Ora Taukamo-Pohio performing at Te Tairāwhiti Arts Festival 2021, Socially distanced audiences at the October 2021 Festival. Photography by: Phil Yeo, courtesy of Te Tairāwhiti Arts Festival 2021

Audience Atlas Aotearoa 2020

March 2022

morris hargreaves mcintyre

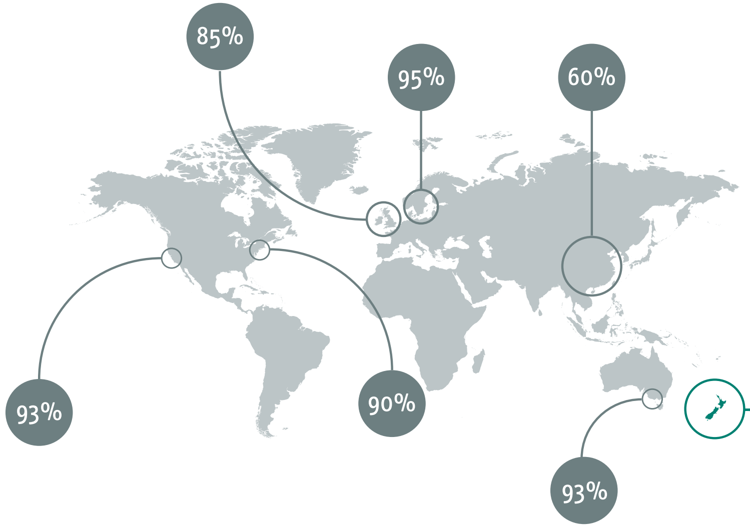
Audience Atlas

creative nz
ARTS COUNCIL OF NEW ZEALAND TOI AOTEAROA

The impact of the Covid pandemic

- Impact on organisations and individual practitioners
- The role of government, funders and philanthropists
- Organisations with deep audience roots
- Impact on audiences

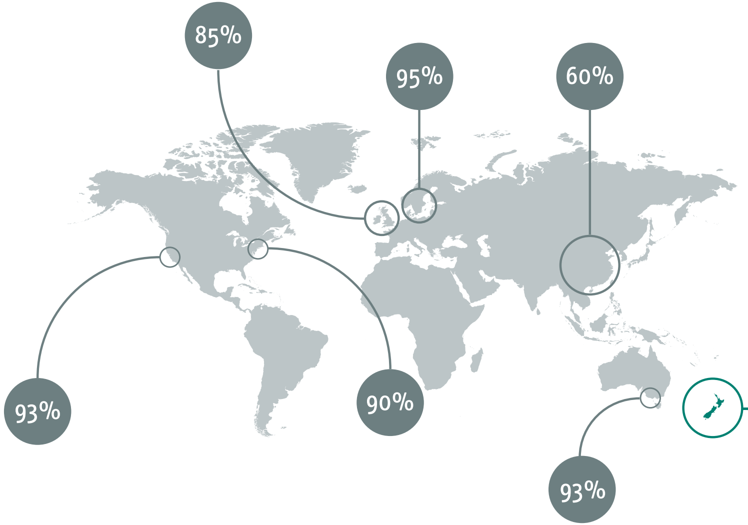
Aotearoa New Zealand market for arts and culture



96% of the adult population (16+) are in the market for arts, culture and heritage

3.94 million
individuals

Aotearoa New Zealand market for arts and culture



96% of the adult population (16+) are in the market for arts, culture and heritage

576k (adults aged 16+) identify as Māori

Audience Atlas

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What makes Audience Atlas unique?

It measures and explores the **current**, lapsed and potential markets

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Across 12 core artforms

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It measures and explores the current, lapsed and potential markets

Across 12 core artforms

Explores the market **demographically** and by **psychographics**; Culture Segments

Segment yourself → **mhminsight.com/segmentme**

Culture Segments

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8%: looking for fun

Māori audiences

Māori audiences more likely to be Essence than average

		Culture market	Māori audiences
Essence	'in pursuit of self-actualisation'	10%	▲ 14%
Expression	'people people'	20%	22%
Affirmation	'do the right thing'	18%	17%
Enrichment	'through the lens of the past'	10%	8%
Stimulation	'all about the big idea'	12%	11%
Release	'say they're too busy'	12%	13%
Perspective	'happy in their own bubble'	9%	7%
Entertainment	'looking for fun'	9%	8%

Māori audiences top motivations are a mix of Social and Intellectual drivers

Social

- Spending time with whānau and friends
- Passing the time in an enjoyable way – entertainment

Intellectual

- Expanding their knowledge and
- Collecting new experiences

Māori audiences are more likely to be seeking identity development

Spiritual

- Stimulation for their imagination
- Get food for the soul

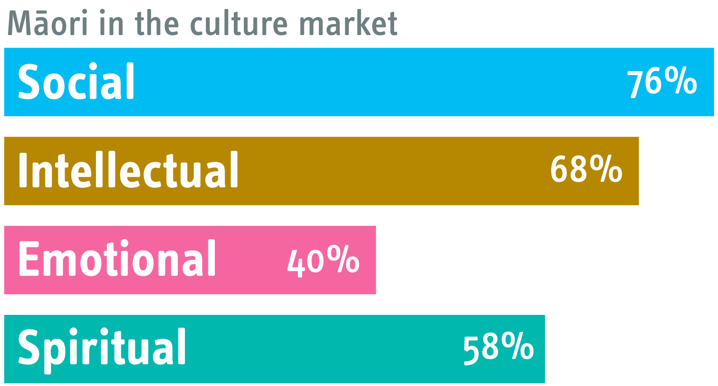
- To develop their tamariki's interests

Emotional

- Better define their cultural or personal identity

Social motivations are the gateway to a deeper reward

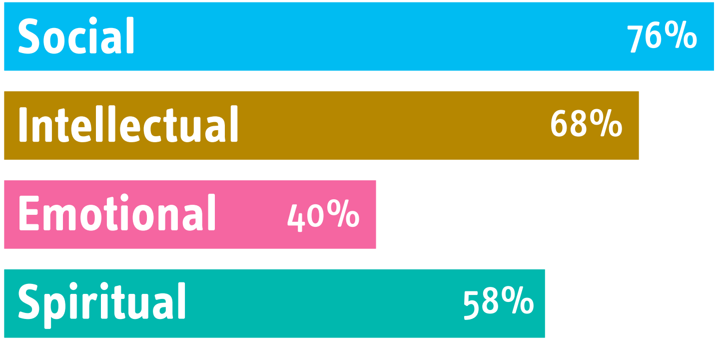
All motivations to engage with arts and culture



Social motivations are the gateway to a deeper reward

All motivations to engage with arts and culture

Māori in the culture market



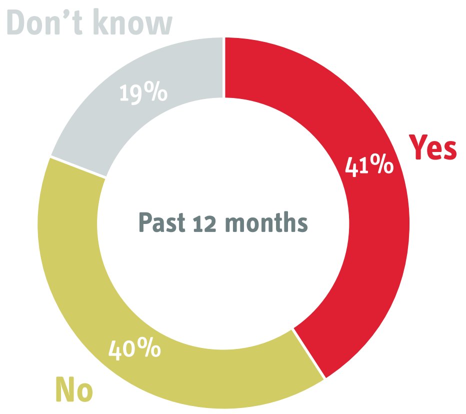
Main motivations to engage with arts and culture

Māori in the culture market

Culture market average

Barriers to arts engagement for Māori audiences – 41% prevented from engaging with arts and culture

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



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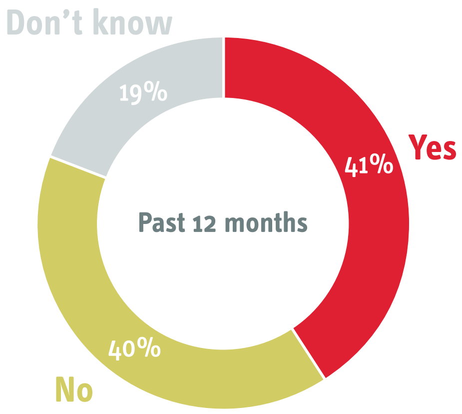
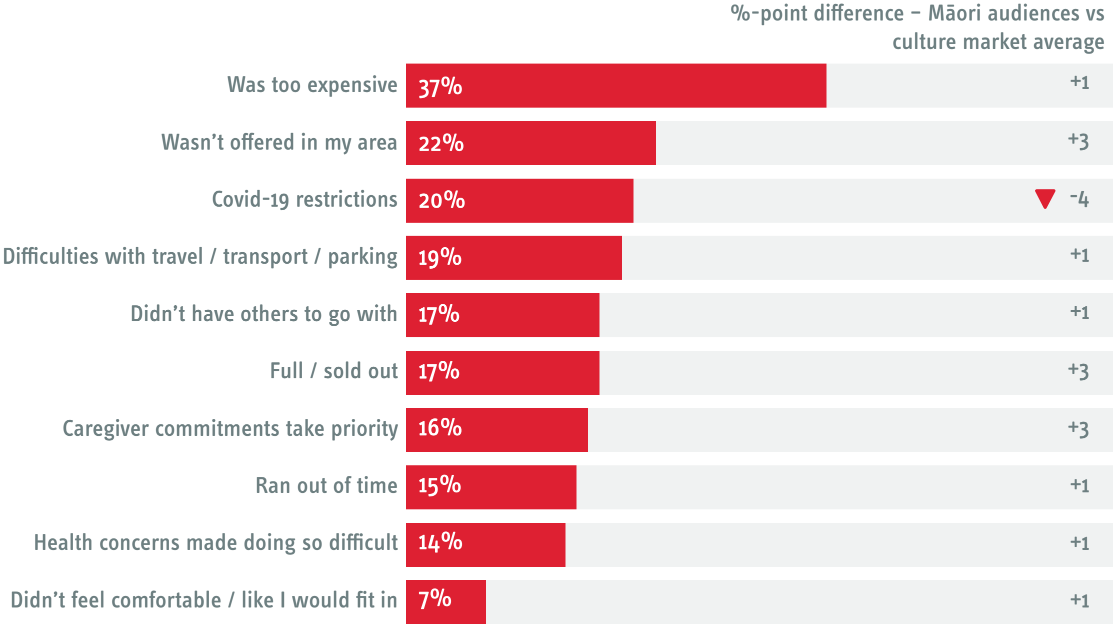


41% / 236k

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

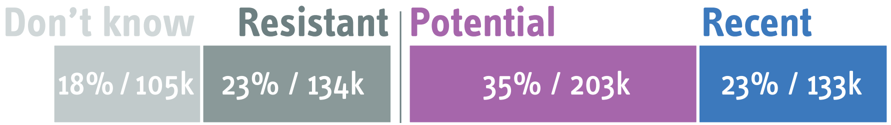
Expense is a universal barrier to arts engagement



Māori audiences are more likely to have engaged with online arts content

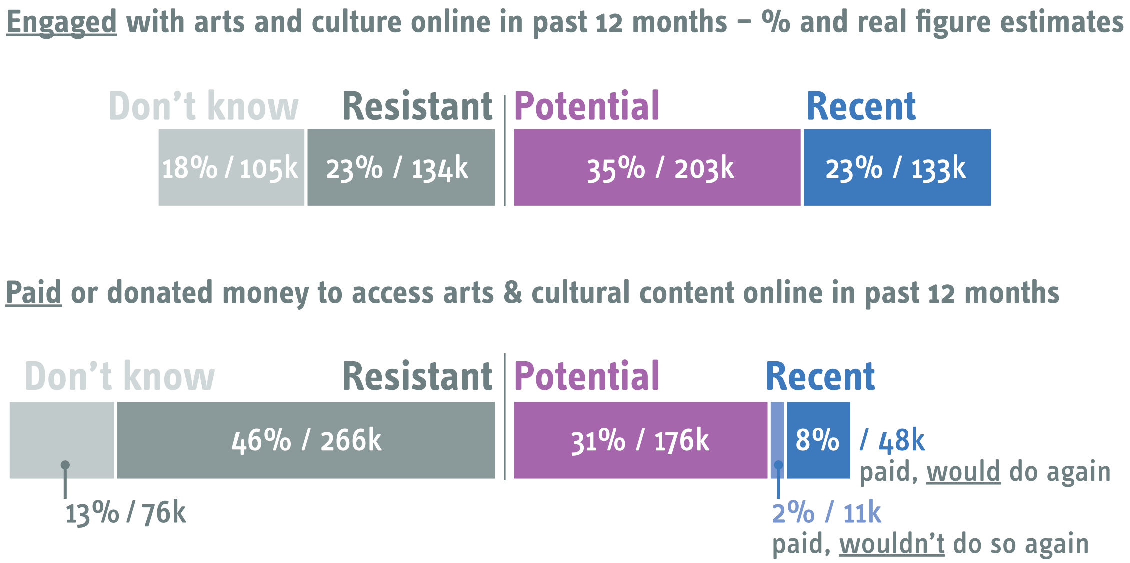
Māori audiences…

Engaged with arts and culture online in past 12 months – % and real figure estimates



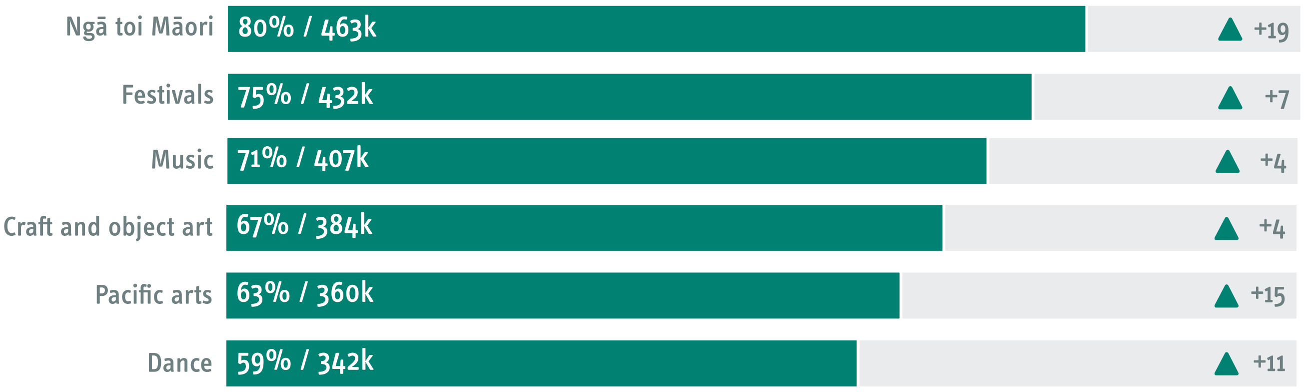
Māori audiences are more likely to consider paying for online arts content

Māori audiences...



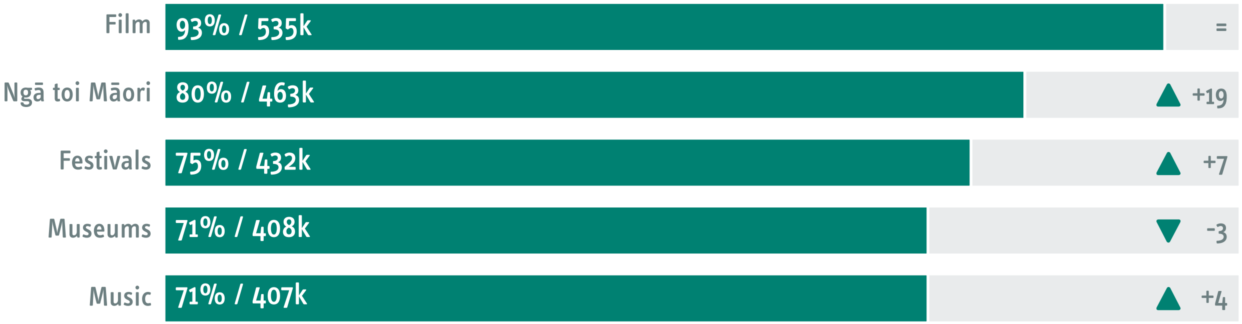
Māori audiences are more engaged with 6 of the 12 core artforms

Current artform markets – % and real figure estimates



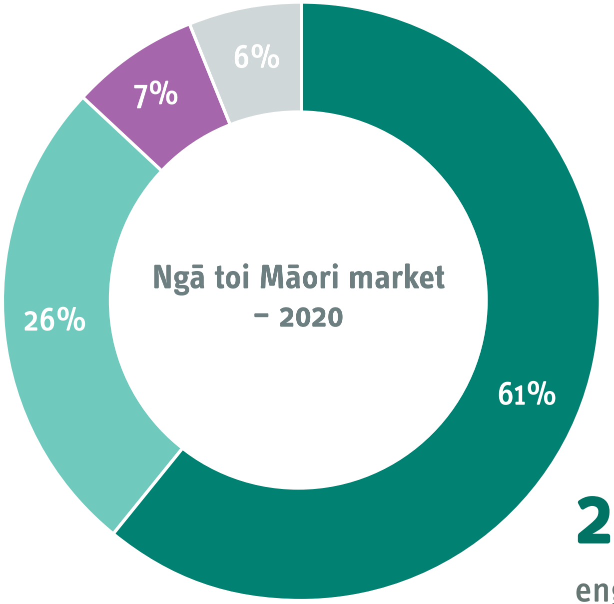
Top artforms Māori audiences have engaged with in past three years

Current artform markets – % and real figure estimates



The culture market's engagement with ngā toi Māori

3.7 million New Zealanders are open to ngā toi Māori



2.4 million

engaged in the past three years (current market)

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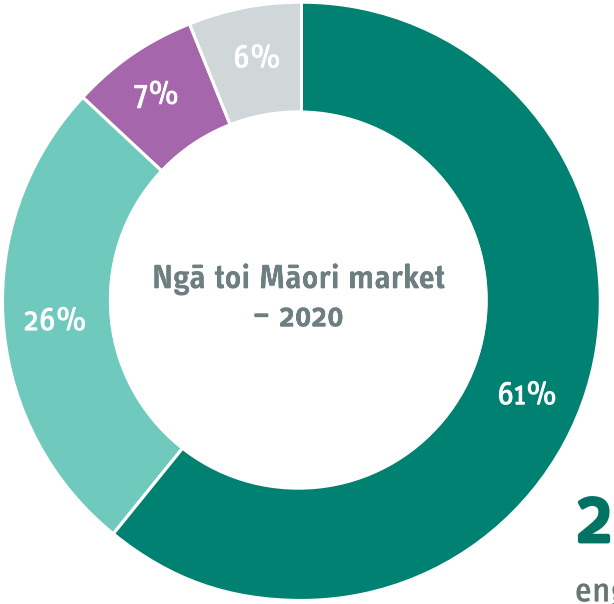


1 million

last engaged over three years age (lapsed market)

2.4 million

engaged in the past three years (current market)

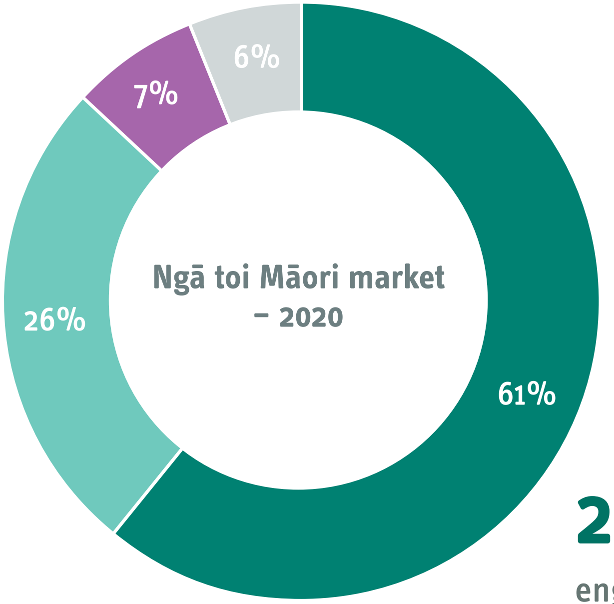
3.7 million New Zealanders are open to ngā toi Māori

287k

would consider engaging but haven't previously (potential market)

1 million

last engaged over three years age (lapsed market)



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Who's in the current market for ngā toi Māori?

61% or an estimated 2.4 million adults

The market is younger than average

36% aged under 35

Who's in the current market for ngā toi Māori?

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36% aged under 35

It's more diverse than average

73% identify as New Zealand European or another European group – a larger proportion of the market than average identifies as Māori (**19%**) and Pasifika (**10%**), Asian (**14%**)

36% have tamariki and **13%** the lived experience of disability

Who's in the lapsed market for ngā toi Māori?

26% or an estimated 1 million adults

The market is older than average

4 in 10 aged 55+

Who's in the lapsed market for ngā toi Māori?

26% or an estimated 1 million adults

The market is older than average

4 in 10 aged 55+

It's less diverse than average

Significantly more likely to identify as New Zealand European or another European group

Significantly less likely to have tamariki in their household or have the lived experience of disability or completed higher education

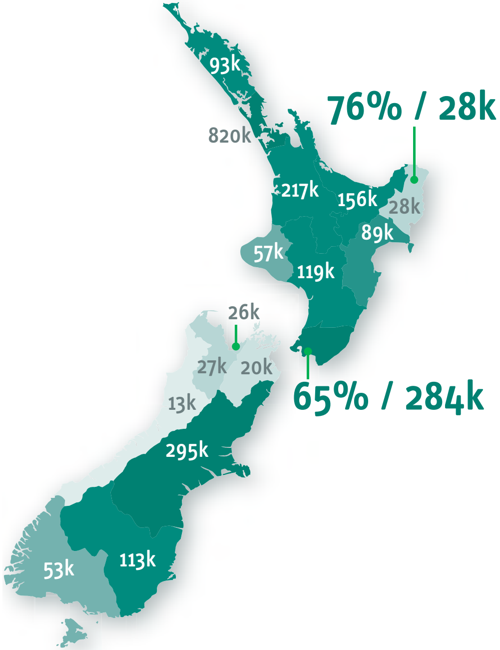
Who's in the potential market for ngā toi Māori?

7% or an estimated 287k adults

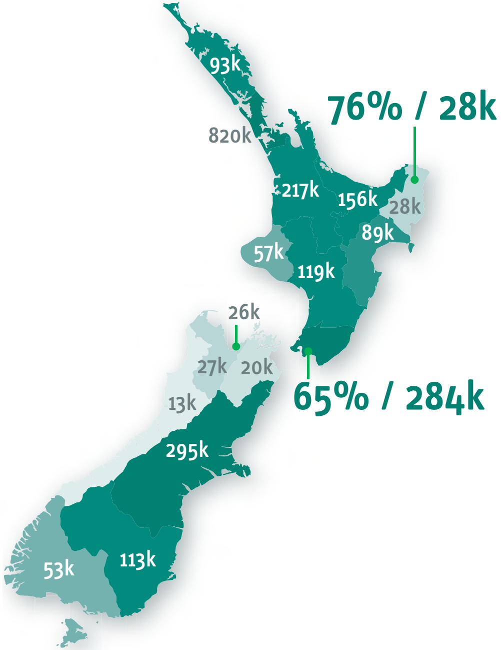
There is less to distinguish the potential market for wider culture market:

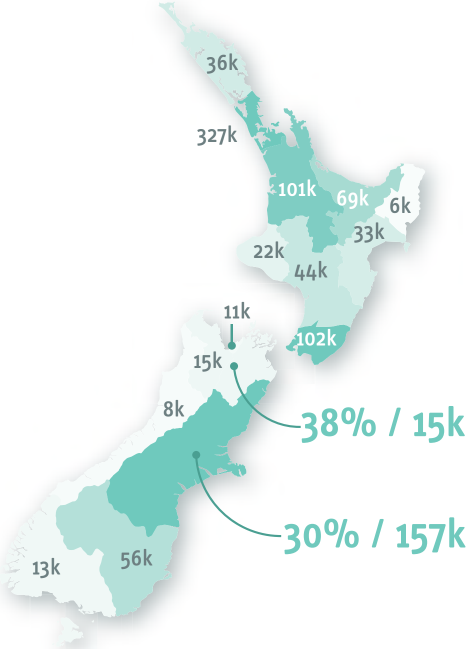
- Those identifying as male are over-represented
- As are those who identify as Asian

Larger proportion of Gisborne and Wellington residents are in the current market for ngā toi Māori

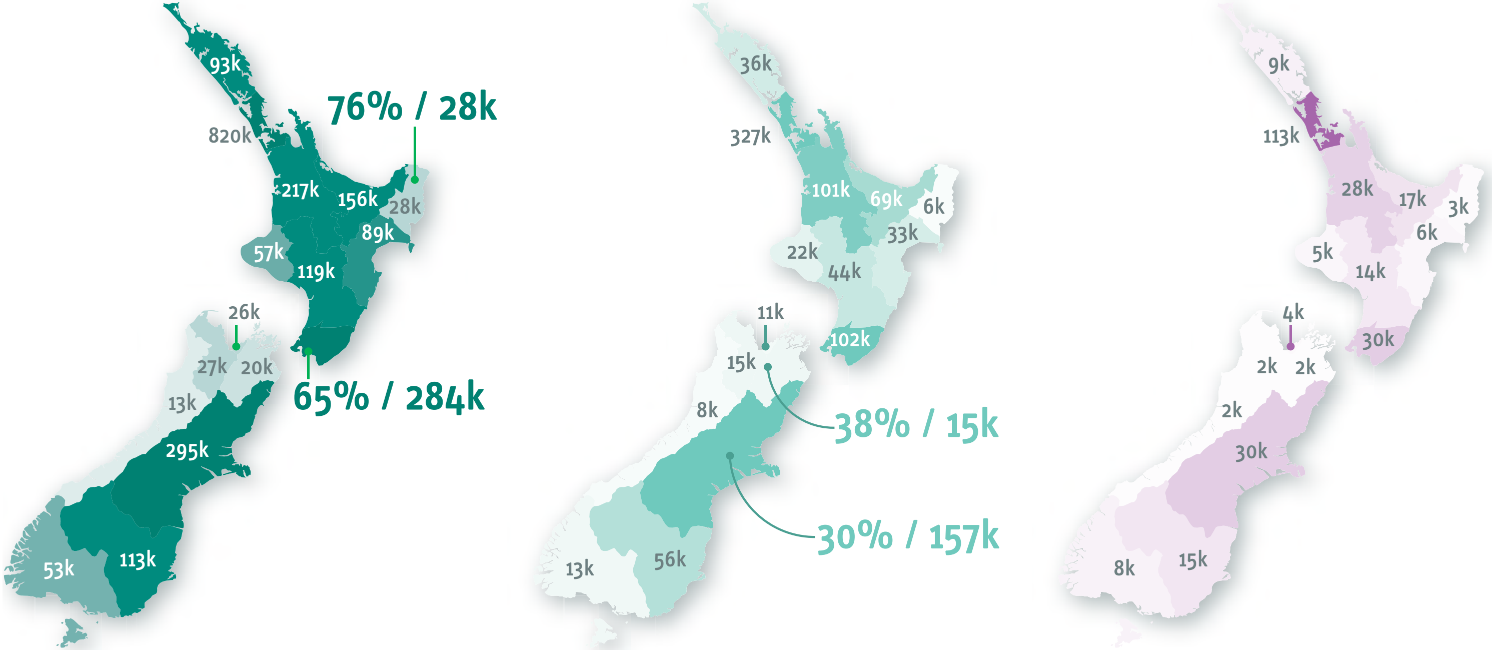


Residents in Malborough and Canterbury are more likely to have lapsed in their engagement



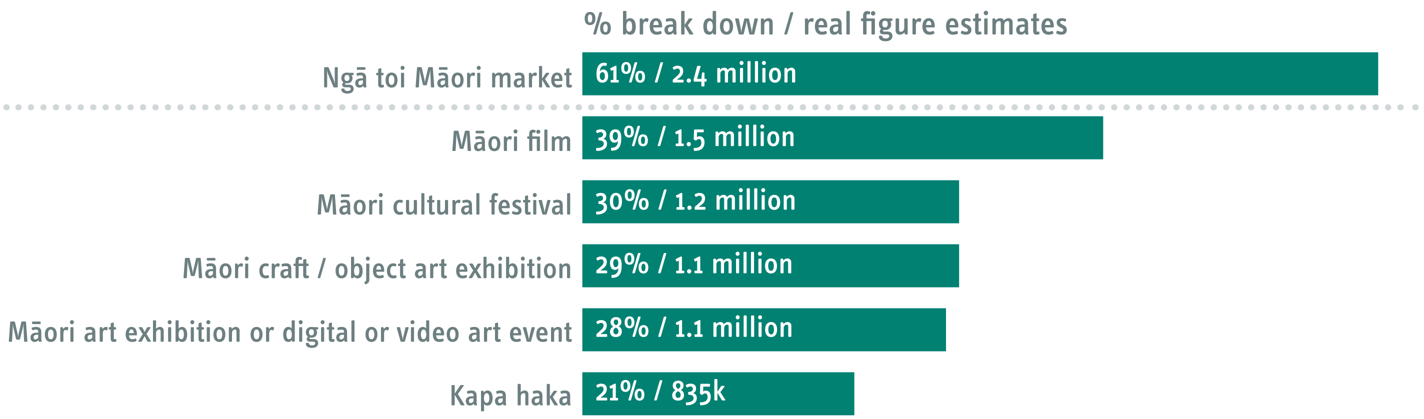


Due to high market penetration, potential market is relatively modest at a regional level



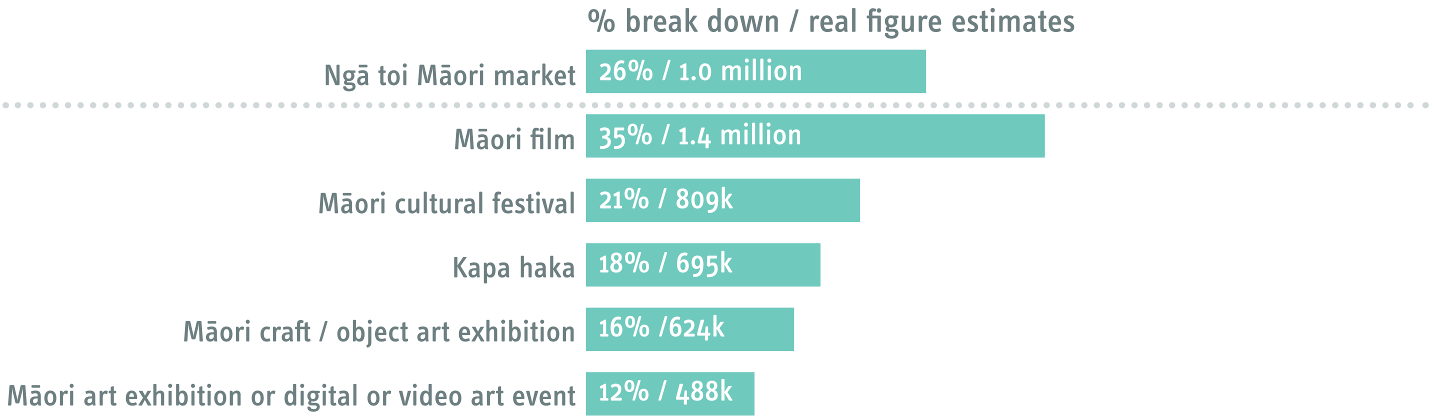
An estimated 1.2 million have engaged with a Māori cultural festival in past three years

Ngā toi Māori **current** market – including top five artforms within ngā toi Māori



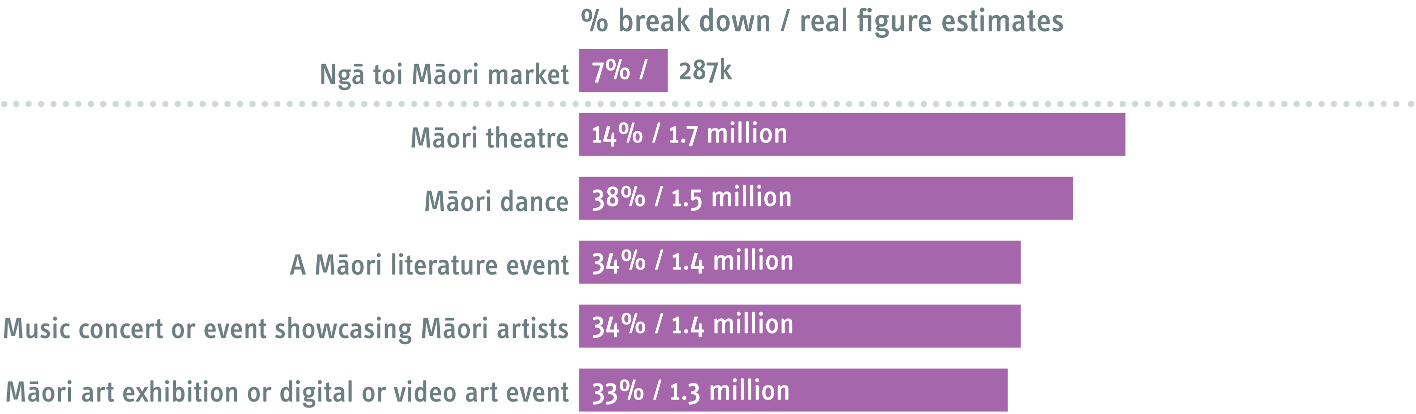
An estimated 809k last engaged with a Māori cultural festival three or more years ago

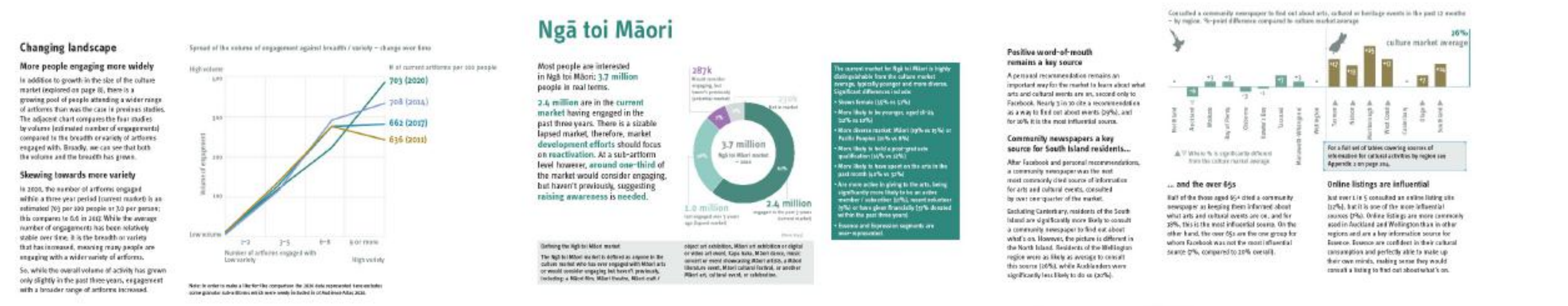
Ngā toi Māori lapsed market – including top five artforms within ngā toi Māori



Healthy potential amongst most artforms within ngā toi Māori

Ngā toi Māori potential market – including top six artforms within ngā toi Māori





https://www.creativenz.govt.nz/audience-atlas-2020

Questions about today's Zui?

Contact: research@creativenz.govt.nz

Upcoming Audience Atlas Aotearoa events:

Pasifkia audiences focused Zono – Tuesday 22 March @9:30am NZST

Thank you

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