

COMMUNITY

Culture Segments in focus

Audience Atlas New Zealand 2017

▶ morris
▶ hargreaves
▶ mcintyre

creative *nz*
ARTS COUNCIL OF NEW ZEALAND TOI AOTEAROA

Culture Segments in focus

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Audience Atlas New Zealand 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.

This investment results in a **growing databank** of comprehensive market data that helps New Zealand arts **organisations** of all shapes and sizes **better understand audiences**.

This document includes the **Culture Segment pen portrait** pages from the larger *Audience Atlas New Zealand 2017* report.

The data represented in these Culture Segment pen portraits is from 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.

Audience Atlas and Culture Segments are
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For the full Audience Atlas 2017 report visit:
www.creativenz.govt.nz/audienceatlas2017

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 (presented in detail in this document), 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.



Culture Segments in focus

This document 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 team¹, 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.

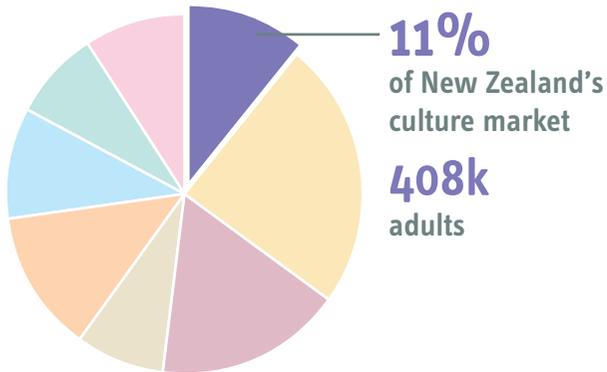
Through embedding the system, you can analyse your brand relationships, survey and profile your audience, identify opportunity in the wider market, identify membership potential, optimise benefits to their needs, grow altruism, understand spending habits and potential, test interpretation and increase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



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

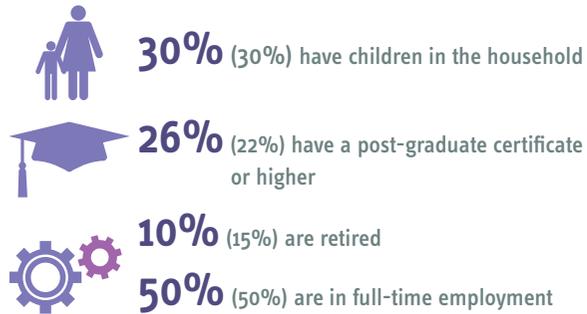
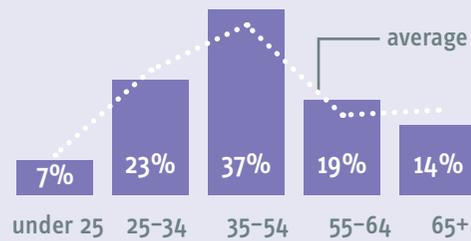
Essence is the segment most likely to say...

'I'll be the judge of that'

... and least likely to say...

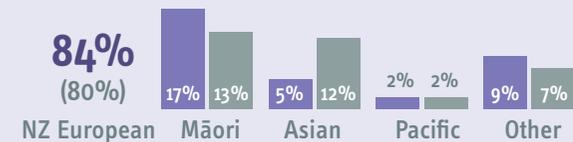
'What would you recommend?'

Less diverse, but highly educated



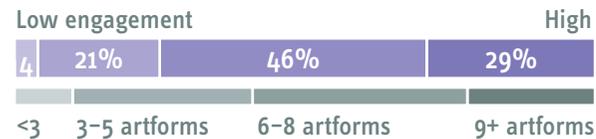
Ethnic identity*

[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.

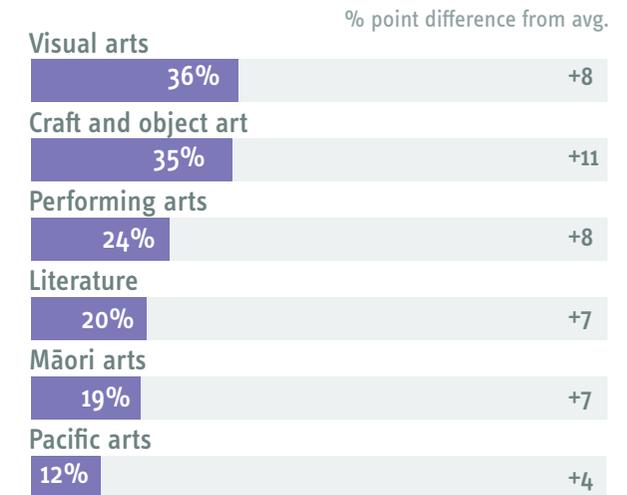


29% of Essence have attended nine or more different artforms in the past three years, 7-percentage points higher than average.

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'

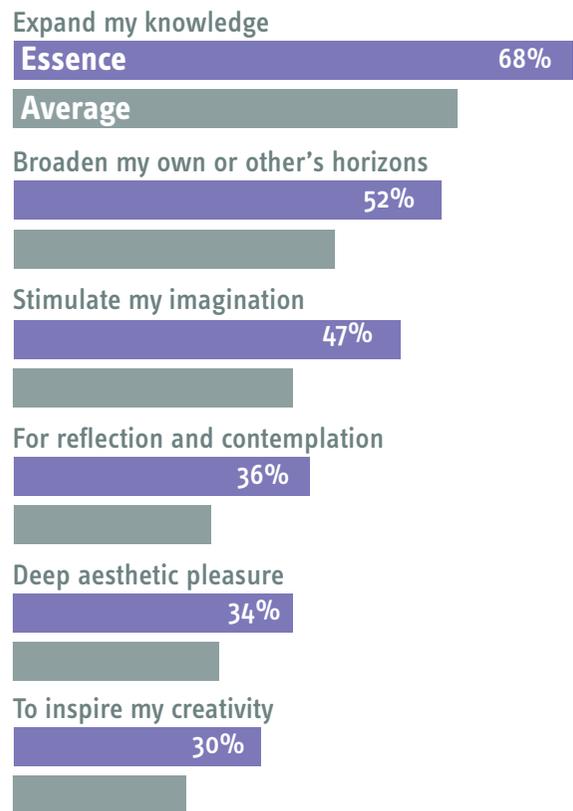
'I don't care if everyone else likes it, I don't like it'

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.

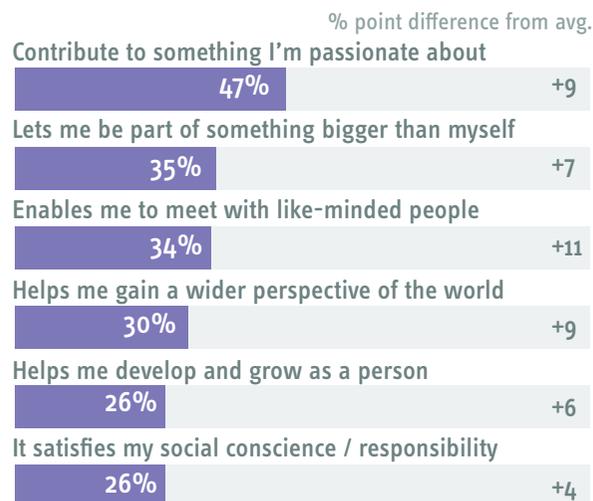
If they do join a scheme it will often be because membership is a pay gate between them and what they need – tickets or early seat selection. Essence have a singular personal agenda.

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



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

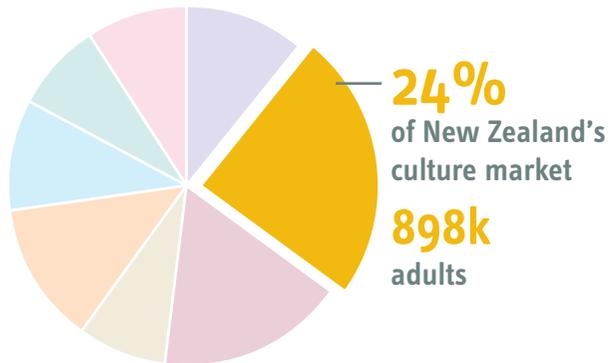


While they believe in the transformative power art can have on communities, they themselves have a low tolerance for amateur arts for their own consumption, favouring quality of process and substantial content and rigour. The principal way they would bond with an organisation is through access to the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

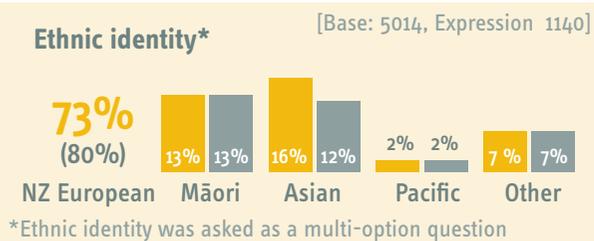
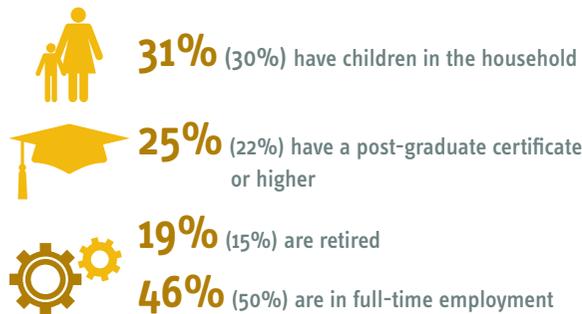
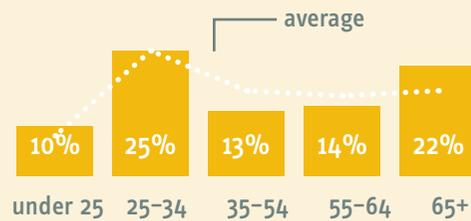
Expression are the segment most likely to say...

'Art's for everyone'

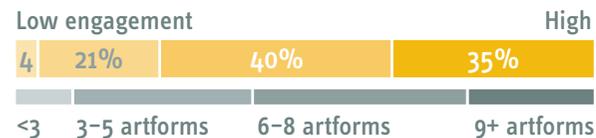
... and least likely to say...

'But what's in it for me?'

More diverse and highly educated



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.



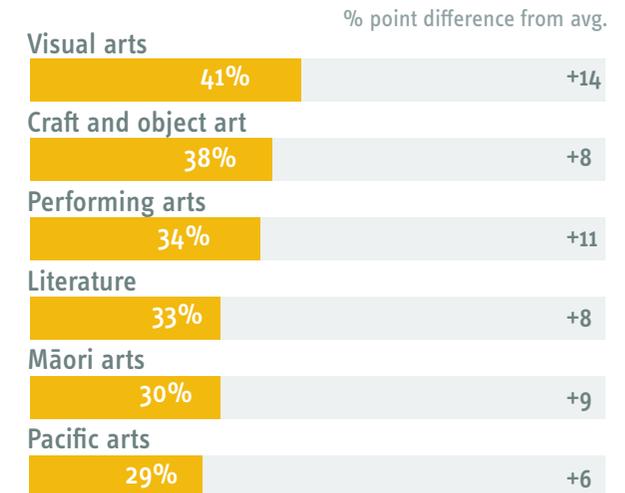
35%

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

Do something out of the ordinary

Expression 42%

Average

Pursue a hobby or personal interest

40%

Get food for the soul

33%

Experience a deep sense of awe and wonder

30%

Inspire creativity

30%

Better define own cultural or personal identity

29%

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





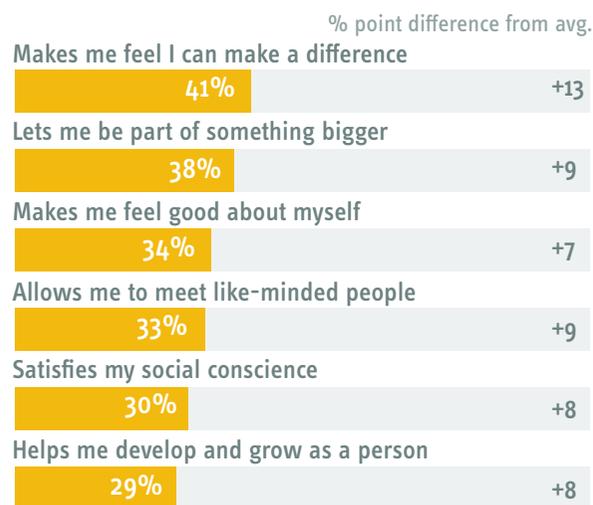
Building relationships with them

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



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)

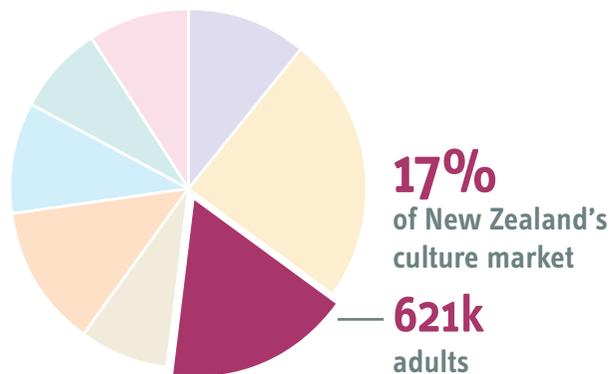
helping organisations to take their work on tour internationally

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



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

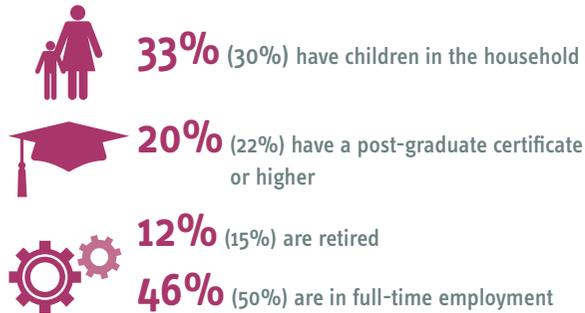
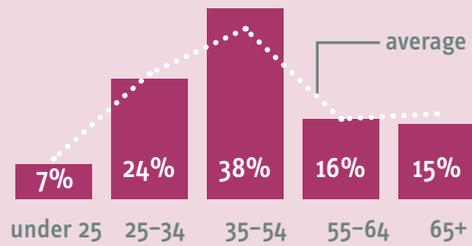
Affirmation is the segment most likely to say...

'It's on my bucket list'

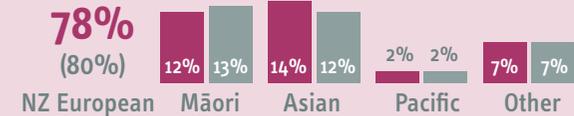
... and least likely to say...

'C'mon - let's just take a punt!?'

More likely to have children in household

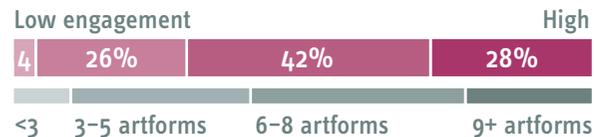


Ethnic identity* [Base: 5014, Affirmation 795]



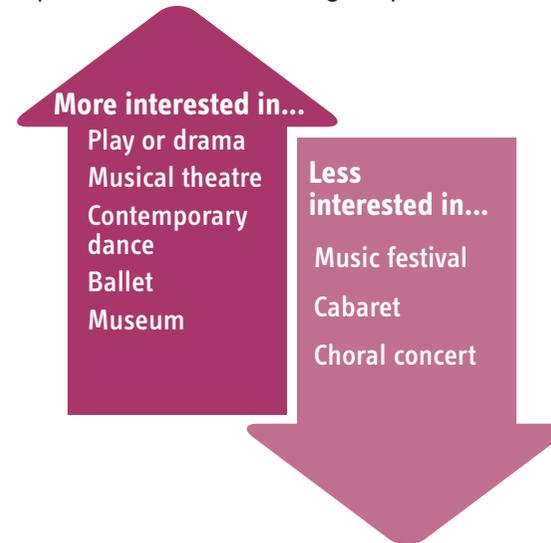
*Ethnic identity was asked as a multi-option question

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.



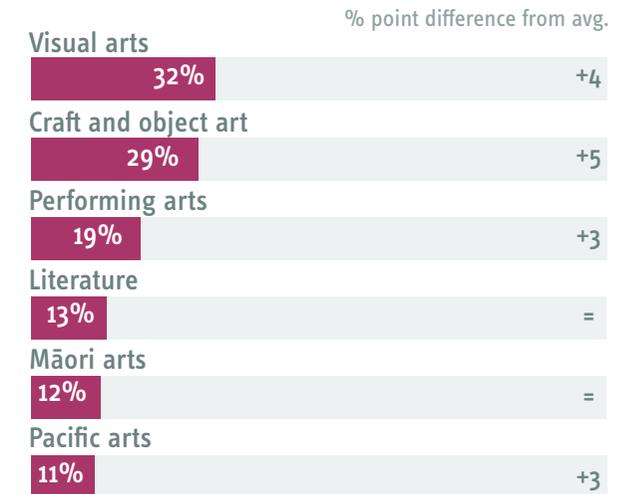
28%

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

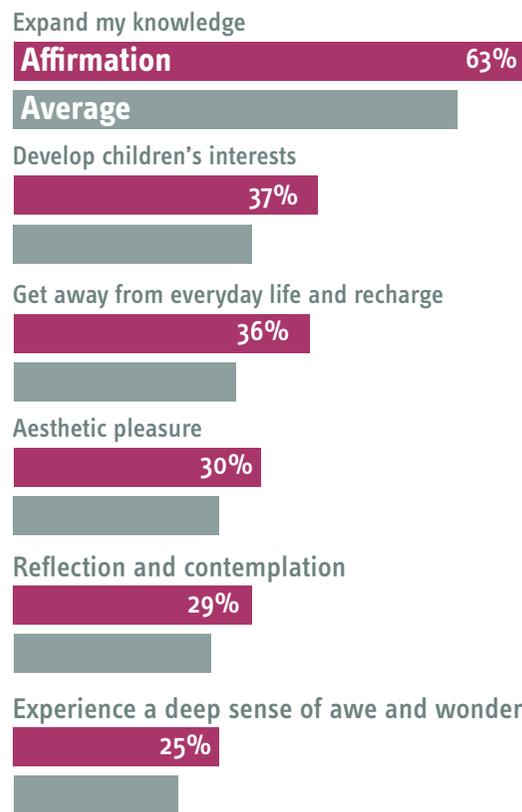
66% (57% overall)
of Affirmation agree the arts helps improve New Zealand's society

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

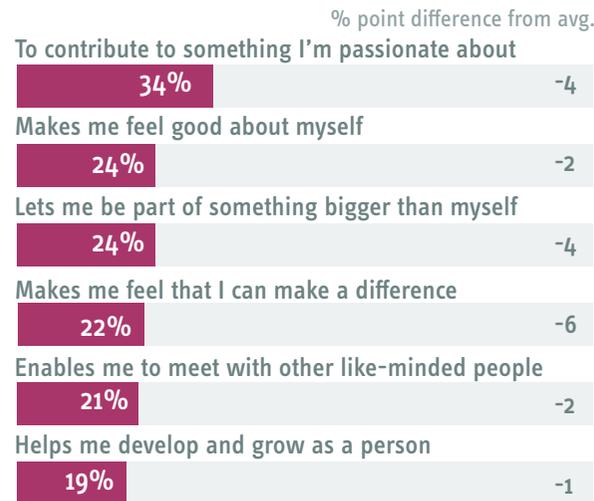
Like most of us, Affirmation want to feel confident and dignified. Museum interpretation for example should make them feel smarter, not reveal their ignorance. Signage, cloakroom facilities, clear seat reservations and great customer service should guarantee the trip a success, not make them feel like 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



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)

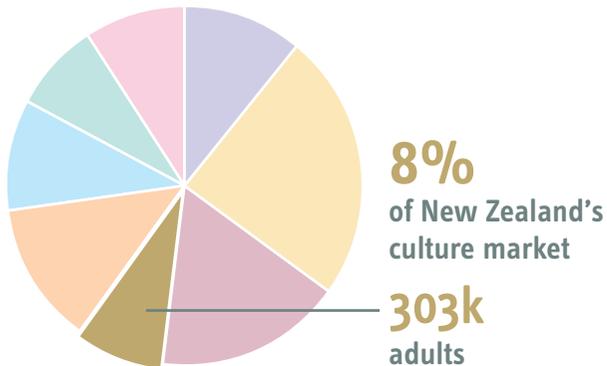
helping organisations tour internationally

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



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

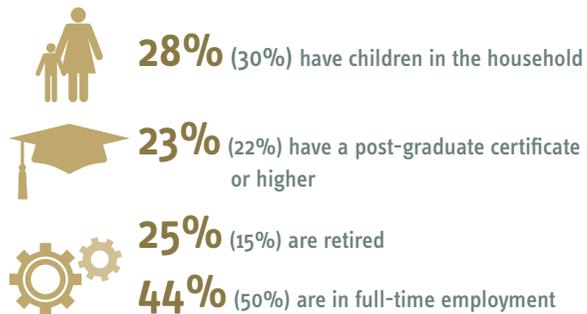
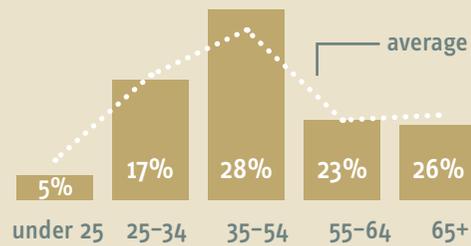
Enrichment is the segment most likely to say...

'It's stood the test of time'

... and least likely to say...

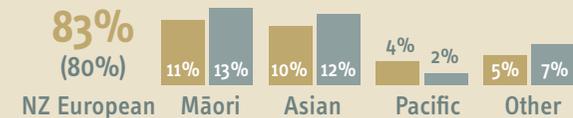
'So much better than the original'

More diverse and highly educated



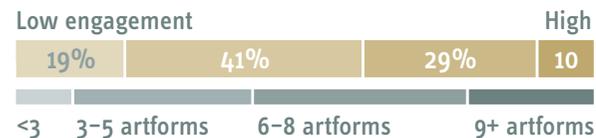
Ethnic identity*

[Base: 5014, Enrichment 458]



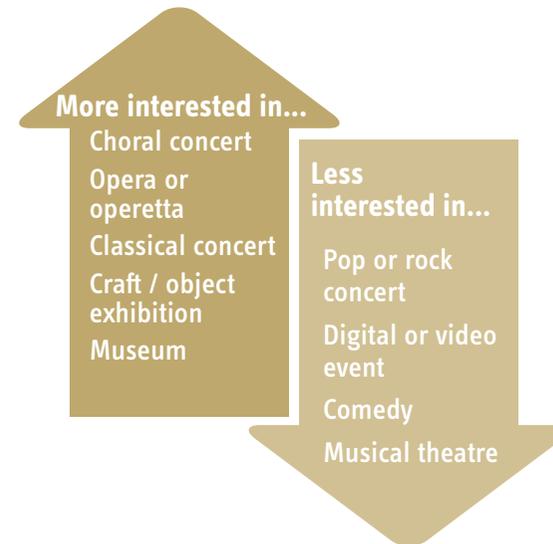
*Ethnic identity was asked as a multi-option question

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.



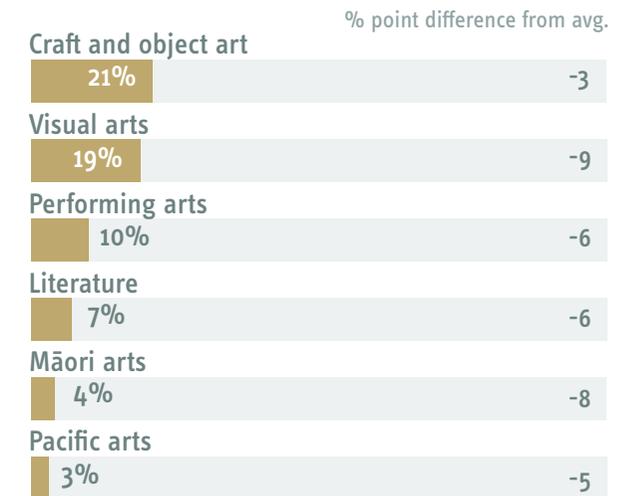
10%

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

To collect new experiences

Enrichment 28%

Average

Do something out of the ordinary

23%

For deep aesthetic pleasure

16%

To get food for the soul

11%

Experience a deep sense of awe and wonder

10%

For something new to talk about

6%

[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

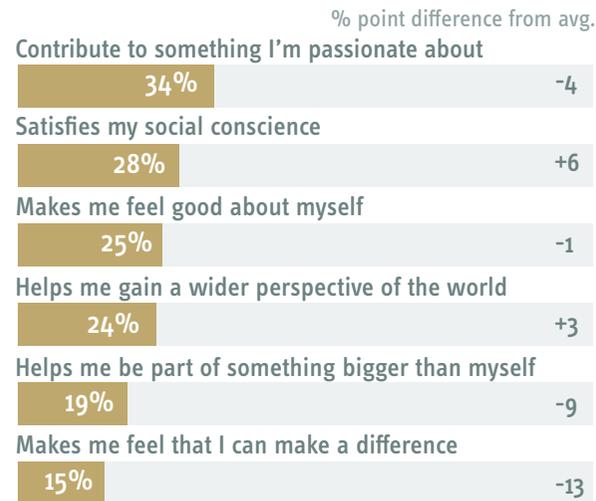
Enrichment are not looking to broaden their horizons and will remain loyal to the organisations that feel most relevant to them.

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



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

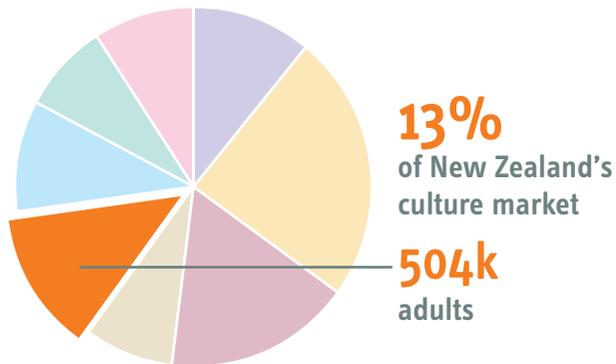


For those in invested loyal relationships, the opportunity to volunteer could provide a way of doing something sociable that is aligned with their preferred pastime.

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

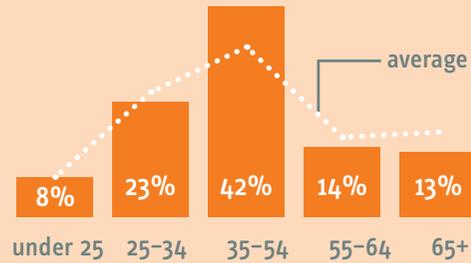
Stimulation is the segment most likely to say...

'What's the big idea?'

... and least likely to say...

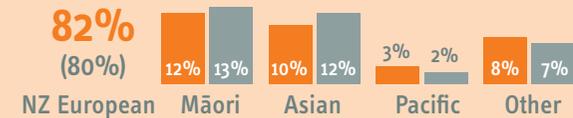
'Are you sure it's safe?'

Less diverse and highly educated



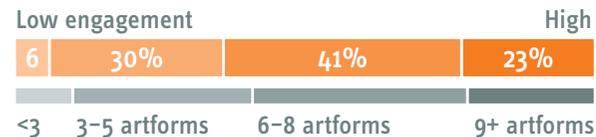
Ethnic identity*

[Base: 5014, Stimulation 679]



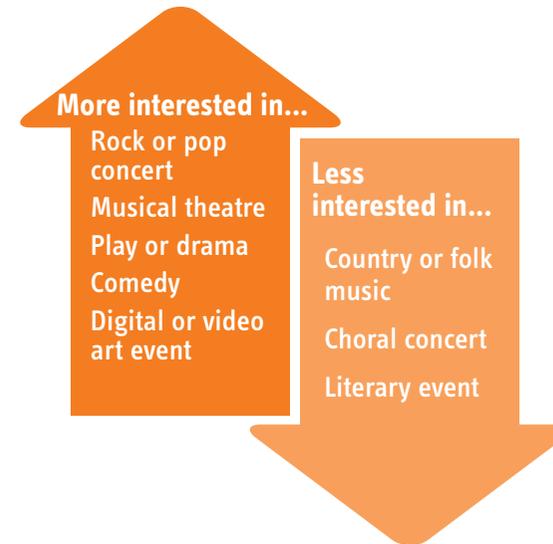
*Ethnic identity was asked as a multi-option question

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 be 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.



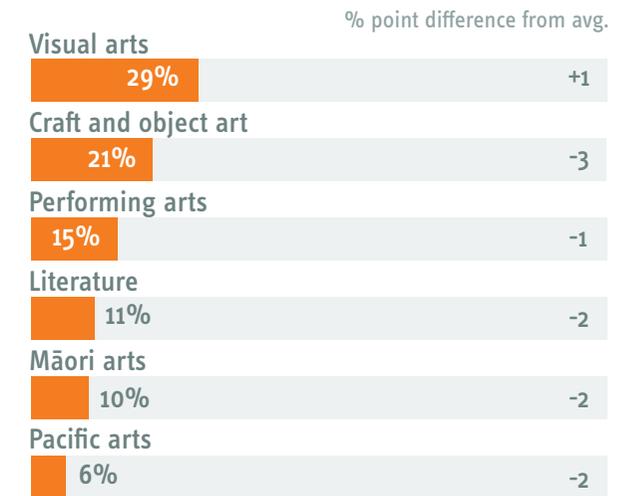
23%

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'

What do they want from it?

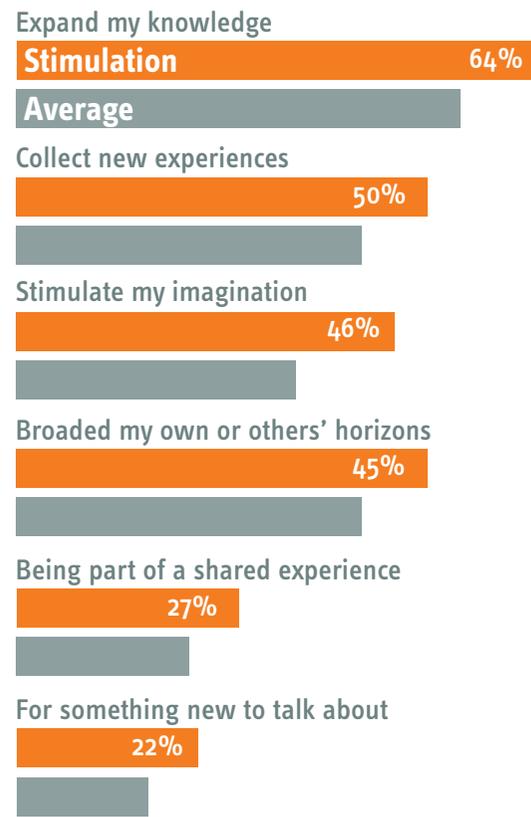
Stimulation are looking for new perspectives – something they haven't seen before. Or not from that angle before. Rule-breaking can be irresistible. They like colliding things together that don't go together for a different take on things or an experience that's unusual.

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'

54% (47% overall)
of Stimulation agree that their local council should give money to support the arts

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

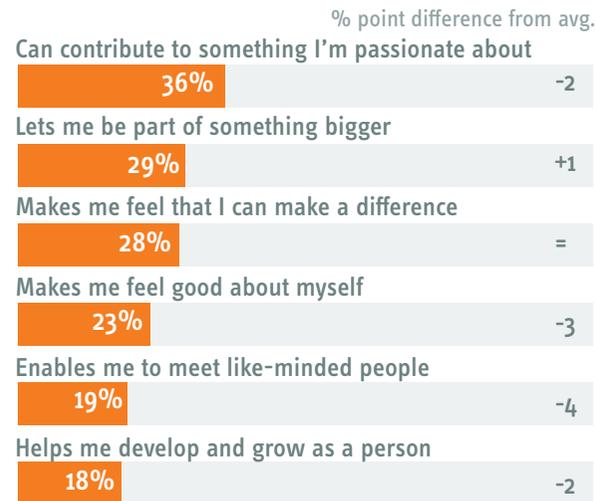
This segment typically has a lower attention threshold and can be distracted by something newer or shinier on the horizon. However, brands they identify as keeping things interesting can successfully develop relationships with Stimulation.

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



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)

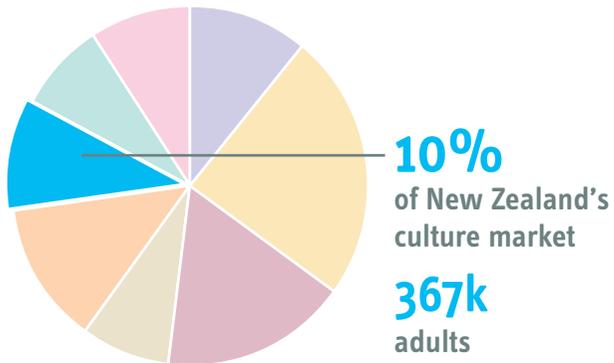
helping organisations tour internationally

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



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

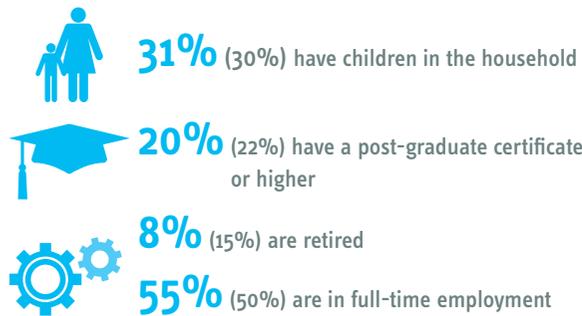
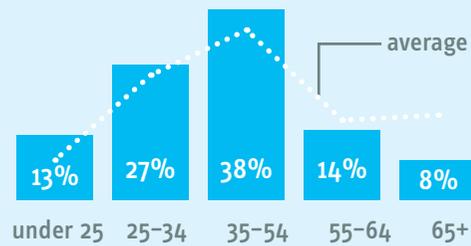
Release is the segment most likely to say...

'We should do this more often'

... and least likely to say...

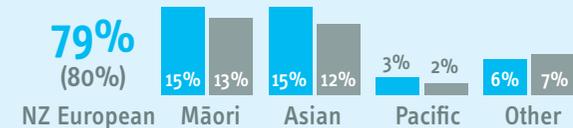
'Don't worry so much - there's plenty of time'

More likely to be employed full-time



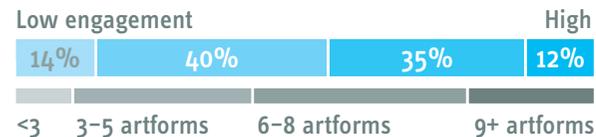
Ethnic identity*

[Base: 5014, Release 795]



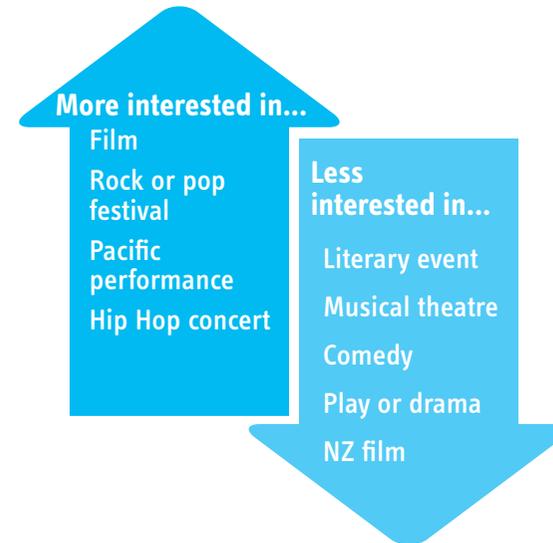
*Ethnic identity was asked as a multi-option question

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%

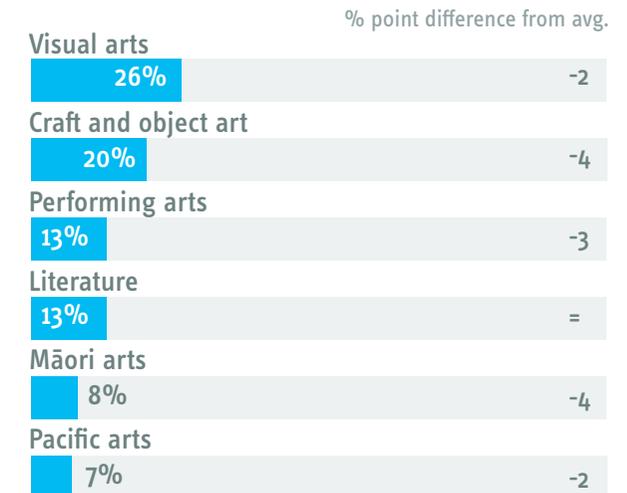
of Release have attended nine or more different artforms in the past three years, 10-percentage points lower than average.

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'

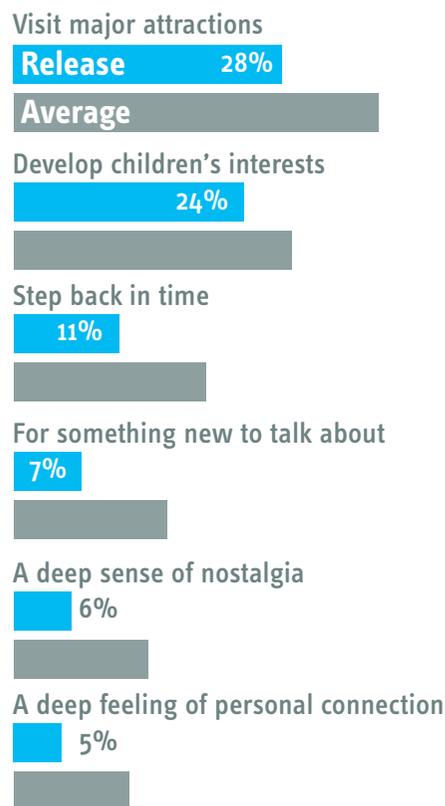
What do they want from it?

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 be reminded 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

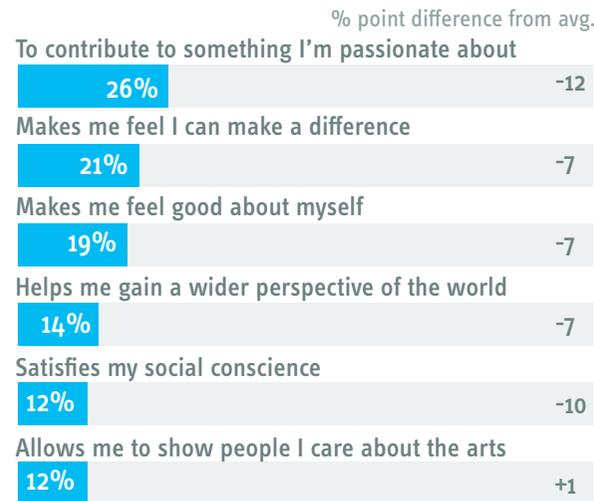
Release tend not to be forthcoming in support for arts and cultural institutions and are unlikely to find time to make the most of cost-saving benefits of membership.

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



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

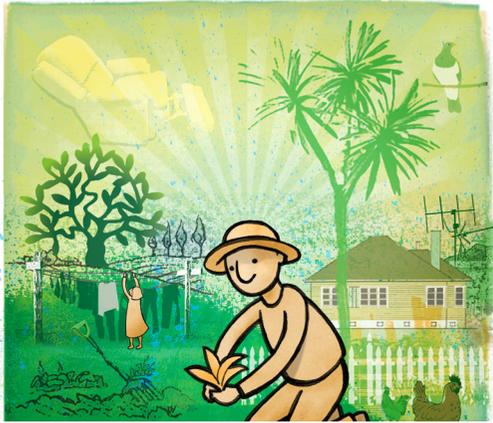
32% (50% overall)

helping organisations build new audiences

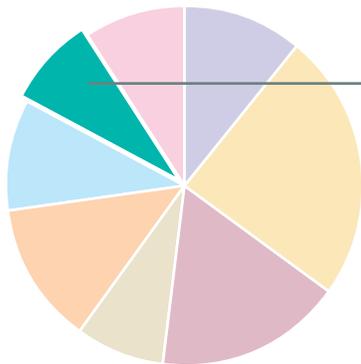


Release may not be the first port of call to build a supporter base, however schemes that reward return at the same time as providing concierge-style services could help keep you top of mind and decrease the perceived obstacles of planning and arranging a visit.

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

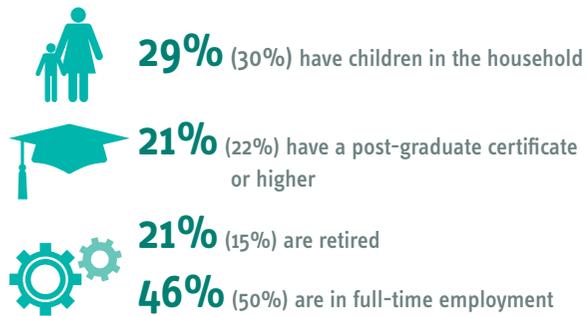
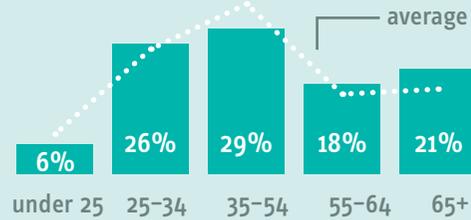
Perspective is the segment most likely to say...

'Really, I'm fine doing my own thing'

... and least likely to say...

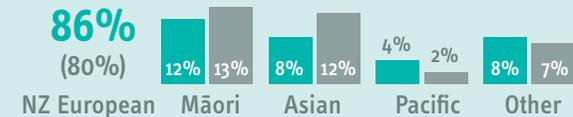
'Let's go out and do something totally different!'

More likely to be retired



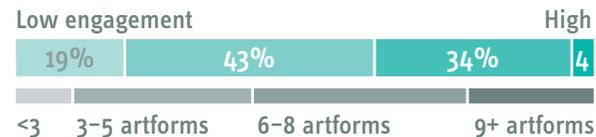
Ethnic identity*

[Base: 5014, Perspective 426]



*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%

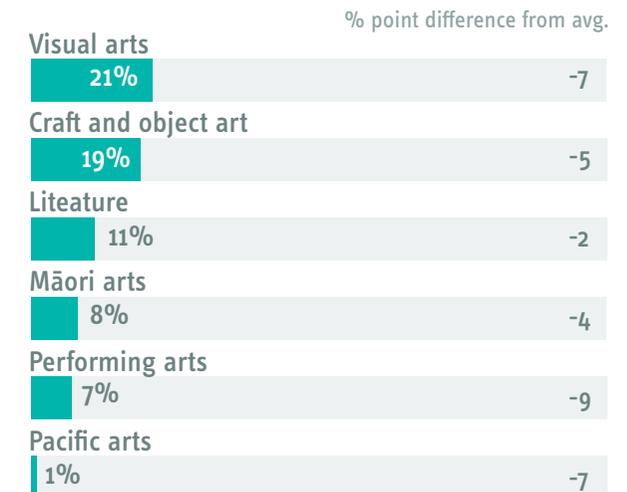
of Perspective have attended nine or more different artforms in the past three years, 18-percentage points lower than average.

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

What do they want from it?

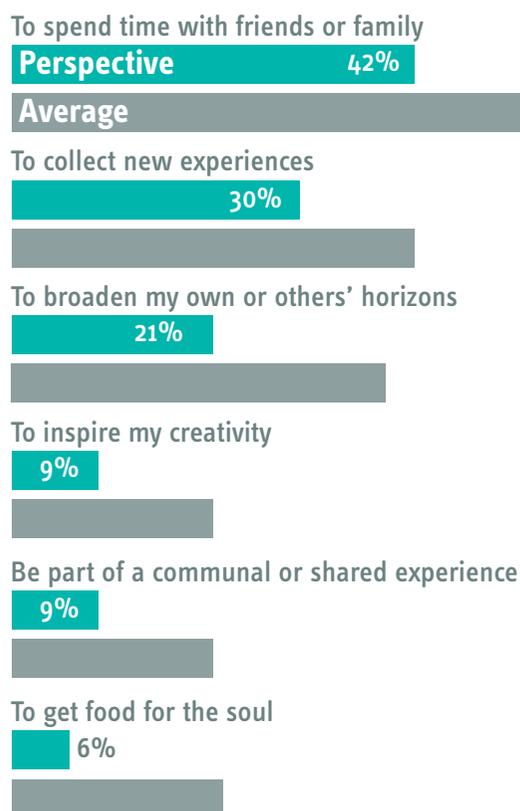
They typically have a particular thing they pursue, enjoy, and are knowledgeable about. The externalisation of this is not so relevant – that it is rewarding to them is what matters. Whether it's online, watching a documentary, reading a book or listening to a podcast, Perspective like putting themselves 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]

'I don't care for a subject that has been done to death for centuries'

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





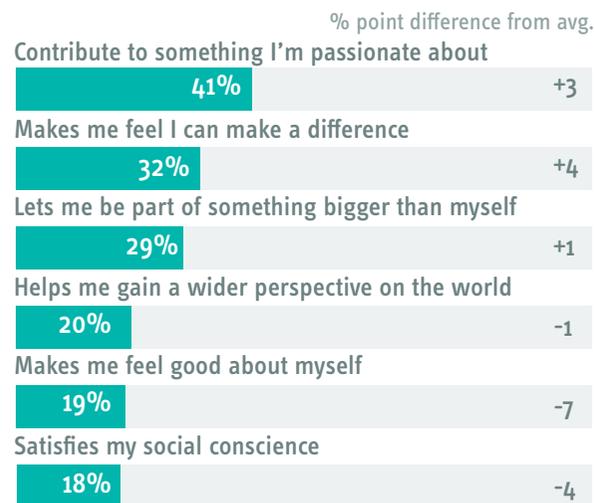
Building relationships with them

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



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



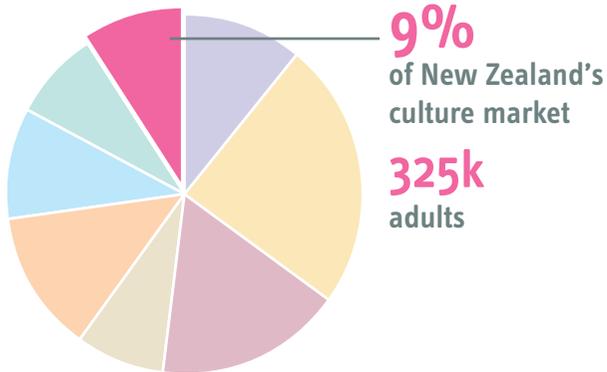
Perspective offer fairly low development potential when it comes to membership. They're around half as likely as average to be a friend, subscriber or member. If they want to join something, they will, but they're unlikely to be persuaded if it's outside their normal comfort zone or irrelevant to their 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 |



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

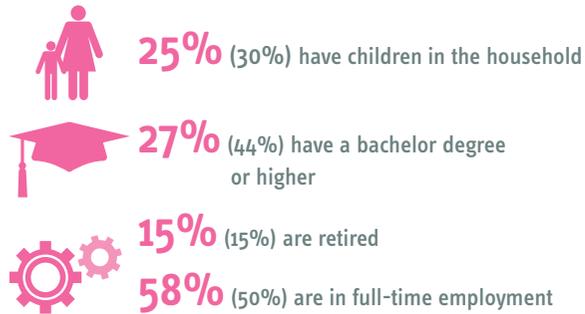
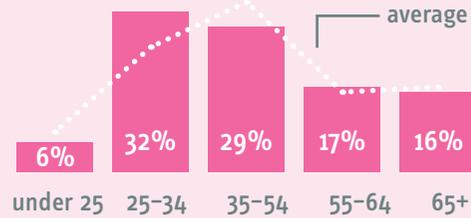
Entertainment are the segment most likely to say...

'Go on – entertain me'

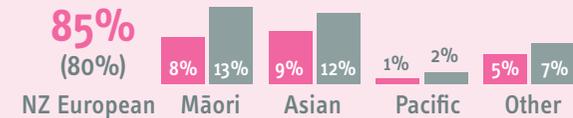
... and least likely to say...

'Let's find something new – with plenty of food for thought'

Less diverse and working full-time

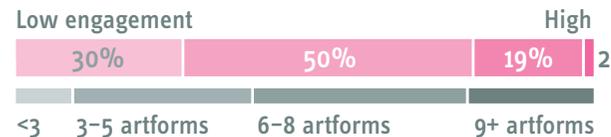


Ethnic identity* [Base: 5014, Entertainment 487]



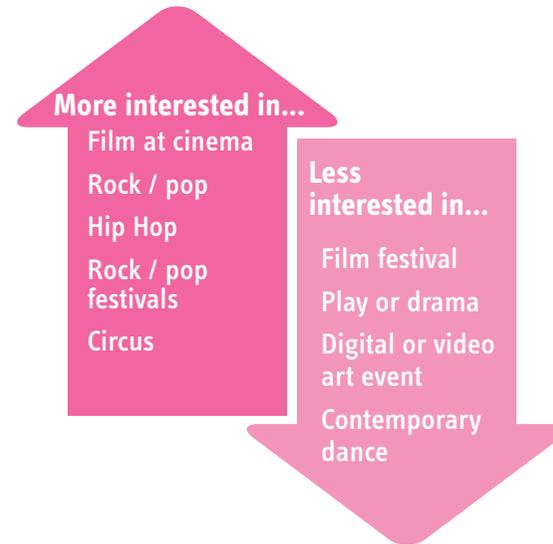
*Ethnic identity was asked as a multi-option question

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.



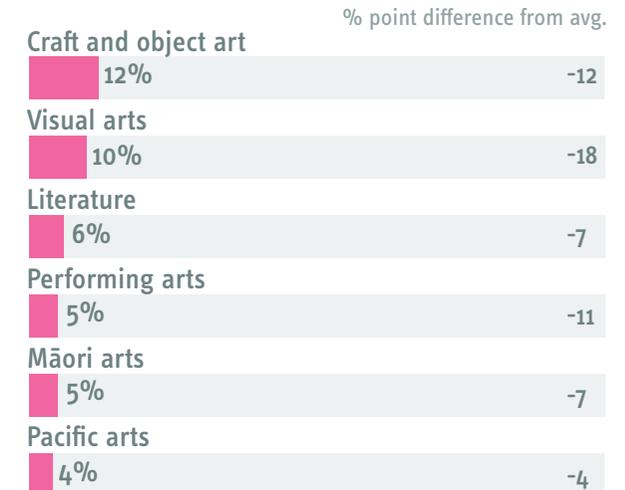
2%

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

To expand my knowledge
Entertainment 33%

Average

To collect new experiences
25%

Broaden my own or others' horizons
22%

Stimulate my imagination
18%

Deep aesthetic pleasure
8%

Get food for the soul
6%

[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 my 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%
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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.

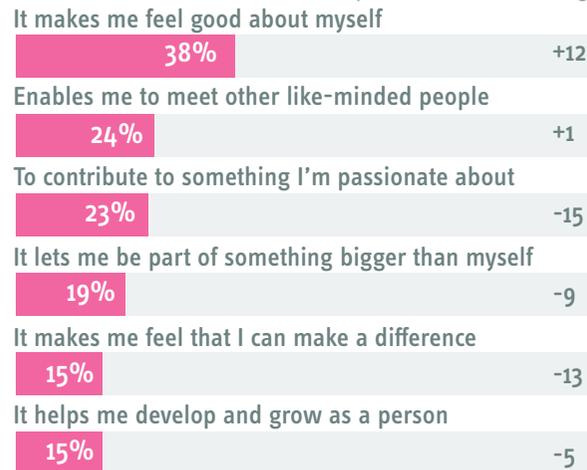
Benefits-driven transactional schemes won't work for Entertainment – purely because they wouldn't make much use of it so it's unlikely to feel relevant or worth it.

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

% point difference from avg.



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.

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%).

Credit: a number of the icons used on this document are supplied courtesy of Vecteezy.com



This report was prepared for Creative New Zealand investment clients, March 2018

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New Zealand (Auckland) office

+64 (0) 9 551 7776

auckland@mhminsight.com

mhminsight.com

For further information please contact:

helen.bartle@creativenz.govt.nz or

ginny.cartmel@mhminsight.com

For the full Audience Atlas 2017 report visit:

www.creativenz.govt.nz/audienceatlas2017

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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