Allows me to meet like-minded people	33%	+9
Satisfies my social conscience	30%	+8
Helps me develop and grow as a person	29%	+8

Philanthropic giving



19% (12% overall)
Expression are the segment most likely to have volunteered for an arts or cultural organisation in the past 3 years

38% (28% overall)
have donated money to an arts or cultural organisation in the past 3 years

Expression are more likely than average to make an add-on donation when purchasing a ticket and to want to contribute to something specific rather than make a general donation.

Perceived importance of arts causes – where Expression differs the most from average

83% (73% overall)
enabling young people to access cultural experiences

69% (32% overall)
funding a production or new artwork for a collection

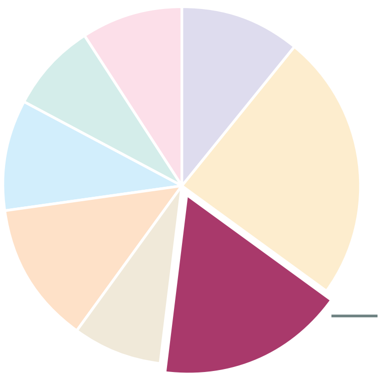
65% (47% overall)
helping organisations to take their work on tour to rural communities

50% (32% overall)
helping organisations to take their work on tour internationally

Organisations who are doing something that promote egalitarianism, access and democracy command more of their support. Promoting these qualities and showing you're doing good, means they will approve of you. They might even write you a cheque for it, if you asked them.

Affirmation

Self-identity | Motivated | Improvement | Considered | Time well spent



17% of New Zealand's culture market

621k adults

Who are they?

Affirmation are perhaps the most **conscientious** of the segments. They make really **considered**, **measured** choices. As adults, they're likely to have made a **conscious decision to embrace more culture**. They have decidedly come to the belief that engagement with culture is going to make their lives better. **Culture is an important and worthwhile activity** so, like going to the gym or meeting friends, reading a book, going to a museum or theatre, culture is a commitment to personal well-being that should be prioritised over a night in. They feel culture is a **commendable pastime** and are keen that they do, and are **seen to do**, **the right thing**.

The segment for whom...

nothing happens by accident

Attitudes & life priorities:

- Personal development
- Doing the right thing
- Quality experiences
- Learning • Enjoyment

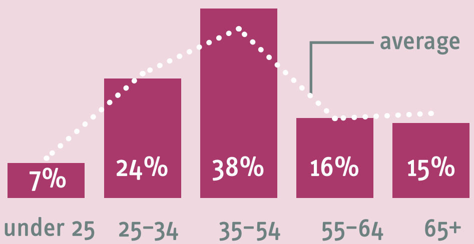
Affirmation is the segment most likely to say...

'It's on my bucket list'

... and least likely to say...

'C'mon – let's just take a punt!?'

More likely to have children in household



33% (30%) have children in the household

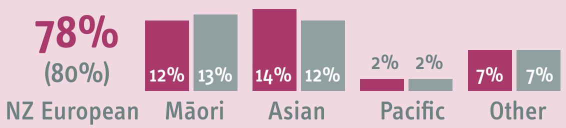
20% (22%) have a post-graduate certificate or higher

12% (15%) are retired

46% (50%) are in full-time employment

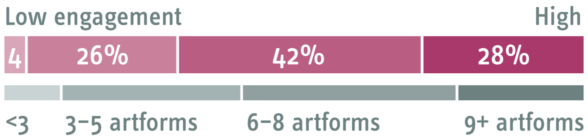
Ethnic identity*

[Base: 5014, Affirmation 795]



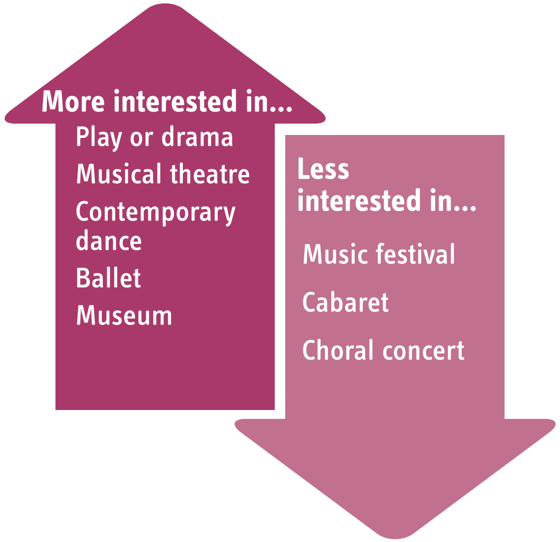
*Ethnic identity was asked as a multi-option question

Artform engagement index



What is culture to them?

Affirmation welcome culture as a way of enjoying quality time with others, as a means of doing something more worthwhile in their leisure time. Cultural visits are self-improving, build memories and add richness to life. Affirmation do care what others think of them and hope to be recognised as going to interesting things and places. Those with children take them to cultural experiences as that is what good parents do.

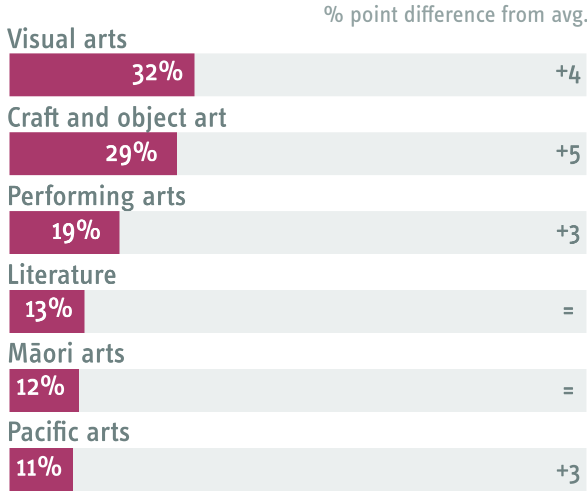


28% of Affirmation have attended nine or more different artforms in the past three years, 6-percentage points higher than average.

How do they approach it?

They may have done cultural visits as children, but for a large proportion this won't have been central to their family lives and as adults there remains lots they are keen to explore. On the one hand they're adventurous, in the sense that they want to try things, but on the other they want to try safe things rather than biting off more than they can chew. This slight insecurity comes from the fear of getting things wrong and letting themselves down – but also because feeling out of place negates the positive well-being sought from attending.

Active participation* (past 12 months) by key artform



[Bases: average 6101 Affirmation 823]

*active involvement with creating in any way in the past 12 months

73% (64% overall)
of Affirmation agree they learn about different cultures through the arts

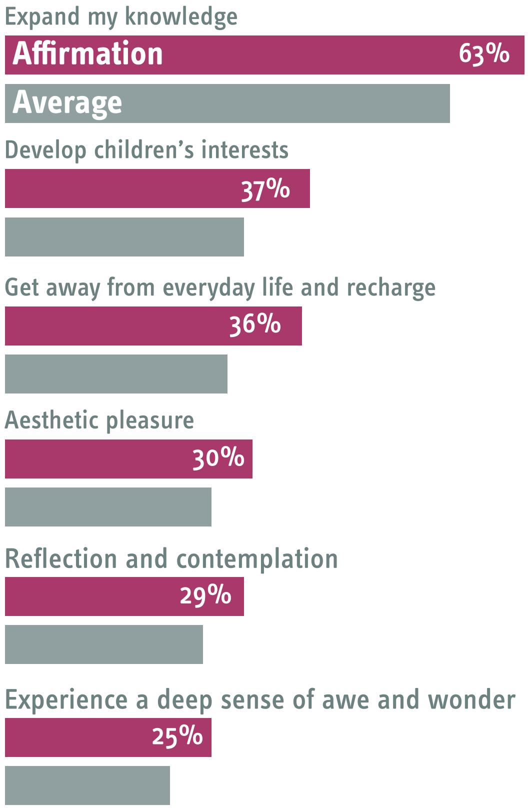
66% (57% overall)
of Affirmation agree the arts helps improve New Zealand's society

What do they want from it?

Affirmation often have underlying social motivations as well as a big dose of self-development. They're looking for wholesome learning that helps them grow as a person and feel good about themselves. They'll feel at home with a mainstream musical or well-known play but, with encouragement, can be convinced to expand their horizons. It doesn't necessarily need to be intellectually challenging, wacky or provocative but should include context and information so they will really understand it and gain insight or knowledge.

> **'It's important to get information as far in advance as possible so that you can get the tickets and plan. Planning is the first word.'**

Where motivations for attending differ the most from average



[Bases: average 1661, Affirmation 257]

And if they don't currently attend?

This segment holds untapped market potential. Affirmation are constantly shortlisting what to do, with a rolling list of potential things that would be worthwhile. The reality is there's a lot of stuff on the list, so they won't get around to all of it. The challenge is to highlight something as the best choice for them.

Affirmation is the segment that does nothing by accident and makes carefully judged decisions. Marketing needs to present a place as welcoming, something they can identify with, and somewhere they can see themselves going.

However, once they are familiar with something, they add it to their repertoire, because it's a known entity now and leaves less to chance. They fancy themselves as becoming connoisseurs so will keep going back. This counts for arts venues and brands too, so while they may take some assurance to reach them in the first place, the prize on offer is loyalty.

Barriers to attending more often

Where barriers differ most from average:

26% (18% average)
'It's too expensive'

10% (6% average)
'I don't know enough about what's on'

Part of getting things right (and feeling in control) includes not being ripped off. Affirmation want to engage with top-notch culture and at times will invest in a really special occasion but on the whole, will appreciate a good deal. Over one-quarter mention price as a key barrier to engaging more often – higher than other segments. When Affirmation are weighing up the options, a discount or offer could just put the final tick in the 'pros' column.

How do they choose?

Affirmation make very well researched decisions. Ultimately, they look for reinforcement that they're choosing the right thing. To do that they need full and comprehensive details. All marketing says everything's good so they need plenty of endorsement and supporting evidence. Word-of-mouth from a trusted friend would be the ultimate. But TripAdvisor and the like, press reviews, star ratings, will all assure Affirmation that there's no risk something's going to be a dud.

Once they have decided, they then want to be sure to have the best experience, make smart choices about seats, arrive in plenty of time to check their coat, have a drink, know how to get to their seats and so on. So again, the devil is in the detail.

When we asked which sources influenced them the most (which might differ from how regularly they use them), they said: 1. social media 2. online listings 3. recommendations.

Where media types differ most from average – top 10

Media sources used by Affirmation to find out what arts and culture events are on (past 12 months).

	Average	Affirmation
Recommendation	42%	44%
Online listings	34%	41%
TV	36%	41%
Newspapers (print)	35%	40%
Email newsletters	32%	39%
Brochures / flyers / posters	33%	37%
Social networking sites	33%	36%
Newspapers (online)	21%	26%
A critic review (print)	13%	16%
Online user reviews	12%	15%

Engaging with organisations online

17% (13% average)
have reviewed or rated a visit to an arts or cultural experience online in past 12-months - they're more likely to have done so than most other segments

18% (17% average)
mentioned or uploaded content to social media about a visit to an arts or cultural experience in past 12-months

47% (44% average)
agree that watching arts performances online is a good alternative if unable to attend in person – a higher level compared to most other segments

81% (76% average)
agree that you can never replace a live with a virtual experience – one of the segments most likely to think this

17% (17% average)
agree that as a result of experiencing arts and culture online they attended a related live arts event

Building relationships with them

Like most of us, Affirmation want to feel confident and dignified. Museum interpretation for example should make them feel smarter, not reveal their ignorance. Signage, cloakroom facilities, clear seat reservations and great customer service should guarantee the trip a success, not make them feel like a fish out of water. Affirmation will return to organisations they trust to deliver, so a little thought about making people feel comfortable goes a long way.

Souvenirs, programmes and other take-aways provide a reminder to themselves of positive experiences and a feeling of having done a good thing, but do need to be worth the money.

13%

of Affirmation are a current subscriber, member or friend of an arts, culture or heritage organisation

Reasons for donating time or money to the arts

Reason	%	% point difference from avg.
To contribute to something I'm passionate about	34%	-4
Makes me feel good about myself	24%	-2
Lets me be part of something bigger than myself	24%	-4
Makes me feel that I can make a difference	22%	-6
Enables me to meet with other like-minded people	21%	-2
Helps me develop and grow as a person	19%	-1

Philanthropic giving

12% (12% overall)

have volunteered for an arts or cultural organisation in the past 3 years

31% (28% overall)

have donated money to an arts or cultural organisation in the past 3 years

Affirmation are the segment most likely to have made a one-off donation online, through an organisation's website or online crowd-funding campaign.

Perceived importance of arts causes – where Affirmation differs the most from average

81% (73% overall)

enabling young people to access cultural experiences

56% (50% overall)

helping organisations build new audiences

54% (47% overall)

helping organisations tour to rural communities

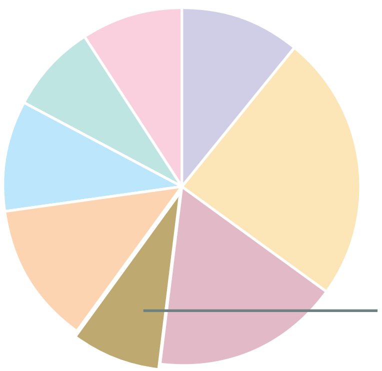
37% (32% overall)

helping organisations tour internationally

For those chosen brands that have succeeded in standing out, membership may provide Affirmation a way of getting even more value. They will initially join to gain personal benefits but as a segment looking for ways to feel good about themselves, a membership card fosters a sense of affiliation and helps them feel they are personally helping organisations they care about.

Enrichment

Tradition | History and heritage | Conservation | Nostalgia | Learning



8%
of New Zealand's culture market

303k
adults

Who are they?

Enrichment tend to be lovers of history with a **respect for the past**. They are strongly **independently minded** and exert their right to be **cautious**. They tend to have **established tastes** and habits and know what they will enjoy. Fad and fashion hold no seduction. It is not that new things hold no worth, but Enrichment will look for **the thread that links them** to what went before.

When it comes to art and culture Enrichment veer towards things they believe to be important, have **stood the test of time** and **command respect**. They like things that talk about our **collective identity** – who we are, where we're from.

Think of Enrichment as...

the ones who: see the present through the lens of the past

Attitudes & life priorities:

- Understanding the past
- Arts and crafts
- Home life
- Nature, gardening, countryside
- Lifelong learners

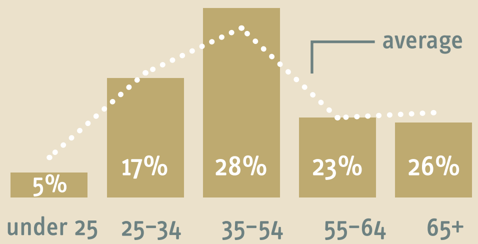
Enrichment is the segment most likely to say...

'It's stood the test of time'

... and least likely to say...

'So much better than the original'

More diverse and highly educated



28% (30%) have children in the household

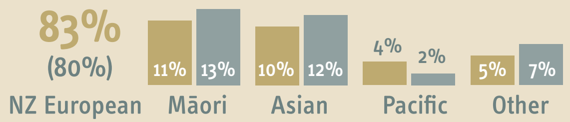
23% (22%) have a post-graduate certificate or higher

25% (15%) are retired

44% (50%) are in full-time employment

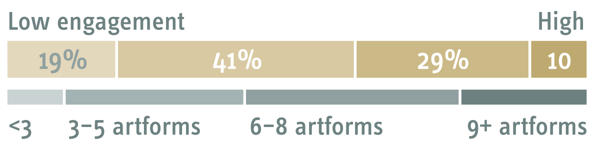
Ethnic identity*

[Base: 5014, Enrichment 458]



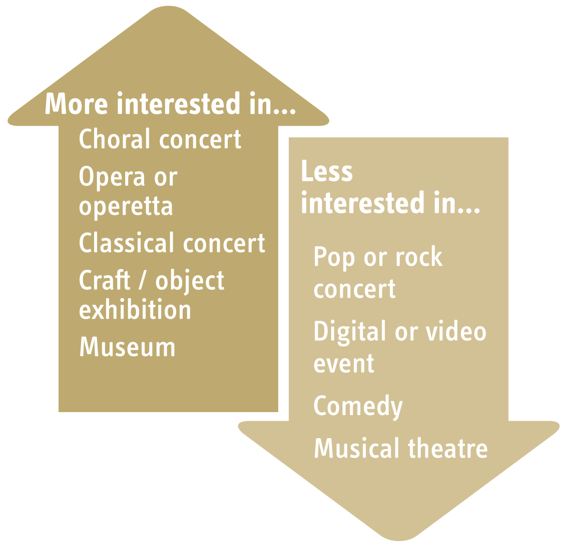
*Ethnic identity was asked as a multi-option question

Artform engagement index



What is culture to them?

Enrichment are drawn to arts and cultural experiences that connect with existing interests. They have reverence for the past and a value of heritage. For them, learning the origins of something heightens its worth and is enriching. They enjoy making sense of the world, and appreciate how the heritage of things helps us understand how we got here.

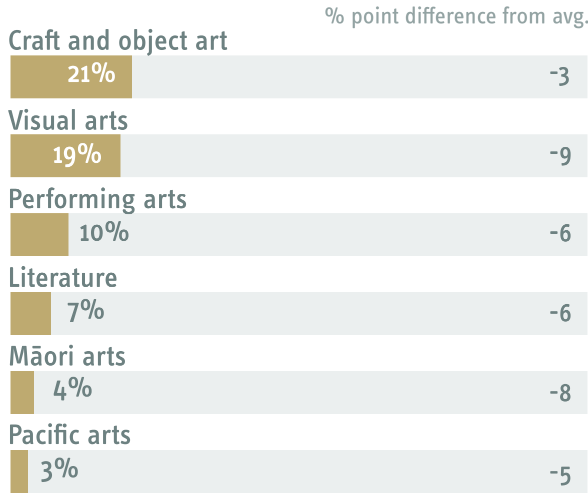


10% of Enrichment have attended nine or more different artforms in the past three years, 12-percentage points lower than average.

How do they approach it?

While Enrichment don't all-out reject change, they also believe we shouldn't jettison everything we once cherished, so enjoy escapism and nostalgia. Their distrust of rewriting history means they may also be less persuaded by updated productions if there was nothing wrong with the original. They're not stick-in-the-muds, but only see the point of taking a new approach if it enhances our understanding. They are one of the least digitally-focused segments and often prefer paper in their hand. It is not that they're luddites, but they're looking for deeper understanding, not to experiment.

Active participation* (past 12 months) by key artform



[Bases: average 6101 Enrichment 782]

*active involvement with creating in any way in the past 12 months

80% (74% overall)
of Enrichment feel proud when New Zealand artists succeed overseas

76% (62% overall)
of Enrichment feel that 'some arts events interest me but I still don't go much'

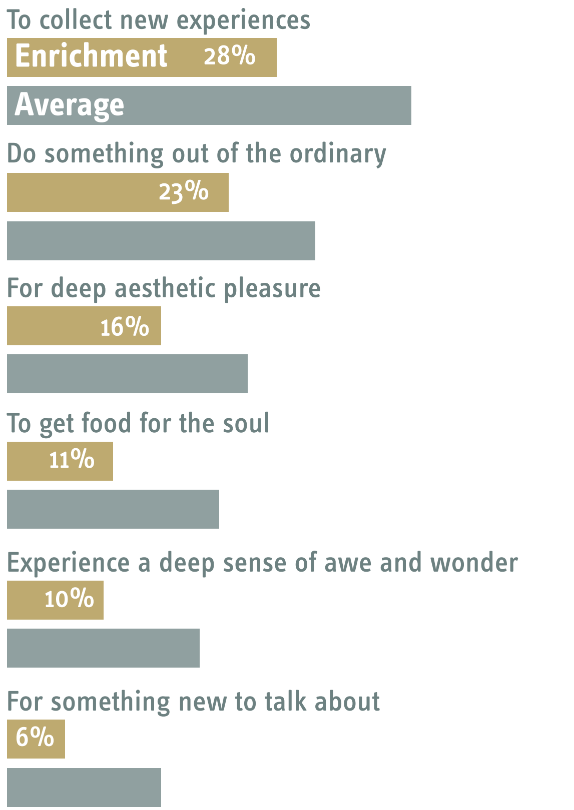
What do they want from it?

The Enrichment segment comes for personal enjoyment and learning. Cultural visits offer pleasant escapism as well as learning and greater fulfilment within their lives. They appreciate institutions populated by experts. They like a single expert voice or curator and interpretation that can enrich their understanding.

They are less likely themselves to want an interactive, participatory experience where they are invited to choose between multiple perspectives on history – instead preferring to learn from you the definitive version of events or a conclusive analysis of an artwork.

> **'You're the expert – why don't you just tell me'**

Where motivations for attending differ the most from average



[Bases: average 1661, Enrichment 380]

And if they don't currently attend?

Depending on specifics of your offer, Enrichment may be underrepresented in your audiences. This segment is likely to have a small number of organisations they know to cater to their needs. Their caution also makes them less frequent attenders than some of the more prolific segments. In addition, they have lower levels of secondary spend. So while some may enjoy loyalty they may be lower net-worth.

Reaching the non-attending Enrichment will be all about convincing them of your relevance to them: overtly showing them the unbroken thread of history that connects things. Risk will be mitigated by providing details of what to expect, any clips or 'try before you buy' opportunities and introductory offers.

Barriers to attending more often

Where barriers differ most from average:

23% (20% average)
'I never have enough time'

22% (18% average)
'I'd rather do other things'

Enrichment are great planners and love an itinerary. As well as aiding a decision on whether something is worth the time and money, they look for comprehensive information to plan their visit. They expect venue websites to have readily available details including where to park, where to get a cup of tea and how long to allow for their visit.

How do they choose?

Enrichment are inherently suspicious of gimmicks or anything that appears to be flimsy, lightweight or capricious. They don't like the idea that marketing will trick them or manipulate them into buying something. Instead, they look for plain English information that supports the quality of the product.

Due to their cautious nature, anything that can lower risk will pay off. Try before you buy, clips, excerpts and thorough information will reassure them. They are also price sensitive and often assess value for their money, wanting to know exactly what they're investing in.

When we asked which sources influenced them the most (which might differ from how regularly they use them), they said: 1. recommendation 2. newspaper (print) 3. social media.

Where media types differ most from average – top 10

Media sources used by Enrichment to find out what arts and culture events are on (past 12 months).

	Average	Enrichment
Newspapers (print)	35%	38%
TV	36%	29%
Brochures / flyers / posters	33%	29%
Online listings	34%	26%
Email newsletters	32%	23%
Social networking sites	33%	21%
Magazines (print)	14%	10%
A critic review	13%	9%
Online user reviews	12%	7%
Arts organisations' website	11%	4%

Engaging with organisations online

5% (13% average)
Enrichment is one of the segments least likely to have reviewed or rated a visit to an arts or cultural experience online in the past 12-months

4% (17% average)
Enrichment were least likely to have mentioned or uploaded content to social media about a visit to an arts or cultural experience in past 12-months

40% (44% average)
agree that watching arts performances online is a good alternative if unable to attend in person - lower than average

71% (76% average)
agree that you can never replace a live with a virtual experience

8% (17% average)
of Enrichment attended a live arts event as a result of experiencing arts and culture online – the segment least likely to do so

Building relationships with them

Enrichment are not looking to broaden their horizons and will remain loyal to the organisations that feel most relevant to them.

Membership is a route to closer engagement by providing increased value – either monetary or through additional, rewarding expert opinion and information.

6% (12% overall)

are a current subscriber, member or friend of an arts, culture or heritage organisation

Reasons for donating time or money to the arts

Reason	%	% point difference from avg.
Contribute to something I'm passionate about	34%	-4
Satisfies my social conscience	28%	+6
Makes me feel good about myself	25%	-1
Helps me gain a wider perspective of the world	24%	+3
Helps me be part of something bigger than myself	19%	-9
Makes me feel that I can make a difference	15%	-13

Philanthropic giving

7% (12% overall)

of Enrichment have volunteered for an arts or cultural organisation in the past 3 years

21% (28% overall)

have donated money to an arts or cultural organisation in the past 3 years

While Enrichment are as likely as average to *consider* making a donation, they are less likely to have actually done this in the past three years.

Perceived importance of arts causes – where Enrichment differs the most from average

51% (59% overall)

helping organisations maintain venues

37% (48% overall)

develop collections or artistic works

35% (73% overall)

enabling young people to access cultural experiences

33% (47% overall)

helping organisations tour to rural communities

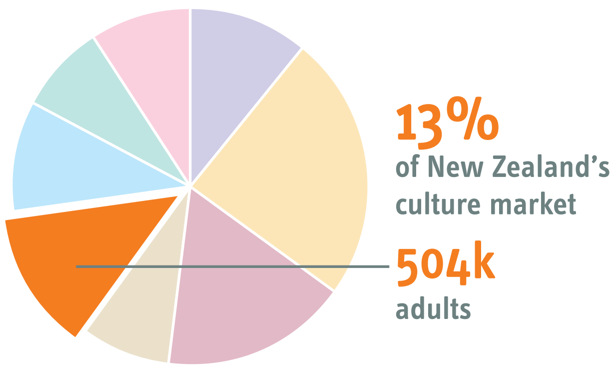
17% (32% overall)

helping organisations tour internationally

For those in invested loyal relationships, the opportunity to volunteer could provide a way of doing something sociable that is aligned with their preferred pastime.

Stimulation

Active | Experimental | Ideas | Social | New



Who are they?

Stimulation are an **active** group who love adventure and live for the moment. They constantly seek out **new experiences**: 'do something different' is a maxim for them. They are all about **big ideas** and **out of the ordinary** experiences. But they also attend cultural events for the **social experience**.

Stimulation are **independently minded**, but aware of how they are perceived by others. They are happy to stand out from the crowd if it shows them to be **ahead of the curve**. They don't need things to have a proven track record. That is not to say they dislike popularity, but they **aren't drawn** to the **very mainstream** as they like to be the one making the discoveries.

Think of Stimulation as...

'the innovators'

Attitudes & life priorities:

- Enjoying life
- Going out • Taking risks
- Contemporary culture
- Food and drink
- Live music

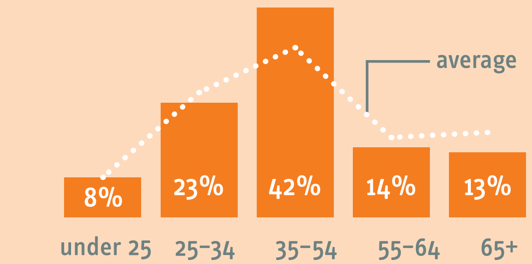
Stimulation is the segment most likely to say...

'What's the big idea?'

... and least likely to say...

'Are you sure it's safe?'

Less diverse and highly educated



30% (30%) have children in the household

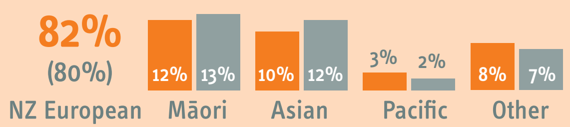
24% (22%) have a post-graduate certificate or higher

11% (15%) are retired

56% (50%) are in full-time employment

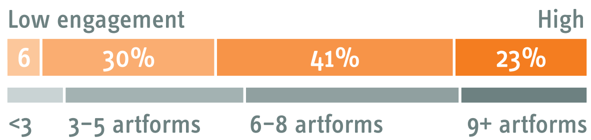
Ethnic identity*

[Base: 5014, Stimulation 679]



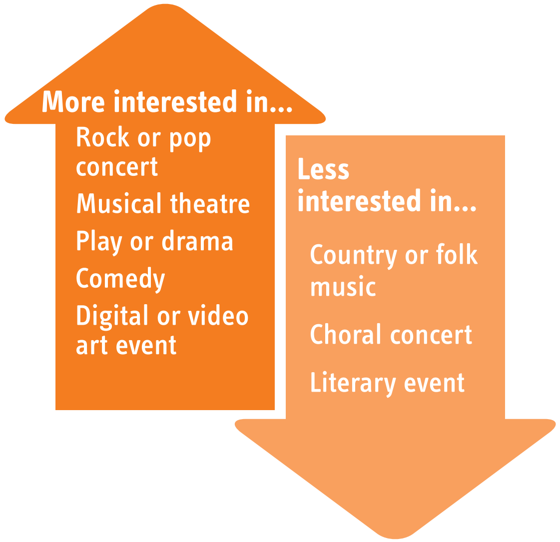
*Ethnic identity was asked as a multi-option question

Artform engagement index



What is culture to them?

For Stimulation it can be quite cerebral – it's about big ideas. These can be historical, they can political, they can be societal. And they also want to do all of this with their friends and a beer in hand. Ultimately, they want to be moved emotionally and challenged intellectually, and consume culture socially.

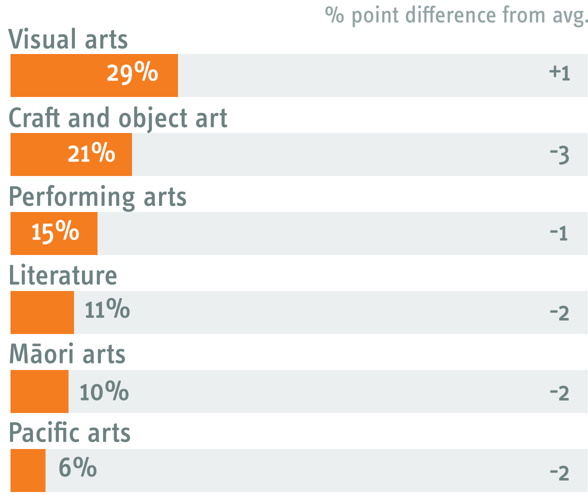


23% of Stimulation have attended nine or more different artforms in the past three years. This is at a similar level to average (22%).

How do they approach it?

Stimulation want to be the first to know about things. They pride themselves in being ahead of the curve. They don't need things to have a proven track record or for others to have endorsed them. In fact, they want to be the ones who dragged their friends along. They want their friends to see them as the advisor because they know they'll tell them about something new and astonishing.

Active participation* (past 12 months) by key artform



[Bases: average 6101 Stimulation 782]

*active involvement with creating in any way in the past 12 months

51% (43% overall)
of Stimulation agree the arts are for 'people like me'

54% (47% overall)
of Stimulation agree that their local council should give money to support the arts

What do they want from it?

Stimulation are looking for new perspectives – something they haven't seen before. Or not from that angle before. Rule-breaking can be irresistible. They like colliding things together that don't go together for a different take on things or an experience that's unusual.

Stimulation are looking to be surprised and amazed. They like spectacle. They like happenings. They also like intimate special things like being let into the bit of the building nobody is usually allowed into and places not many people know about.

> **'It was so bizarre that I just loved it'**

Where motivations for attending differ the most from average

[Bases: average 1661, Stimulation 232]

And if they don't currently attend?

This naturally curious, adventurous segment is always on the look-out for new and extraordinary experiences. They will be open to most artforms but will need their attention grabbing and a compelling suggestion that an experience will be unexpectedly good. A new venue should simply invite them before everyone else catches on. However for all those in this segment who have made it over the threshold – and can see that what you do is radical and a great experience – there will be many more on the outside who have assumed you're standard – perfectly good but run of the mill. Clear articulation of what makes your experiences special and a strong and a confident brand are needed. Or grab their attention by doing something different. Stimulation like fireworks going off, they like pop-ups. They like it to be after-dark, on the roof (or in the basement), starting at 10 o'clock. Do something that makes them reconsider.

Barriers to attending more often

Where barriers differ most from average:

24% (20% average)
'I never have enough time'

8% (6% average)
'I don't always have other people to go with'

Don't be mistaken that everyone in the Stimulation segment is at the extreme end of the spectrum, with an almost boundless energy and appetite for risk and adventure. Some Stimulation have a more mild 'up for anything' spirit, favouring the new and interesting but being more relaxed in their quest for adventure.

How do they choose?

Stimulation enjoy marketing as an artform in its own right. If it's clever, or beautiful, or visual, or tech-y, or gadget-y, they'll viral it to everyone. But if it's lame, they'll also viral it to everyone.

Marketing needs to highlight the hook, the twist, the thing that makes it incredible and different, that alters their view. But no spoilers please – don't give too much away. Intrigue them and spark their interest but the 'reveal' should happen during the experience itself.

When we asked which sources influenced them the most (which might differ from how regularly they use them), they said: 1. social media 2. online listings 3. recommendation.

Where media types differ most from average – top 10

Media sources used by Stimulation to find out what arts and culture events are on (past 12 months).

	Average	Stimulation
Recommendation	42%	46%
Radio	35%	44%
Social networking sites	33%	43%
Online listings	34%	42%
TV	36%	39%
Email newsletters	32%	34%
Newspapers (online)	21%	24%
Online user reviews	12%	14%
On-demand recommendations	3%	5%
A critic review (print)	13%	15%

Engaging with organisations online

11% (13% average)
reviewed or rated a visit to an arts or cultural experience online in past 12-months – a level lower than for Essence, Expression and Affirmation

21% (17% average)
of Stimulation mentioned or uploaded content to social media about a visit to an arts or cultural experience in past 12-months - higher than most other segments

45% (44% average)
agree that watching arts performances online is a good alternative if unable to attend in person

73% (76% average)
agree that you can never replace a live with a virtual experience

23% (17% average)
of Stimulation attended a live arts event as a result of experiencing arts and culture online - after Expression, they're the segment most likely to do so

Building relationships with them

This segment typically has a lower attention threshold and can be distracted by something newer or shinier on the horizon. However, brands they identify as keeping things interesting can successfully develop relationships with Stimulation.

Membership that doubles as a pass into new and extraordinary experiences may increase the loyalty of an otherwise promiscuous group.

13% (12% overall)
are a current subscriber, member or friend of an arts, culture or heritage organisation

Reasons for donating time or money to the arts

Reason	%	% point difference from avg.
Can contribute to something I'm passionate about	36%	-2
Lets me be part of something bigger	29%	+1
Makes me feel that I can make a difference	28%	=
Makes me feel good about myself	23%	-3
Enables me to meet like-minded people	19%	-4
Helps me develop and grow as a person	18%	-2

Philanthropic giving

14% (12% overall)
of Stimulation have volunteered for an arts or cultural organisation in the past 3 years

32% (28% overall)
have donated money to an arts or cultural organisation in the past 3 years

Stimulation are one of the segments most likely to have donated in the past 3 years and are more likely to consider donating to something specific over making a general donation.

Perceived importance of arts causes – where Stimulation differs the most from average

56% (50% overall)
helping organisations attract new audiences

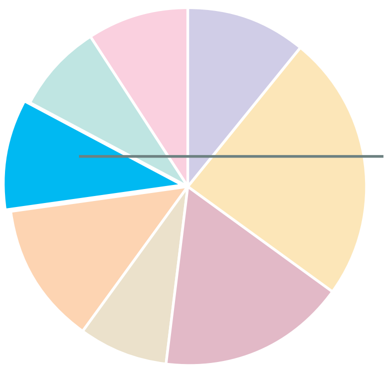
43% (47% overall)
helping organisations tour to rural communities

27% (32% overall)
helping organisations tour internationally

Aware of how they're perceived by others, cultural experiences can be great conversation starters that reflect well on Stimulation's self-image. Brands that align to their own 'self brand' will be more successful in securing support and membership. Their early-adopter nature means that it pays to give them something exclusive to talk about early on: make sure they feel ahead of the crowd and have cool, sharable content and they'll proactively spread the word and act as a valuable, trend-setting brand ambassador.

Release

Busy | Prioritising | Ambitious | Escape



10% of New Zealand's culture market

367k adults

Who are they?

The Release segment is looking for **escape** from the stresses of everyday life. They can feel a little under siege from all the different pressures and **conflicting demands** on their time. For some these conflicts may be reality, but often, being in the Release segment is more a **state of mind**. It is the **feeling of being time poor**, rather than the actual reality of not having any time.

'In theory, I would try new stuff, but maybe not this time'

Think of Release as the ones who...

'always think they're too busy'

Attitudes & life priorities:

- Work, home and family
- Relaxation • Entertainment
- Juggling commitments
- Live music

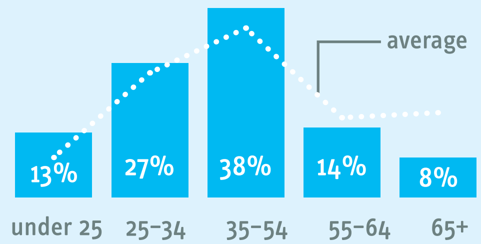
Release is the segment most likely to say...

'We should do this more often'

... and least likely to say...

'Don't worry so much – there's plenty of time'

More likely to be employed full-time



31% (30%) have children in the household

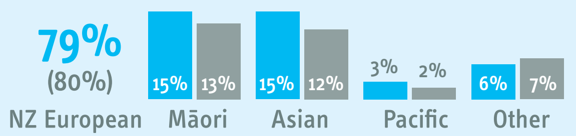
20% (22%) have a post-graduate certificate or higher

8% (15%) are retired

55% (50%) are in full-time employment

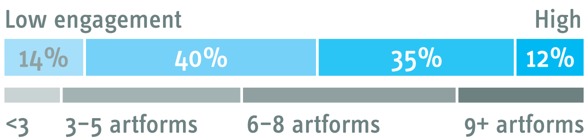
Ethnic identity*

[Base: 5014, Release 795]



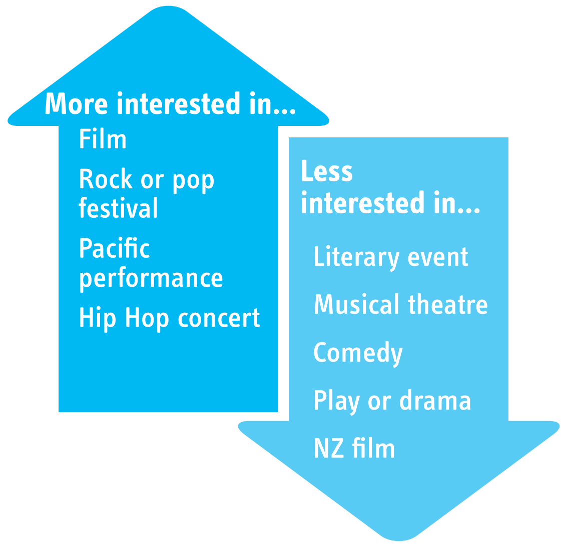
*Ethnic identity was asked as a multi-option question

Artform engagement index



What is culture to them?

Culture can be a means of staying in the loop with things that are current and contemporary. However when day-to-day life is so busy it is easy to become switched off to this optional pastime with other things jostling for priority. This means they tend to veer towards more popular things. Because they don't have much time, they're not prepared to take a risk on the one chance to go out.



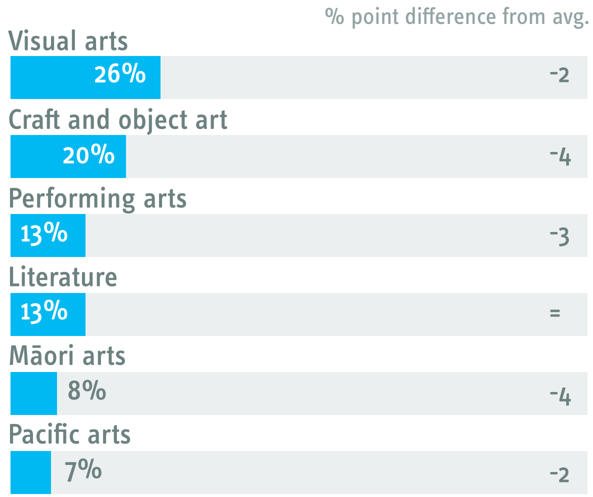
12% of Release have attended nine or more different artforms in the past three years, 10-percentage points lower than average.

How do they approach it?

Release don't have time to proactively look for what's on. As a result, very few things come across their radar. So they only find out about things that are 'unmissable'. Literally, you can't miss it, because it's advertised everywhere. Or, more likely, someone they know points something out to them and asks if they've been.

It is not so much whether something will meet their intellectual needs, or be too challenging, that poses a barrier to attendance as low bandwidth. Even if they're faced with something that really sparks their interest, practically how realistic is it when there is already so much going on?

Active participation* (past 12 months) by key artform



[Bases: average 6101 Release 738]

*active involvement with creating in any way in the past 12 months

30% (43% overall)
of Release agree the arts are for 'people like me'

48% (62% overall)
of Release agree that overall, 'New Zealand arts are of high quality'

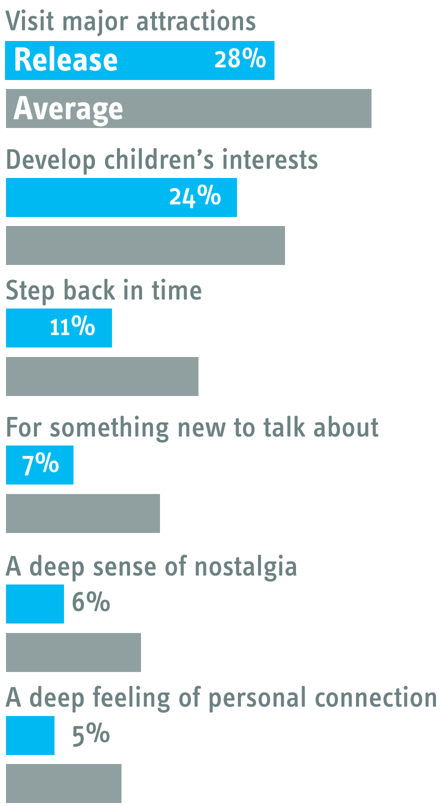
What do they want from it?

Release often use logistics to talk themselves out of organising outings but they aspire to go to more things and enjoy the escape and relaxation this can provide. They need to be encouraged to see arts and culture as a sociable activity: a means of having fun and taking some well-deserved time out.

Release feel time-poor so make things irresistibly easy for them. Reduce the effort, streamline the user journey, keep to low cognitive load. One-stop booking – food, drink, parking – everything in a package makes life that bit easier. The guaranteed easy option.

> **'Getting away from my everyday life is a special treat'**

Where motivations for attending differ the most from average



[Bases: average 1661, Release 141]

And if they don't currently attend?

There are significant numbers of Release in the cultural market who aren't wholly convinced that cultural trips sufficiently meet their needs and are worth the effort. They need to reminding what they are missing out on and that their precious time is well spent together with others on cultural activities. Risk reduction is key for activating Release. Efficient, transparent and simple booking processes, good facilities, and delivering what is promised will help galvanise this time-poor group.

While many of them may never become the most frequent attenders, those you successfully win over, will be captivated by convenience. They are more likely to go where they're kept up to date with what's on and already have a booking account than go searching out new places and activities. Positive experiences will, in turn, fuel their appetite and encourage them to be more adventurous.

Barriers to attending more often

Where barriers differ most from average:

10% (5% average)
'parking or finding a carpark'

7% (3% average)
'I wouldn't understand the art / content'

Sometimes it is easy to see why Release feel conflicting demands on their time – a busy job, children or elderly parents to care for and so on. But there are other segments who, on paper, are doing twice as many things and still trying to fit more in. This isn't a life-stage segment or about actual capacity, it is the mindset: 'When am I going to fit it in?!'. It's to do with how you deal with the stresses of daily life.

How do they choose?

For Release you have to think like you have just one shot at captivating their attention. Put it all on a plate, with multiple reasons to go – and a hard stop call to action. They want to do things, but may have been putting it off for months so if it is only happening this week make sure they know.

Highlight multiple benefits – maybe an activity to entertain the kids is also a great chance to catch up with neglected friends (and it's guaranteed their kids will like it too).

When we asked which sources influenced them the most (which might differ from how regularly they use them), they said: 1. social media 2. recommendation 3. online listings

Where media types differ most from average – top 10

Media sources used by Release to find out what arts and culture events are on (past 12 months).

	Average	Release
Recommendation	42%	33%
TV	36%	30%
Radio	35%	27%
Social networking sites	33%	26%
Online listings	34%	25%
Brochures / flyers / posters	33%	23%
Email newsletters	32%	21%
Newspapers (print)	35%	20%
Magazines (print)	14%	7%
A critic review (print)	13%	4%

Engaging with organisations online

3% (13% average)
Release were the segment least likely to have reviewed or rated a visit to an arts or cultural experience online in the past 12-months

11% (17% average)
mentioned or uploaded content to social media about a visit to an arts or cultural experience in the past 12-months

40% (44% average)
agree that watching arts performances online is a good alternative if unable to attend in person

64% (76% average)
Release was one of the segments least likely to agree that you can never replace a live with a virtual experience

9% (17% average)
attended a related live arts event as a result of experiencing arts and culture online. Release were converted at a much lower level than the majority of segments

Building relationships with them

Release tend not to be forthcoming in support for arts and cultural institutions and are unlikely to find time to make the most of cost-saving benefits of membership.

For Release, it's more about efficient transactions than becoming a close ally to the cause.

6% (12% overall)
are a current subscriber, member or friend of an arts, culture or heritage organisation

Reasons for donating time or money to the arts

Reason	%	% point difference from avg.
To contribute to something I'm passionate about	26%	-12
Makes me feel I can make a difference	21%	-7
Makes me feel good about myself	19%	-7
Helps me gain a wider perspective of the world	14%	-7
Satisfies my social conscience	12%	-10
Allows me to show people I care about the arts	12%	+1

Philanthropic giving

7% (12% overall)
of Release have volunteered for an arts or cultural organisation in the past 3 years

19% (28% overall)
have donated money to an arts or cultural organisation in the past 3 years

Release are less likely to have donated than average. Those who do are most interested in giving to something specific through a one-off donation.

Perceived importance of arts causes – where Release differs the most from average

55% (73% overall)
enabling young people to access cultural experiences

39% (57% overall)
supporting up and coming artists and practitioners

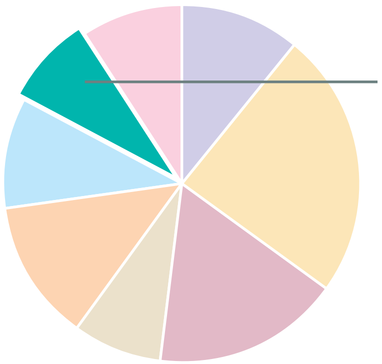
35% (48% overall)
develop collections or artistic works

32% (50% overall)
helping organisations build new audiences

Release may not be the first port of call to build a supporter base, however schemes that reward return at the same time as providing concierge-style services could help keep you top of mind and decrease the perceived obstacles of planning and arranging a visit.

Perspective

Self sufficient | Focused | Independent | Fulfilled | Reflective



8%
of New Zealand's culture market

316k
adults

Who are they?

Perspective are **fulfilled**, happy doing their own thing, driven by their own agenda. They are very focused on a **limited number of interests** they find satisfying and rewarding and have a **low appetite for expanding** this repertoire.

They are very self-sufficient and don't rely on others for fulfilment. They're unaffected by the views of others and tend to **prioritise their own needs**.

Perspective have a need to **make their own discoveries**, so it will be their **desire to learn** that provides a focus for any cultural engagement.

Think of Perspective as the ones who...

are happy in their own bubble

Attitudes & life priorities:

- Reading
- Learning
- Personal space
- The outdoors

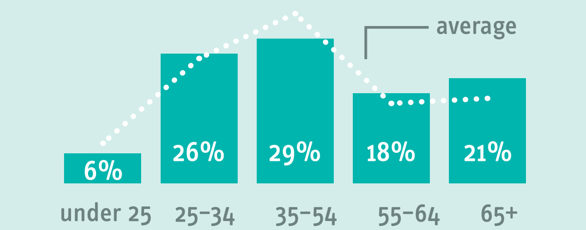
Perspective is the segment most likely to say...

'Really, I'm fine doing my own thing'

... and least likely to say...

'Let's go out and do something totally different!'

More likely to be retired



29% (30%) have children in the household

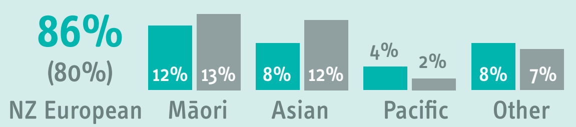
21% (22%) have a post-graduate certificate or higher

21% (15%) are retired

46% (50%) are in full-time employment

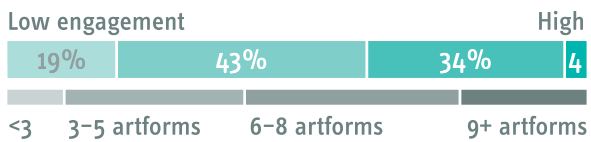
[Base: 5014, Perspective 426]

Ethnic identity*



*Ethnic identity was asked as a multi-option question

Artform engagement index



What is culture to them?

Perspective have an underlying spontaneous nature that means they may just opt to explore what you have to offer them - but it will be for them to decide if this is the case: they do things on their own terms. Going to a communal experience like a theatre, or a big, busy museum is not Perspective's natural game. Rather, they prefer entering a private, affective, personal bubble.

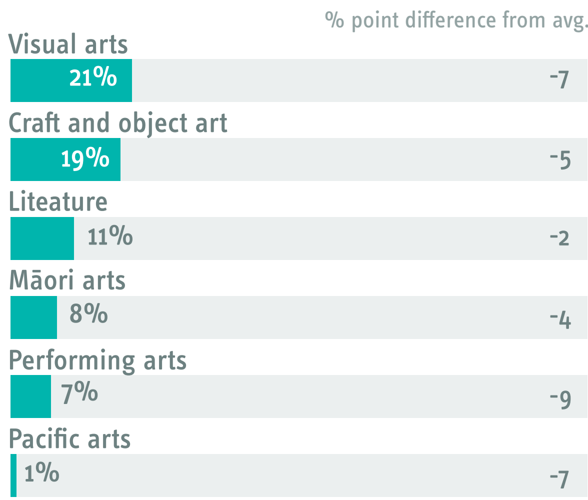
4% of Perspective have attended nine or more different artforms in the past three years, 18-percentage points lower than average.

How do they approach it?

Perspective are thinkers. It is not that they are averse to new things and ideas, rather that they already have an enthusiasm for particular subjects and want to focus their time in ways that relate. They therefore register lower levels of interest in most artforms as the artform itself will not be the pull – more the subject matter being dealt with.

It may be that Perspective engage with culture socially, on the occasions they join in with their family or friendship group, and are seeking a pleasant time in the company of others. But they mark this out differently from when pursuing their own personal interests.

Active participation* (past 12 months) by key artform



[Bases: average 6101 Perspective 504]

*active involvement with creating in any way in the past 12 months

36% (27% overall)
of Perspective don't find the arts that interesting

15% (24% overall)
of Perspective agree that the arts are part of their everyday life

> **'I don't care for a subject that has been done to death for centuries'**

What do they want from it?

They typically have a particular thing they pursue, enjoy, and are knowledgeable about. The externalisation of this is not so relevant – that it is rewarding to them is what matters. Whether it's online, watching a documentary, reading a book or listening to a podcast, Perspective like putting themselves in environments where the stimulation is quite personal.

Going to things with other people may not be their first instinct but they may be convinced to go along if something's really special. Actually having an up-close personal encounter with the object they've read about, seeing a text they've read and imagined interpreted for stage or the depth they could get from hearing a curator talk, could actually be irresistible.

67% (81% average)
would find discounts or special offers appealing

34% (57% average)
would find the chance to see an artist at work or open rehearsal / development workshop appealing

Where motivations for attending differ the most from average

[Bases: average 1661, Perspective 116]

And if they don't currently attend?

You could ignore them for a life time and they wouldn't realise. They view it as their business if they decide to engage with you – not yours to try and persuade them.

Therefore, on the most part, they don't make a priority segment to actively target as the return on investment is less rewarding than for other segments. Those in the market for what you do, are likely to attend – providing you have sufficient profile and people can find out what's on. This may also be the case where you are picked up by the blogs or editorial they follow. Others will come on their own terms and you may pick them up along the way.

Barriers to attending more often

Where barriers differ most from average:

37% (18% average)
'I'd rather do other things with my free time'

4% (2% average)
'I'm not a creative person'

Perhaps think of Perspective as a much, much more narrowly focused and introverted breed of Essence. They lack the ardent appetite for cultural fixes, having homed in on their personal specialist subject. They pay even less attention to what others think and they are serious about their interests and confident in their choices.

How do they choose?

When it comes to marketing, Perspective are the one segment that have no fear of missing out. All the other segments think there's probably something happening somewhere that they've not heard of. Perspective think they've already found what matters, so they're not looking.

If what you're doing aligns with their pre-existing interests and ignites their passion, then they will arrive with great motivation to engage, hoping you will really bring things to life for them. However, given these tend to be private passions it will be for them to discern its relevance to them.

Top three most influential sources for Perspective to find out about arts and culture are: 1. recommendation 2. social media 3. newspapers (print)

Where media types differ most from average – top 10

Media sources used by Perspective to find out what arts and culture events are on (past 12 months).

	Average	Perspective
Recommendation	42%	28%
TV	36%	26%
Newspapers (print)	35%	25%
Brochures / flyers / posters	33%	25%
Radio	35%	22%
Online listings	34%	22%
Email newsletters	32%	20%
Social networking sites	33%	19%
Newspapers (online)	21%	10%
A critic review (print)	13%	5%

Engaging with organisations online

6% (13% average) reviewed or rated a visit to an arts or cultural experience online in the past 12-months – one of the segments least likely to have done so

8% (17% average) mentioned or uploaded content to social media about a visit to an arts or cultural experience in the past 12-months – one of the segments least likely to have done so

24% (44% average) agree that watching arts performances online is a good alternative if unable to attend in person – one of the segments least likely to have done so

71% (76% average) agree that you can never replace a live with a virtual experience

7% (17% average) attended a related live arts event as a result of experiencing arts and culture online – one of the segments least likely to have done so

Building relationships with them

Perspective tend to be self-centred and not ultimately interested in having a relationship with you. Remote is fine. They are interested in what artists do but they don't feel a need to meet them.

6 % (12% overall)

are a current subscriber, member or friend of an arts, culture or heritage organisation

Reasons for donating time or money to the arts

Reason	%	% point difference from avg.
Contribute to something I'm passionate about	41%	+3
Makes me feel I can make a difference	32%	+4
Lets me be part of something bigger than myself	29%	+1
Helps me gain a wider perspective on the world	20%	-1
Makes me feel good about myself	19%	-7
Satisfies my social conscience	18%	-4

Philanthropic giving

5% (12% overall)

of Perspective have volunteered to an arts or cultural organisation in the past 3 years

22% (28% overall)

of Perspective have donated money to an arts or cultural organisation in the past 3 years.

Perspective are less likely to have donated either time or money than average. Of those that had, they are three times more likely to have made a one-off donation than a regular payment.

Perceived importance of arts causes – where Perspective differs the most from average

61% (73% overall)

enabling young people to access cultural experiences

51% (59% overall)

helping organisations maintain venues

40% (57% overall)

helping to support up and coming artists and practitioners

36% (48% overall)

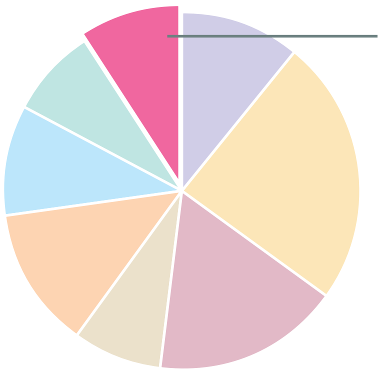
helping organisations develop their collections or artistic works

Perspective offer fairly low development potential when it comes to membership. They're around half as likely as average to be a friend, subscriber or member. If they want to join something, they will, but they're unlikely to be persuaded if it's outside their normal comfort zone or irrelevant to their core passions and interests.

A membership will provide them with access under their own terms, giving them the functional benefits of flexibility and good value. They're not, however, interested in being part of something collective or using membership as a route to socialise.

Entertainment

Popularist | Leisure | Fun | Consumers |



9%
of New Zealand's culture market

325k
adults

Who are they?

Entertainment tend to see arts and culture as very much on the **periphery** of their lives. Their occasional forays into culture are likely to be for **mainstream events** or **days out**. Leisure time is for fun, and this segment is looking for **entertainment and escapism** – if they do attend it will be socially motivated and their **engagement** is typically among the **lowest** of all segments.

Think of Entertainment as...

the mainstream

Attitudes & life priorities:

- Home and pub
- TV, celebrity, sports
- Thrill and spectacle
- Priorities close to home

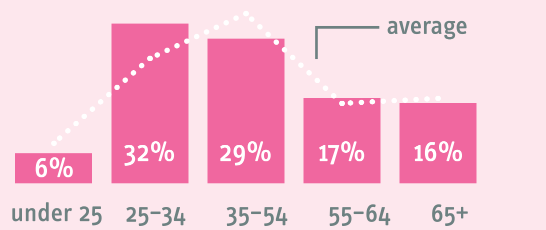
Entertainment are the segment most likely to say...

'Go on – entertain me'

... and least likely to say...

'Let's find something new – with plenty of food for thought'

Less diverse and working full-time



25% (30%) have children in the household

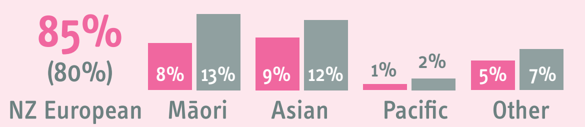
27% (44%) have a bachelor degree or higher

15% (15%) are retired

58% (50%) are in full-time employment

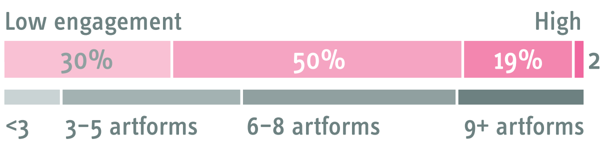
Ethnic identity*

[Base: 5014, Entertainment 487]



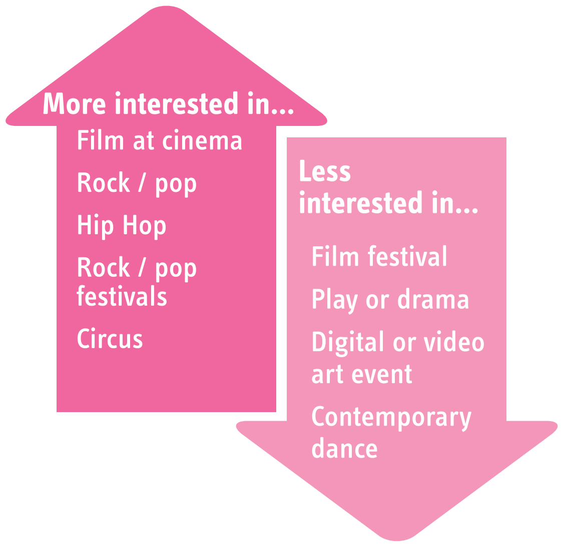
*Ethnic identity was asked as a multi-option question

Artform engagement index



What is culture to them?

If asked, this segment would probably say culture doesn't really play a role in their lives. They don't see themselves as cultural attenders or arts-goers as such. But they do go out – sometimes this could include a blockbuster exhibition or a popular show. But the emphasis is on having fun with other people rather than intellectual pursuit and the meaning behind the art.

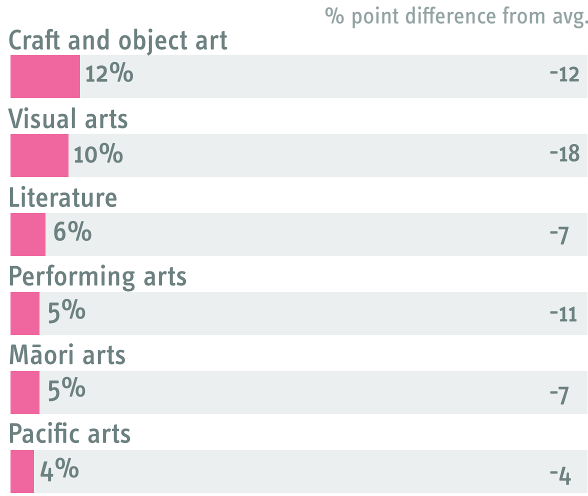


2% of Entertainment have attended nine or more different artforms in the past three years, 20-percentage points lower than average.

How do they approach it?

Entertainment are the one segment who don't have some kind of taxonomy of culture. They don't reflect on all the different artform categories they could be choosing between - they just see it all as leisure. It's the same as shopping, going to the beach, going for a meal, going ten-pin bowling. Going to a theatre, going to a gig - these are all leisure activities you can do. Therefore culture and the arts are literally competing against everything.

Active participation* (past 12 months) by key artform



[Bases: average 6101 Entertainment 824]

*active involvement with creating in any way in the past 12 months

51% (36% overall)
of Entertainment agree the arts are only for certain types of people

51% (24% overall)
of Entertainment don't find the arts all that interesting

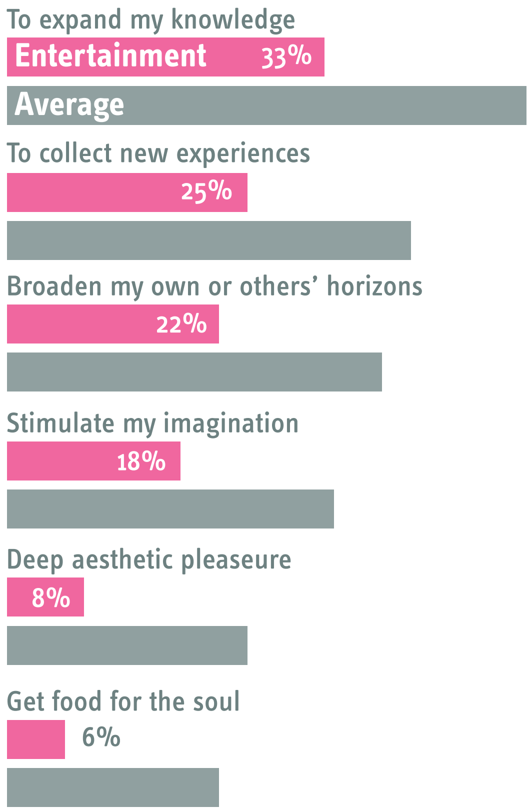
What do they want from it?

Entertainment's visits are primarily socially driven. They are looking for a fun time, so you could be in a museum, having a fun time with your kids or you could be in a park, it doesn't really matter.

The deciding factors are most likely to be around 'will it be entertaining?', 'do the facilities meet our needs?' – fairly simple hygiene factors.

> **'Occasionally things that pop up on the street... Because it's easy to forget about a place if you've already been once.'**

Where motivations for attending differ the most from average



[Bases: average 1661, Entertainment 174]

And if they don't currently attend?

If cultural visits are to compete with every other kind of day or night out, they really have to deliver on the social aspects and more. If a show is truly spectacular, has huge sets and mind-blowing costumes, perhaps someone famous on the stage, it will be a great thing to talk about with their friends and adds excitement to the social dimension. However, the social convention around many cultural visits is less conducive to pure socialising than, for example, going to a pub or for pizza.

One temptation to avoid is the idea of seducing Entertainment with discounts. If they don't attend, perhaps they are not convinced the experience holds value. On their occasional forays, they want the most shiny, special experience. A night out that is worth dressing up for, with the best seat for the best show in town. The risk in discounting is it suggests lower demand, which means less popular appeal and could shake their confidence in the experience.

Barriers to attending more often

Where barriers differ most from average:

36% (18% average)
'I'd rather do other things with may spare time'

9% (3% average)
'I'd be bored'

Entertainment are sometimes over-represented in overseas audiences. Going to a big museum with a blockbuster exhibition is perhaps something you'd do in a new place – ticking off the main sites and doing something out of the ordinary from their day-to-day at home.

How do they choose?

Entertainment prefer to stick with the tried and tested, and they view popularity and celebrity casting an endorsement of quality. Therefore, they only try things which have established popular currency and have little interest in engaging with what could be considered specialist or niche.

This segment likes marketing and advertising – it's a useful way to get information. They can tell a lot from marketing – a big, expensive billboard campaign for example is an indicator that something has high production values.

Top three most influential sources for Entertainment to find out about arts and culture are: 1. social media 2. recommendation 3. online listings.

Where media types differ most from average – top 10

Media sources used by Entertainment to find out what arts and culture events are on (past 12 months).

	Average	Entertainment
Recommendation	42%	24%
TV	36%	24%
Radio	35%	24%
Online listings	34%	21%
Social networking sites	33%	21%
Email newsletters	32%	18%
Newspapers (print)	35%	17%
Brochures / flyers / posters	33%	17%
Newspapers (online)	21%	10%
Arts organisations' websites	11%	2%

Engaging with organisations online

4% (13% average)
Entertainment are one of the segments least likely to have reviewed or rated a visit to an arts or cultural experience online in the past 12-months

10% (17% average)
mentioned or uploaded content to social media about a visit to an arts or cultural experience in the past 12-months

23% (44% average)
Entertainment are the segment least likely to agree that watching arts performances online is a good alternative if unable to attend in person

58% (76% average)
Entertainment were also least likely to agree that you can never replace a live with a virtual experience

5% (17% average)
Entertainment were the least likely to have attended a live arts event as a result of seeing related arts and culture content online

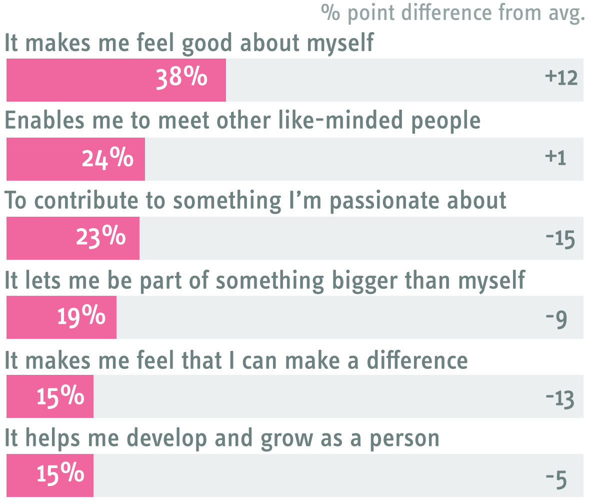
Building relationships with them

Entertainment very rarely invest in a supportive way. They don't see culture as contributing to community or society at large. On the other hand, the instrumental benefits of hospitals and schools are clear to see.

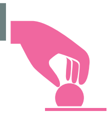
Benefits-driven transactional schemes won't work for Entertainment – purely because they wouldn't make much use of it so it's unlikely to feel relevant or worth it.

3% (12% overall)
are a current subscriber, member or friend of an arts, culture or heritage organisation

Reasons for donating time or money to the arts



Philanthropic giving



2% (12% overall)
Entertainment volunteered for an arts or cultural organisation in the past 3 years, the lowest of the segments

9% (28% overall)
have donated money to an arts or cultural organisation in the past 3 years – again the lowest of the segments

Entertainment are three times less likely than average to have donated in the past three years and offer low returns when it comes to philanthropy

Perceived importance of arts causes – where Entertainment differs the most from average

55% (73% overall)
enabling young people to access cultural experiences

40% (59% overall)
helping organisations maintain venues

35% (57% overall)
supporting up and coming artists and practitioners

27% (50% overall)
helping organisations build new audiences

23% (48% overall)
develop collections or artistic works

This is not a segment to target for membership or support. Rather, try to increase their spend while they're on site through catering, retail and added extras – help them make a real day or night of it.

Research parameters

This study was carried out for Creative New Zealand by Morris Hargreaves McIntyre.

It was commissioned in September 2017.

Target group for the research The New Zealand culture market.

Date of fieldwork: 3 November – 20 December 2018.

Data collection method Respondents were recruited by Consumer Link and responded to an online questionnaire which was designed to be compared to both 2011 and 2014 data. In order to qualify to take part in the survey, respondents had to be aged 16 or over and live in New Zealand.

Weighting procedures Responses were weighted to be representative of the New Zealand population – based on Census data estimates. Weighting was conducted according to age band, gender, ethnicity and location.

Sample size 5014 (nationally)

Initial regional sampling was based on 2013 Census population estimates. Some organisations opted to boost the sample in certain regions. Any imbalance was corrected post-collection, with weighting methods applied so that the final sample matched the demographic breakdown of the New Zealand population.

Population estimates: For all three 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?DataSetCode=TABLECODE7501. Please note that we deduct children, those not in the culture market and those in areas 'outside regions' before applying these estimates.

Region	Sample
North Island	
Northland	190
Auckland	589
Waikato	668
Bay of Plenty	287
Gisborne	93
Hawke's Bay	186
Taranaki	189
Manawatu-Whanganui	287
Wellington	785
South Island	
Tasman	96
Nelson	98
Marlborough	97
West Coast	94
Canterbury	583
Otago	584
Southland	188

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 **+/-1.38%** at 50% (ie, where the result is 50%, the actual result may fall between 48.62% and 51.38%).

North Island

The data for the **Northland regional market** has a confidence interval (margin of error) of +/-7.10% at 50% (ie, where the result is 50%, the actual result may fall between 42.90% and 57.10%).

The data for the **Auckland regional market** has a confidence interval (margin of error) of **+/-4.04%** at 50% (ie, where the result is 50%, the actual result may fall between 45.96% and 54.04%).

The data for the **Waikato regional market** has a confidence interval (margin of error) of **+/-3.79%** at 50% (ie, where the result is 50%, the actual result may fall between 46.21% and 53.79%).

The data for the **Bay of Plenty regional market** has a confidence interval (margin of error) of **+/-5.78%** at 50% (ie, where the result is 50%, the actual result may fall between 44.22% and 55.78%).

The data for the **Gisborne regional market** has a confidence interval (margin of error) of **+/-10.15%** at 50% (ie, where the result is 50%, the actual result may fall between 39.85% and 60.15%).

The data for the **Hawke's Bay regional market** has a confidence interval (margin of error) of **+/-7.18%** at 50% (ie, where the result is 50%, the actual result may fall between 42.85% and 57.18%).

The data for the **Taranaki regional market** has a confidence interval (margin of error) of **+/-7.12%** at 50% (ie, where the result is 50%, the actual result may fall between 42.88% and 57.12%).

The data for the **Manawatu-Whanganui regional market** has a confidence interval (margin of error) of **+/-5.78%** at 50% (ie, where the result is 50%, the actual result may fall between 44.22% and 55.78%).

The data for the **Wellington regional market** has a confidence interval (margin of error) of **+/-3.49%** at 50% (ie, where the result is 50%, the actual result may fall between 46.51% and 53.49%).

South Island

The data for the **Tasman regional market** has a confidence interval (margin of error) of **+/-9.99%** at 50% (ie, where the result is 50%, the actual result may fall between 40.01% and 59.99%).

The data for the **Nelson regional market** has a confidence interval (margin of error) of **+/-9.89%** at 50% (ie, where the result is 50%, the actual result may fall between 40.11% and 59.89%).

The data for the **Marlborough regional market** has a confidence interval (margin of error) of **+/-9.94%** at 50% (ie, where the result is 50%, the actual result may fall between 40.06% and 59.94%).

The data for the **West Coast regional market** has a confidence interval (margin of error) of **+/-10.09%** at 50% (ie, where the result is 50%, the actual result may fall between 39.91% and 60.09%).

The data for the **Canterbury regional market** has a confidence interval (margin of error) of **+/-4.06%** at 50% (ie, where the result is 50%, the actual result may fall between 45.94% and 54.06%).

The data for the **Otago regional market** has a confidence interval (margin of error) of **+/-4.05%** at 50% (ie, where the result is 50%, the actual result may fall between 45.95% and 54.05%).

The data for the **Southland regional market** has a confidence interval (margin of error) of **+/-7.14%** at 50% (ie, where the result is 50%, the actual result may fall between 42.86% and 57.14%).

Results based on sub-groups Where results are based on sub-groups of respondents, this is clearly indicated in the body of the report.

Credit: a number of the icons used on pages 147–186 are supplied courtesy of Vecteezy.com

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This report was prepared for Creative New Zealand, February 2018

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Morris Hargreaves McIntyre is an award- winning arts management consultancy. We use consumer insight to help organisations transform their relationships with audiences.

We are passionate about understanding cultural consumers, getting to the heart of issues that matter to you and making practical recommendations.

All projects are different, but the value we add is constant: we measure our success by the impact we have on organisations we work with.

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