Audience Atlas Aotearoa 2020 summary

November 2021

This **summary** sets out the key findings of the 2020 edition of *Audience Atlas Aotearoa*.

This is the **Plain Text version** of the Research Summary, a July 2021 publication, produced by Morris Hargreaves McIntyre for Creative New Zealand.

The full suite of reports from *Audience Atlas Aotearoa 2020* is on Creative New Zealand's website at: www.creativenz.govt.nz/development-and-resources/research-and-reports/audience-atlas-2020

Questions, comments and feedback on the research can be emailed to: research@creativenz.govt.nz

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Research method

This is the fourth edition of Audience Atlas Aotearoa. The first edition was produced in 2011 followed by editions in 2014 and 2017.

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

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

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

Robust methodology

The fourth Audience Atlas study for Aotearoa

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

This report represents responses of a sample of 6,743 people nationally, representative of the population's demographics. Respondents were sampled through quotas on age, gender and educational attainment, with additional quotas on ethnicity. Additional investment was made to 'boost' responses from those identifying as Māori, Pacific Peoples and Asian. The increased number of responses ensures we can report on results for these key groups with confidence.

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

3.94 million individuals – 96% of the adult New Zealand population (16+) – are in the market for arts, culture and heritage.

96% compares to adults in the market for arts, culture and heritage[1]:

- 90% of adults in the Washington DC Area
- 93% in San Francisco Bay Area
- 93% in the Australian state of Victoria
- 95% in Sweden
- 85% in the UK
- 60% in China.

[1] As measured in Audience Atlas Washington DC Area 2020, New York City 2015, Victoria 2019, Sweden 2020, United Kingdom 2010 and China 2014.

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

1. Executive summary

Valuing the arts is key to market growth

The attitude of nearly 6 in 10 people in the culture market, about the role that arts and culture plays in their lives, is relatively ambivalent. These people might be ‘in the market’ for culture – having engaged with at least one arts, cultural or heritage activity within the past three years, but the perceived importance of the arts in their lives is muted at best (32%), or absent at worst (26%). This poses a huge challenge for the sector.

While the strength of the culture market is reliant on building lasting relationships with those who already value the arts – the 42% who already see its importance; the natural attenders and supporters, growth in the market will require focus on those who currently struggle to see the valuable role that the arts can play in their lives.

Demonstrating this value by prioritising content, experiences and communications that resonate with the market’s values, will be key to this growth. Culture Segments provides the practical tool to facilitate both market strength and growth. Fulfil people’s core values and the arts will become more important to them and their lives.

Digital engagement begs for digital strategy

In the 12 months prior to this study, fewer than 1 in 5 engaged with the arts online and there was only a slight net gain in levels of online arts engagement (12% engaging more / 4% less). These are perhaps surprising findings given the huge volume of online content produced by arts organisations recently, even more so during the pandemic, and the growing dominance of the online world.

While the pandemic provided many arts organisations with the impetus to ‘become digital’, a year on, and with only limited growth in online arts engagement, it is time to take stock. Online content production needs to switch from reactive to proactive - organisations need digital strategies.

A smart digital strategy lays out who you are targeting and what you want the outcome of the engagement to be. Digital content and experiences are then devised, developed and promoted to meet the needs of your target audience and achieve these objectives.

Social experiences the gateway to deeper reward

While the market is primarily seeking Social reward and gain from their engagement with the arts, 6 in 10 are also seeking Intellectual, Emotional or Spiritual return on investment for their time and money – an extension on a purely social encounter.

With Social motivations dominant however, it makes sense to capitalise on this as a means of extending the experience further. Key to success is ensuring that the artistic or cultural offer is at the centre of the social experience, rather than the two things being distinct from one another – acting as a catalyst for connection between people and an entry point for deeper engagement.

Not only will ‘Social plus’ experiences meet the needs of the market but this is also an important tactic to building strength in the sector. Those who seek and receive deeper reward and gain from their arts and cultural engagement are more likely than those who don’t, to become loyal repeat engagers, members, supporters and advocates.

Access pricing models to bridge the gap

Across the market, expense was cited as the primary barrier preventing engagement with the arts; an estimated 522,000 people deciding not to engage because it was ‘too expensive’. While this was heightened for those with lower household incomes, it was a universal issue across demographics.

With arts organisations under increasing pressure to ensure financial self-sufficiency and sustainability, the need for alternative pricing models to assure growth in arts audience numbers and diversity, alongside fiscal prosperity, has never been greater. Access pricing models such as ‘pay what you can / want’ and other experimental pricing approaches to increase accessibility, need wider consideration and adoption.

2. Understanding the culture market

Culture Segments your tool for retention and growth

Culture Segments is a psychographic segmentation system clustering people based on their deep-seated values towards arts and culture.

These values frame a person's attitudes, lifestyle choices and ultimately, cultural consumption.

Culture Segments gives you real insight into what motivates your audience and the tools to not only predict but influence future behaviour; perhaps to visit for the first time, attend more frequently, or even donate to your cause. Through Culture Segments, you can grow audiences, encourage repeat attendance, and develop long-lasting, mutually beneficial relationships.

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

Essence – art is everything:
- discerning, confident, independent, arts-essential

Expression – this is for everyone:
- community, nurturing, generous, committed

Affirmation – we should do more culture:
- self-identity, considered, diligent, time well spent

Stimulation – I like it. What is it?:
- active, experimental, ideas, social

Enrichment – greatness stands the test of time:
- tradition, history and heritage, nostalgic, learning

Release – my time is precious:
- settled, self-sufficient, focused, contented

Perspective – I'm happy exploring alone:
- busy, prioritising, ambitious, escape

Entertainment – let's have fun:
- mainstream, popular appeal, leisure, fun

The Culture Segment profile in Aotearoa

Culture market 2020:

Expression – ‘people people’	20%
Affirmation – ‘do the right thing’	18%
Stimulation – ‘all about the big idea’	12%
Release – ‘say they’re too busy’	12%
Essence – ‘in pursuit of self-actualisation’	10%
Enrichment – ‘through the lens of the past’	10%
Perspective – ‘happy in their own bubble’	9%
Entertainment – ‘looking for fun’	9%

[Base 6743]

Discover your segment here: https://mhminsight.com/culture-segments/survey

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

One-fifth are Expression – the ‘people people’

Expression is the largest segment nationally and are one of the segments most likely to engage with arts and cultural on a regular basis. They are also likely to join in and share their experiences with others, making them great advocates.

Affirmation seek self-development

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

Stimulation and Release the third largest segments

Stimulation are characterised by two key traits; their desire for something new and unique (and to discover this themselves) as well as being exposed to 'big ideas' in their arts and cultural consumption.

Release are often people who feel unable to prioritise the arts as much as they'd like. Release prioritise seeking relaxation on their days off and can be difficult for organisations to mobilise into action.

1 in 10 are Essence; the core cultural attenders

Although not as large as some of the other segments, **Essence** are core cultural attenders; typically engaging in higher frequency than others.

Essence seek peak experiences from their cultural consumption and are looking for deep, emotional connections.

Enrichment, Perspective and Entertainment round out the market

The remaining 28% of the market is made up of Enrichment, Perspective and Entertainment.

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

Some Culture Segment variation by ethnicity

The mindsets behind Culture Segments are universal, based on deep-seated human values that are slow to change. That said, other factors can have influence within different demographic cohorts, and the manifestation of this is some subtle variance in Culture Segment profiles across different ethnic groups. Compared to the culture market average:

- Those identifying as Māori are significantly more likely to be **Essence**. This suggests that a larger proportion of Māori place arts and culture as more central to their lives.
- The **Expression** segment is defined by its close connection to community. Pacific Peoples and Asian audiences are significantly more likely to be Expression.
- **Release** is significantly more prominent in Pacific People’s and Asian cohorts. Release are the segment most likely to say ‘they’re too busy’ to engage with arts and culture.
- Over one-fifth of the culture market’s Asian cohort are **Affirmation**. Affirmation is a segment committed to personal growth.

Culture Segment	Culture market	European	Māori	Pacific Peoples	Asian
Essence	10%	11%	▲ 14%	▼ 6%	▼ 7%
Expression	20%	▼ 18%	22%	▲ 30%	▲ 25%
Affirmation	18%	17%	17%	16%	▲ 22%
Enrichment	10%	11%	8%	▼ 7%	9%
Stimulation	12%	12%	11%	13%	11%
Release	12%	11%	13%	▲ 17%	▲ 15%
Perspective	9%	10%	7%	▼ 3%	▼ 5%
Entertainment	9%	9%	8%	▼ 5%	▼ 6%
Base	[6743]	[5009]	[996]	[432]	[1127]

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

3. Social impact of arts and cultural engagement

6 in 10 are relatively ambivalent about the role the arts plays in their lives

Importance placed on engaging with arts and culture:

Higher importance	Moderate importance	Lower importance
42% / 1.6 million	32% / 1.3 million	26% / 1.0 million

The culture market can be split into three groups relating to the importance people place on arts and cultural engagement. While around 4 in 10, or an estimated 1.6 million adults, value the role the arts plays in their lives, around 6 in 10, or an estimated 2.3 million, view arts and cultural engagement as of moderate or lower importance.

Those in the 'higher importance' group are predisposed towards the arts and while there is still work to do to activate them to attend particular events, or more often, they are already paying attention.

Meanwhile, the attitude of 58% of the culture market is relatively ambivalent. Around one-quarter place little importance on the arts and will be harder to convert into core cultural engagers.

Growth for the sector will come from the estimated 1.3 million who's attitude is more moderate. It is this 'moderate importance' group, who need to be won for the sector to grow.

Moderates are open to persuasion but need to be convinced that engaging will be worth their while. It is the sector's job to demonstrate this in ways that resonate; prioritising content, experiences and communications that align with their values.

Culture Segments provides the practical tool to facilitate both market strength and growth. Fulfil people's core values and the arts will become more important to them and their lives.

Engaging with the arts positively impacts wellbeing…

Engaging with arts and culture...

	Disagree	Tend to agree +	Strongly agree	Net score
…stimulates my imagination and creativity	13%	41%	11%	+39
…gives me a sense of pride in my community	12%	39%	11%	+38
…has a positive effect on my personal wellbeing	12%	38%	12%	+37
…helps me understand the perspectives of others	13%	40%	10%	+37
…allows me to develop as a person	13%	39%	10%	+36
…enriches my life	15%	39%	10%	+34
…helps me feel connected to others	19%	27%	7%	+15
…helps me feel like I belong	23%	23%	6%	+6
…helps me cope with stresses of daily life	26%	24%	6%	+4

[Base 6743]

Exploring how the market feels about engaging with the arts and its impact on their lives in a more holistic way. Around half agree with six of the 'wellbeing statements', including that 'engaging with arts and culture has a positive effect on personal wellbeing' (50%).

The response was more neutral to three of the statements. For example, 3 in 10 agree engaging 'helps them cope with daily stressors'. Meanwhile, a broadly similar proportion disagreed, resulting in a relatively neutral net score (+4).

Net score: to more easily show levels of agreement in the market, this has been expressed as a net score. The proportion who disagree with a statement is removed from those who agree (neutrals are ignored) to result in a net score.

but those who value it less are less likely to recognise benefits

The arts and cultural experiences I engage with enrich my life – by importance group

	Disagree	Tend to agree +	Strongly agree	Net score
Higher importance [Base 1428]	6%	53%	20%	+66
Moderate importance [Base 1058]	11%	38%	5%	+33
Lower importance [Base 828]	35%	21%	1%	-12

Looking at arts and cultural impact on wellbeing by the three arts ‘importance’ groups (defined on page 12), reveals that it is those valuing it more who are most likely to see the benefits. For example, 72% of those in the ‘higher importance’ group agree that engaging with arts and cultural experiences ‘enriches their life’ and 52% agree it helps them ‘feel connected to others’.

By contrast, those who don’t already see the value of engaging, don’t see arts and culture as providing these holistic benefits. Those in the ‘lower importance’ group are more likely to disagree than agree with all the wellbeing statements.

4. Online arts engagement

Low growth for online arts engagement

Online arts engagement remains niche

Fewer than 1 in 5 had engaged with arts and culture online in the 12 months prior to the study (18%).

Potential twice the size of recent engagers

A relatively healthy 35% would consider engaging with digital culture but haven't previously (potential). At an estimated 1.4 million adults, the potential market for online offers is more than twice the size of recent engagers.

Resistance remains

3 in 10 have no interest in engaging with the arts online and wouldn't consider doing so in the future.

Growth for online engagement muted

12% had engaged with the arts online in the past and are doing so more now, or hadn't engaged pre-Covid and do so now. The result is a net gain of +8 or an estimated 314k more people who have engaged with arts and culture online in the past 12 months.

Engaged with arts and culture online – past 12 months:
18% / 693,000

Would consider engaging but haven't previously (potential):
35% / 1.4 million

Haven't engaged and wouldn't consider (resistant):
30% / 1.2 million

Don't know:
17% / 677,000

Age not a factor for online arts engagement

Engaged with arts and culture online in past 12 months – percentage-point difference compared to culture market average of 18%:

Culture segment	
Essence Ù	+10
Expression Ù	+6
Affirmation	+2
Enrichment	-7
Stimulation Ù	+4
Release	-3
Perspective	-10
Entertainment	-13

Ethnic identity	
Pakeha and European	-1
Māori Ù	+6
Pasifika	+4
Asian	=

Age band	
16–24	+2
25–34	+1
35–44	+2
45–54	=
55–64	-2
65+	-2

Disability	
Differently-abled	+1
No limitations	=

Educational attainment	
No qualifications	-9
School level	-3
Bridging (level 4-6)	+1
Under-graduate Ù	+4
Post-graduate Ù	+10

Level of importance	
Higher importance Ù	+13
Moderate importance	-7
Lower importance	-12

Ù Where % is significantly different from the culture market average

Online arts engagement had little to do with demographics:

- **Essence** is the segment **most connected digitally**, followed closely by **Expression** and then **Stimulation**.
- Those who place a '**higher importance**' on the arts were 13-percentage points above the culture market average for recent online engagement.
- **Māori and those who had completed higher education** were significantly more likely than average to have engaged with the arts online within the past 12 months.
- **Age is not a factor** on whether someone has engaged with the art online in the past 12 months. All age groups were as likely as average to have done so.

Smart digital, not more digital

The smart digital strategy is to know who you are targeting and what you want the outcome to be.

- Is reaching new audiences the goal?
- Is it about keeping members engaged?
- Do you want to deliver outcomes you normally would in-person, or is it something different?

Only then can you devise, develop and promote digital content that is going to meet the needs of your target audience and achieve the digital aspirations of your organisation.

How the Culture Segments engage with arts and culture online…

Essence Online engagement will only ever be an extra: a wrap-around enhancement.

Expression Hold them closer. Curating this online community would build huge brand equity.

Affirmation Being able to try before they hazard a visit could become a key part of their visit decisions.

Enrichment The convenience of home viewing is very appealing but difficult to monetise in this price-conscious segment.

Stimulation They've discovered new sources to feed their habit.

Release Remote consumption suits them, as long as it's from trusted sources.

Perspective Understanding their often minority specialisms is the key to engagement.

Entertainment Seeking highlights – will only connect if our content gets on the populist radar.

Culture Segments to optimise online engagement

The above table provides a useful summary of what each of the eight Culture Segments seeks from engaging with arts culture online. Consider, which of the segments you're aiming at and which functions are you aiming to serve.

There's a difference between monetised online consumption as a form of distribution and somebody wanting to dig deeper into the artistic practice by watching behind the scenes videos of artists. Organisations need to decide which function will add the most value and which will achieve its objectives; whether that's growing audiences or deepening engagement.

5. Motivations and barriers for cultural engagement

Social is a gateway to deeper reward

Entertaining, informative, social experiences sought

The top 10 motivations for cultural engagement are predominantly a mix of Social and Intellectual drivers.

‘Spending time with others’, ‘expanding knowledge’ and ‘passing the time in a pleasant way’ and drive around 4 in 10 in the market to attend.

Other popular motivations include ‘seeing interesting buildings or places’ (38%) and ‘collecting new experiences’ (35%). Two Spiritual motivations, to ‘stimulate my imagination’ and to ‘escape and recharge’ round out the top 10 most common motivations driving around one-quarter of the culture market.

Top motivations for engaging with arts and culture – all:

Spend time with friends or family	43%	Social
Expand my knowledge	42%	Intellectual
Pleasant form of entertainment / way to pass the time	41%	Social
See interesting buildings or places	38%	Social
Collect new experiences	35%	Intellectual
Visit a major attraction(s)	29%	Social
Broaden my own or others’ horizons	27%	Intellectual
Do something out of the ordinary	26%	Social
Stimulate my imagination	24%	Spiritual
Escapism – get away from everyday life and recharge	23%	Spiritual

[Base 3389]

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

Different segments have distinct motivational drivers to engage

	Culture market	Essence	Expression	Affirmation	Enrichment	Stimulation	Release	Perspective	Entertainment
Social	42%	▼ 31%	▼ 35%	40%	▲ 53%	39%	44%	48%	▲ 58%
Intellectual	33%	37%	31%	37%	▼ 27%	38%	33%	31%	▼ 24%
Emotional	9%	▲ 13%	▲ 14%	8%	8%	8%	6%	6%	▼ 4%
Spiritual	16%	19%	20%	15%	▼ 12%	15%	17%	15%	13%
Base	[3019]	[378]	[621]	[560]	[274]	[399]	[352]	[233]	[202]

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

‘Spending time with others’ or ‘finding a pleasant or entertaining way to pass the time’, are fairly universal drivers. Beyond these Social motivations, there are some distinct differences by segment:

- ‘Developing their own knowledge’ is particularly key for Essence and Stimulation.
- Essence can be seeking arts experiences to find ‘food for the soul’ or to have their ‘imagination stimulated’.
- A key driver for Expression is to be to ‘be part of a communal or shared experience or to ‘define their cultural or personal identity’.
- ‘Doing something out of the ordinary’ is something Stimulation and Affirmation are more likely to look for from their arts experiences.
- Most segments engage with arts and culture to ‘develop a child’s interest’. For those segments with lower than average arts engagement, such as Enrichment or Entertainment, this might suggest that while they are not seeing personal gain in engaging they look for benefits for others. While for Affirmation – a segment who likes to be seen to be ‘doing the right thing’ – seeking engaging experiences for children may be seen as just ‘what good parents do’.

Some different drivers to engage by ethnicity

Mirroring the culture market, drivers such as ‘spending time with others’ or a ‘pleasant way to pass the time’ are universal across the four ethnic groups. As is, ‘collecting new experiences’ and ‘expanding knowledge’. There are, however, some distinct variations:

- For Māori and Pacific Peoples, ‘better defining their own cultural or personal identity’ is a key driver.
- For Pacific Peoples and Asian, ‘developing a child’s interest’ is a key driver.
- The Asian cohort are more likely to be looking to ‘visit major attractions’.

	Culture market	European	Māori	Pasifika	Asian
Social	42%	43%	41%	▼ 35%	37%
Intellectual	33%	32%	29%	▲ 15%	9%
Emotional	9%	8%	▲ 13%	8%	8%
Spiritual	16%	16%	17%	16%	15%
Base	[3019]	[2262]	[424]	[217]	[463]

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

1.4 million prevented from attending

In the past 12 months, 36% of the culture market could recall at least one occasion where they had wished to attend an arts, cultural or heritage event but had been prevented from doing so.

Not all reasons (explored on following page) are within an organisation's control. However, this equates to a minimum estimated 1.4 million missed opportunities for engagement.[1]

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

In the past 12 months:

Yes	36%
No	46%
Don't know	17%

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

Expense a universal barrier to engaging

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

Was too expensive	36%
Covid-19 restrictions	25%
Wasn't offered in my area	19%
Difficulties with travel / transport / parking	18%
Didn't have others to go with	16%

[Base 2582]

While one-quarter cited Covid-19 restrictions as a factor preventing attendance in the 12 months prior to the study, this was not the most common barrier. 36% were prevented from engaging with at least one recent arts or cultural event because it 'was too expensive'.

Younger adults can be concerned about fitting in

Compared to average, younger adults (16–24s) were significantly more likely to cite social comfort – not feeling like they would fit it – as preventing arts engagement (16%, compared to 7% overall). This group was also significantly more likely than average 'not to have others to attend with' (24%, compared to 16% overall).

Wider range of barriers for those with a lived experience of disability

For those with a lived experience of disability, associated factors preventing attendance were difficulties travelling (32%), health concerns (38%) and level of comfort (11% felt they wouldn't feel comfortable or like they would fit in (significantly above the culture market average 7%).

Specific features can make the arts more accessible

There are a range of elements that make an arts activity, event or venue accessible for those with a lived experience of disability:

- 'Not too many people' was the most cited element. Crowds have a greater impact on those with a cognitive difficulty.
- 3 in 10 with a lived experience of disability wish to be prepared. This was of greater importance to those a lived experience of disability in a

physical category; 36% are looking for information about accessibility before visiting.
- Being assured staff are appropriately trained is another key factor (25%).

Elements that make an arts activity, event or venue accessible – for those with the lived experience of disability

Not too many people there	34%
Info. about accessibility provided pre-visit	30%
Website is accessible	29%
Staff understand accessibility and disability	25%
Accessible transport	22%
Support staff available	20%
Accessible venues or facilities	19%
Information is in accessible formats	18%
Support worker/carer attends at no extra cost	15%
Assistive technology available	12%
Engaged beforehand about my access needs	11%
Sign language interpreters available	7%

[Base 846]

6. Spend on in-person arts engagement

No increase in numbers spending

Spent in a four-week period

	Proportion of the market spending	Number of people spending	Average spend of spenders	Total four week spend	Total annual spend	Base
2020	32%	1.25 million	$150	$187.93m	$2.44b	[6743]
2017	33%	1.24 million	$153	$188.95m	$2.46b	[5014]
2014	39%	1.37 million	$106	$144.83m	$1.88b	[4011]
2011	40%	1.31 million	$124	$162.25m	$2.11b	[3877]

An estimated 1.25 million people in the culture market had spent on engaging, in-person, with arts and culture in the four weeks prior to the study, a nominal increase on three years ago.

The nominal growth masks the fact that, despite culture market growth, the numbers of people spending has not increased in nine years.

Half resistant to paying for online arts engagement

Typically, online content is perceived as free of charge, but there is some openness to paying to access online cultural content. Overall, an estimated 1.5 million people in the market are open to pay to engage online. Nearly 4 in 10 have done so in the past 12 months or are open to trying this form of engagement in the future (38%). However, around half the market are resistant (51%), with the remainder being undecided.

An estimated 371,000 people in the culture market (9%) reported having paid or donated money to access arts and cultural content online in the past 12 months.

It is worth noting that an estimated 75,000 (2% of those who had paid) are reluctant to do so again.

Paid or donated money to access arts and cultural content online – past 12 months:

Paid, and would do again	8% / 296,000
Haven’t paid, but would consider doing so in the future (potential market)	28% / 1.1 million
Paid, and wouldn’t do it again	2% / 75,000
Haven’t paid and wouldn’t consider doing so (resistant)	51% / 2 million
Don’t know	11% / 434,000

[Base 6743]

7. Reaching the market

Growth in media use, but more 'skimming' likely

The adjacent chart looks at the culture market's media consumption in a typical week and how that has changed over the past year (net gain).

Watching television – free to air (71%) or subscription (69%) – is the most common channel followed by a local news site or app (69%) and social media (63%).

The majority of channels had a net gain in 2020, however, this does not refer to the proportion of consumption or volume. As the media landscape becomes ever more diverse, the market's attention is divided across a wider range of options.

General media used in a typical week:		Net gain=
Free to air TV	71%	+31
Subscription streaming service	69%	+18
NZ news site or app	69%	+15
Social media	63%	+9
Actively listen to the radio	51%	+24
On demand TV (NZ)	51%	+24
International news site or app	37%	+24
Local / community newspaper (print)	33%	-1
NZ national newspaper (print)	24%	+4
NZ magazine (print)	18%	+5
On demand TV (international)	17%	+23
Read an online blog	14%	+21
Radio through a streaming platform	14%	+32
International magazine (online)	7%	+25
NZ magazine (online)	7%	+9
International magazine (print)	6%	+25

[Base 3475]

Net gain: describes a shift in usage to determine whether the culture market is using / doing an activity more now than 12 months age. Net gain does not refer to the proportion of consumption or volume but a shift over time amongst users.

TikTok activates diverse, young audiences

Taking a more granular look at social media used in a typical week, Facebook is most common (77%), followed by YouTube (70%).

While TikTok has a relatively small share of the market compared to others (14%), TikTok was the most downloaded mobile app in New Zealand for 2020.[1] This result is mirrored by a net gain of +50 for the platform – 64% of TikTok users weren't using the platform 12 months ago and now do or are using it more now than 12 months ago.

- Māori, Pasifika and the Asian cohort are all overrepresented amongst TikTok users.
- Primary users in the culture market are younger adults (16–24s), suggesting that the platform is a way to reach diverse young audiences.

[1] https://datareportal.com/reports/digital-2021-new-zealand

General social media – top channels used in a typical week

		Net gain	Net gain base
Facebook	77%	+8	[2631]
YouTube	70%	+25	[2369]
Instagram	41%	+26	[1388]
Snapchat	24%	-7	[763]
Pinterest	18%	+7	[668]
LinkedIn	18%	+14	[666]
TikTok	14%	+50	[435]
Twitter	12%	+20	[387]

[Base 3389]

Net gain: describes a shift in usage to determine whether the culture market is using / doing an activity more now than 12 months age. Net gain does not refer to the proportion of consumption or volume but a shift over time amongst users.

Facebook most influential to find out what's on

Over 4 in 10 use Facebook to find out what's on in the arts and cultural space, and it is also the most influential source. YouTube and Instagram were other commonly used social media channels, however, a lower proportion cited these as the most influential source of information.

- Those under 45 are significantly more likely to have been kept up-to-date about arts events via Facebook than the market average.
- It's more common for Māori and Pacific Peoples to have learnt about arts events via Facebook than European or Asian cohorts.
- Around half of the Essence, Expression, Affirmation and Stimulation segments were kept up-to-date via Facebook.

Top information sources to find out about arts, culture or heritage events or organisations

	All sources	**Most influential**
Facebook (Social media)	43%	20%
Personal recommendation (Recommendation)	29%	10%
Community newspaper (print) (Newspaper – print)	26%	7%
Radio (streamed or live) (Radio + TV)	23%	7%
Free to air television (Radio + TV)	22%	3%
Online listings (Online – media)	22%	3%
Brochures or flyers (Brochures + outdoor)	19%	2%
Online news site or app (Online – media)	19%	4%
YouTube (Social media)	17%	4%

Organisation’s website (Online – organisation)	15%	4%
National newspaper (print) (Newspaper – print)	14%	3%
Instagram (Social media)	14%	2%
Magazine (print or online) (Online – media)	11%	1%
On demand television (Radio + TV)	9%	<1%
Online user reviews (Online – media)	8%	1%
Professional recommendation (Recommendation)	8%	1%
Outdoor media (Brochures + outdoor)	7%	1%
Organisation’s enews (Online – organisation)	6%	1%

[Base 6743]

8. Engagement with individual artforms

Film has largest current market of individual artforms

The current market is defined as those who have engaged in the past three years.

Of the 12 core artforms, film enjoys the largest current market followed by museums, visual arts, festivals and music.

- In 2020, visual arts had a larger market share than festivals, music and theatre, which was not the case 10 years ago.
- The proportion of the culture market in the current market for museums has not grown since the first study (75% in 2011).
- Literature has the smallest market share. The current market for literature is half the size of the next smallest artform: Pacific Arts.

Current artform markets – % and real figure estimates

	Current market – engaged in past three years
Film	92% / 3.6 million
Museums	74% / 2.9 million
Visual arts	70% / 2.8 million
Festivals	68% / 2.7 million
Music	67% / 2.6 million
Theatre	63% / 2.5 million
Craft and object art	63% / 2.5 million
Ngā toi Māori	61% / 2.4 million
Asian arts	49% / 1.9 million
Dance	49% / 1.9 million
Pacific arts	47% / 1.9 million
Literature	22% / 882,000

[Base 6743]

Opportunities for re-activation across markets

The lapsed market is defined as those who last engaged over three years ago.

With the exception of film, all artforms have sizable lapsed markets, ripe for reactivation.

The size of lapsed markets for dance, theatre, Pacific arts and ngā toi Māori are relatively high. Around 1 million people have lapsed in their engagement with each of these artforms.

For theatre and ngā toi Māori, the lapsed market is three times the size of the potential market and there is a similar picture for dance. This suggests that growth for these artforms will come from re-activation rather than enticing those who are yet to engage.

Engagement with individual artforms

Lapsed artform markets – % and real figure estimates

	Lapsed – last engaged over three years ago
Film	6% / 244,000 (real figure estimate)
Museums	22% / 860,000
Visual arts	19% / 734,000
Festivals	21% / 841,000
Music	24% / 942,000
Theatre	26% / 1.0 million
Craft and object art	18% / 697,000
Ngā toi Māori	26% / 1.0 million
Asian arts	19% / 742,000
Dance	29% / 1.2 million
Pacific arts	27% / 1.1 million
Literature	14% / 543,000

[Base 6743]

Asian arts and literature have largest potential

The potential market is defined as those who would consider engaging but haven't previously.

Literature and Asian arts are the two core artforms with the most potential for growth, as a sizable proportion of the culture market have yet to engage but are open to doing so (34% and 23%, respectively).

Potential artform markets – % and real figure estimates

	Potential – would consider engaging, but haven't previously:
Film	1% / 38,000
Museums	2% / 98,000
Visual arts	9% / 336,000
Festivals	9% / 367,000
Music	8% / 298,000
Theatre	9% / 344,000
Craft and object art	14% / 538,000
Ngā toi Māori	7% / 287,000
Asian arts	23% / 547,000
Dance	15% / 890,000
Pacific arts	16% / 632,000
Literature	34% / 1.3 million

[Base 6743]

9. Research parameters and methods

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Morris Hargreaves McIntyre (MHM) is an international consultancy that works with charities, heritage and cultural organisations of all sizes.

MHM is fascinated by what makes people and organisations tick. Its strategic thinking, insight and creativity transform how its clients see their world.

MHM clients use their work to connect more people, more deeply, with their causes, fuelling their success.

Morris Hargreaves McIntyre