Audience Atlas Aotearoa 2020

July 2021 report

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Audience Atlas Aotearoa 2020

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

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

Cover image

Te Kura Kaupapa Māori o Hoani Waititi. Photograph David St George. Courtesy of Auckland Art Gallery Toi o Tāmaki.

Five areas of focus

1 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 this market strength and growth. Fulfil people's core values and the arts will become more important to them and their lives.

2 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.

3 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 becoming loyal repeat engagers, members, supporters and advocates.

4 Access pricing models to bridge the gap

Across the market, expense was cited as the primary barrier preventing engagement with the arts; an estimated 522k 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.

5 Future Proofing subscription models

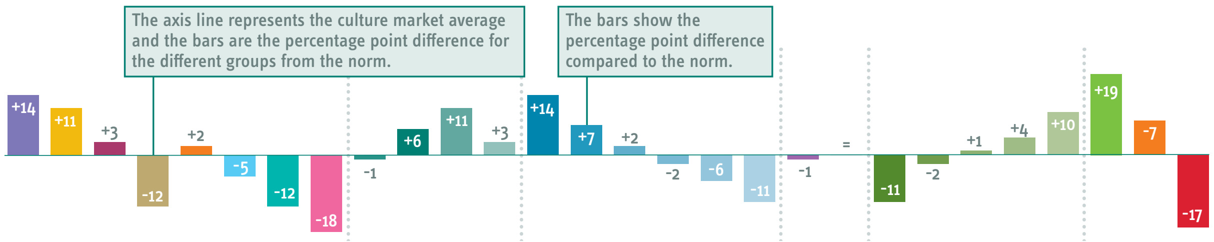
Looking across the past four Audience Atlas studies, it is clear that joining arts organisations is declining steadily – loyalty can't be expected. While interest in joining remains, the landscape has changed; fresher and more flexible memberships and subscription offers are needed to reignite the market. The sector is competing in a fast-moving world of opportunity and distraction. People want to try more things and expect more choice and flexibility and subscription models outside the arts sector are offering just this. The challenge for the sector is to find the arts equivalent of this flexibility and choice.

Leading cultural thinker, Diane Ragsdale, has proposed the need for a collaborative sector-wide subscription model – and we agree. The proposed model would allow subscribers access to a range of arts engagement – comedy, dance, the orchestra, theatre, an exhibition – all offered as part of one subscription and facilitated through a concierge service. Not only does this align with the markets evolving understanding of subscriptions, but it supports strength across the sector by promoting the discovery of new artforms and experiences.

How to read this report

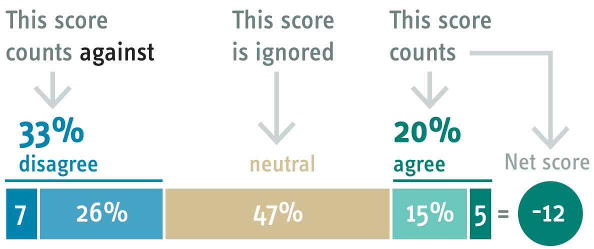
The ‘graphic equaliser’

Here’s how we show a lot of the data, so that you can easily compare differences through a range of different lenses.



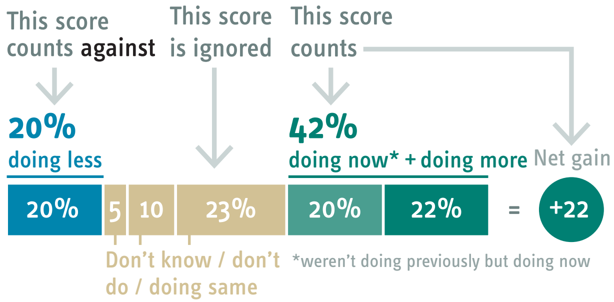
Net score

To more easily show levels of agreement in the market, we have expressed this 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.



Net gain

In some instances, a net gain is given. This describes a shift in usage to determine whether the culture market is using / doing an activity more now than 12 months ago.



Key terms used throughout this report

Artform: the study covers 12 core artforms: craft and object art, dance, festivals, film, literature, music, museums, Ngā toi Māori, Pacific arts, Asian arts, theatre and visual arts. Most artforms encompass a range of genres / formats, for example, ‘dance’ includes ballet, Pasifika dance, urban dance, etc.

Culture market: Aotearoa New Zealand adults aged 16 or over who’ve engaged with at least one arts, cultural or heritage activity within the past 3-years. The overall definition is inclusive; from attending the opera to going to a movie.

Engagement: visited or attended, could be in-person or online.

Current market: engaged in the past 3-years.

Lapsed market: last engaged over 3-years ago.

Ever market: engaged at any stage in the past.

Potential market: would consider engaging, but haven’t previously.

Resistant: Have no interest in attending; wouldn’t consider doing so in the future, and haven’t previously.

Robust methodology

The insight in this report comes from a **representative survey** of the **population** of Aotearoa New Zealand, which took place from December 2020 through January 2021.

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 from Washington DC to Sweden, Aotearoa New Zealand is the first country to invest in a regular series of studies, with *Audience Atlas Aotearoa 2020*, the fourth iteration.

Please refer to the **research parameters** on page 211 for more detailed information on sampling, methodology and confidence intervals.

Representative of Aotearoa New Zealand

This report represents the responses of a sample of 6,743 people nationally, representative of the population's demographics. The respondents were sampled through quotas on age, gender and educational attainment, with additional quotas on ethnicity.

For the 2020 iteration of Audience Atlas Aotearoa, 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.

The overall sample (6,743) means that the data is accurate to 1.19% at 50% (ie, where the result is 50%, the actual result may fall between 48.81% and 51.19%), and data differences analysed can be considered statistically significant unless specified as otherwise. In some cases, we have specified data that shows indicative changes, meaning that there is no statistical significance but that the data is suggestive of difference. Any results reported as real numbers (to aid understanding) are estimates based on the weighted proportions applied to population estimates from Census data.

Confidence intervals / margin of error for key sub-groups

	Sample	Margin of error
Ethnicity groups		
Māori	996	+/- 3.10
Pacific Peoples	432	+/- 4.71
Asian	1,127	+/- 2.92
Lived experience of disability		
Differently-abled	794	+/-3.48*
Overall sample		
Total	6,742	+/- 1.19

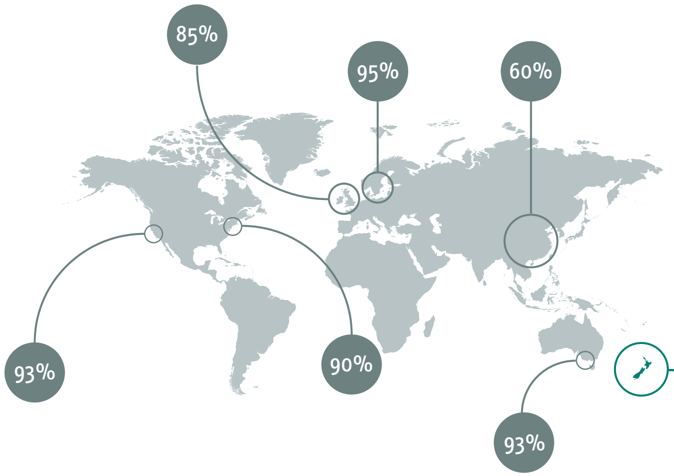
*Lived experience of disability confidence interval is an approximation based on available data from StatsNZ. The definition of 'disability' is not directly comparable to *Audience Atlas New Zealand 2020*. www.stats.govt.nz/information-releases/disability-survey-2013

Larger culture market than other territories

In Aotearoa New Zealand, 96% of adults, or 3.94 million people, are in the culture market. Compared to 2017 results, the size of the culture market has grown steadily in line with the country's population growth.

The definition of the culture market, used in this report, is inclusive; it refers to adults –aged 16 years old and over – who have attended at least one cultural activity within the past three years. Attendance could be attending the opera or an art exhibition, to going to a movie or a popular music concert.

Compared to similar international studies, a larger percentage of residents of Aotearoa New Zealand are in the culture market than anywhere else this study has been replicated.



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

3.94 million
individuals

96% compares to 90% of adults in the Washington DC Area who are in the market for arts, culture and heritage, 93% in San Francisco Bay Area, 93% in the Australian state of Victoria, 95% in Sweden, 85% in the UK and 60% in China[1].

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

3.9 million in the market for culture

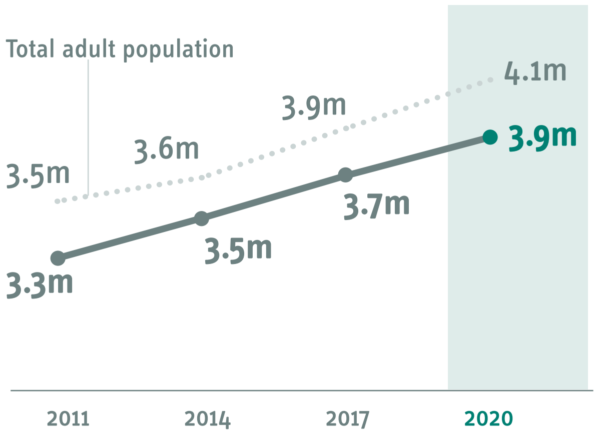
The proportion of adults in the **culture market** has remained broadly **stable** across the four Audience Atlas studies; 96% in 2020. In real terms, the **number** of people has been **growing steadily** in line with population increases.

Regionally, results **range** from **93%** in the Waikato up **to 99%** in Wellington.

Culture market growth in line with population growth

Between 2017 and 2020, the proportion of adults in the culture market remained broadly unchanged (96%, compared to 97% in 2017). In 2020 an estimated 3.9 million people are in the market for arts and culture; 8% more than in 2017 (3.7 million).

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

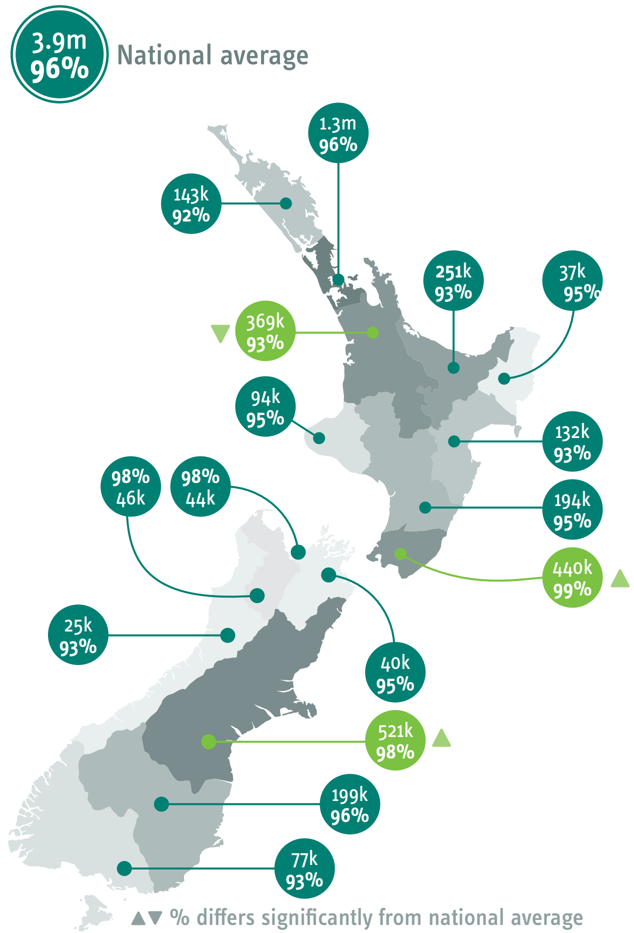


The 8% growth of the culture market since 2017 is just below the estimated 9% growth in the adult population over this period.

Wellington has the largest proportion of active cultural consumers

Regionally, the proportion of the adult population in the market for arts and culture varies from 92% in the Northland to 99% in the Wellington Region. However, the market in Northland is broadly comparable to the national average and it's the Waikato where the

Culture market by region



▲▼ % differs significantly from national average

For regional base sizes see research parametres at the end of this document proportion of residents in the culture market (93%) is significantly below the norm.

The proportion of Wellington region and Canterbury residents in the culture market (99% and 98% respectively) is significantly higher than the national norm (96%)

All groups are culturally active

Where there have been significant population changes due to migration, it is worth considering the cultural engagement of this cohort compared to the existing population.

Growth of the culture market has broadly mirrored population changes, and this suggests that these extra people are as engaged in arts and culture, whether arrived via immigration or a part of the existing population.

Population growth across the regions

Culture market growth in all regions is broadly in line with population growth, lagging most in Northland and the Waikato, followed by Marlborough and Southland. Culture market growth is slightly ahead of population increases in Gisborne.

Population change vs culture market change

	% Population change: 2020 vs 2017	Culture market size		% Culture market change: 2020 vs 2017	% point difference: culture market vs population change
		2017	2020		
Culture market	+9%	3.7m	3.9m	+8%	-1
Northland	+10%	135k	143k	+6%	-4
Auckland	+10%	1.2m	1.3m	+9%	-1
Waikato	+9%	351k	369k	+5%	-4
Bay of Plenty	+10%	231k	251k	+9%	-2
Gisborne	+8%	34k	37k	+10%	+2
Hawke's Bay	+8%	123k	132k	+7%	-1
Taranaki	+6%	89k	94k	+5%	-1
Manawatū-Whanganui	+7%	184k	194k	+5%	-2
Wellington	+8%	405k	440k	+9%	+1
Tasman	+9%	42k	46k	+10%	+1
Nelson	+8%	41k	44k	+7%	-1
Marlborough	+6%	38k	40k	+3%	-3
West Coast	+3%	24k	25k	+2%	-2
Canterbury	+8%	477k	521k	+9%	+1
Otago	+10%	184k	199k	+8%	-2
Southland	+6%	75k	77k	+3%	-3

Source: StatsNZ population figures for 2017 have have been updated since *Audience Atlas New Zealand 2017*

Understanding the culture market

What if you could **understand** the fundamental **needs** and **values** of your market? What if you could access insight into your market's **motivations** and what they **need from you** to become **loyal** engagers and supporters?

By looking at a person's deep-seated **needs** and **values** and focusing on understanding what they are **seeking to fulfil in themselves** from experiencing arts and culture, you can **target** them more **accurately**, engage them more **deeply** and **build relationships** to **maximise loyalty**.

The following pages introduce you to a **sector-specific** tool for audience retention and growth.

Photograph David St George, courtesy Auckland Art Gallery Toi o Tāmaki.

Culture Segments

Your tool for retention and growth

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

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

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

ESSENCE

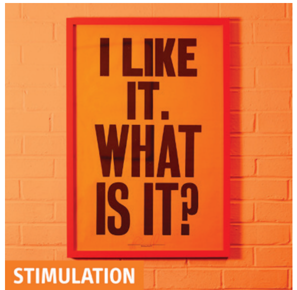
- Discerning
- Confident
- Independent
- Arts-essential

EXPRESSION

- Community
- Nurturing
- Generous
- Committed

AFFIRMATION

- Self identity
- Considered
- Diligent
- Time well spent



STIMULATION

- Active
- Experimental
- Ideas
- Social

ENRICHMENT

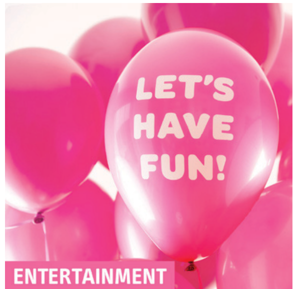
- Tradition
- History and heritage
- Nostalgic
- Learning

RELEASE

- Settled
- Self-sufficient
- Focused
- Contented

PERSPECTIVE

- Busy
- Prioritising
- Ambitious
- Escape



ENTERTAINMENT

- Mainstream
- Popular appeal
- Leisure
- Fun

The eight Culture Segment clusters

Culture Segments is a subtle, granular and sophisticated system, designed specifically for organisations with an arts, culture or heritage offer. We've identified eight segments in the market for arts, culture and heritage. They are based on people's core cultural values, giving insight into why each segment would like the arts in their lives; what benefits they perceive it to offer; how they feel their lives will be improved by it. Unlike other systems, we haven't tried to simply explain, predict or describe current patterns, we've set out to give you the drivers to influence and change those patterns.

Understand values, influence behaviour

The big idea behind Culture Segments is this: only when you understand an individual's deep-seated beliefs about the arts, can you develop your offer and communications that will truly resonate. Rather than profile existing habits or assuming a link between demographics and arts engagement, it is designed to help you understand what drives people to engage with culture so that you can influence that behaviour.

Culture Segments is powered by an algorithm that has been developed by Morris Hargreaves McIntyre over the past 15 years, with arts organisations around the world. Using just a small number of 'Golden Questions' that can be inserted into any research survey, the algorithm instantly establishes a respondents' segment.

Culture Segments and demographics

Basing a segmentation system on demographics creates a simplistic but reassuringly statistical way to target, refer to, and evaluate audience groups. It helps define the group we wish to target. But these describers can't give you the psychographic understanding you need to influence this group's behaviour.

This is why we have not used demographics as definers for Culture Segments. Suggesting all young people are into experimental theatre is as crude as saying that all older people love classical ballet. Or, just because a group of people enjoys a certain level of disposable income, or lives in the same postcode, doesn't make them all active cultural consumers.

Culture Segments has been used as a lens to investigate the market throughout this report, with the aim of helping arts and cultural organisations understand which segments are most valuable for relevant artforms or which offer most return on investment when it comes to fundraising and membership development, for example.

Therefore, we defined Culture Segments using psychographic factors – values and mindsets specific to culture. While there may be demographic skews in some segments or segment skews in some demographic groups; important to be aware of when you come to implementation, all demographic groups are found in all eight segments.

Therefore, you can identify with which target segments you, as an organisation, most strongly align with; which segments are 'best fit' for you, and use messages that will resonate with their mindset.

You can do this in particular areas where the demographic you seek is likely to be, or on platforms with which they are likely to engage – but first and foremost, you need to use messages that will resonate with them and their deep-seated values towards the arts.

Culture Segment profile in Aotearoa

The Culture Segment profile for Aotearoa New Zealand in 2020 reveals a **well-balanced distribution** of segments, with the diversity of this profile reflecting the **broad** and **inclusive definition of culture** used in this study. **Expression** is consistently the **largest segment** nationally, followed by **Affirmation**.

As Culture Segments is based on deep-seated **needs** and **values**, the 'shape' of the culture market has remained **similar over time**. However, there are some **differences** in Culture Segment profiles across **key ethnic groups**; **Māori** are more likely to be **Essence** while **Expression** and **Release** are **prominent** amongst **Pacific Peoples** and the **Asian** cohort.

[Base 6743]

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

Discover your segment here:

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

Culture Segment pen portraits

For a deeper dive into Culture Segments, see Appendix 1 on page 171 where there's a comprehensive summary of each of the eight segments, including how to reach them through marketing communications.

ESSENCE

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

10% of culture market

EXPRESSION

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

20% of culture market

AFFIRMATION

Affirmation make measured decisions, seeking endorsement before making choices. One of many leisure choices, they embrace culture as important and worthwhile;part of their commitment to personal wellbeing. They recognize opportunity for self-improvement as well as quality time with others.

18% of culture market

STIMULATION

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

12% of culture market

ENRICHMENT

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

10% of culture market

RELEASE

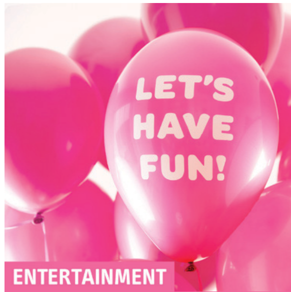
Release are looking for escape and to unwind from the stresses of everyday life. They can feel a under siege from different pressures on their time. These conflicts may be reality, but often it is the feeling of being time-poor rather than the actual reality of not having any time. They'd like to do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

12% of culture market

PERSPECTIVE

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

9% of culture market



ENTERTAINMENT

Entertainment see culture as on the periphery of their lives. Their occasional visits are likely to be for mainstream events or days out. Leisure time is for fun, entertainment and escapism. If they do attend, it will be socially motivated. Their engagement is typically the lowest of all segments.

9% of culture market

One-fifth are Expression – the 'people people'

Because Culture Segments is based on people's deep-seated needs and values the 'shape' of the Culture Segment profile in Aotearoa New Zealand has remained similar over time, with Expression consistently the largest segment nationally. In 2020, 1 in 5 (20%) adults in the culture market are Expression.

Expression 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, so can be great advocates.

Large Affirmation cohort seeking self-development

Affirmation closely follows Expression in its size in the culture market (18%). Affirmation is a segment keen on learning and self-improvement. They are conscientious and keen to grow through their engagement with arts and culture.

Affirmation are cautious consumers and often engage with more mainstream artforms, perceived as lower-risk, as they often lack the confidence to try new things. For Affirmation, the arts offer a chance to enjoy themselves with friends and build their sense of identity.

Stimulation and busy Release are the third largest segments

Stimulation is an important segment representing 12% of the culture market. 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 represents the same proportion as Stimulation (12%). Unlike Stimulation, 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 a difficult market for organisations to mobilise into action. They tend to come out for box office hits and blockbuster exhibitions, where they can be reassured that their investment in time and money will be well spent.

1 in 10 are Essence; the core cultural attenders

Although not as large as some of the other segments in the culture market, Essence are core cultural attenders; typically engaging in higher frequency than other segments. Essence are seeking peak experience in their arts and cultural consumption and are looking for deep, emotional connection with the artform. Essence account for 10% of the culture market.

Enrichment, Perspective and Entertainment round out the market

The remaining 28% of the market is made up of Enrichment (10%), Perspective (9%) and Entertainment (9%).

Think of Perspective as 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 are less motivated by the idea of being up-to-date. They tend to be cautious with established tastes; meaning they know what they will enjoy, and when it comes to art and culture they veer towards things they believe to have stood the test of time.

For Entertainment arts and culture is on the periphery of their lives. They are looking for mainstream events or days out that will be fun. Their engagement is typically among the lowest of all segments.

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 being 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.

Māori less likely to differentiate culture from their identity

While the broad pattern remains the same, with Expression still the largest segment, followed by Affirmation, those identifying as Māori are significantly more likely to be Essence (14%) compared to the culture market average (10%).

That Māori are significantly more likely to be Essence (4-percentage points above the norm) is likely to do with the role the arts plays in their lives. It suggests that a larger proportion of Māori place arts and culture as more central to their lives – it's a part of who they are, rather than something they do.

Culture Segment profile by key ethnicity groups

	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]

Culture market average
▲ % significantly higher than the culture market average
▼ % significantly lower than the culture market average

Asian and Pacific Peoples Culture Segment profile differs

Pacific Peoples and Asian audiences more likely to be Expression

Three in ten Pacific Peoples and one-quarter of the ethnically Asian population in the culture market are Expression, a significantly higher level compared to the culture market average (20%).

The Expression segment is defined by it's close connection to community, therefore, it's likely that higher levels of Expression amongst the Pacific Peoples and the Asian cohorts is correlated to the migrant experience, where having a community identity; mixing with similar populations, living in inter-generational families, where family is at the heart of social structures, it likely to be more commonplace.

Prominence of Release in Pacific People's and Asian cohorts

Compared to the culture market average, the Pacific Peoples and Asian cohorts also are significantly more likely to be Release (17% and 15% respectively, compared to 12% overall).

Although not defined by it, the Release segment can be aligned with a life stage, and a number of life-style factors, for example, busy work, study and children competing for time.

Like the over-representation of Expression however, it is likely that the prominence of Release amongst these two cohorts is also correlated with the migrant experience, where arts and cultural consumption may be seen as something difficult to fit in to the everyday life of establishing oneself in Aotearoa New Zealand.

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

Overall, 22% of the culture market Asian cohort are Affirmation. Affirmation are a segment committed to personal growth. They recognise the opportunity for self-improvement as well as quality time with others and like to build memories of these special experiences. Again, likely connected to the migrant experience, this broadly suggests a large number of this cohort exploring, widening and expanding their cultural repertoire by trying things out in a new environment.

Arts and culture in our lives


CSO's Karawhiua! Let's Play! week long school residency at St Mary's Primary School, Learning a Drum Fugue

morris hargreaves mcintyre

Demonstrate value to grow the market

The **pandemic** had only a **marginal impact** on the **importance** placed on the **arts** – for those already valuing it, its importance **increased** for a **small proportion**. Conversely, sentiment remained largely unchanged amongst the rest of the market.

Engaging with the arts **positively** impacts **wellbeing**, although those who **value** the arts **less**, are **less likely** to recognise the **benefits**.

While the **strength** of the market relies on building **lasting relationships** with those **already valuing** the arts, **growth** in the market will require **focus** on those seeing the arts as **less important**. **Culture Segments** is the practical tool to facilitate both this **strength** and **growth**.

Wellness as a meta trend

The Wellness culture trend existed pre-pandemic.[1] The global coronavirus pandemic has acted as an accelerant, forcing many to reflect on their life balance and mental health.

Art and culture is not a basic human need...

Looking through the Eurocentric lens of Maslow's hierarchy of human needs[2] sheds some light on behaviour in the lead-up to worldwide lockdown restrictions. People rushed to purchase toilet paper and non-perishable food items driven by perceived threats to physiological and safety.

... but community and belonging are

While, in the face of uncertainty, art and culture may not have met immediate needs, the cultural sector is particularly relevant to building a sense of community, belonging and hauora (health and wellbeing). Belonging sits just above safety on Maslow's hierarchy.

1 Wellness culture is a focus on mental health as much as physical. One tangible example is Aotearoa New Zealand's 2019 'wellbeing' budget.

2 https://www.simplypsychology.org/maslow.html#gsc.tab=0

New Zealand's alert level timeline 2020

Level 2: 21 March 2020

Level 3: 23 March 2020

Level 4: 11.59pm, 25 March 2020 – nationwide lockdown declared

Level 3: 11.59pm, 27 April 2020 – some lockdown restrictions lifted

Level 2: 11.59pm, 13 May 2020 – remaining lockdown restrictions lifted. Physical distancing and size limits on social gatherings remain.

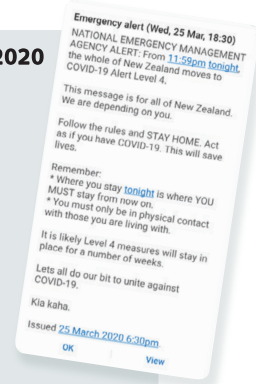
Level 1: 11.59pm, 8 June 2020 – all remaining restrictions, except border controls, lifted.

Auckland only

Level 3: 11:59am, 12 August 2020 – Auckland region re-enters Level 3.

Level 2.5: 11:59pm, 1 September 2020 – Auckland enters Level '2.5'.

Level 1: 7 October 2020 – Auckland returns to Level 1.



Emergency alert (Wed, 25 Mar, 18:30)
NATIONAL EMERGENCY MANAGEMENT AGENCY ALERT: From 11:59pm tonight, the whole of New Zealand moves to COVID-19 Alert Level 4.

This message is for all of New Zealand. We are depending on you.

Follow the rules and STAY HOME. Act as if you have COVID-19. This will save lives.

Remember:
* Where you stay tonight is where YOU MUST stay from now on.
* You must only be in physical contact with those you are living with.

It is likely Level 4 measures will stay in place for a number of weeks.

Lets all do our bit to unite against COVID-19.

Kia kaha.

Issued 25 March 2020 6:30pm.

OK View

Pandemic marginally affected relationship to arts and culture

The adjacent chart maps the importance the market placed on arts and culture pre-Covid restrictions, and how the level of importance changed, if at all, because of the pandemic.[3]

Slight positive uplift amongst the 'already converted'

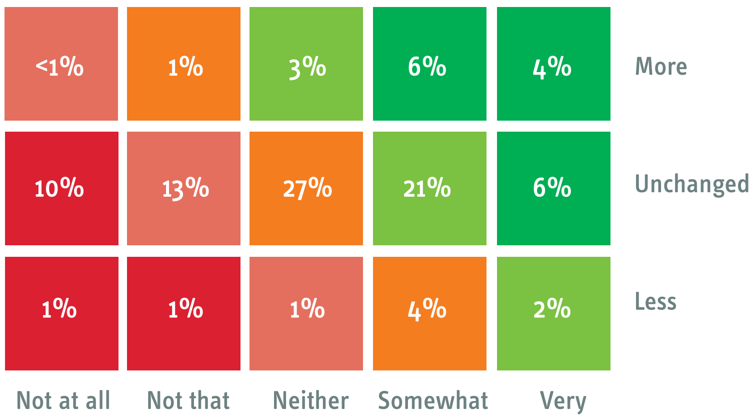
Those who felt engaging with arts and culture was 'somewhat important' or 'very important' pre-Covid shifted slightly towards it being 'more important'. Revealing a slight intensification amongst those who already agree on arts and culture's importance in their lives.

Those valuing arts and culture less, remained largely unmoved

Conversely, those for whom arts and culture was, 'not important at all', 'not that important', or 'neither important nor unimportant' pre-restrictions, their views are broadly unchanged. Overall, for those who already value arts and culture its importance has been slightly heightened. Meanwhile, if arts and culture was not a factor, feelings are broadly unchanged.

3 Questions: 'Before Covid-19 lockdown restrictions, how important was engaging with arts and cultural events to you? Followed by: 'And how important is engaging with arts and cultural events to you now, compared to before Covid-19?'

Importance of engaging with arts and culture



Importance of arts and culture pre-Covid

Before the Covid-19 lockdown restrictions, how important was engaging with art and culture to you?

Change in importance

How important is engaging with art and culture to you now, compared to before Covid-19 restrictions

16% / 26% Higher importance

32% Moderate importance

14% / 12% Lower importance

The data modelling on this page gives us an interesting lens though which to explore the culture market. Throughout this report you will see analysis by these groups: those placing higher importance, moderate importance and lower importance on arts and culture.

How 'arts importance' groups differ significantly from culture market average:

Higher importance – 42% / 1.6 million	Moderate importance – 32% / 1.3 million	Lower importance – 26% / 1.0 million
• Over-represented in Auckland and Wellington • Are younger: more likely to be aged under 35 • Skews female • Pacific Peoples are over-represented • Completed higher education • Working full-time • The more culturally active segments: Essence, Expression, Affirmation and Stimulation are over-represented.	There is little which distinguishes the 'moderate' group from the culture market average. The moderate importance group is the norm. See following page for a visual summary of level of the three level of importance groups.	• Over-represented in the Bay of Plenty and Canterbury • Are older: aged 55 or over • Skews male • Pākehā and European are more prominent and less likely to be Māori, Pacific Peoples or Asian • Were born in Aotearoa New Zealand • Finished formal education at a high school level • Less likely to have children in the household and more likely to be retired • More likely to have the lived experience of disability • Enrichment, Perspective and Entertainment segments are over-represented.

Strong relationship between Culture Segment and arts importance

The charts on the following page show how Culture Segment, ethnicity, age, different ability and educational attainment, are over or under represented, compared to the norm, within each of the arts importance groupings.

Culture Segments are derived from a person's deep-seated values, so it is perhaps no revelation that the segments strongly align with the three arts importance groupings.

Unsurprisingly, the more culturally active segments of Essence, Expression, Affirmation and Stimulation are all over-represented in the 'higher importance' group. Meanwhile, the typically less culturally active Enrichment, Perspective and Entertainment are more likely to fall in the 'lower importance' group while the Culture Segment profile of the 'moderate' group, looks more broadly like the culture market average.

Strong education sector, strong arts sector

In addition to Culture Segments, there is also a strong correlation between the level of educational attainment and the importance people are placing on arts and culture. Those with higher educational attainment are over-represented amongst those placing higher importance on the arts and conversely, those with no formal education are over-represented amongst the lower arts importance group.

Sustainability in the arts sector is therefore connected to a strong education sector. Building cross-sector strength should be a priority for the arts.

Attitude towards arts and culture – %-point difference compared to culture market average

Building lasting relationships with those who value the arts is key to market strength...

Those in the culture market who place higher importance on arts and culture than others (42%) are core engagers and natural attendees and supporters.

This is a group who is predisposed towards the arts, and while there is work to be done to activate them to attend particular events, they are already paying attention and see the benefits of arts attendance. Building deeper relationships with these audiences should always be a high priority; encouraging them to engage more often and developing them beyond engagement into strong all-round supporters and advocates.

... while demonstrating value to 'moderates' is key to market growth

The attitude of 58% of the culture market is relatively ambivalent. Around one-quarter (26%) place little importance on the arts and will be harder to persuade otherwise or convert into core cultural engagers. Growth for the sector will come from the 32% of the market who's attitude is more moderate. In order for the sector to reach beyond existing arts audiences (the 'higher importance' group) it is the middle; 'moderate importance' group, who need to be won.

Moderates are open to persuasion but need to be convinced that engaging with the arts will be worth their while. It is the sector's job to demonstrate art and culture's importance and value in ways that resonate with and are relevant to their lives.

Culture Segments the tool for growth

Those seeing the arts as 'moderately important' have little to distinguish them from the culture market average. Within this group however, are an estimated 734k Expression, Essence, Affirmation and Stimulation; the more culturally engaged segments, who, with the right offers and messaging, could become stronger arts advocates. The muted importance of the arts in their lives currently, is likely because that which they have encountered is yet to hit the mark. Fulfil their core values and the arts will become more important to them and their lives.

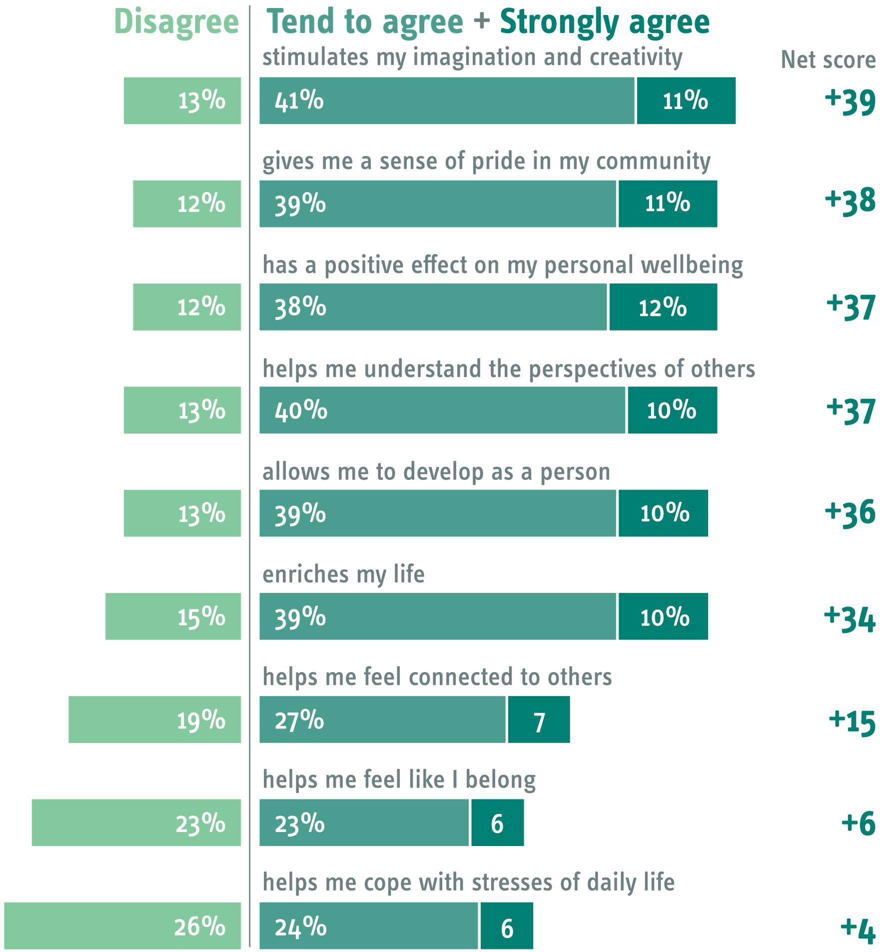
Arts impacts positively on wellbeing

The adjacent chart explores how the market feels about engaging with the arts and how it may impact their lives in a more holistic way. Around half the market agrees 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 with arts and culture 'helps them cope with daily stressors' and a broadly similar proportion of the market disagreed, resulting in a relatively neutral net score (+4).

For an explanation of net score see page 5 how to read this report.

Engaging with arts and culture...



[Base 6743]

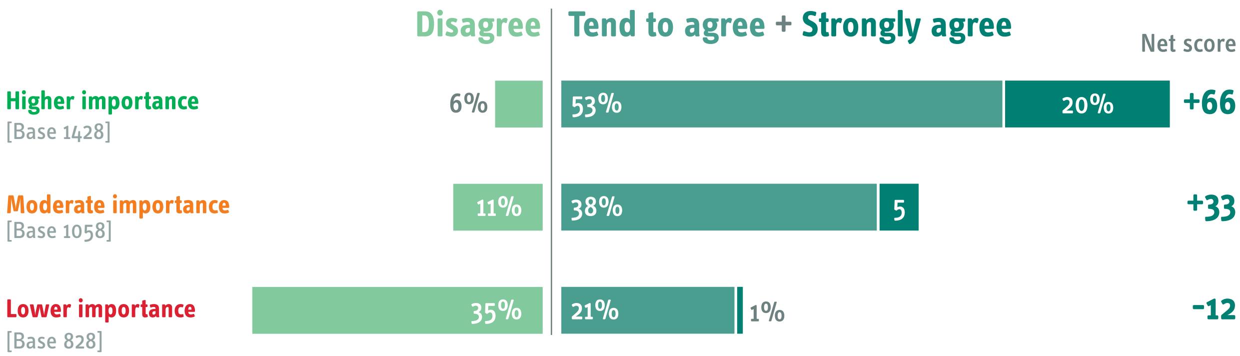
Those already converted are receiving the benefits...

The adjacent chart explores the attitude of the market to two of the wellbeing statements by the arts importance groups defined earlier in this chapter. Those who already see the value in engaging with arts and culture – the ‘higher importance group’ are significantly more likely to see the benefits from engaging with arts and culture. For example, 72% agree engaging with arts and cultural experiences ‘enriches their life’ and 52% agree it helps them ‘feel connected to others’.

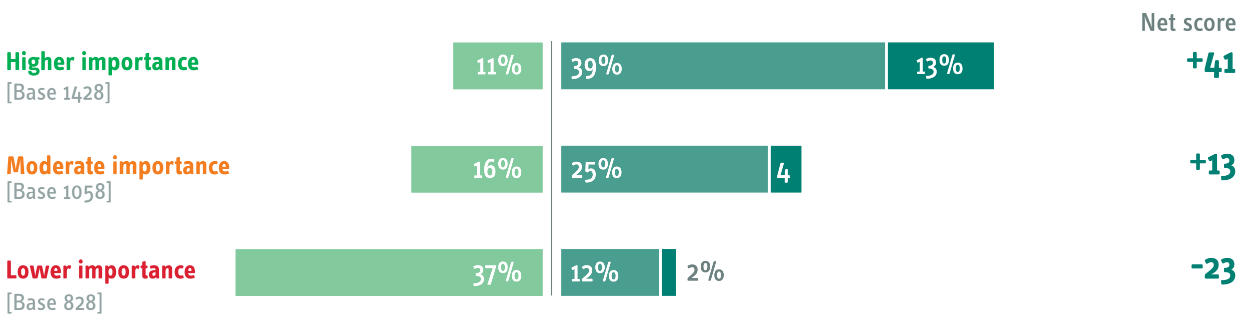
...those who don’t recognise benefits aren’t seeking out cultural experiences

Meanwhile, 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 the wellbeing statements.

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



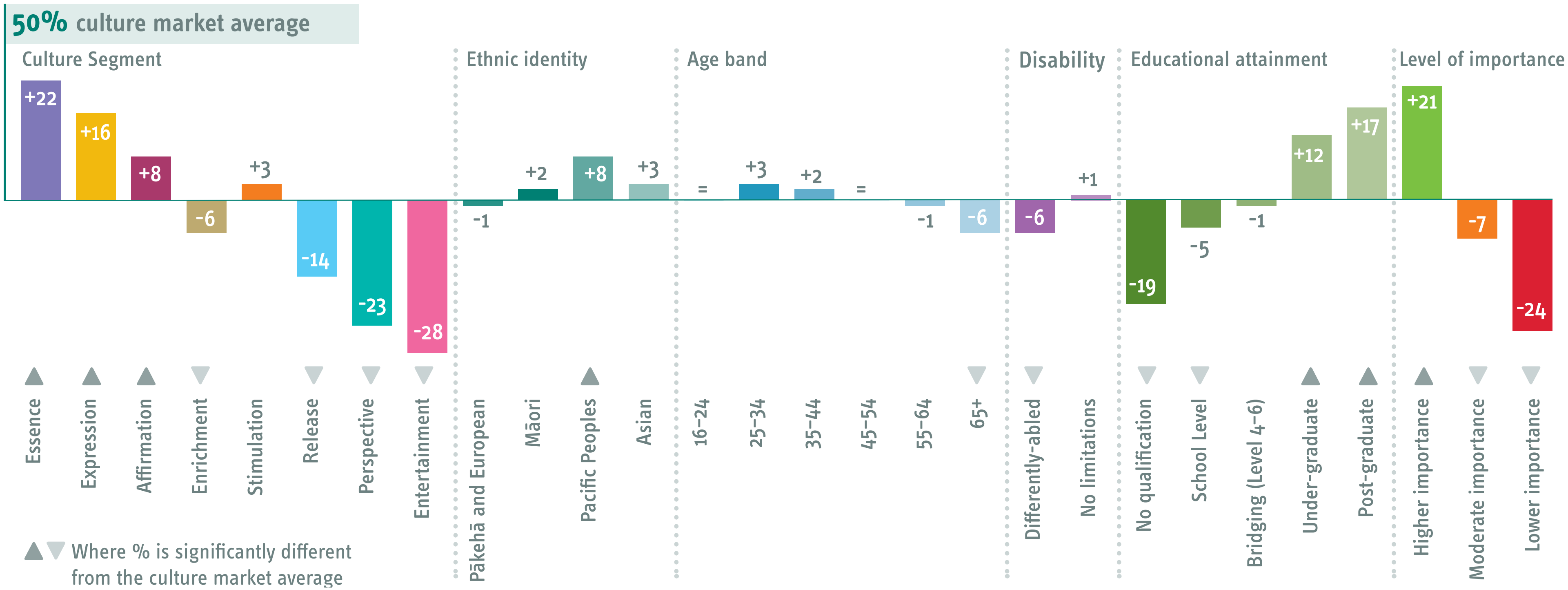
Engaging with arts and culture helps me feel connected to others – by importance group



Arts and culture has the power to deliver a raft of positive benefits to personal wellbeing. But there is a sizeable portion of the culture market not receiving this message.

Are organisations good at telling those who are not engaged what’s on offer and more importantly perhaps, are they good at doing this in a way that resonates with their core cultural values?

Engaging with arts and culture has a positive effect on personal wellbeing (agree only) – %-point difference compared to culture market average



A belief in the positive effect of the arts not predicated by demographics

The chart above looks at those who agree that 'engaging with arts and culture has a positive effect on wellbeing' and how this differs to the culture market norm across key subgroups.

Those groups whose level of agreement is below the average were not necessarily more likely to disagree than agree with the wellbeing statement but were less likely than average to agree.

- The 'higher importance' group sits 21-percentage points above the average for agreement that 'engaging with culture has a positive effect on wellbeing'.
- This statement particularly aligns with Essence, Expression and Affirmation; three of the more culturally active Culture Segments.
- Those with the lived experience of disability were significantly less likely to agree.
- There is a strong correlation between when someone finished formal education and levels of agreement.
- Factors such as age or ethnicity and household income (not shown above) has a more muted impact.

Low growth for online arts engagement

Fewer than 1 in 5 engaged with the **arts online** in the 12 months prior and there was only a **slight net gain** in levels of **online arts engagement**; perhaps **surprising** given the **acceleration** in **content production** due to Covid-19.

While the pandemic provided many arts organisations with the reason to '**become digital**', a year on, and with only limited growth in online engagement, it is time to **take stock**.

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. This is a **critical success factor** in online strength and growth.

Online engagement remains niche

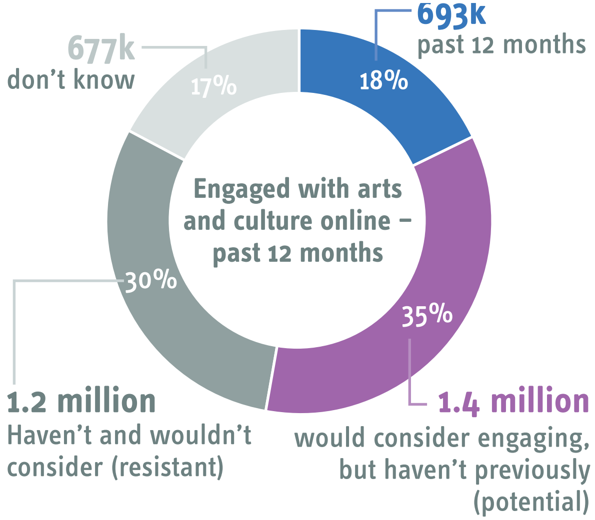
In the past 12 months, fewer than 1 in 5 reported having engaged with arts and culture online (18%).[1] This equates to an estimated 693k people in the culture market in 2020.

Potential market twice the size of recent engagers

The size of the market who would consider engaging with digital culture (potential) is healthy (35%). At an estimated 1.4 million, the potential market for online offers is more than twice the size of the recent market (693k had engaged online within the past 12 months).

There remains some resistance to overcome; 30% have no interest in engaging with the arts in this way and wouldn't consider doing so in the future.

1 Question: 'In the past 12 months have you engaged with arts and culture online?' Engagement is not limited to local content and could be engagement with arts and culture content accessible online

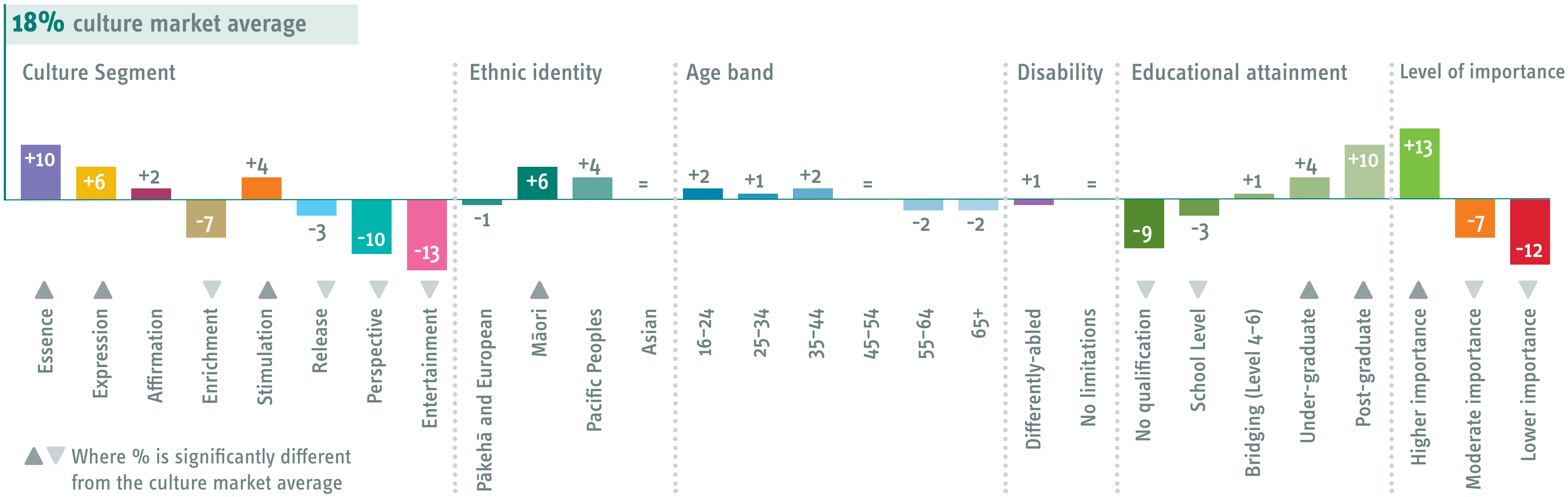


Growth for online engagement muted

Overall, 12% had either engaged with the arts online in the past and are doing so more now or didn't engage pre-Covid and do so now. While 4% are doing less than 12 months ago.

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 in past 12-months – percentage-point difference compared to culture market average



Age is not a factor for online arts engagement

Whether someone had engaged with the arts online had little to do with demographics; value placed on engaging with arts and culture has more influence.

- 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 norm 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 had 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.

Culture Segments to optimise online engagement

The adjacent 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.

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.

See the individual Culture Segment pen portraits in Appendix 1 on page 170 for more detail on the benefits each segment wishes to gain from online cultural engagement.

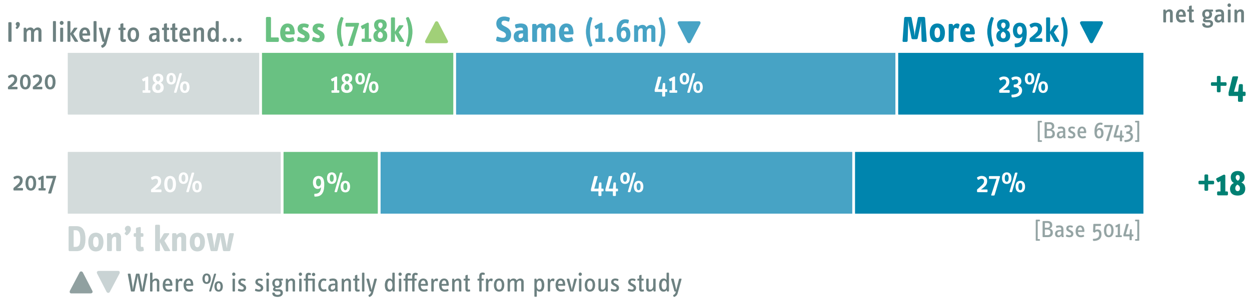
Anticipating a less active market

While **overall** there is a **greater number** of people within the culture market who **anticipate attending more in-person** arts events in the **coming year**, the number is **modest** and is a marked **drop** on **three years ago**.

Anticipated **growth** across the regions might be **uneven** and **concentrated** around the main population centres – **Auckland**, **Wellington** and **Canterbury**.

Younger adults, **Māori** and **Pacific Peoples** all have a **higher level** of **anticipation** and are significantly more likely to expect to attend more in the coming year.

Anticipated in-person arts and cultural attendance in next 12 months



Anticipating a less active market in the coming year

Sentiment analysis anticipates how the market expects to behave in the coming year.

Around one-quarter of the market anticipates attending more in-person in the next 12 months, which is a significant decrease on 2017 results (23%, compared to 27% respectively). Similarly, 41% anticipate attending a similar amount, also a significant drop on three years ago (44%).

The balance of the market is anticipating attending less in-person arts events (18%), twice that expected three years ago (9%).[1]

Overall, there is a modest net gain of +4 or an estimated 174k more people in the culture market anticipate attending more in the coming year. This is a 74% drop on three years ago (net gain of +18 or an estimated 673k more people).

1 Uncertainty around the pandemic may have impacted results and predisposed some groups to respond more cautiously.

Anticipated market growth is unevenly distributed

The adjacent chart illustrates estimated net gains in anticipated attendance gain by region.[1]

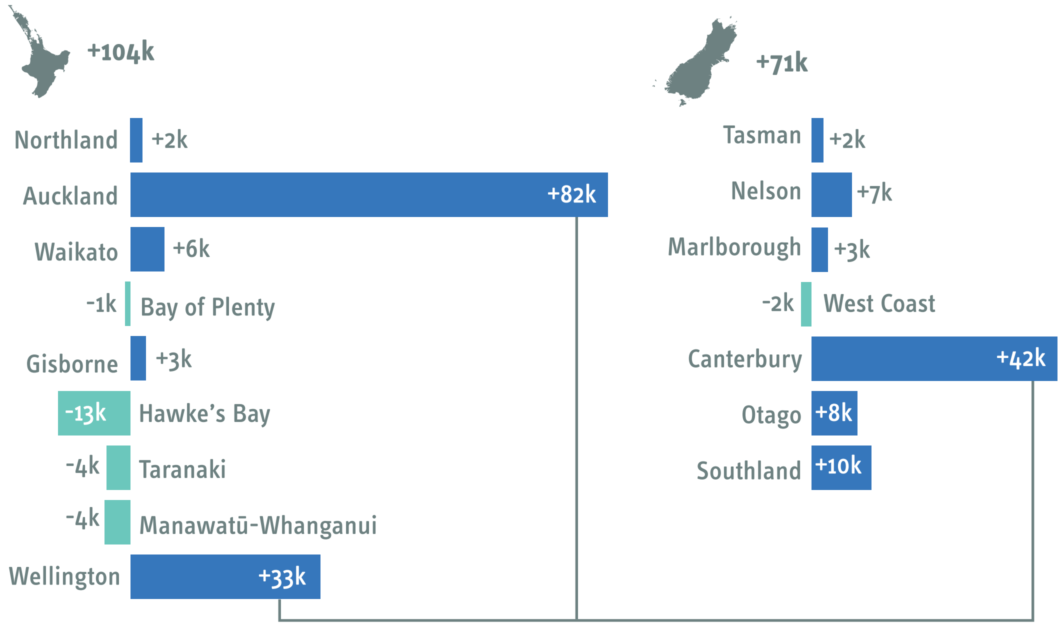
Real growth might be anticipated in the main population centres of the Auckland, Wellington and Canterbury regions; the estimated number of those who anticipate attending more in the coming 12 months is markedly higher than those who anticipate attending less. Estimated net gains in Southland, Otago, Nelson and the Waikato are more modest. Conversely, the Hawke's Bay has an estimated net loss of -13k.

Sentiment is polarised in Auckland

The Auckland region market showed some polarisation of sentiment. While a significantly larger proportion of Aucklanders anticipate attending more in the next 12 months compared to the culture market norm (27% and 23% respectively), residents of the region are also significantly more likely than average to anticipate attending less in the coming year (21%, compared to 18% overall). Results for the region may have been impacted by increased uncertainty as Auckland was subject to a number of changes in Covid-19 Alert Levels which had less of an impact for the rest of the country.

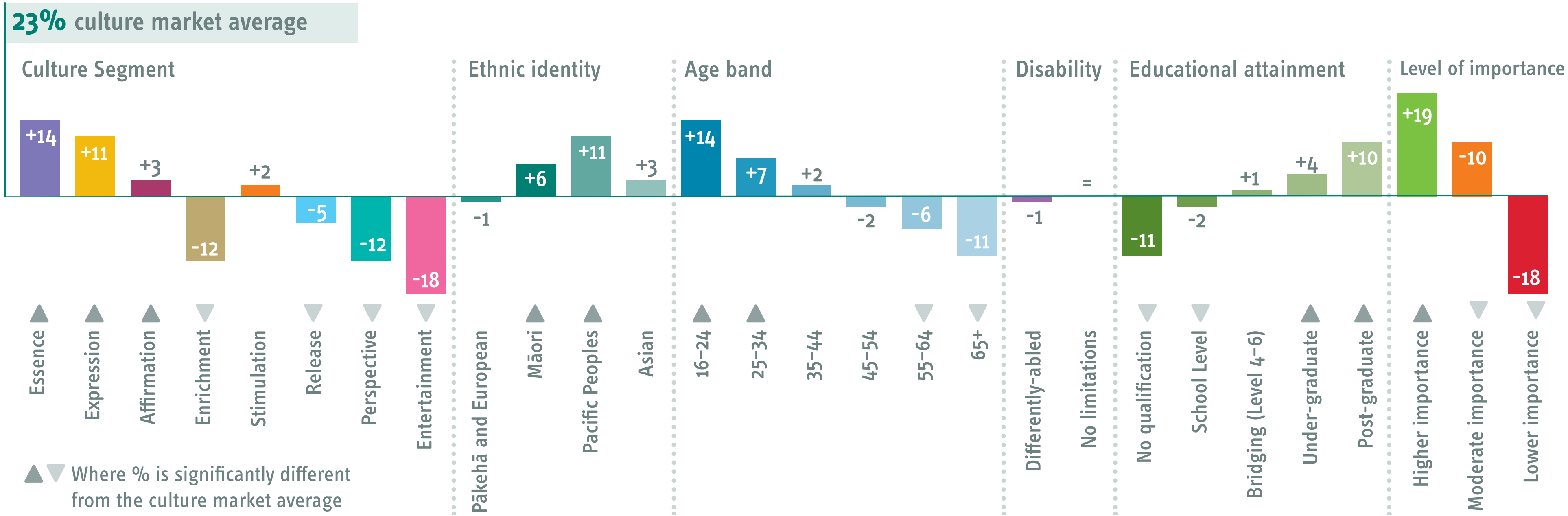
1 Estimated net gain: the estimated number of people anticipating attending less, subtracted from those anticipating attending more.

Estimated net gain by region



Estimated net gains in the three most populated areas is markedly higher than other regions.

Expectation of attending more in the next 12-months – percentage-point difference compared to culture market average



Those who value the arts anticipate attending more

General factors predicting engagement with the arts hold true for the expectation of attending more in-person in the next 12 months:

- Those who place the arts as 'higher importance', the more culturally active segments – particularly Essence and Expression, and those who finished education later are all significantly more likely than average to anticipate attending more in the coming year.

Younger adults have a higher level of anticipation

- There was a stronger sentiment amongst Māori and Pacific Peoples to attend more in-person in the coming year when compared to other ethnicity groups.
- Younger adults, aged under 35, also expect to attend more in-person.
- Those with the lived experience of a disability are as likely to anticipate attending in-person in the coming year as the market norm. However, this is masking the true picture, as those who identify as having difficulty in one of the physical activities are significantly less likely to anticipate more in-person attendance (8-percentage points below the norm).

Some correlation with household income

- Those in the lower household income bracket are significantly less likely to anticipating attending more compared to the norm and the opposite is true at the top end (see page 44 for factors preventing arts attendance for related data).

Black Grace, pre-show rehearsal, The Joyce Theater, New York City, 2019 Photograph by Christopher Duggan

Motivations and barriers to engagement

morris hargreaves mcintyre

Social 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.

Proudly Asian Theatre, PINAY, Fresh off the Page. Photography by John Rata

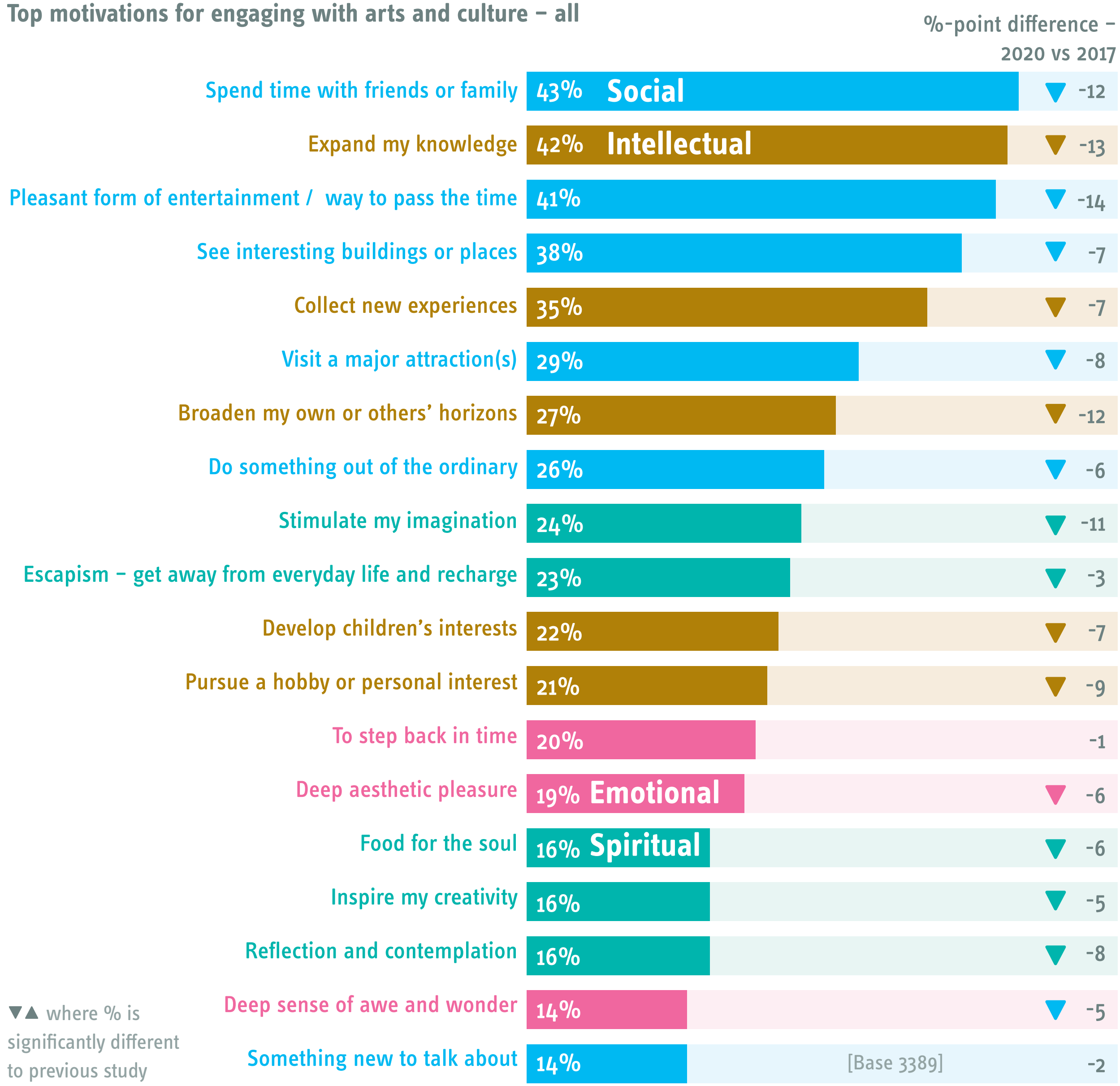
Adults in the culture market have a range of motivations for engaging with the arts and these are likely to vary for individuals, across different artforms and within different contexts. Broadly however, motivations for engagement on any given day can be clustered into four broad human needs – Social, Intellectual, Emotional and Spiritual. These drivers dictate the benefits people are seeking and ultimately, the expectations and needs they have once through the door. Understanding patterns across the market and how these might vary for different sub-groups and correlate with Culture Segments, is an important tool in effective audience development.

Entertaining, informative, social experiences

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

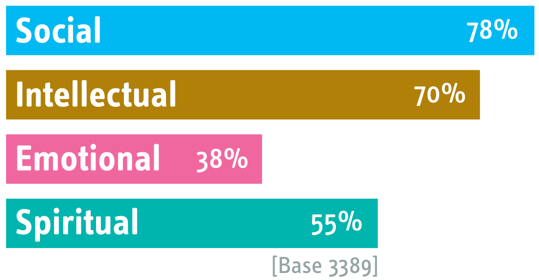


Close to 6 in 10 seek extension of Social experiences

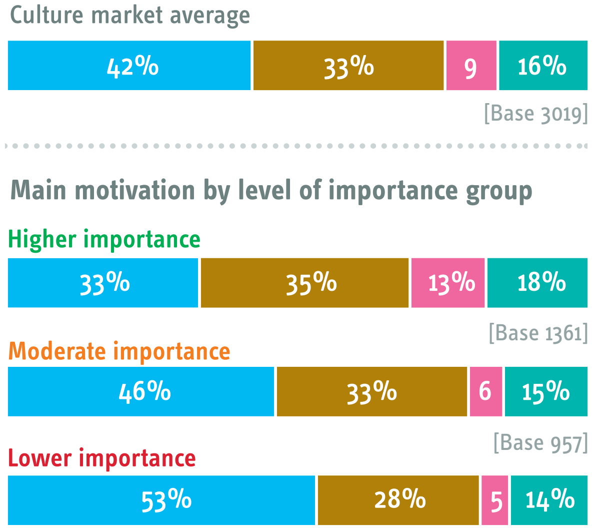
The majority of the market have multiple drivers for engaging with the arts (6.3 on average). Overall, 78% have at least one Social driver, while 70% have an Intellectual motivation and over half, Spiritual (55%). Emotional reasons for engaging are less common (38%).

We can also look at the market's **main** motivation for engaging (see adjacent chart). This reveals that while more than 4 in 10 (42%) have a main Social driver, a larger proportion are seeking an extension to this. Close to 6 in 10 are driven to fulfil a main Intellectual, Emotional or Spiritual need (58%). This rises to nearly 7 in 10 for those who see the arts as of 'higher importance'

Motivations to engage with art and culture – all



Motivations to engage with art and culture – main



Social experiences as a gateway

Many organisations have successfully engaged this strategy with Late / After Hours events aimed at reaching new, young professional audiences. These evening events are designed around a 'salon' concept and might include talks or social games that encourage visitors to explore the artistic offer, share observations with others and enjoy refreshments and live music; a social proposition, but with a deeper payoff.

Main motivation by Culture Segment

	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]

Culture market average

▲ % significantly higher than the culture market average

▼ % significantly lower than the culture market average

Different segments have distinct motivational drivers to engage

If we look at motivations and Culture Segments, we see clear patterns across the Segments which align with what we know about them.

While 'spending time with others' or 'finding a pleasant or entertaining way to pass the time', are fairly universal drivers across the different segments, beyond these more social motivations, we see some distinct differences:

- Most segments see value in the arts and culture for 'developing their own knowledge', but this 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'.
- 'Collecting new experiences' is a key feature among reasons to attend for Expression and Affirmation.
- 'Doing something out of the ordinary' is something that the Stimulation and Affirmation segments are more likely to look for from their arts experiences.
- Visiting 'interesting buildings and spaces' is a main reason to attend for Enrichment, Perspective and Entertainment.
- While less of a factor for Essence and Stimulation, 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'.

Main motivation by ethnicity group

	Culture market	European	Māori	Pacific Peoples	Asian
Social	42%	43%	41%	▼ 35%	37%
Intellectual	33%	32%	29%	35%	▲ 39%
Emotional	9%	8%	▲ 13%	▲ 15%	9%
Spiritual	16%	16%	17%	16%	15%
Base	[3019]	[2262]	[424]	[217]	[463]

Culture market average

▲ % significantly higher than the culture market average

▼ % significantly lower than the culture market average

Drivers to engage by ethnicity group

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 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’.

The ‘wrap-around’ offer

More Social experiences are often presented as the augmentation of, or offer to ‘wrap-around’ the core artform experience. The adjacent chart explores the appeal within the culture market of some possible wrap-around offers. Overall, getting the chance to see behind the scenes or understand the artistic processes generates higher interest.

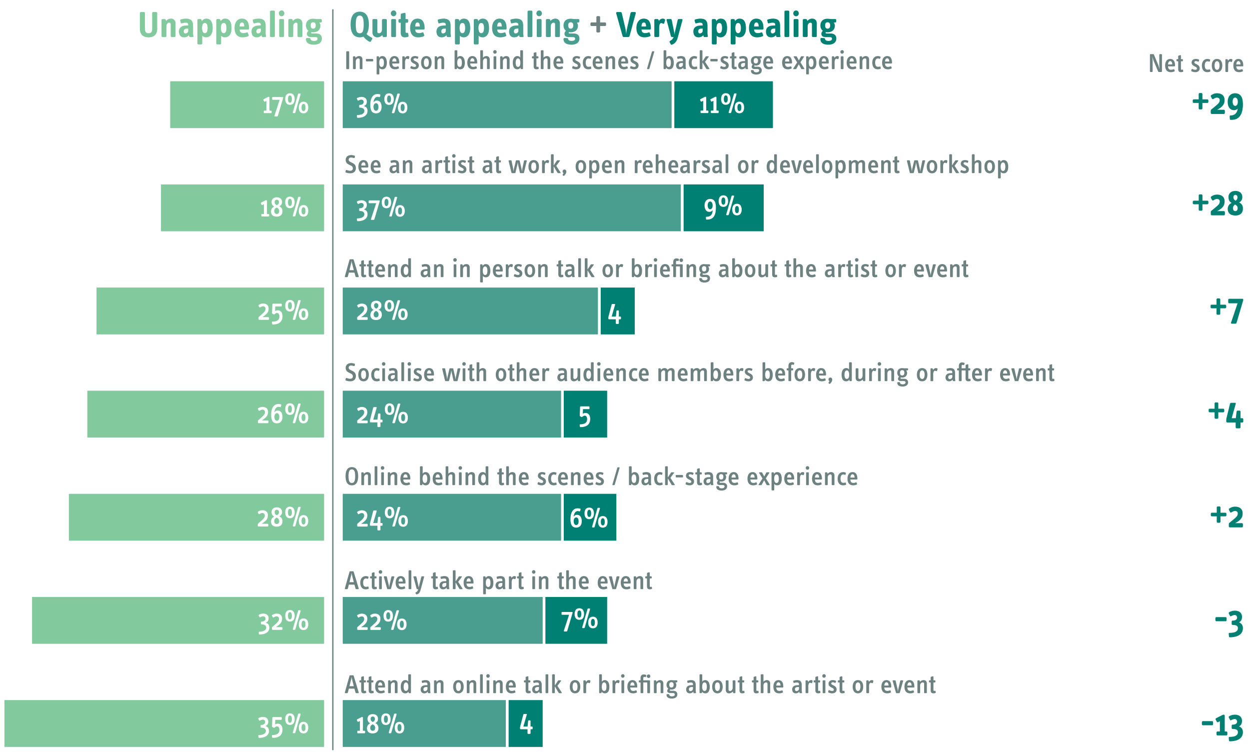
Younger audiences are more likely to want to actively take part

Audience participation has more niche appeal, and more of the market finds this unappealing than they do appealing. Actively taking part in an arts event is of higher appeal for younger adults (16-34) who are more than twice as likely to be interested in active participation (40%) than those aged 55 or over (17%).

Going behind the scenes also has stronger appeal for the younger market, appealing to 52% compared to 38% among the more senior audience.

Typically, the tested offers had significantly lower appeal to those in the older age bands.

Appeal of wrap around offers



[Base 3475]

Younger, diverse audience are more open to socialising with others

The market was broadly neutral on the appeal of socialising with other audience members either before, during or after an arts event; only slightly more found this appealing (29%) as unappealing (26%). There was a significantly higher level of appeal amongst Māori (34%), Pacific Peoples (44%), Asian (39%) and younger adults (16–24s, 41%) to this kind of offer.

Expense a universal barrier to engaging

More than one-third of the culture market reported an occasion in the past 12 months that they had **wanted to attend** the arts but had been **prevented from doing so**; equating to an estimated **1.4 million adults precluded** from engagement.

While **expense** was the most commonly cited **barrier** for all sub-groups, this was heightened for **lower incomes** and arts **provision** – or lack therefore – in **different regions** was a factor.

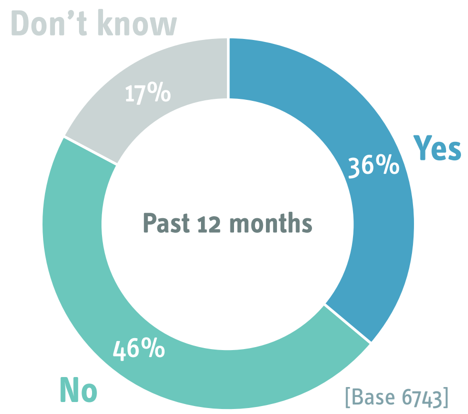
Pacific Peoples and **Asian** cohorts were significantly **more likely** to cite **transport** or **parking** as preventing arts attendance while **younger adults** can be concerned about **fitting in**.

1.4 million prevented from attending at least one event

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 and had been prevented from doing so.

Not all reasons (explored further on page 41) 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?



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

Expense most commonly cited barrier to attendance

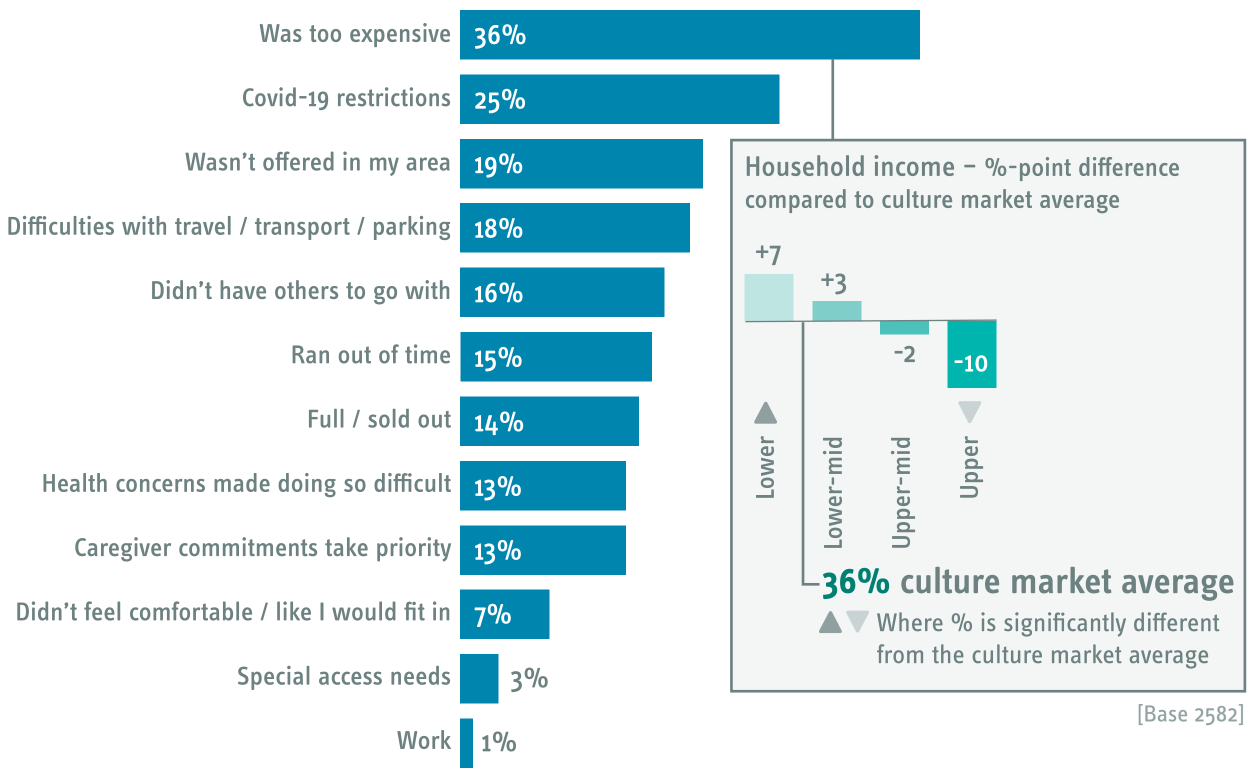
The arts and cultural sector in Aotearoa New Zealand was impacted by the global pandemic across 2020[1] and one-quarter of the market cited Covid-19 restrictions as a factor preventing attendance of at least one recent arts event. However, Covid-19 restrictions was not the most common barrier.

An estimated 522k people were prevented from engaging with at least one recent arts or cultural event because it 'was too expensive'; the most commonly cited factor (36%).

Expense was a factor for key groups

Compared to the culture market average, core groups were all equally likely to cite expense as a factor that prevented attendance. For example, of both Māori or Pacific Peoples (who had been prevented from attending) 37% cited expense as a factor and 36% for the European and Asian cohorts. Results by age band were also all broadly comparable to average.

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



However, there was correlation between household income and whether respondents were prevented from attending due to the expense. For those in the lower household income bracket expense was significantly more likely to be a barrier than average (43%); the opposite was true for those with higher household income.

Provision impacted around 1 in 5

Nearly 1 in 5 were prevented from attending because 'it wasn't on offer in their area' (19%) and there was much variation across the regions. Residents of the Waikato, Nelson, West Coast and Otago regions (who'd been prevented from attending) cited provision

1 *Audience Atlas Aotearoa 2020* survey was in field in December 2020.

What prevented the market from attending an arts, cultural or heritage organisation or event in the past 12 months – by core group

	Culture market	European	Māori	Pacific Peoples	Asian	16–24 year olds	Lived experience of disability
Was too expensive	36%	36%	37%	37%	36%	35%	40%
Covid-19 restrictions	25%	27%	▼ 20%	20%	17%	21%	▼ 12%
Wasn't on offer in my area	19%	20%	22%	19%	17%	17%	20%
Difficulties with travel / transport / parking	18%	▼ 16%	19%	▲ 27%	▲ 24%	24%	▲ 32%
Didn't have other people to go with	16%	15%	17%	▲ 22%	17%	▲ 24%	17%
Ran out of time	15%	14%	15%	15%	18%	19%	▼ 9%
Was full / sold out	14%	14%	17%	16%	13%	▲ 26%	12%
Health concerns made doing so difficult	13%	13%	14%	12%	14%	▼ 8%	▲ 38%
Parent / caregiver commitments	13%	12%	16%	16%	14%	11%	16%
Didn't feel comfortable / like I would fit in	7%	6%	7%	9%	▲ 10%	▲ 16%	▲ 11%
Special access needs made it difficult	3%	3%	2%	3%	▲ 8%	3%	▲ 16%
Base	[2582]	[1959]	[434]	[205]	[367]	[225]	[313]

Culture market average
▲ % significantly higher than the culture market average
▼ % significantly lower than the culture market average

at a significantly higher level than average. Conversely access was less likely to be a factor for those in the Auckland region.

The Pacific Peoples and Asian cohort were significantly more likely to cite transport or parking as preventing arts attendance. This may be correlated to the concentration of these populations in the Auckland and Wellington regions.

Younger adults can be concerned about fitting in

Overall, a relatively small proportion 'wouldn't feel like they would fit in' (7%), and this prevented their attendance at a specific arts event. Two groups who were significantly more likely to cite social comfort as preventing attendance were younger adults (16–24s, 16%) and the Asian cohort (10%).

Linked to this, younger adults were also significantly more likely 'not to have others to attend with' (24%) compared to the norm (16%). Not having others to go with was also a key concern for Pacific Peoples (22%).[2]

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

Overall, a relatively low proportion of the culture market cited special access needs as preventing attendance to a specific event (3%). However, this was significantly more prevalent amongst the Asian cohort (8%) and for those with the lived experience of disability (16%).

Associated factors were difficulties travelling (32%), health concerns (38%) and level of comfort as over 1 in 10 felt they wouldn't feel comfortable or like they would fit in (11%, significantly above the culture market norm 7%). Features that make arts activity, events or venues accessible for those with the lived experience of disability are explored on page 44.

2 It is worth noting that Pacific Peoples have a considerably younger age profile than the total New Zealand population, with far greater proportions in the younger age groups and smaller proportions in the older age groups. StatsNZ.

Need for access pricing models

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. Links to examples are included below.[1]

1 Battersea Arts Centre, offering universal 'Pay What You Can' (PWYC) ticketing: https://advisor.museumsandheritage.com/news/battersea-arts-centre-pay-what-you-can-model-targets-reconnection-with-post-lockdown-audiences/
and Court Theatre's access pricing initiative: https://courttheatre.org.nz/visit/concessions/

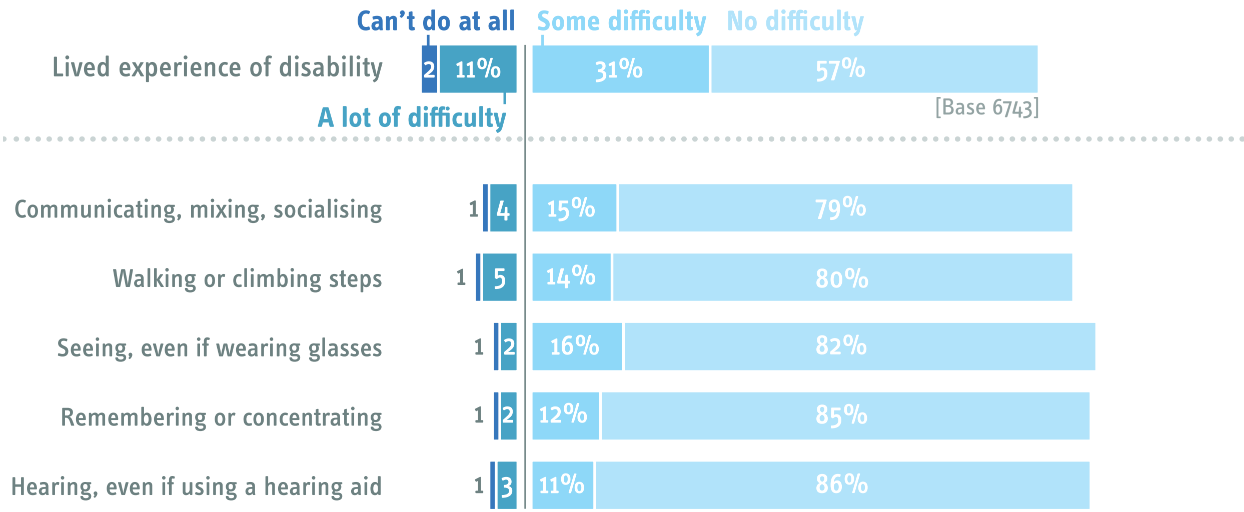
1.7 million have some arts access issues

For 13% of the culture market, **engagement** with the arts is **impacted** by their **lived experience of disability**, meaning they either have a ‘lot of difficulty’ or ‘can’t do’ one of five basic actions within an arts and cultural engagement context.

While more than 1 in 10 are conventionally classified as having a lived experience of disability, **over 4 in 10** report at least ‘some difficulty’ having **impact on their engagement** with arts and culture.

Physical barriers are **twice as common** as the more **cognitive** barriers and there is some **correlation** with **age**.

A health problem or a condition (lasting 6 months or more) impacting engagement with arts and culture



498k have the lived experience of disability

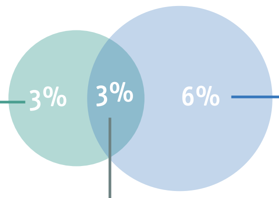
Overall in 2020, an estimated 498k people in the culture market (13%) have the lived experience of disability and identify as having ‘a lot of difficulty’ or ‘can’t do at all’ at least one of five basic activities and that this impacts their engagement with the arts.[1]

1 Threshold for having the lived experience of disability: a respondent must report having ‘a lot of difficulty’ or ‘cannot do at all’ for at least one of the basic activities.

A sizable proportion report ‘some difficulty’ engaging with the arts

While 13% are conventionally classified as having a lived experience of disability, a much larger proportion have at least ‘some difficulty’, in one or more of the five activities and this has an impact on engagement with arts and culture (43% or an estimated 1.7 million people).

6%
are impacted by a physical difficulty (seeing hearing or moving)



3%
are impacted by both

3%
are impacted by a cognitive difficulty (communicating / socialising or remembering / concentrating)

31%
have some difficulty

57%
None

[Base 6743]

Physical barriers twice as common as cognitive

Looking more closely at those classified as having a lived experience of disability, physical difficulties (6% of the culture market) are twice as common are those identifying cognitive barriers (3%). Meanwhile, 3% have at least one impairment in both categories.

Some correlation with age

The StatsNZ *Disability Survey 2013* revealed that the number of people with a lived experience of disability had lifted compared to previous studies. This finding was due, in part, to an aging population. People in older age groups are more likely to be impaired compared to younger adults and children and, as societal attitudes shift, people are more willing to report limitations.[1]

This finding is broadly mirrored within the 2020 culture market. Of those impaired in at least one physical activity (walking, seeing, hearing), 46% are aged 65+, which is significantly above the culture market norm (18%). Conversely, 18% of those impacted by a cognitive issue (remembering or concentrating and communicating, mixing with others or socialising) are younger adults (18% aged 16–24s, significantly higher than average 10%).

1 https://www.stats.govt.nz/news/one-in-four-new-zealanders-identified-as-disabled.

Specific features can make the arts more accessible

Those with a physical difficulty want information and understanding by staff

The adjacent chart explores what makes an arts activity, event or venue accessible for those with the lived experience of disability.

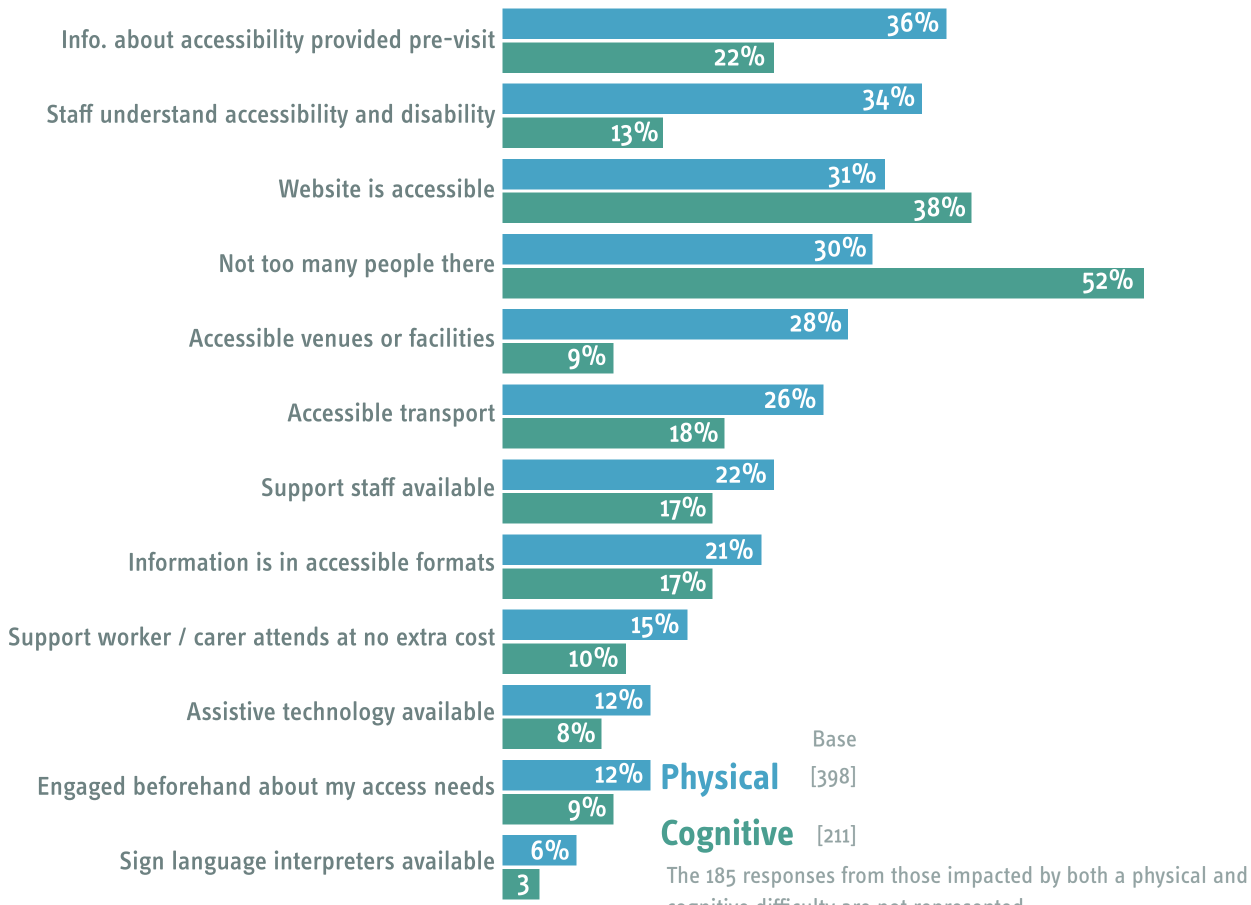
Those who identify in the physical category wish to be prepared; 36% are looking for information about accessibility before visiting. Being assured staff are appropriately trained is another key factor (34%).

Crowds have a greater impact on those with a cognitive difficulty

Activities, events or venues with too many people are of primary concern to those with difficulty in at least one of the cognitive activities. Arts engagement is impacted for over half of this group if surrounded by 'too many people' (52%).

Website accessibility is a factor for both groups but more so for the cognitive group.

Elements that make an arts activity, event or venue accessible



The 185 responses from those impacted by both a physical and cognitive difficulty are not represented.

WORD Christchurch 2020, Zadie Smith and James Hay. Photography by Johannes van Kan

Spend on arts and culture

morris hargreaves mcintyre

No increase in numbers spending

The **number** of people who **personally spent** money engaging with arts and culture in the four weeks prior has been relatively **stagnant** across the four studies; an **estimated 1.3 million** had done so, a nominal increase on 2017 and down on 2014 and 2011 results.

Spend is **unevenly distributed**, with those in **Auckland** and **Wellington** significantly more likely to have spent on the arts. At the same time, those in the **Waikato**, **Otago**, **Southland** and the **West Coast** were significantly less likely to have done so.

There is a relatively similar number of people **spending** but they are spending **less** and this is being **spread** more **thinly** across a larger number of artforms.

Numbers spending in a given month has plateaued

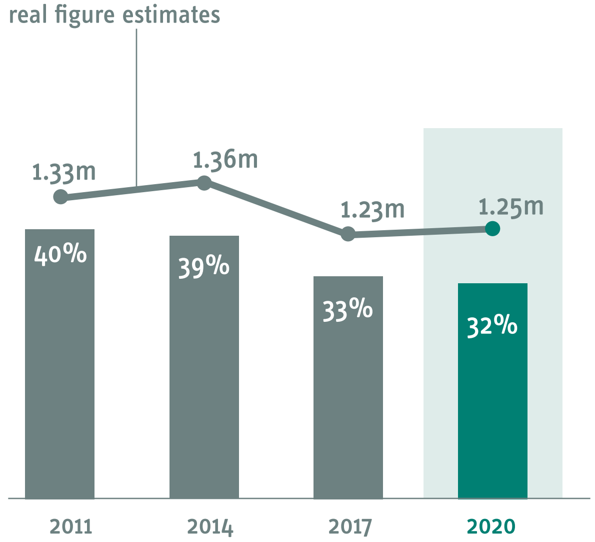
An estimated 1.3 million people in the culture market had spent on engaging, in-person, with arts and culture in a four week period (32%); a nominal 1% increase compared to three years ago (an estimated 1.23 million people).

The nominal growth masks the fact that, despite culture market growth, the numbers of people spending has not increased in nine years (an estimated 1.4 million in six years ago and an estimated 1.3 million in 2011). Also, broadly people are engaging with a greater number of artforms (explored on page 96), but spend frequency hasn't changed much.

Auckland and Wellington markets most likely to spend

The Auckland and Wellington markets are significantly more likely to spend in a given month than the national average. In contrast, the Waikato, the West Coast and Southland regional markets are significantly less likely to do so.

Proportion of the culture maket who have spent on arts and culture in the past 4-weeks



Spend of spenders – in-person

1.3 million

estimated number of people in the culture market who have personally spent money to engage with arts and culture in-person in a given month

+1%

estimated increase in number of people spending on arts and culture in a given month between 2017 and 2020

$2.4b

estimated total annual spend in 2020 on arts and culture by the culture market

-6%

decrease in estimated total spend by the market in 2020 compared to 2017[1]

Spend on arts and culture activities

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]

Spenders are spending less across more artforms

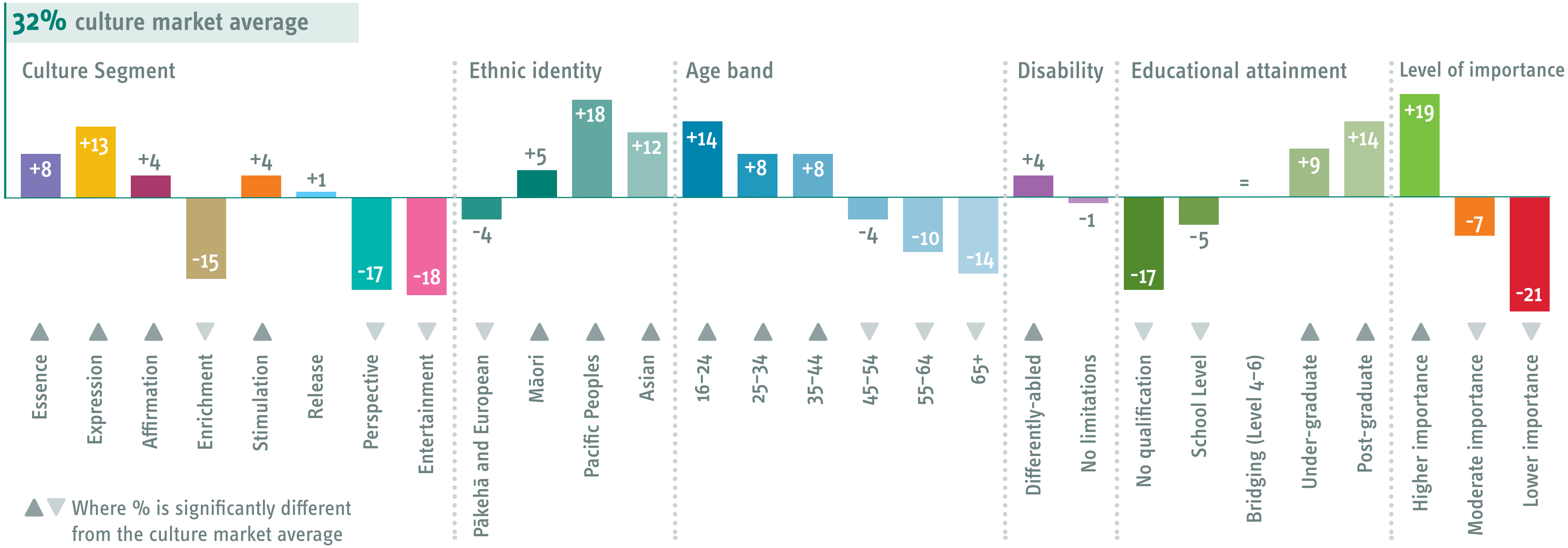
The numbers of people spending has plateaued and those who do spend are spending less on the arts.

There was a step down in the dollar value spenders reported spending on in-person engagement with arts and culture in a four week period ($150 on average). Therefore, there is a relatively similar number of people in the market spending compared to three years ago, but they are spending less and spreading it across a wider range of artforms (explored on page 96).

The lower average amount spent in 2020 means that, after adjusting for inflation, total spend in is 6% down on three years ago.

1 Adjusted for inflation

Had personally spent on arts and culture in the past four weeks – percentage-point difference compared to culture market average



Combination of factors impact paid in-person engagement

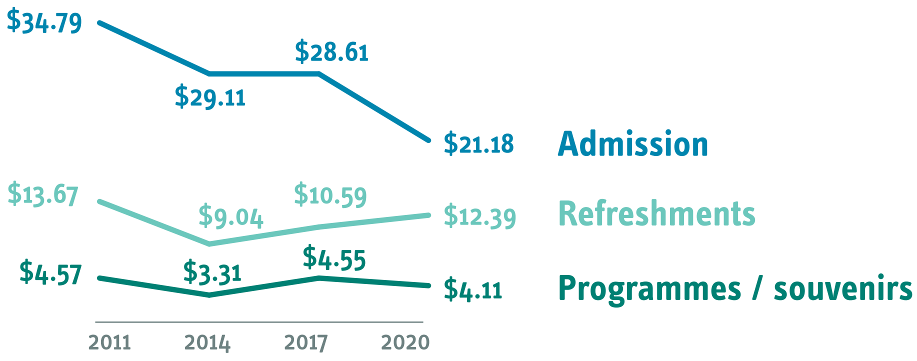
Looking at the profile of those who personally spent on engaging with arts and culture in-person the four weeks prior highlights some expected patterns:

- Those who place 'higher importance' on the arts or finished education later are more likely to have paid to attend in-person.
- Expression was the segment most likely to have paid, followed by Essence, Affirmation and Stimulation – representing the four most culturally active segments.

Diverse, younger members of the market are most likely to have paid

- Those identifying as Māori, Pacific Peoples and Asian are more likely than average to have spent in the past month.
- Younger adults had a higher propensity for paid in-person engagement compared to the norm and older adults.
- As were those with the lived experience of disability.

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



Per capita spend remains below 2011 levels

On average, the per capita spend on arts and culture in a four week period is $37.68, 14% lower than 2017 ($43.75) and lower still compared to nine years ago ($53.03).

In 2020 average spend on admissions and tickets ($21) dipped compared to previous studies. Secondary spend on refreshments recovered modestly to be up on 2017 and 2014 but has not recovered to 2011 levels.

Those in Auckland and Wellington regions most likely to have spent

Compared to the culture market average, a significantly larger proportion of Auckland and Wellington region residents had spent on in-person attendance at arts and cultural activities within a four week period. However, on average, residents of Taranaki and Nelson were bigger spenders.

Residents of the Waikato, Otago, Southland and the West Coast were significantly less likely to have spent in the past month, and Southland and the West Coast had the lowest per capita dollar value of spend.

▲ % significantly higher than average

▼ % significantly lower than average

Culture market per capita spend by region – ranked highest to lowest

	% who spent	Average per capita spend
Culture market average	32%	$38
Taranaki	26%	$51
Nelson	31%	$51
Wellington	▲ 39%	$49
Auckland	▲ 36%	$46
Hawke's Bay	28%	$44
Marlborough	22%	$37
Canterbury	30%	$31
Bay of Plenty	28%	$31
Northland	28%	$31
Gisborne	23%	$29
Waikato	▼ 26%	$29
Otago	▼ 28%	$25
Manawatū-Whanganui	27%	$25
Tasman	29%	$19
Southland	▼ 20%	$14
West Coast	▼ 19%	$14

*Due to sample size results should be seen as indicative only

Monetisation of online content

There is a willingness to pay

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.

Fewer than 1 in 10 have paid to engage online

An estimated 371k people in the culture market (9%) reported having paid or donated money to access arts and cultural content online in the past 12 months.[1]

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

1 The proportion of the market who had paid is significantly lower than results for a recent US based Audience Atlas study in the (39% had paid to engage with digital content from a cultural institution in the past 12 months).

One-quarter of the dollar amount spent on arts engagement is spent online

The dollar value **spenders** reported spending on online arts engagement in a four week period is $61.60, revealing an average per capita spend of $6.52.[2]

Taking into account in-person admissions ($21.18), the market is spending on average $27.70 in a four week period to engage with arts and culture in-person and online. In 2020, digital engagement represented 24% of the market's paid engagement with the arts.

Spend of spenders – online

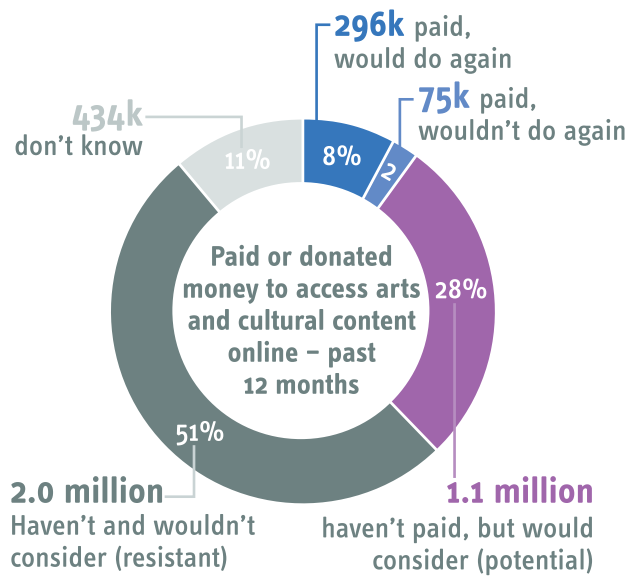
371k

estimated number of people in the culture market who spent money to engage with arts and culture online in a given month

$61.60

Spent on online events in previous four weeks

2 Online spend is not limited to local content and could be any engagement type of engagement with arts and culture content accessible online.



[Base 6743]

Expectations when accessing arts and cultural content online

I'd expect to...	Norm	Essence	Expression	Affirmation	Enrichment	Stimulation	Release	Perspective	Entertainment
Pay more than I would in-person	2%	2%	▲ 4%	2%	▼ <1%	3%	3%	▼ <1%	▼ <1%
Pay about the same as I would in-person	9%	10%	▲ 14%	10%	▼ 4%	9%	8%	▼ 4%	▼ 3%
Pay less than I would in-person	33%	▲ 44%	34%	▲ 39%	▼ 28%	▲ 37%	31%	▼ 23%	▼ 20%
Make a voluntary donation, koha or pay what you want	9%	9%	11%	9%	9%	12%	10%	8%	7%
Access it for free	21%	22%	20%	20%	21%	20%	23%	25%	19%
I'd never access arts and cultural content online	26%	▼ 14%	▼ 18%	▼ 20%	▲ 37%	▼ 19%	25%	▲ 41%	▲ 50%
Base	[6743]	[778]	[1324]	[1240]	[687]	[819]	[816]	[561]	[518]

Culture market average

▲ % significantly higher than the culture market average

▼ % significantly lower than the culture market average

Most expect to pay less than in-person

There is a general expectation that organisations would monitise some online cultural experiences. Over half the market expect to be asked to at least make a voluntary donation in order to access the arts online (53%).

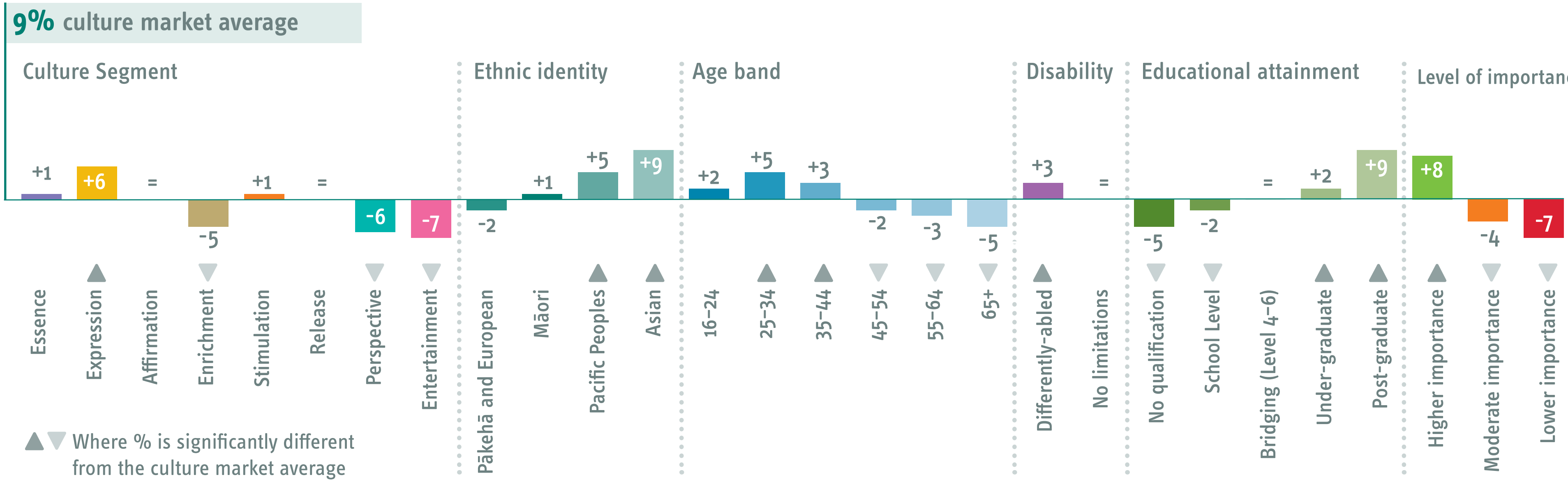
It is most common for the market to expect to pay less than for in-person experiences (33%). The more culturally active segments of Essence (44%), Affirmation (39%) and Stimulation (37%) are all significantly more likely to expect to pay less. Meanwhile, Expression is the segment most likely to expect to pay at least the same, if not more, for online arts access.

Expectations that unpaid access should be available remains

Around 1 in 5 expect cultural experiences would be accessed for free online. This sentiment is broadly consistent across the eight segments (above) and other key groups.

While a larger number of people in the market expect there to be some monitisation of cultural content online (an estimated 2.1 million) than are resistant or expect free access (an estimated 1.8 million), this does not guarantee a market motivated to pay.

Paid or donated to engage with arts and culture online in past 12-months – percentage-point difference compared to culture market average



Community-minded Expression most likely to have paid to access content online

- Expression have a strong sense of civic responsibility with a natural in-built predisposition to support non-profit organisations, so, it is unsurprising that they are the segment most likely to have paid for cultural content.
- Younger and diverse audiences are more likely to have paid. There is possibly a link as the Pacific Peoples and Asian groups are a younger demographic and are significantly more likely to be Expression (explored on page 16).

Don't forget families in digital planning

- Those with children in the household were also significantly more likely to have paid to accessed cultural content online (2-percentage point above the norm).

Hamilton Arts Festival 2020. Photography by Mark Hamilton

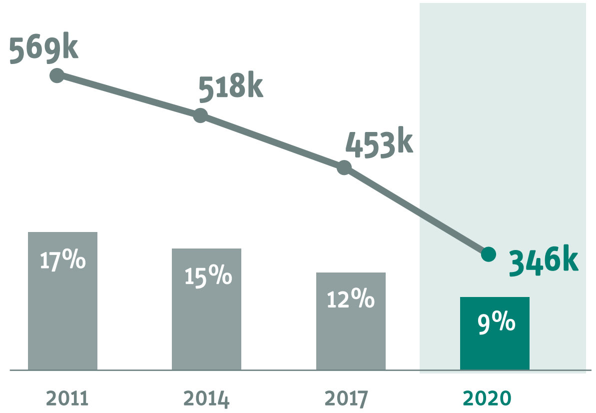
Supporting the arts

Rates of membership continue to dip

The **number of people** in the culture market holding an **active membership** or subscription to an arts, cultural or heritage organisation has **fallen steadily,** effectively **halving** in **nine years**. The **decline** was observed **across** all **regions**, including the main centres. Residents of both **Auckland** and **Wellington** are significantly less likely to be active members compared to three years ago.

Positively, there remains the **appetite** to **support** arts organisations through membership or subscriptions. The challenge for the sector is to **break the chains** of **traditional support models** and align offers to meet **changing needs** of the market.

Active member, subscriber or friend of an arts, cultural or heritage organisation



Rates of joining at a nine-year low

The number of adults in the culture market with at least one active membership or subscription to an arts, cultural or heritage organisation is at a nine-year low.

While uncertainty around the global pandemic may have impacted rates of joining, levels of membership or subscriptions had been on a steady downward trajectory. In 2011, 17% of the culture market held an active membership or subscription, dropping to 9% in 2020 or an estimated 39% fewer people than nine years.

-24%

estimated decrease in people in the culture market with at least one current membership / subscription between 2017 and 2020

2.2

average number of membership / subscriptions held by 'active' members

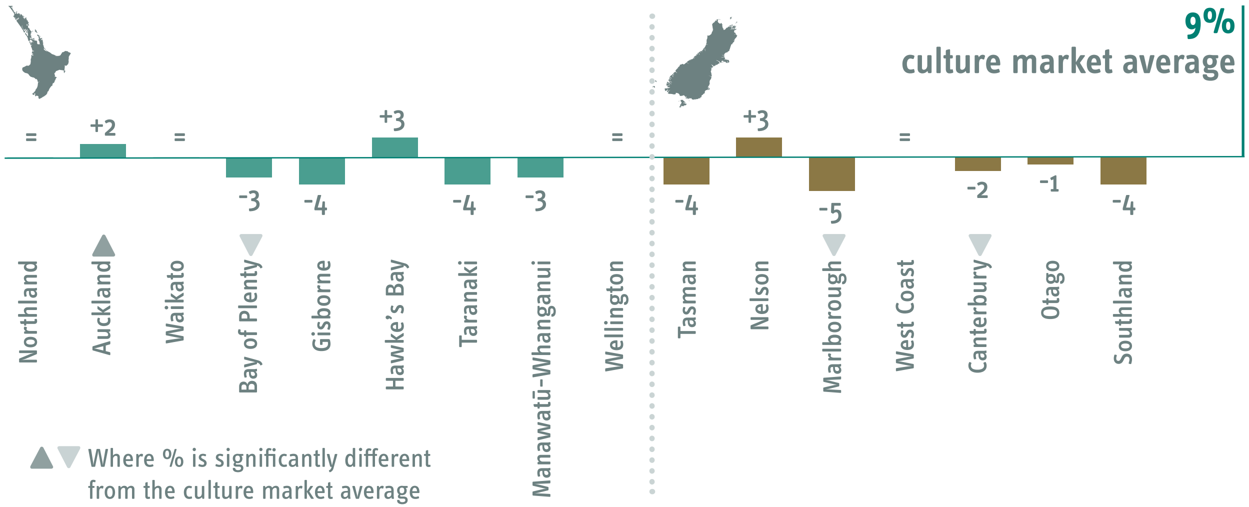
0.2

average number of membership / subscriptions held per capita

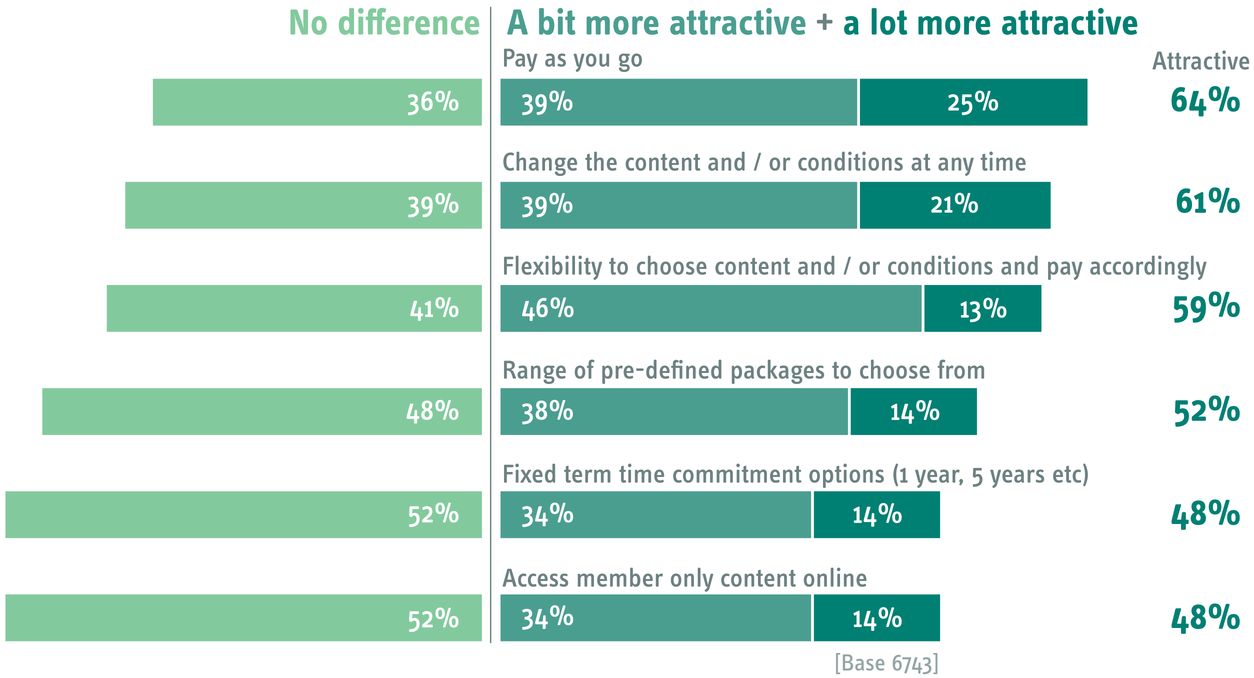
Levels of membership dip in Auckland and Wellington

Compared to six years ago, there has been a significant drop in levels of membership or subscription in two of the most populous regions, Auckland (11% are active members, compared to 16% in 2017) and Wellington (9%, compared to 14% in 2017). This was not the case three years ago when levels of joining were stable in both regions despite an overall decrease in membership rates nationally.

Active members – %-point difference compared to culture market average



Attractiveness of broad types of membership / subscriptions



Alternative models to reignite the market

As explored on page 96, there is a trend towards engaging with a more eclectic mix of artforms. Younger people, particularly, are more likely to want to mix up experiences,[1] which could be one factor impacting falling levels of joining. If the market has a greater desire to spread engagement rather than being locked into a single organisation or venue – loyalty can't be expected.

The falling rates of joining highlight that traditional membership or subscription models haven't kept pace with changing expectations. For the sector to rebuild, this type of support will require fresh, flexible models that align with market expectations.

Spreading payments and flexibility are attractive options

Of the six broad membership types tested, a 'pay as you go' model was the most attractive (64% of the market consider this option 'more attractive'). Flexibility to change content and conditions at any time (61%) or choose content and pay accordingly (59%) also held appeal.

The flexibility of a pay as you go model holds appeal for the market. Not a new concept, pay as you go subscriptions have been on the rise since the start of the e-commerce revolution, which has normalised monthly subscriptions for software, games and streaming content. The appeal of these options is convenience, tailored, personalised experience and maybe a good deal.

Member only online content was among the least attractive option

Overall, just under half the market would consider membership or subscriptions more attractive with access to member-only online content (48%); a larger proportion (52%) were unmoved. However, this has a higher level of appeal for current members (62%) and implies member-only online content will enhance value to existing members or subscribers.

1 Younger adults are significantly more likely to be in the current market for a wider variety of artforms compared to the norm and older groups.

Memberships still holds potential for the sector

While membership rates are falling, this is not because the market is resistant to this form of support. The majority of active and lapsed members are open to supporting organisations in this way in the future. In addition, one-quarter of those who have never been a member or subscriber of an arts, cultural or heritage organisation remain open to this form of support.

70% / an estimated 244k

are current member / subscribers and open to supporting in this way again

71% / an estimated 371k

are a lapsed member / subscriber and open to supporting in this way again

25% / an estimated 782k

have never-been-member / subscribers and are open to becoming one in the future

Flexibility across a sector-wide model

The sector is competing in a fast-moving world of opportunity and distraction. As a result, there is an increasing trend for people to want to try more things and to expect more choice and flexibility.

Subscription models outside the arts sector are moving to higher levels of flexibility. People are comfortable committing and paying to access 'a lot of stuff' rather than purchase one at a time – to switch purchasing a song on iTunes to a Spotify subscription, or to subscribe to a viewing channel that gives choice and variety but doesn't lock in viewing times. The challenge for the sector is to find the arts equivalent of this flexibility and choice.

Leading cultural thinker, Diane Ragsdale, has proposed the need for a collaborative sector-wide subscription model. The proposed model would allow subscribers access to a range of arts engagement – comedy, dance, the orchestra, theatre, an exhibition – all offered as part of one subscription and facilitated through a concierge service. Not only does this align with the markets evolving understanding of subscriptions, but it supports strength across the sector by promoting the discovery of new artforms and experiences.

Mission vs transactional-motivated memberships

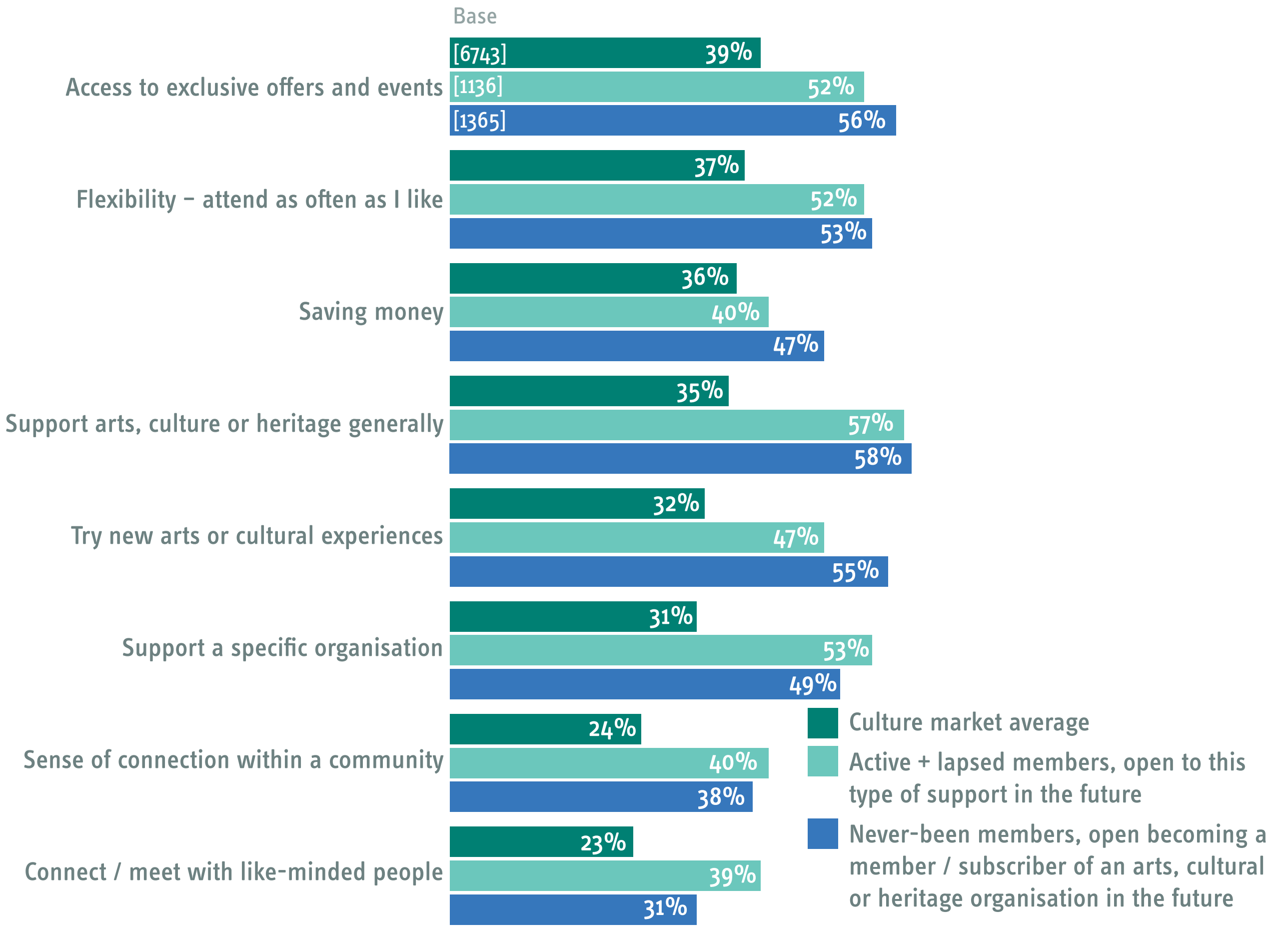
Membership is seen as a form of support for the sector

Active and lapsed members or subscribers, who are open to continuing this type of support, have a larger understanding of the benefits of membership. Nearly 6 in 10 see membership or subscriptions as benefitting the sector generally (57%), and around half see the benefit of supporting a specific organisation (53%). Similarly, those who have never been members, but are open to doing so, also view this as a form of general support (58%).

Transactional benefits are of a lower priority

The benefits where active + lapsed members and those never-been-members, but open to this support, differ most, are 'saving money' and 'exclusive offers'. While these transactional benefits are important to both groups (40% and 47% for saving money, respectively), these sit below general support, flexibility, exclusive offers and gaining new experiences.

Top attractive features or benefits of membership / subscriptions to arts, cultural or heritage organisation(s)



Balance of transaction and emotion for memberships

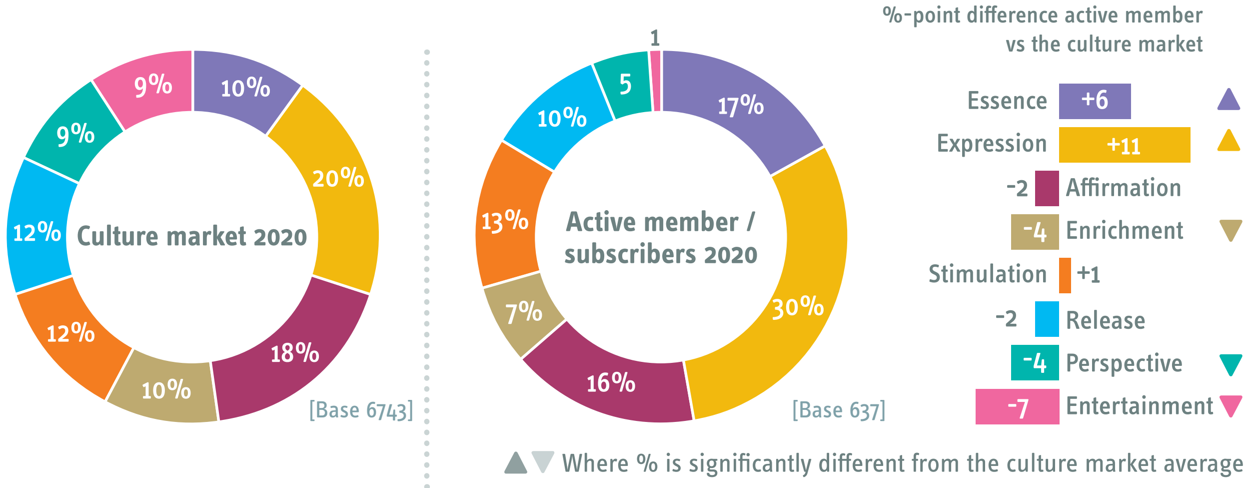
Transactional benefits of saving money and exclusive offers may hook people into membership or subscriptions; however, ensuring people know how their contribution supports the organisation, along with building a sense of belonging and community, are important components to ensure members feel valued.

Essence and Expression are core members or subscribers

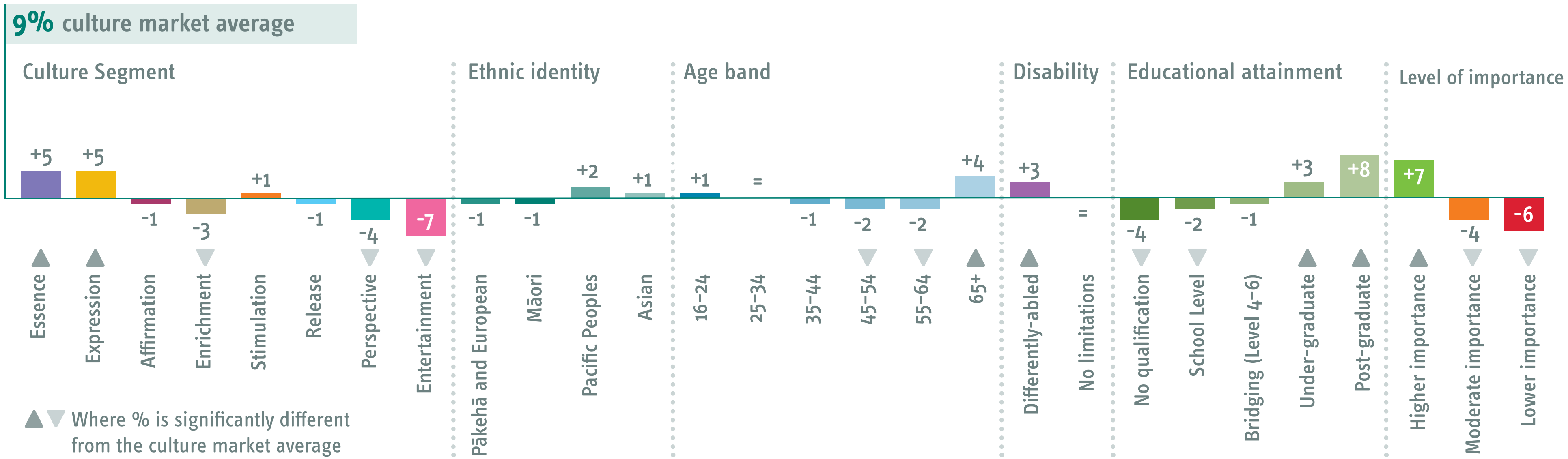
Knowing that those open to membership see this as supporting the sector, it's not surprising that Essence and Expression represent nearly half of all members or subscribers (47%).

As explored through this report, Essence and Expression engage more frequently and with a broader range of artforms than other segments and place a higher value on arts and culture in their lives.

Culture Segment profile – active member / subscribers



Active member of at least one arts, cultural or heritage organisation – %-point difference compared to culture market average



Active members are typically older...

There is little to distinguish active member / subscribers when it comes to demographics, however:

- Active members or subscribers are typically more mature, with those aged 65+ significantly more likely than average to be active members of at least one arts, cultural or heritage organisation.

... have completed higher education

- Ethnicity and household income is not an indicator of membership, but educational attainment is. However, if we triangulate ethnicity, household income and educational attainment, it is revealed that European degree-holders are significantly more likely to be an active member / subscriber than average, no matter what household income band they are in.
- Those with the lived experience of disability are significantly more likely to be an active member (3-percentage point above the market norm).

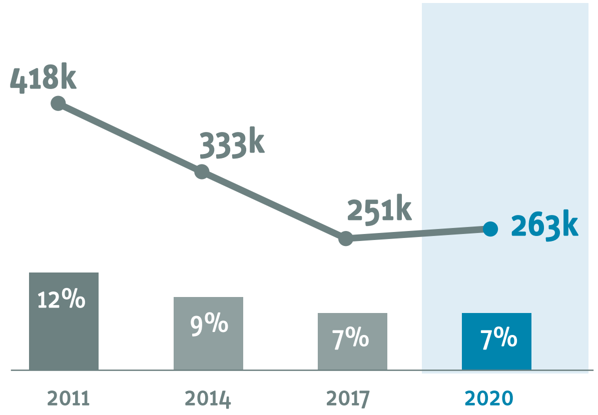
Numbers volunteering has stabilised

After six years of steady decline, the **number** of **recent volunteers lifted**. In 2020, an estimated **263k people** had **volunteered** for an arts, cultural or heritage organisation in the **past 12 months**; **5% more** than in 2017.

There is **opportunity** to develop volunteering, with an estimated **1.4 million people** in the culture market who would consider it. The potential to the sector is non-trivial, equating to an **estimated 7k full-time equivalent positions**.

Consider the **expectations** of volunteers and other patterns of volunteering to **activate** this market. **Flexibility** and **micro-volunteering options** have appeal, and the market is most keen to offer a **professional service**.

Volunteered at an arts, cultural or heritage organisation in past 12-months (recent)



263k had recently gifted time to an arts organisation

The arts sector has always had a reliance on volunteering, JB Were's most recent New Zealand Philanthropic study estimates volunteering represents around half of all staffing in the arts, culture and heritage sector.[1] However, a key finding from the study showed that volunteering is undervalued, and levels have been falling.

Looking at the culture market, after six years of steady decline in the number of people gifting their time to the arts, this has stabilised in 2020. In 2020, 7% of people in the culture market had recently volunteered (within the past 12 months), equating to an estimated 263k.

While the proportion of recent volunteers is unchanged on three years ago (7% in both studies), due to population changes, the number of recent volunteers within the sector grew by an estimated 12k compared to 2017 (when an estimated 251k were a recent volunteer).

+5%

Estimated increase in people in the culture market who've volunteered in support of arts, culture or heritage between 2017 and 2020

-37%

Estimated decrease in people in the culture market who've volunteered in support of arts, culture or heritage between 2011 and 2020

1 https://www.jbwere.co.nz/latest-insights/philanthropy/the-new-zealand-support-report-february-2020/

Expression most likely to volunteer

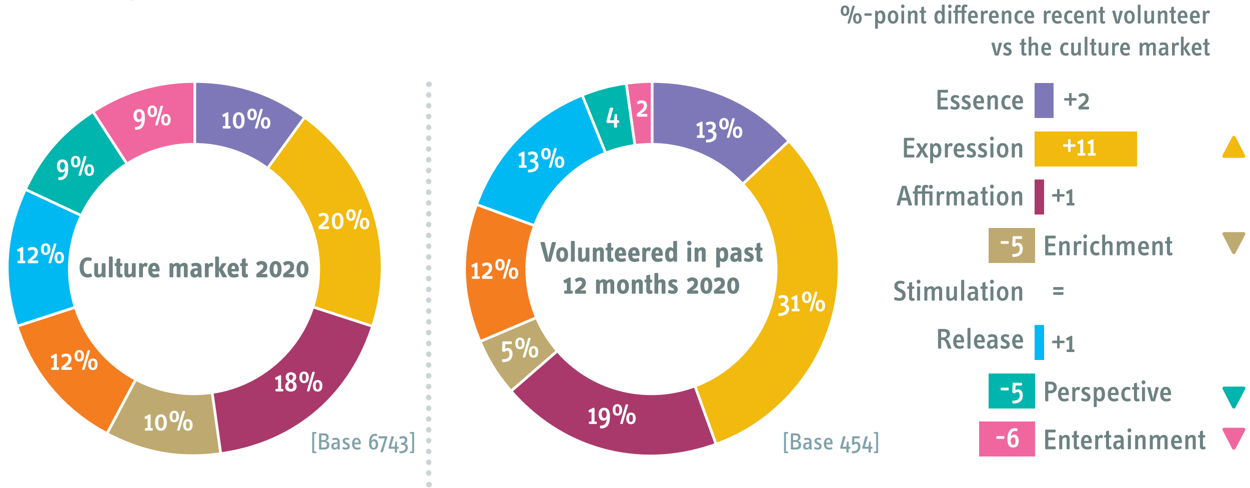
Across all four Audience Atlas Aotearoa studies, those in the Expression segment are consistently more likely than average to have recently volunteered in support of the arts. While Essence remains slightly over-represented amongst recent volunteers, but not significantly so, there has been a decline in volunteering rates amongst this segment across the past nine years.

Broaden the volunteering workforce by reactivating Essence and enticing Affirmation

In previous studies, the proportion of Essence who had recently volunteered has been markedly larger (26% of those in the Essence segment had recently volunteered nine years ago, dropping to 8% in 2020).

The consistency of Expression amongst volunteers gives a strong indication of where organisations are best to direct volunteer recruitment efforts. However, a strategy to 'reactivate' Essence would also help to rebuild this resource.

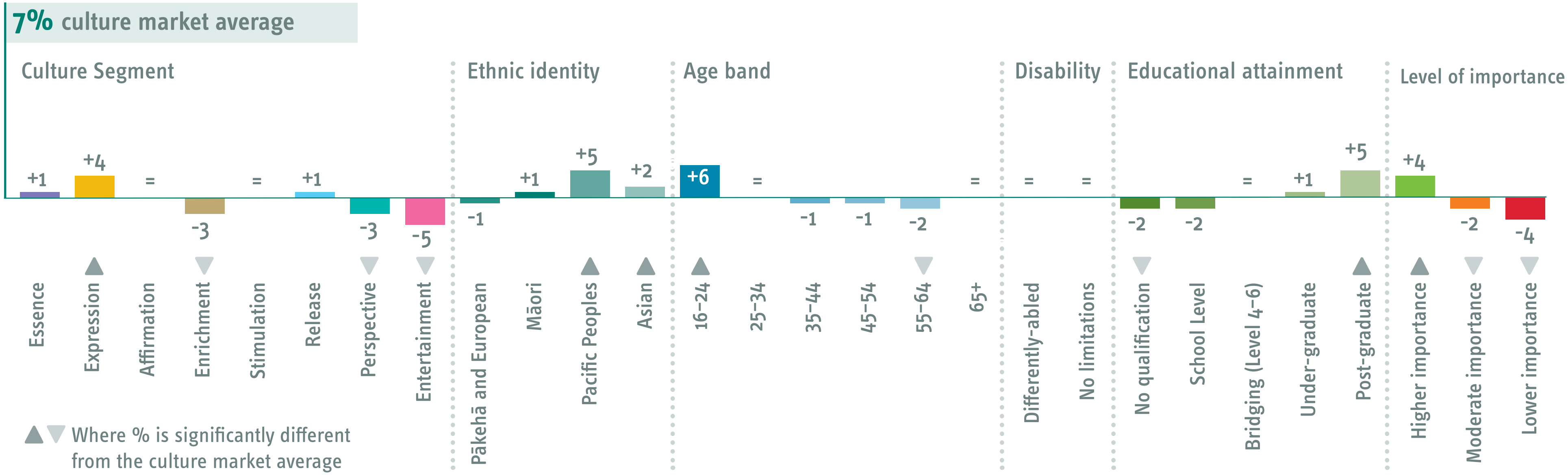
Culture Segment profile



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

Calls to action appealing to Affirmation may also be prudent. This segment is as likely as average to have volunteered recently (in the past 12 months) and there is potential here – 44% have never volunteered in the arts, but express interest in doing so.

Volunteered at an arts, culture or heritage organisation in past 12 months (recent) – %-point difference compared to culture market average



Diversity and inclusion amongst the volunteer workforce

The most recent Volunteer New Zealand 2020 report revealed the volunteering workforce does not reflect the diversity of Aotearoa New Zealand.[1] Results for the culture market suggest this may be less of an issue for the arts.

Recent volunteers place 'higher importance' on the arts

- Expression is the segment most likely to have volunteered in the past 12 months.
- Pacific Peoples and Asian are more likely to be Expression so it follows these groups are also more likely to recently volunteered than average.
- Younger adults are over-represented amongst recent arts, culture and heritage volunteers.
- Triangulating ethnicity, household income and educational attainment reveals that those in a lower income bracket and who finished education later – irrespective of broad ethnic identity – are significantly more likely to have recently volunteered. This may be related to lifestyle factors. For example, those who work part-time, those who are retired or those seeking to retrain after a break from the workforce.

1 https://www.volunteeringnz.org.nz/state-of-volunteering-2020/ Broadly, diversity included age, ethnic identity, sexual orientation and gender identity.

Number of people open to volunteering

1.4 million

number of people in the culture market who have ever volunteered or are open to doing so

Estimated capacity in the market

8.3 hours / month

ideal number of hours volunteers are open to gifting to an arts, cultural or heritage organisation

Potential value to the sector

1.5 million

potential 8 hour working days on offer

7k

full-time equivalent positions

$244 million

dollar value of 7k full-time equivalent volunteer positions[1]

1 Based on a median income level of $35.8k

Volunteering is a two-way street, and volunteers are not a cost-free resource

For a sector that traditionally relies on volunteers, attracting and retaining them is critical. Retention often relies on how volunteers feel about their experience. So, while organisations may view volunteering as a 'free workforce', there is time, money and emotional effort needed to manage this resource.[1]

Careful management is needed to retain a workforce that doesn't necessarily have to show up or do what it's told. Reasons people volunteer are often related to a passion for, or commitment to, a particular organisation, which has been identified as the key difference between volunteers and paid staff.[2]

Volunteers often have a stronger passion for the places they volunteer and are therefore more likely to speak out if they think something is impacting an organisation negatively; they are more vocal and emotional than paid staff.[3]

Consider what people's expectations are when they gift time to an organisation. Volunteers don't want to be asked to do something they don't want to do; feel overburdened, which is too much like a paid job; or feel under-utilised.

Managers of volunteers need strong emotional intelligence. Retention of this resource requires a healthy culture that includes regular acknowledgement.

Creative New Zealand offer resources to support arts and cultural organisations to manage volunteers.[4]

1 www2.le.ac.uk/departments/business/images/research/work-and-employment/a-report-of-the-findings-from-the-national-trust-project
2 *ibid*
3 *ibid*
4 www.creativenz.govt.nz/development-and-resources/volunteer-management-toolkit

Potential volunteering worth an estimated $244 million to the sector

The available volunteering resource is invaluable and there is potential for development and rebuilding. Those who volunteered over a year ago or who never have, but are open to doing so, are open to offering an average of 8 hours a month, worth an estimated $244 million to the sector, or 7k full-time equivalent positions.

This, of course, doesn't necessarily mean there are 7k adults ready to volunteer for 40hr weeks for your organisation, but instead provides a real sense of the potential value of tapping into this resource.

Activate skilled volunteering

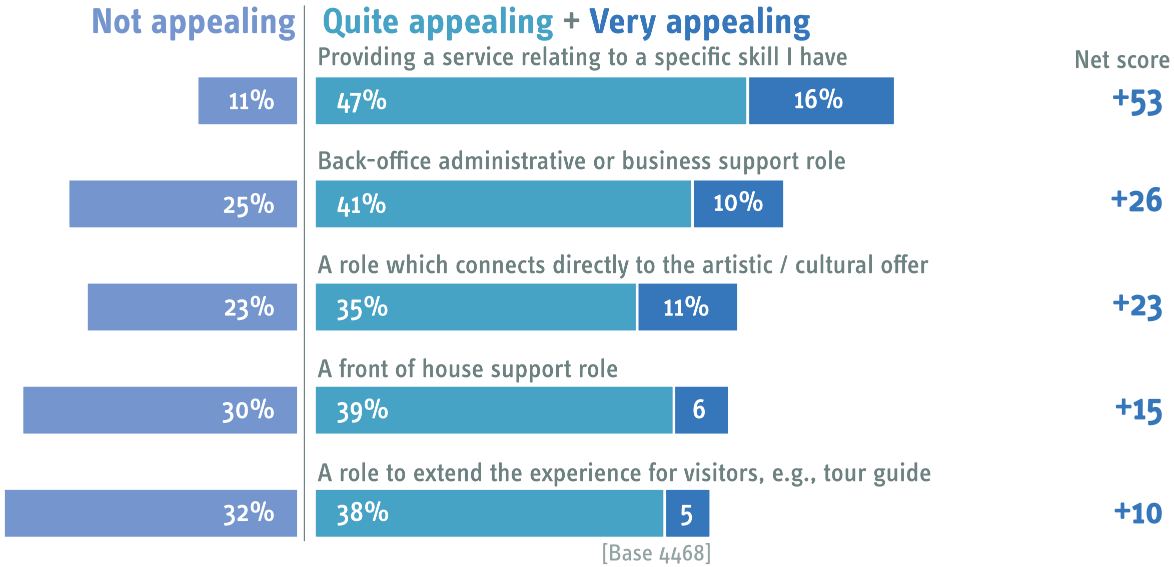
To attract and retain volunteers, it is interesting to explore what type of tasks are most appealing. Looking at those who have ever volunteered or would consider doing so, 'providing a service related to a specific professional skill' holds the most appeal (64%). Aligning and utilising a person's vocational skills through volunteering roles is an area that is likely to satisfy both party's needs.

It is worth noting that a larger proportion preferred to give time relating to a personal skill than work directly with an organisation's artistic offer (46%).

Front of house tasks hold lower appeal

Amongst those open to volunteering, all five broad types hold some appeal. However, front of house roles have a lower appeal compared to others. For example, 45% would find a front of house support role appealing and 43% a visitor experience role, compared to 51% for a back-office role.

Appeal of broad types of volunteering – open to volunteering only



Other patterns of volunteering

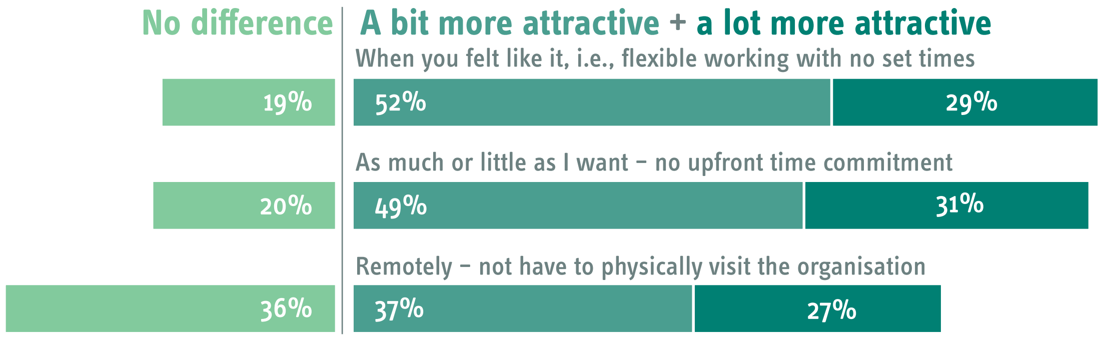
Flexibility and micro-volunteering options have appeal to those open to this form of support. They may help unlock the interest amongst groups who traditionally might be excluded due to work, social, educational or caring commitments.

There is a preference for episodic, project-based volunteering. Amongst those in the market who are predisposed to volunteer, options with no up-front time commitments and flexibility hold appeal; attractive for around 8 in 10.

Micro volunteering options – choosing how and when you volunteer – can be a helpful way to engage volunteers for flexible 'micro' tasks. Virtual volunteering is a prime example and holds appeal to 64% of those open to this form of giving. Online tasks requiring access to the internet are an ideal form of virtual volunteering.

Keep in mind motivations for volunteering and the segments most likely to be in the volunteer workforce. Expression, the core volunteering segment, enjoy activities that help them connect with and share experiences with others; therefore, virtual volunteering won't fulfil this need.

Attractiveness of broad types of volunteering – open to volunteering only



[Base 4468]

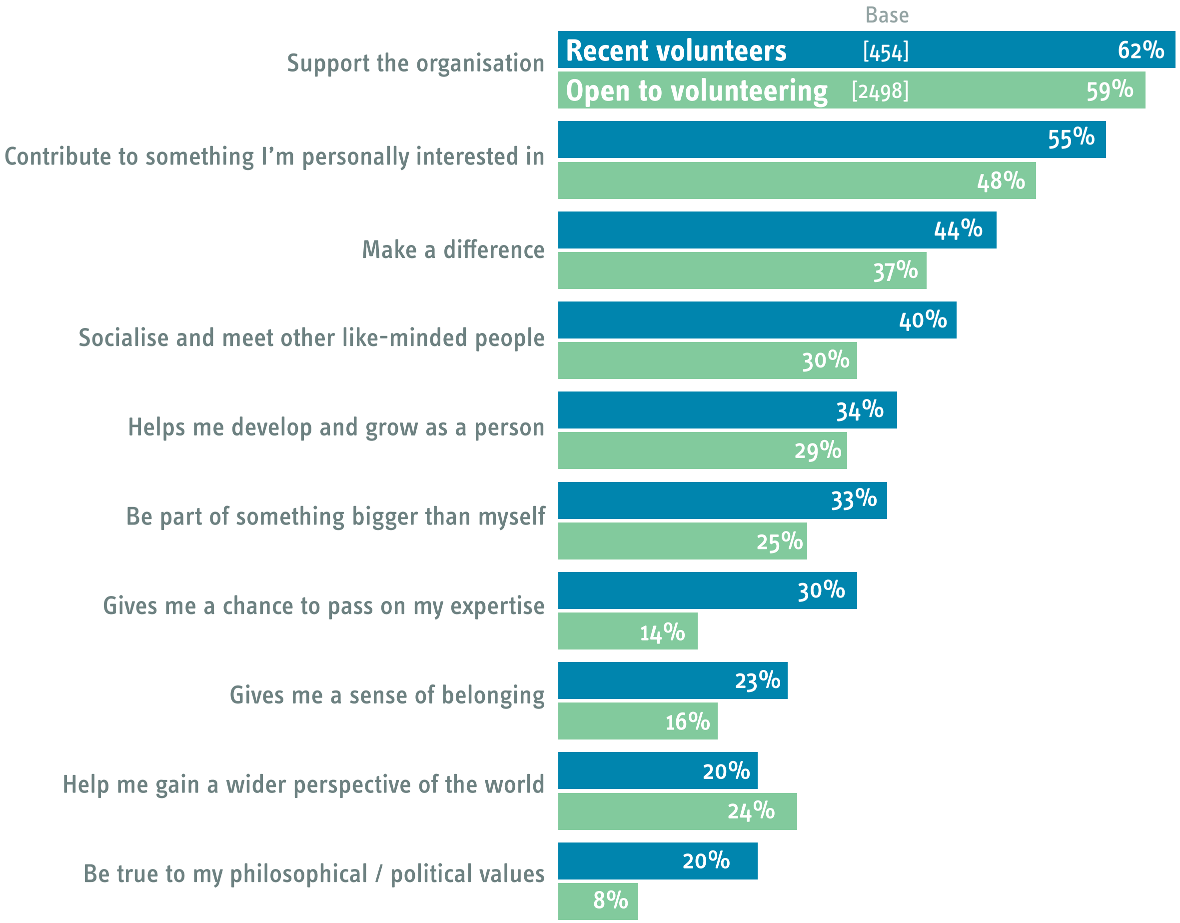
Volunteering built on passion and opportunity to make a difference

Like other forms of support, what motivates people in the market to gift their time to the arts, is primarily to support a particular organisation aligned to a personal passion and to have the opportunity to be making a difference.

To help secure and retain volunteering, consider:

- Offering a range of opportunities to align to your audiences' – and therefore potential volunteers – personal passions and vocational skills.
- Ensure the impact volunteers have is celebrated and clearly communicate how their contribution makes a difference.
- Ensure that any 'call to action' highlights a communal spirit, which will particularly appeal to Expression.
- Invest in the careful management of this resource.

Top 10 attractive features or benefits of volunteering to arts, cultural or heritage organisation(s)



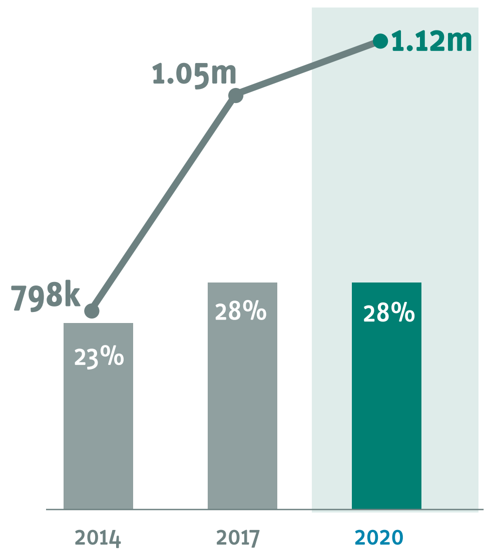
Financial support grew in 2020

An estimated **1.12 million** people **contributed financially** to an arts organisation in the past three years, **6% more** than **three years ago**.

Arts and culture is considered a **worthy cause** to support. Current **donors** are **driven** to support organisations that align with a **personal passion** and their desire to **make a difference**.

Motivate donors with messaging that aligns with your **mission**, **supports** something **specific** and **demonstrates** how their gift will make a **difference**.

Supported arts financially in past 3 years



+6%

Estimated increase between 2017 and 2020 in people donating money to the arts, culture or heritage in the past three years (current donors).

Growth in financial giving below population change

The number of people who gave financially to support the arts in the past three years (current donors) increased by an estimated 6%, an estimated 65k more people gave in 2020 than in 2017. However, growth in current donors is below overall market growth (8%) and slowed on 2017 results when an estimated 32% more people donated money to the arts than 2014.

Arts and culture a worthy cause to support...

Arts, culture and heritage currently receives around 2.5% of total donations and bequests made to charities in Aotearoa New Zealand; representing over $40 million annually.[1]

Nearly half the culture market agree that 'arts, culture and heritage are important charitable cause(s) to support' (49%). However, around 1 in 10 disagree (11%) giving a net score of +37.[2]

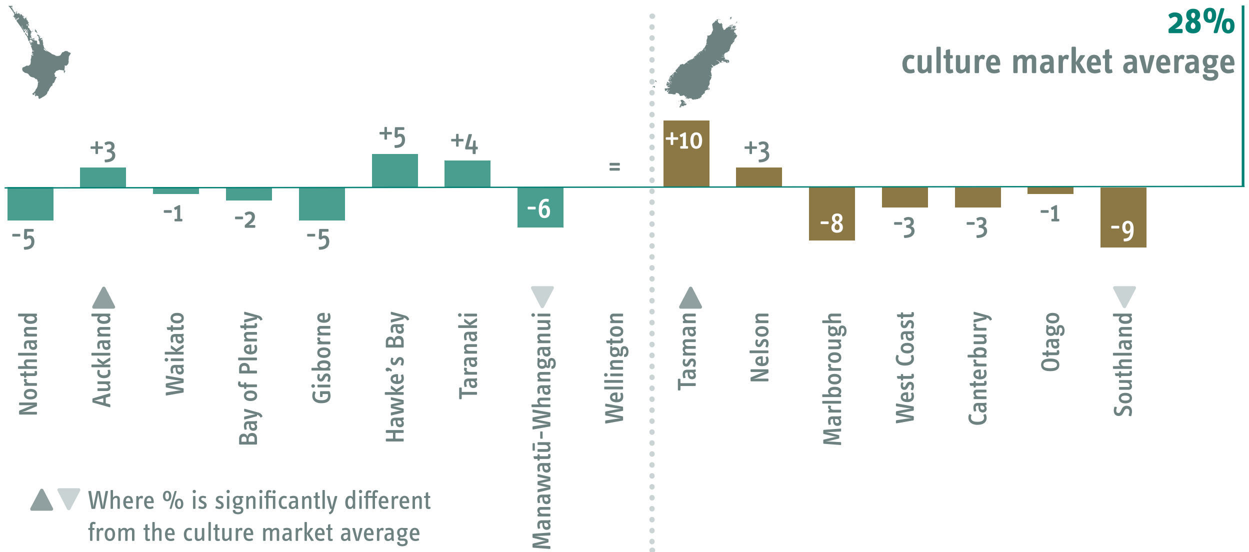
1 An estimated $3.8 billion a year is made in philanthropic contributions. https://www.jbwere.co.nz/latest-insights/philanthropy/the-new-zealand-support-report-february-2020/
2 See page 5 for explanation of net scores.

... but faces competition

While around half the market considers the sector as contributing to overall wellbeing (explored on page 24) and being worthy of support, there is competition for donors from other causes. Religion is the main cause supported by donations and bequests; however, its dominance has fallen and is expected to continue to decline.[3] Causes that grew most for support between 2013 and 2018 were welfare, social services, community development and disabilities.[4]

Communicating the important role arts and culture plays in community building, belonging and personal wellbeing will be important to developing and maintaining levels of support.

Donated money to support an arts, cultural or heritage organisation in past 3 years – by region
%-point difference compared to culture market average



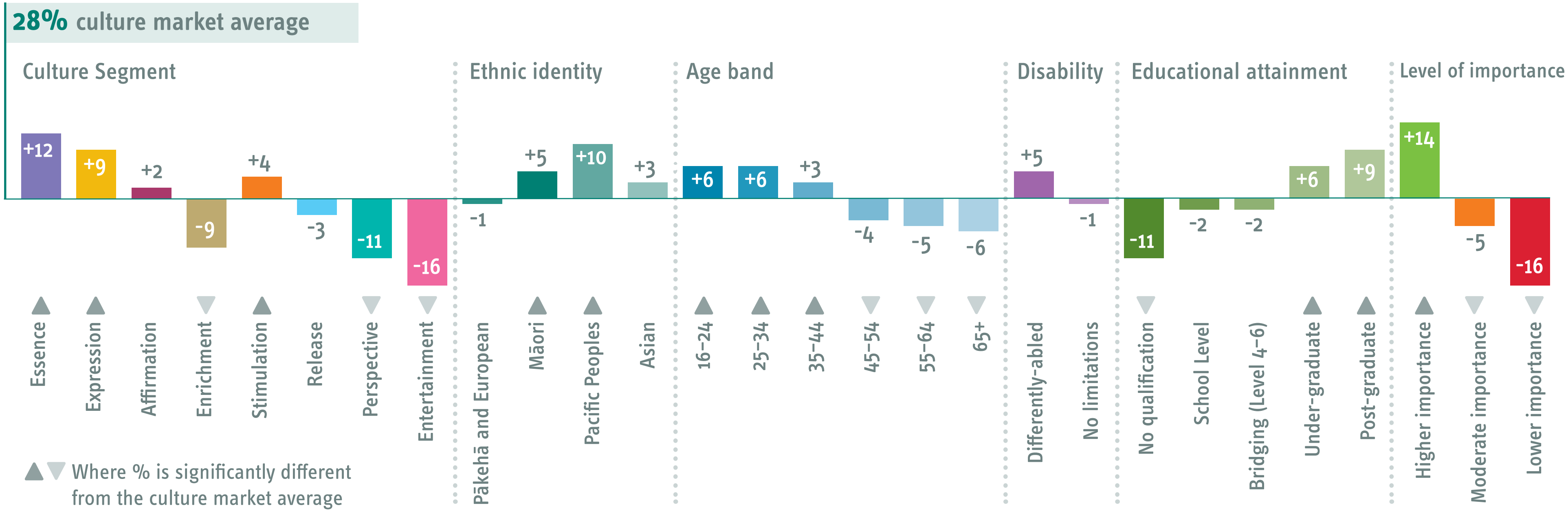
Residents of Auckland and Tasman more likely to be current donors

The propensity to donate is unevenly spread across the regions. Compared to the culture market average (28%), residents of the Auckland and Tasman regions are significantly more likely to be current donors (31% and 39%, respectively. Conversely, residents of Manawatū-Whanganui (22%) and Southland (19%) are significantly less likely to be a current donor.

The proportion of the culture market giving money to an arts, cultural or heritage organisation in the past three years (current) has not changed, 28% in 2020 and 2017. This pattern was broadly mirrored across the regions.

3 https://www.jbwere.co.nz/latest-insights/philanthropy/the-new-zealand-support-report-february-2020/
4 ibid

Current donors – %-point difference compared to culture market average



Current donors are younger and place higher importance on the arts

Unsurprisingly, the propensity to donate money to an arts, cultural or heritage organisation(s) is signalled by the importance you place or the arts.

- Those in the higher importance group are significantly more likely to be a current donor (14-percentage points above the norm).
- The more culturally active segments of Essence, Expression and Stimulation are significantly more likely to be a current donor.
- Younger adults are more likely to be current donors, while older adults are significantly less likely to be.
- Māori and Pacific Peoples are both over-represented amongst current donors to arts, cultural and heritage organisations.

Educational attainment a bigger factor than household income for donation

- Current donors are more likely to have a higher annual household income and the opposite is true at the lower end.

Giving by income levels

Across the culture market, household income has a relatively muted impact on support for the arts compared to other factors, such as, the level of importance someone places on the arts, Culture Segment or highest level of formal education.

The adjacent chart looks at three types of support for the arts; membership, volunteering and financial donations, by household income level.[1] We can see that those at the lower and higher income levels are as likely to be members as the culture market average. In contrast, those with lower household incomes are significantly more likely to be a recent volunteer.

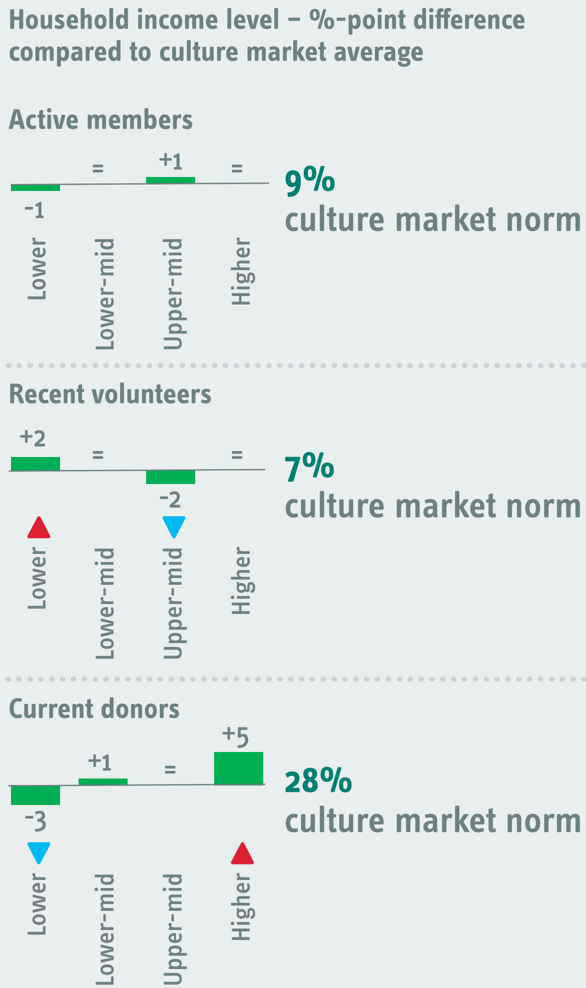
There is more variation when it comes to financial donations. Compared to the culture market average, those with a lower household income are significantly less likely to have made a financial contribution to the arts. Conversely, those with a higher household income are significantly more likely to have done so.

1 Lower income refers to an annual household income of up to 50k, Lower-mid (50+ to 80k), Upper-mid (80+ to 120k), upper (120k+).

The finding that those with higher incomes are more likely to support the arts is broadly mirrored in studies done in other countries, which reveals that charitable causes supported change with income level. For example, as income levels rise in the USA and Australia, giving to religion falls and support for education, **the arts** and health lifts.[2]

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

2 https://www.jbwere.co.nz/latest-insights/philanthropy/the-new-zealand-support-report-february-2020/



Individual donors important to the sector

One-off donations are most common

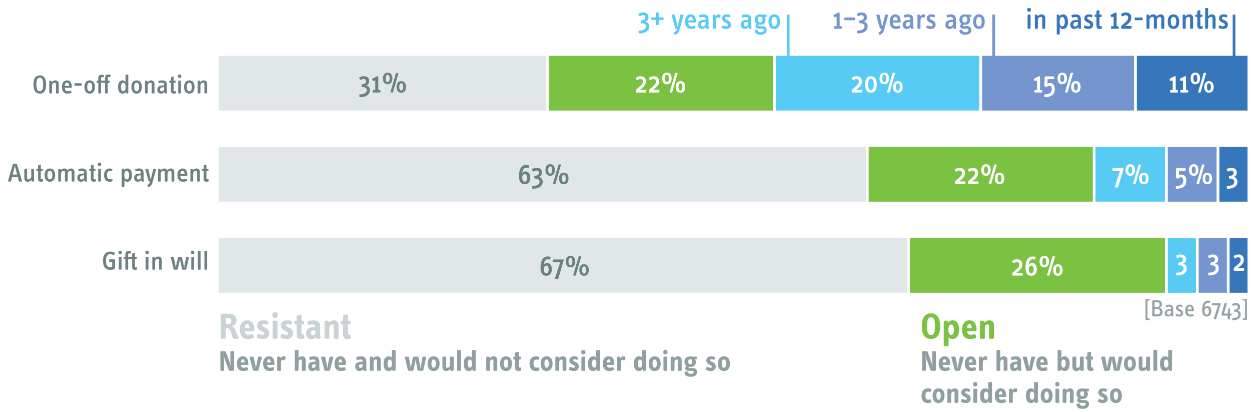
According to JB Were, broad 'mass-market donors' make up around half of total donations in all charitable sectors. However, donations from this source are expected to decrease in the future, due to the falling proportion of donors and growth in other forms of fundraising.[1]

One-off donations[2] are the most common form of giving; 46% of the culture market report having made a one-off donation to the arts in the past three years. This form of giving yields an estimated $50.9 million annually. Despite relatively high activity for one-off giving, there is potential to convert more; 22% or an estimated 878k people have never supported the arts in this way but are open to doing so.

1 www.jbwere.co.nz/latest-insights/philanthropy/the-new-zealand-support-report-february-2020/

2 One off donations could be: through collection box donations during a visit, add-ons when purchasing a ticket, in response to a fundraising appeal / crowd-funding campaign.

History of giving to arts and culture organisations



Compared to one-off donations, fewer support the arts through a regular automatic payment. Just 3% have done so in the past 12 months. A less common form of giving, the amounts donated are typically larger; however, the estimated yield is lower than for one-off donations. An estimated $37 million is generated for the sector in a 12 month period via regular payments.

Ageing population increases the importance of bequests

On average, 7% of people in the culture market reported having left a gift in a will to an arts, culture or heritage organisation, a significant uplift on three years ago (5%).

The number of people aged 65+, in the total population,[3] doubled between 1991 and 2020. By 2030 it is projected that 19–20% will be aged 65+ (compared to 16% in 2020).[4]

As the population ages, bequests may become more common. While this type of giving currently represents a relatively small proportion of donations to the arts, 26% of the market is open to this form of giving in the future.

3 Total population and not the culture market.

4 Source StatsNZ www.stats.govt.nz/information-releases/national-population-projections-2020base2073

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

Format of one-off giving	Norm	Essence	Expression	Affirmation	Enrichment	Stimulation	Release	Perspective	Entertainment
In-person cash donation(s), collection box	73%	76%	72%	76%	76%	76%	▼ 64%	71%	68%
At a special fund raising event	30%	29%	▲ 34%	30%	28%	32%	26%	26%	▼ 18%
Add-on when purchasing a ticket (in-person or online)	22%	25%	22%	22%	▼ 13%	26%	23%	20%	▼ 14%
In-person donation(s) via Paywave™ or similar	17%	18%	▲ 22%	▼ 13%	▼ 11%	18%	21%	▼ 11%	16%
Online (organisation's website)	16%	18%	▲ 20%	14%	▼ 12%	18%	18%	▼ 8%	▼ 11%
Text / SMS	8%	8%	9%	7%	8%	7%	11%	▼ 4%	6%
Online (crowdfunding site)	7%	9%	7%	7%	▼ 4%	8%	6%	5%	6%
Other	4%	4%	4%	4%	5%	3%	4%	6%	5%
Base	[3228]	[480]	[754]	[642]	[243]	[447]	[357]	[187]	[118]

Culture market average
▲ % significantly higher than the culture market average
▼ % significantly lower than the culture market average

Donations historically linked to in-person visits

Amongst those who have ever donated, it is most common to have done so in-person when visiting (73% via a collection box or 17% via Paywave™ / contactless method). With in-person attendance suppressed due to the pandemic[1], a reliance on in-person cash donations highlights challenges facing organisations.

The pandemic accelerated the shift to cashless

Except for Release, all segments are as likely as average make an in-person cash donation; the most common form of giving across the segments. There is more variation when it comes to contactless giving. While 22% of Expression have donated in this way, Affirmation, Enrichment and Perspective are less likely to have done so.

1 At the time of writing the country's boarders remained closed to non-residents and changing Covid-19 Alert Levels led to temporary closures and cancellations in 2020 and 2021.

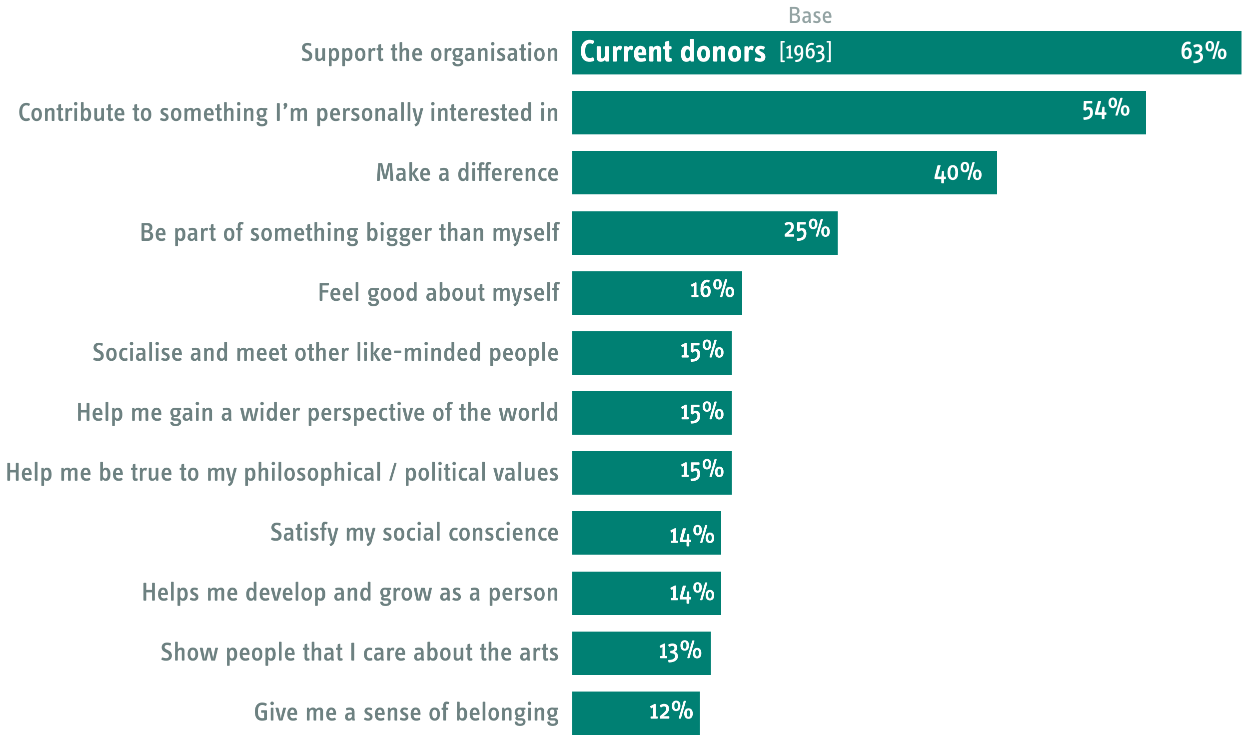
Compared to cash donations, the lower propensity towards contactless giving may be due to access. The pandemic accelerated the decline of cash;[2] therefore, contactless formats will be an increasingly important way for organisations to access mass-market giving.

Demonstrate how a donation makes a difference

When asked what motivates current donors to support the arts financially, the most common reasons were to support a particular organisation (63%), followed by contributing to something that is a personal passion (54%) and being able to make a difference (40%). The top three reasons to donate mirror the benefits of volunteering (explored on page 69).

Making a difference to a particular organisation they have a personal interest in is a more important driver for financial giving than to 'feeling good about oneself', 'satisfying a social conscience' or 'showing others they care about the arts'.

Top reasons to donate money to support arts, cultural or heritage organisation(s) – current donors



2 https://worldpay.globalpaymentsreport.com/en/

The market wants to support something specific

Most frequently, people are more likely to envisage donating towards something tangible rather than a general, 'unrestricted' form of giving. The proportion of the market favouring support for something specific has increased significantly compared to three years ago (53% vs 43% in 2017).

53%

want to contribute to something specific and know where their money will be spent

26%

are happy to make a general donation to an organisation and don't need to know specifically what its for

Social proof and financial giving

Knowing that potential donors are more open to contributing to something specific can help inform messaging around donation asks, whether on your website, ticket add-ons or in-person collections. Aligning messaging to your organisation's mission and clearly communicating what contributions will be supporting, rather than asking for a general gift will be more appealing; framing specific asks as sustaining individual programs or initiatives.

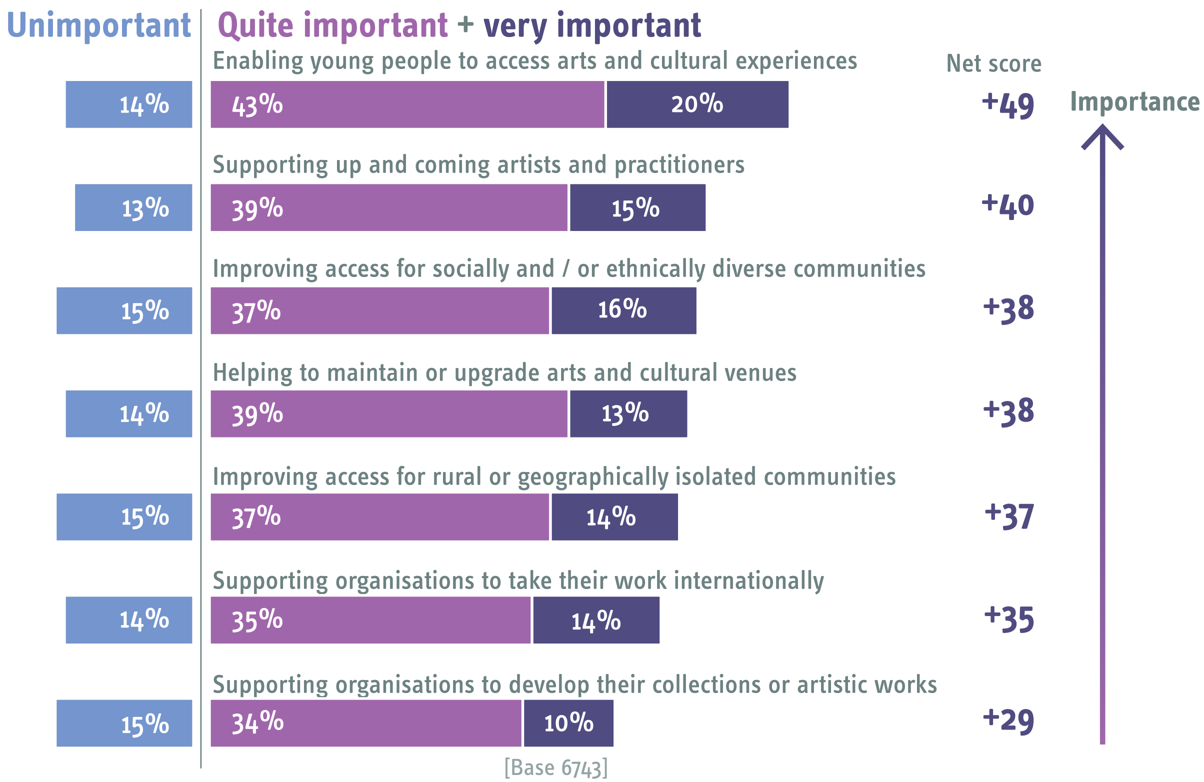
People are wired to follow the actions of others (social proof), and if framed as a positive behaviour, organisations can help increase the likelihood for giving. For example, don't publicly announce a fundraising campaign until you have around 50% of the money pledged, signalling that others have supported the cause and the finish line is close.

Enabling access for young people is a compelling cause

When it comes to specific causes that the market feels are most important to support, enabling children and young people to access the arts, consistently comes out on top (63% agree that this is important).

The market as a whole sees supporting up-and-coming artists and practitioners (54%), improving access of socially and / or ethnically diverse communities (53%), helping maintain venues (52%), improving access for isolated communities (51%) and supporting organisations to take their work internationally (50%) as equally worthy of support, with around half the market seeing these as worthwhile causes to support.

What the market wants to support



$3.8 billion

estimated $3.8 billion a year made in philanthropic contributions to all charitable sectors (2018)[1]

$40 million

2.5% of total donations and bequests made to charities in Aotearoa given to the arts, culture and heritage sector (2018)[2]

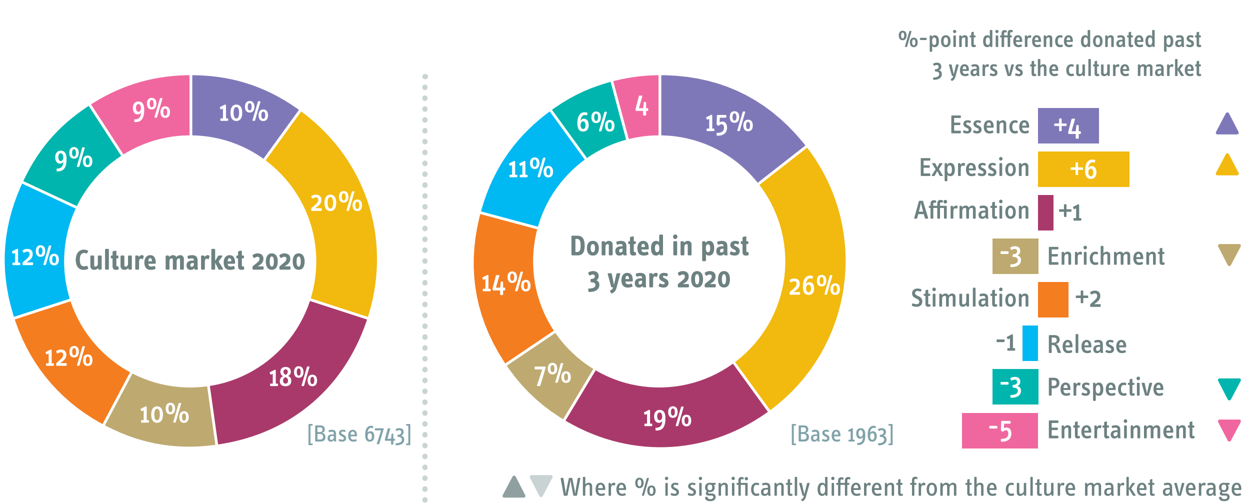
$50.9 million

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

$37.0 million

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

Culture Segment profile – donated to an arts, culture or heritage organisation in past 3 years (current)



Expression leads the way for financial giving

As with other forms of giving, community-minded Expression are the segment with the highest propensity to support the arts financially. Expression represents 26% of all donors, and along with Essence, Expression is significantly over-represented amongst current donors compared to their representation in the wider market (20%).

Similarly, Affirmation (19%) and Stimulation (14%) are both slightly over-represented compared to the culture market, but not significantly so.

1 www.jbwere.co.nz/latest-insights/philanthropy/the-new-zealand-support-report-february-2020/
2 ibid

Reaching your market

Photo by Bruce Mars on Unsplash

Social media has grown in influence

As the **media landscape** becomes **ever more diverse**, the market's **attention** is **divided** across a wider range of media. While the market might be **engaging more**, this is likely at a **shallower level**.

As patterns of **consumption change**, it appears **harder to reach** the **market** through traditional channels. Typically the culture market are consulting fewer sources to find out **what's on** in the arts and **cultural space**.

Knowing the market is **less** likely to be **actively looking** for arts events will require an **adaptive approach** to how and where organisations present themselves.

The data in this section can help distinguish differences within an organisation's regional or touring markets, but it becomes more useful when applying Culture Segments. Organisations should consider both regional context as well as preferences of target Culture Segments, meaning marketing resource can be used more strategically and efficiently. The main aim is getting effective messages on optimum platforms to increase return on investment. For a full set of tables covering sources of information for cultural activities by region and Culture Segment, see Appendix 2 on page 204.

Photo by Gian Cescon on Unsplash

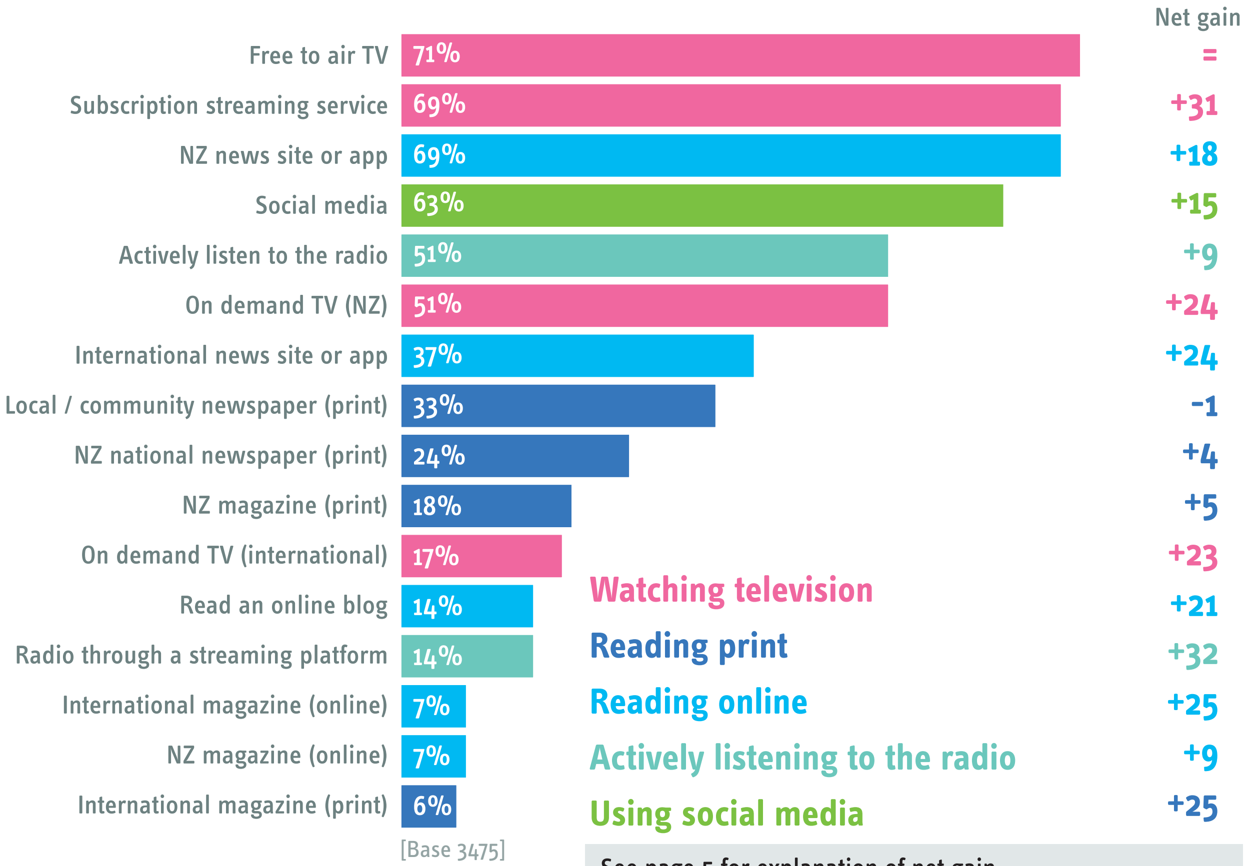
Market using 'more' media

The adjacent chart looks at what media the culture market consumes 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 media type engaged within a typical week, followed by a local news site or app (69%) and social media (63%).

Growth in use but more 'skimming' likely

The majority of media types had a net gain in 2020; this is people using them more now than 12 months ago or who have started using them minus those using them less; 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 media. While the market is engaging more, this is likely at a shallower level.

General media used in a typical week



See page 5 for explanation of net gain

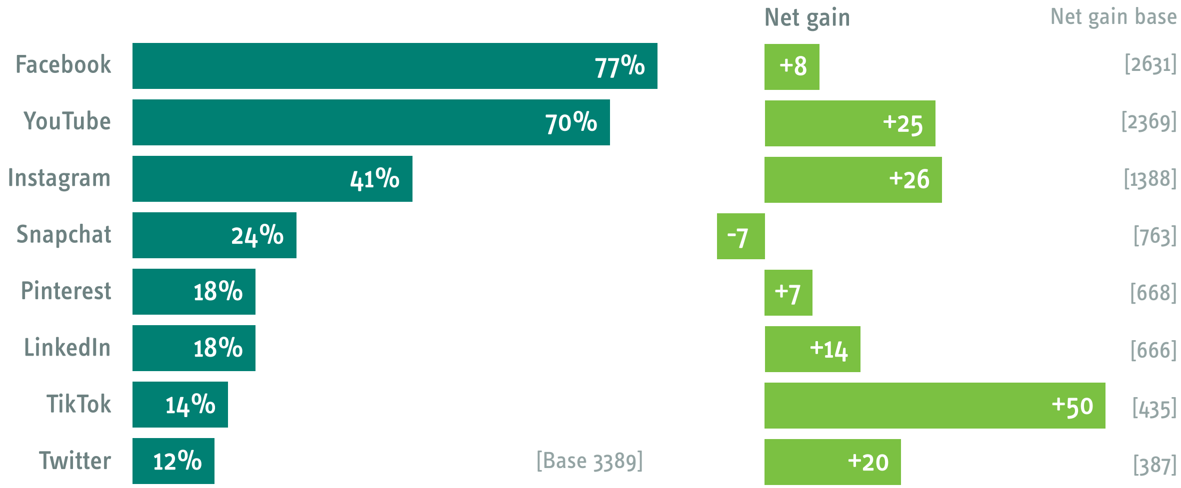
TikTok made gains

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

While the short-form video platform TikTok has a relatively small share of the market compared to others (14% of social media users in the culture market reported using the platform in a typical week), TikTok was the most downloaded mobile app in Aotearoa New Zealand for 2020.[1] This result is mirrored by a net gain of +50[2] 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, while 14% were using it less.

1 https://datareportal.com/reports/digital-2021-new-zealand
2 Note: net gain does not refer to the proportion of consumption or volume but a shift over time amongst users.

General social media – top channels used in a typical week



3.97 million social media users

New Zealanders spend around 6 hours and 40 minutes a day online, including over three hours a day streaming film and television and about 1 hour 55 minutes on social media, accessing an average 7.6 social media accounts.[1]

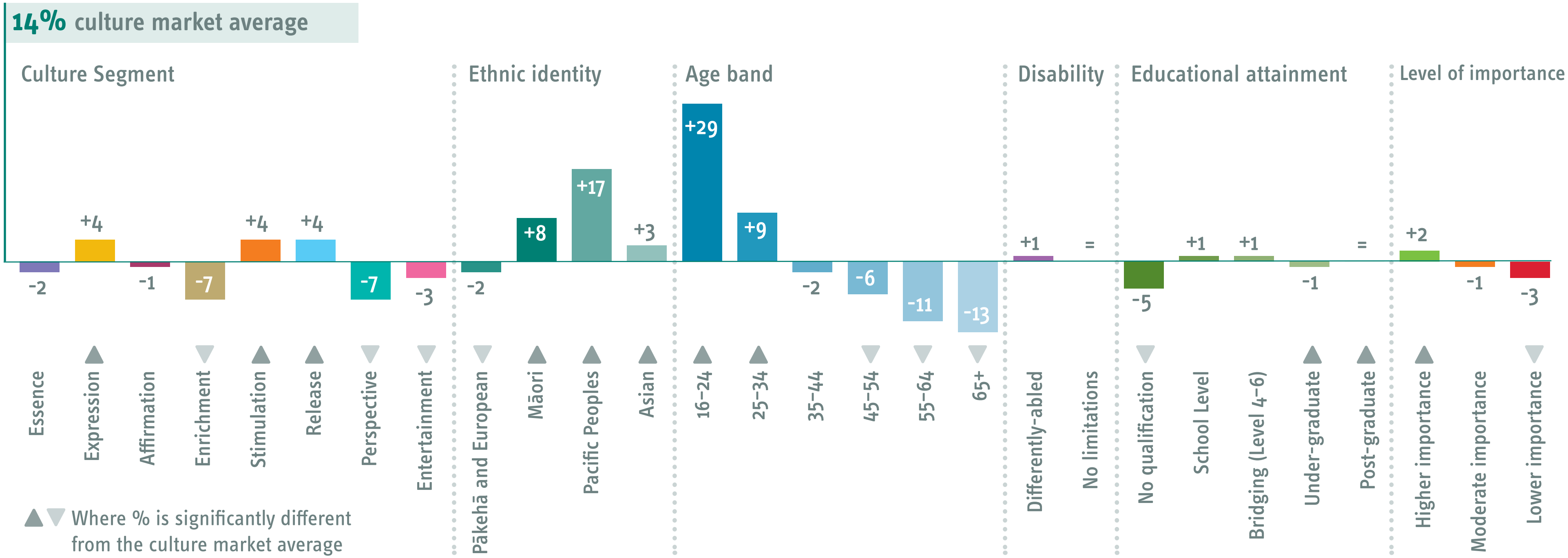
The number of social media users in Aotearoa New Zealand increased by +2.8% between and January 2020 and 2021, with an estimated 3.97 million social media users or 82% of the population.[2]

The top 10 websites used, based on traffic volume, are: Google.com, YouTube, Facebook, Wikipedia, Stuff, NZHerald, Trademe, Metservice, Google.co.nz and Reddit.[3]

1 Source: Hootsuite and We Are Social: https://datareportal.com/reports/digital-2021-new-zealand

2 *ibid*
3 *ibid*

Used TikTok in a typical week – %-point difference compared to average of social media users in the culture market average



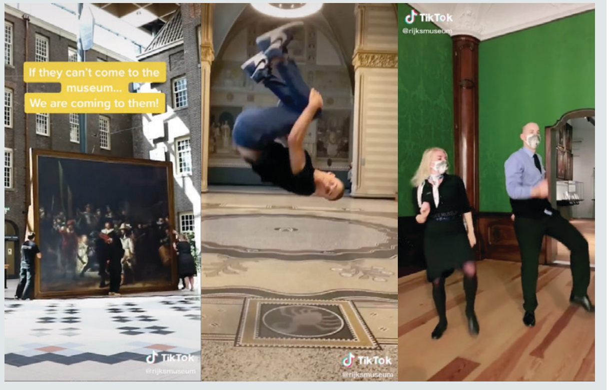
TikTok activates diverse young audiences

- Māori, Pacific Peoples (17-percentage points above the norm) and the Asian cohort are all over-represented amongst TikTok users.
- Primary users in the culture market are younger adults (16–24s). Meaning the platform is a way to reach diverse young audiences.

Leveraging creators of content to reach new audiences

Globally in 2020, TikTok benefited as people sought a substitute for social interaction during the pandemic. In contrast to Instagram and Facebook, which focus on advertising, TikTok puts the creator at the centre and helped users monetise content; cultural organisations noticed.[1]

TikTok started life as a platform for lip-syncing and dance videos, and dance organisations were among the first to see an opportunity. American Ballet Theatre engaged new audiences by empowering dancers to present their ‘highbrow’ artform in a fun and accessible way. Arts museums, such as Rijksmuseum, saw TikTok as a meaningful extension of their digital offer.[2] Meanwhile, the Black Country Museum and Carnegie Museum of National History took a less reverent approach to leveraging individual staff's uniqueness.[3]



www.tiktok.com/@rijksmuseum

Cultural organisations have used the platform to share stories with a younger audience, who are connected online, but often under-represented onsite. However, these organisations warn that TikTok is not a platform for self-serving messages.

1 https://intelligence.wundermanthompson.com/trend-reports/the-future-100-2021/.
2 https://www.dw.com/en/tiktok-and-museums-can-they-really-jibe/a-54422999
3 https://carnegiemnh.org/press/carnegie-museum-of-natural-history-partners-with-tiktok-to-create-educational-videos/

See Appendix 2: media tables on page 86 for information source by region and Culture Segment.

Facebook the most influential source to find out what's on

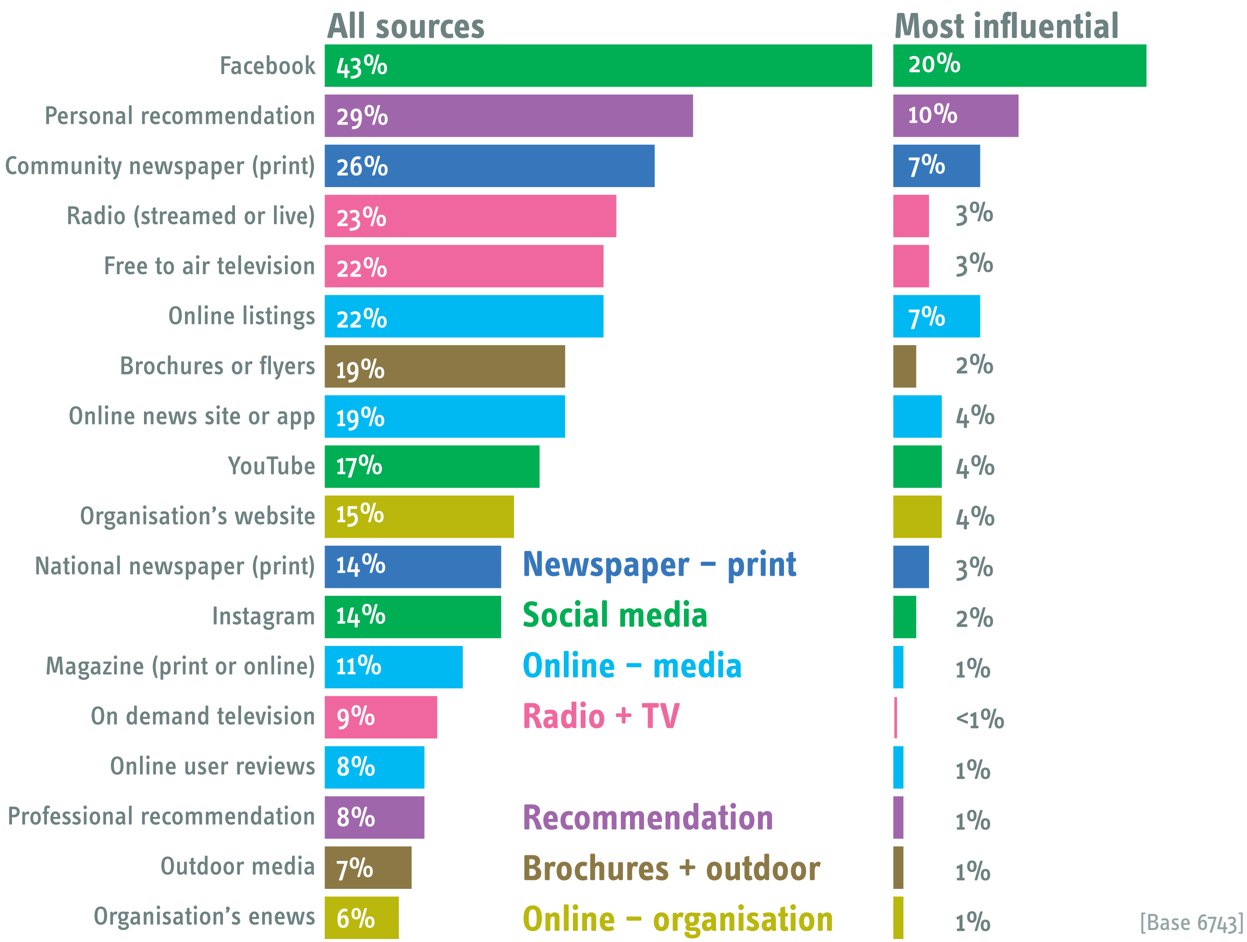
The adjacent chart looks at how the market finds out about arts, cultural and heritage events or organisations.

Over 4 in 10 use Facebook to find out what's on in the arts and cultural space (43%), and it is also the most influential source of information (20%).[1] YouTube (17%) and Instagram (14%) were other commonly used social media channels; however, a lower proportion cited these as the most influential source of information.

Facebook was also the most commonly consulted source across all the key groups (see page 88), the exception being those aged 65+. While 32% of those aged 65+ found out about arts events through Facebook, this is significantly below the culture market norm. This cohort is more, or as likely to, consult free to air television (38%) or a personal recommendation (33%).

1 Questions: 'In the past 12 months, which of the following have you used to find out about arts, culture or heritage events or organisations?' Follow-up question: 'Which of these was the most influential source you used to find out about what arts and culture events are on?'

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



Positive word-of-mouth remains a key source

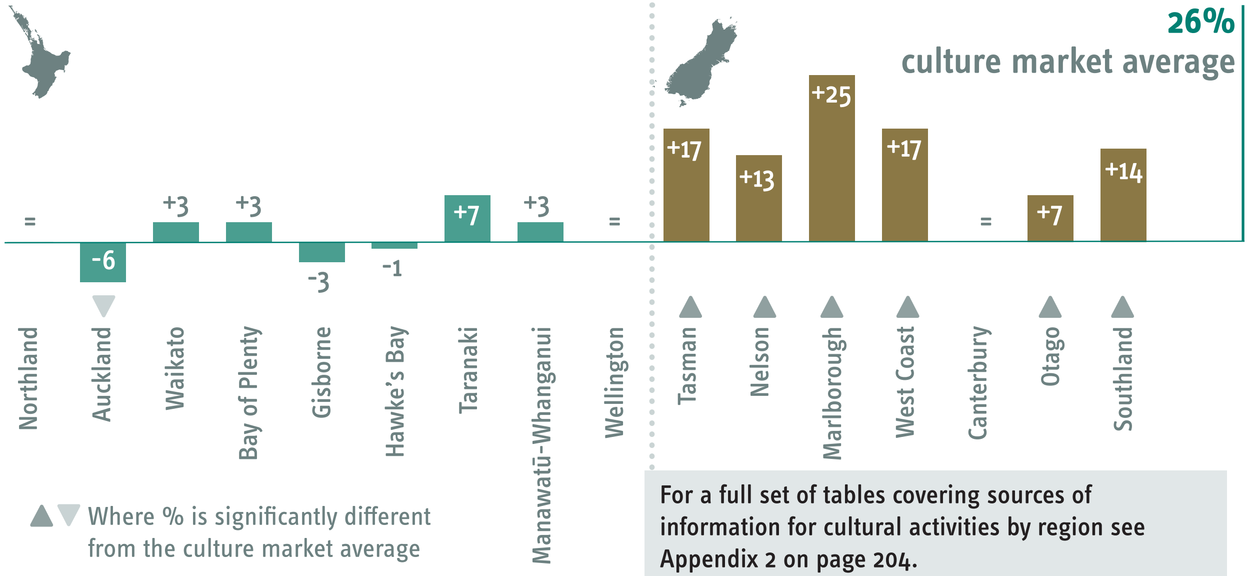
A personal recommendation remains an important way for the market to learn about what arts and cultural events are on, second only to Facebook. Nearly 3 in 10 cite a recommendation as a way to find out about events (29%), and for 10%, it is the most influential source.

Community newspapers a key source for South Island residents...

After Facebook and personal recommendations, a community newspaper was the next most commonly cited source of information for arts and cultural events, consulted by over one-quarter of the market.

Excluding Canterbury, residents of the South Island are significantly more likely to consult a community newspaper to find out about what's on. However, the picture is different in the North Island. Residents of the Wellington region were as likely as average to consult this source (26%), while Aucklanders were significantly less likely to do so (20%).

Consulted a community newspaper to find out about arts, cultural or heritage events in the past 12 months – by region. %-point difference compared to culture market average



For a full set of tables covering sources of information for cultural activities by region see Appendix 2 on page 204.

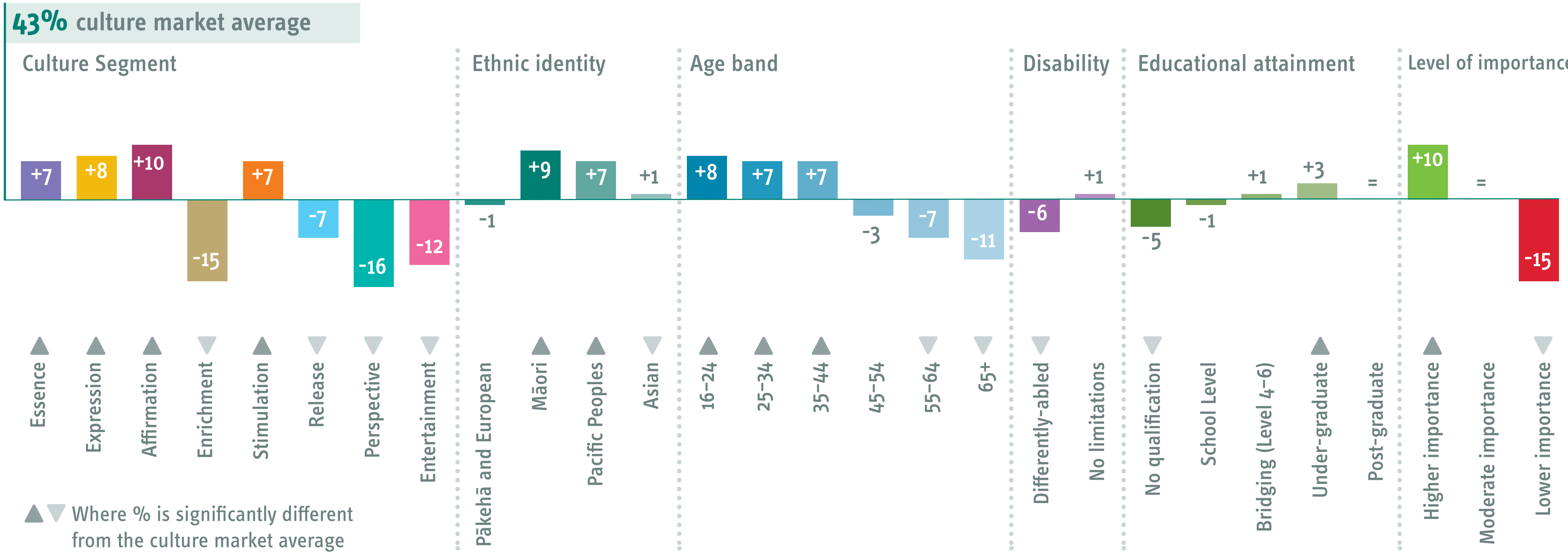
... and the over 65s

Half of the those aged 65+ cited a community newspaper as keeping them informed about what arts and cultural events are on, and for 18%, this is the most influential source. On the other hand, the over 65s are the one group for whom Facebook was not the most influential source (7%, compared to 20% overall).

Online listings are influential

Just over 1 in 5 consulted an online listing site (22%), but it is one of the more influential sources (7%). Online listings are more commonly used in Auckland and Wellington than in other regions and are a key information source for Essence. Essence are confident in their cultural consumption and perfectly able to make up their own minds, so it makes sense they would consult a listing to find out about what's on.

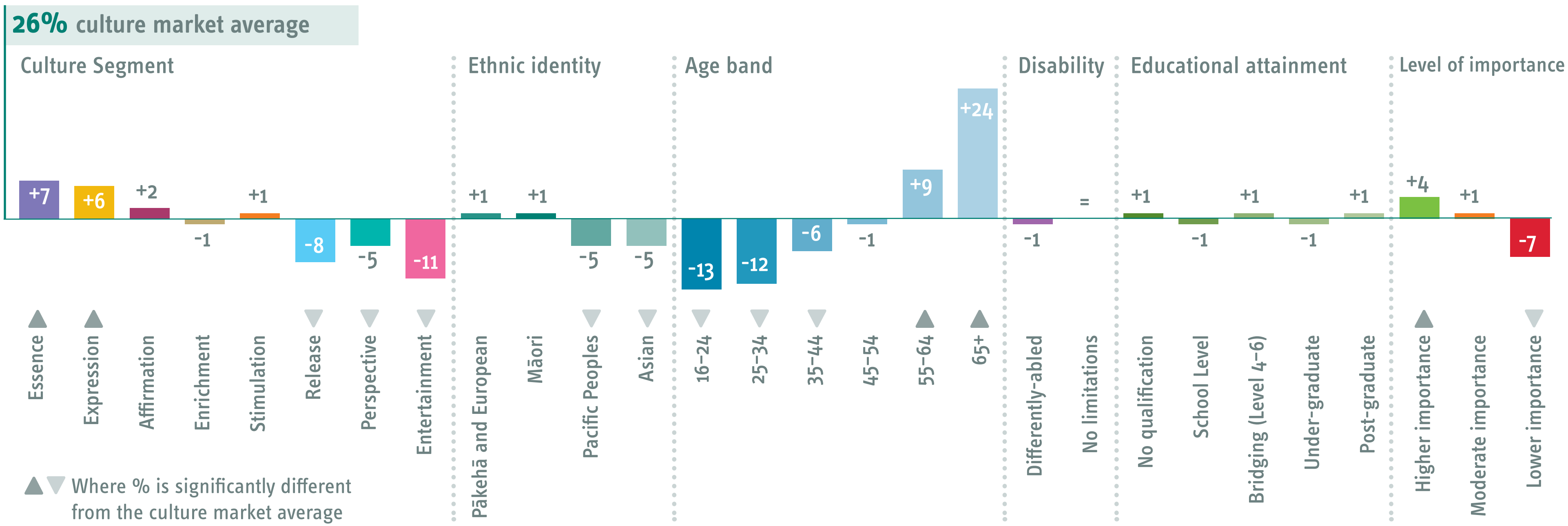
Used Facebook to find out about arts events or organisations, in past 12 months – %-point difference compared to culture market average



Facebook activating younger, more diverse engagement

- Younger adults are more likely to have been kept up-to-date about arts events via Facebook than those in the older age bands.
- 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 all people in the Essence, Expression, Affirmation and Stimulation segments were kept up-to-date through Facebook.
- Those in the Stimulation segment are always on the hunt for something new to do. Peer-to-peer, organic social media content has more influence on them. One-quarter of this segment cited Facebook as the most **influential** information source, the highest among the eight segments.

Used a community newspaper to find out about art events or organisations, in past 12 months – %-point difference compared to culture market average



Community newspapers reaching older sections of the culture market

- The majority of Pacific Peoples and Asian cohort reside in the Auckland and Wellington regions. As explored earlier, a local or community newspaper is not a key way for people in either of these regions to find out about arts events; therefore, it makes sense that these ethnicity groups are less likely to be informed through a community newspaper overall.
- The group that stands out as most active in their use of community newspapers to stay abreast of cultural events are the over 65s (24-percentage points above the norm).

Sources of information for cultural activities (trends)*

	2014	2017	2020
Social media channel	31%	▲ 33%	▲ 51%
Recommendation	51%	▼ 42%	▼ 37%
Television	43%	▼ 36%	▼ 31%
Local/community paper (print)			26%
Radio (streamed or live)	36%	35%	▼ 23%
Online listings		34%	▼ 22%
Online news site or app	25%	▼ 21%	▼ 19%
Specific organisation's website	32%	▼ 11%	▲ 15%
Newspaper (print)	50%	▼ 35%	▼ 14%
Magazine (print)	11%	▲ 14%	▼ 11%
Magazine (online)	4%	▲ 10%	
Online user reviews		12%	▼ 8%
Specific organisation's enews	13%	▼ 10%	▼ 6%
None	15%	▲ 17%	▲ 22%
Base	[4008]	[5014]	[6743]

*Due to fast paced changes in the way the market consumes media this table only show ways the market finds out about arts and cultural events and organisations where options are somewhat comparable across the past three *Audience Atlas* studies.

Culture market average
▲ % significantly higher than previous study
▼ % significantly lower than previous study

Shifting patterns of consumption

Use of social media to find out about the arts lifts

In the three years since the last Audience Atlas, social media has over taken a recommendation as the most common way for people to find out about arts and cultural events. Usage of social media for this purpose increased significantly over the past six years, from 31% in 2014, 33% in 2017 to 51% in 2020.

Consulting a specific organisation's website also experienced a significant uplift compared to 2017, but has not returned to 2014 levels (32%).

The market is behaving differently

Overall, 22% of the market reported not utilising any source to find out about what's on in the arts and cultural space, which has increased significantly with each study since 2014.

Except for social media and organisation websites, the proportion of the market consulting a range of media sources has decreased significantly – notably a national newspaper. This indicates patterns of consumption and planning are changing, making the market harder to reach through traditional channels.

The predominant behaviour around searching out arts and cultural events is changing. Knowing the market is less likely to be actively looking for arts, cultural or heritage events will require an adaptive approach to how and where organisations present themselves.

The Master Builder by Henrik Ibsen, new version Colin McColl, 2020. Pictured: Andrew Furness & Kalyani Nagarajan. Credit: Andrew Malmo. Presented: Auckland Theatre Company

Engagement by individual artform

morris hargreaves mcintyre

The current market for individual artforms

The **current market** for an individual artform is defined as those who have engaged with this in the **past three years**. Of the **12 core artforms** explored in this study, **film** enjoys the largest current market closely followed by **museums**, **visual arts**, **festivals** and **music**.

The market is **engaging** with a **wider range** of artforms compared to previous studies. This suggests the **culture market** is growing and **consuming** a **wider range** of artforms; notably in Auckland and Wellington. However, **those** who **already engage** with multiple artforms **are doing more** rather than the portion of the market, who has a narrow focus to their cultural consumption, now doing more.

Cuba Dupa 2021, Chloe Loftus and Rodney Bell. Photography by Oliver Crawford

Film has the largest market share

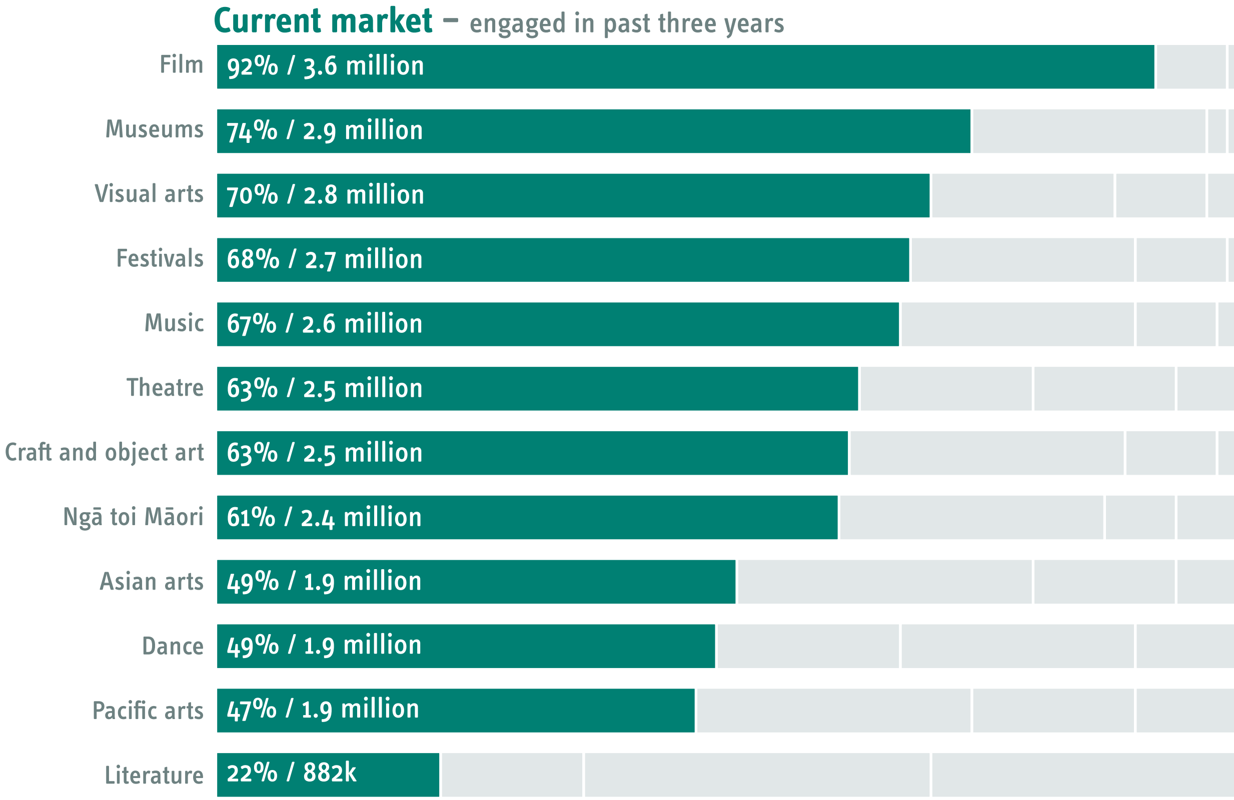
Engagement with film (at a cinema or another venue, including film festival venues) is near-universal and has the largest current market of the core 12 artforms. Overall, 92% of the culture market has engaged with film in the past three years.

Film has the largest share of the market across all 16 regions. However, provision likely has an impact. Compared to the national average, the proportion in the current market for film is significantly smaller in Gisborne (83%) and Taranaki (85%) and significantly larger in the Auckland Region (94%) and Nelson (98%).

Market share for visual arts larger than for theatre

In 2020, visual arts has a bigger market share than festivals (68%), music (67%) and theatre (63%), which was not the case 10 years ago. In 2011, a larger proportion of the culture market engaged with the theatre (77%) compared to visual arts (66%).

Current artform markets – % and real figure estimates



[Base 6743]

Museums' share of the market has not increased in 10 years

Museums have the second-largest current market (74%), followed by visual arts (70%). The proportion of the culture market in the current market for museums has not grown across the past nine years (75% in 2011), and the gap with visual arts was much larger (current market for visual arts was 66% in 2011).

1 in 5 are in the current market for literature

Literature is the artform with the smallest current market (22%). Literature has the smallest market share of the 12 core artforms and is half the size of the next smallest artform: Pacific Arts (47%).

The share of the culture market for literature has decreased compared to 2017 and 2014, but broadly unchanged on 2011 (23%). While literature has the smallest market share, it's the artform with the most potential to grow (explored on page 98).

Seung Yul Oh *Conduct Cumulus* 2018. Image courtesy of SCAPE Public Art. Photography by Jade Cavalcante

Eating out and spending time at the beach is near-universal

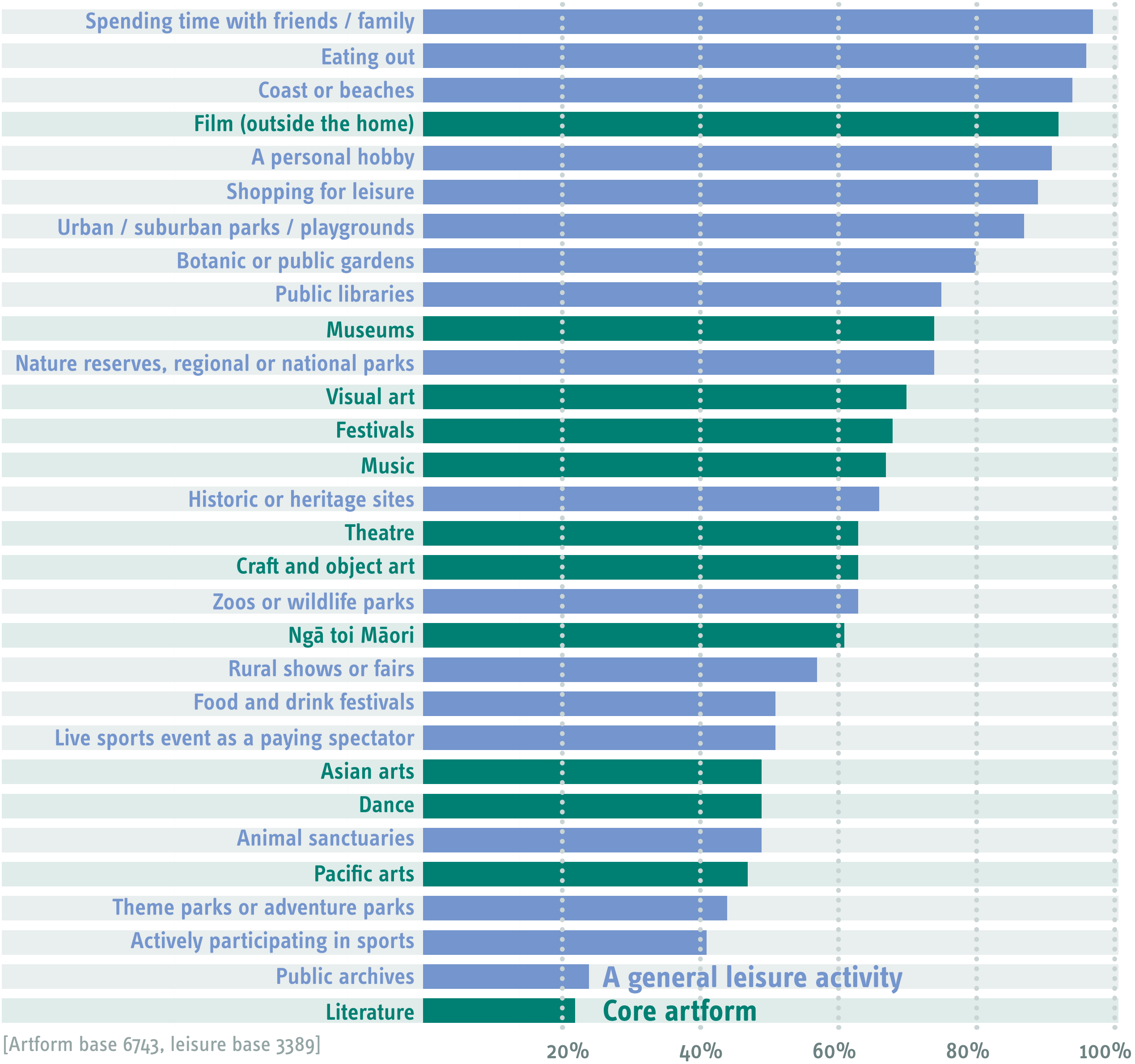
To establish the picture of how the market chooses to spend its leisure time, the adjacent chart looks at the current market for the 12 core artforms in the context of other activities the market is also engaging with. Spending time with others, eating out and going to the beach is near-universal activities. The core artform of film (92%) is one of the most common leisure activities. The current market for museums, visual arts, festivals and music sits mid-pack and below several other leisure pursuits such as a hobby (91%), shopping for leisure (89%), visiting a library (75%) or an urban park (87%).

Size of the current live sports market matches dance

Among the culture market,[1] a similar number of people have attended a live sports event (51%) as engaged with Asian arts or dance (49%) in the past three years. A larger proportion of the market has engaged with dance than have actively participated in sports (41%).

1 Note this data represents the culture market, 96% of the resident population, not the population as a whole. Alternative leisure activities focus on activities out of the home.

Engagment with a range of leisure activities – in the past three years (current)



[Artform base 6743, leisure base 3389]

Changing landscape

More people engaging more widely

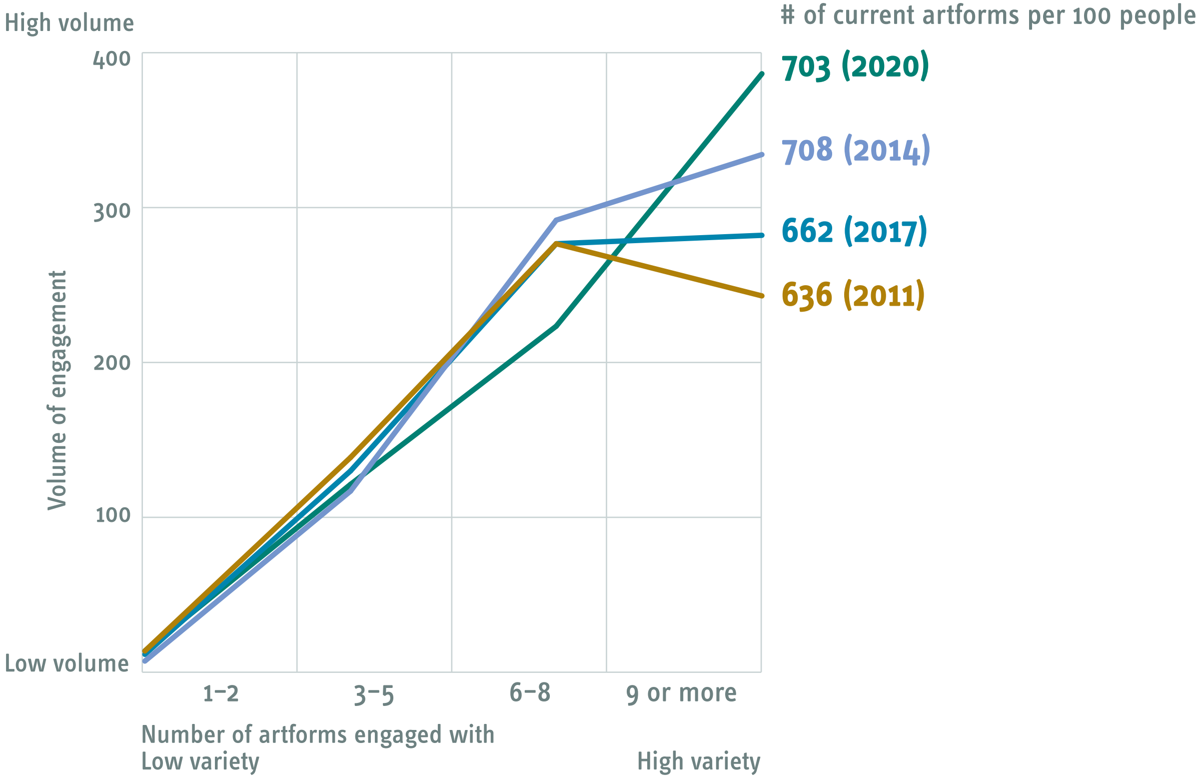
In addition to growth in the size of the culture market (explored on page 8), there is a growing pool of people attending a wider range of artforms than was the case in previous studies. The adjacent chart compares the four studies by volume (estimated number of engagements) compared to the breadth or variety of artforms engaged with. Broadly, we can see that both the volume and the breadth has grown.

Skewing towards more variety

In 2020, the number of artforms engaged within a three year period (current market) is an estimated 703 per 100 people or 7.0 per person; this compares to 6.6 in 2017. While the average number of engagements has been relatively stable over time, it is the breadth or variety that has increased, meaning many people are engaging with a wider variety of artforms.

So, while the overall volume of activity has grown only slightly in the past three years, engagement with a broader range of artforms increased.

Spread of the volume of engagement against breadth / variety – change over time



Note: in order to make a like-for-like comparison the 2020 data represented here excludes some granular sub-artforms which were newly included in of Audience Atlas 2020.

The market is changing – it's not shrinking but is becoming more eclectic with more of the audience engaging with a wider variety of artforms.

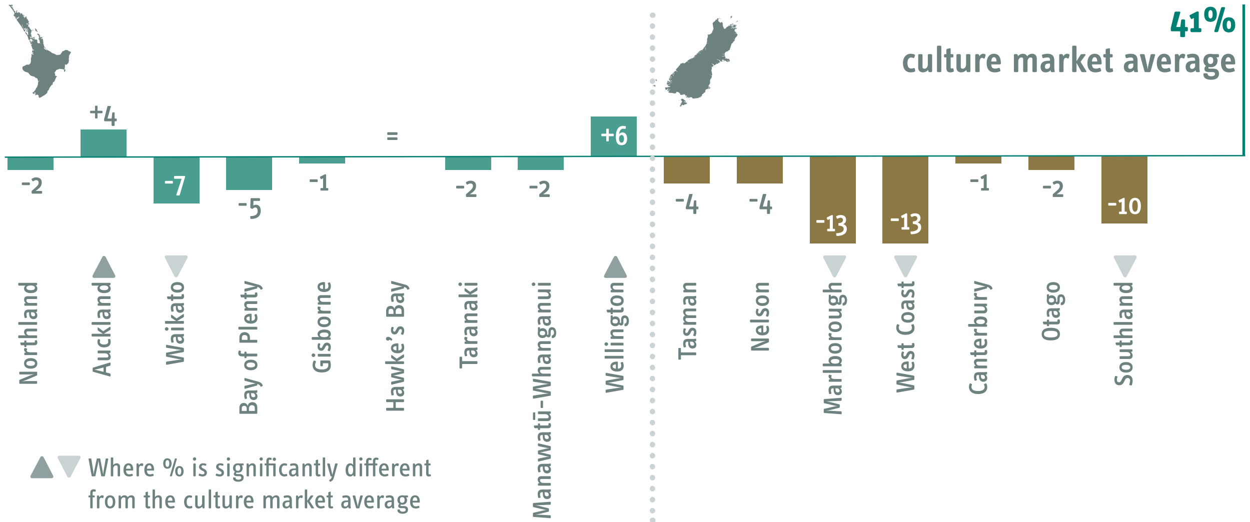
People at the bottom are not being pushed to try new things

The proportion currently engaging with 1–2 or 3–5 artforms has remained relatively stable across the four Audience Atlas studies. This suggests a core section of the culture market have a narrow focus to their cultural consumption. Therefore, while overall people are engaging with more variety, it is not those who engage with a relatively narrow range of art forms engaging with more. Rather it is those who already engage with a wider breadth are now doing more.

Breadth of artforms engaged with likely linked to accessibility

Residents of the Auckland (45%) and Wellington (47%) regions are significantly more likely than average (41%) to have engaged with a larger range of artforms. Auckland and Wellington are the only regions to have a larger proportion of 'high variety' residents compared to the norm, which suggests provision plays a role. Meanwhile, in the Waikato (34%), Marlborough (28%), West Coast (28%) and Southland (31%), residents were significantly less likely to be into the 'high variety' category.

High variety engagers (engaged with 9 or more artforms in past 3-years) – %-point difference compared to culture market average



Opportunities for growth in all artforms

Exploring the **lapsed** and **potential** markets of individual artforms; those who either attended over three years ago or who have never engaged but are open to doing so – reveals **growth prospects** for the majority of core artforms.

With the exception of Asian arts and literature, the size of the **lapsed market** is **larger** than the **potential market**. While the **literature market** has the smallest current market share, it has the **largest potential** for growth; **543k** have **lapsed**, and **1.3 million** have never engaged with a literature event but are open to doing so.

Dowse Art Museum, Neke Moa workshop

Opportunities for growth in all markets

The adjacent chart looks at potential growth possibilities for the 12 core artforms by exploring the size of the lapsed and potential markets.

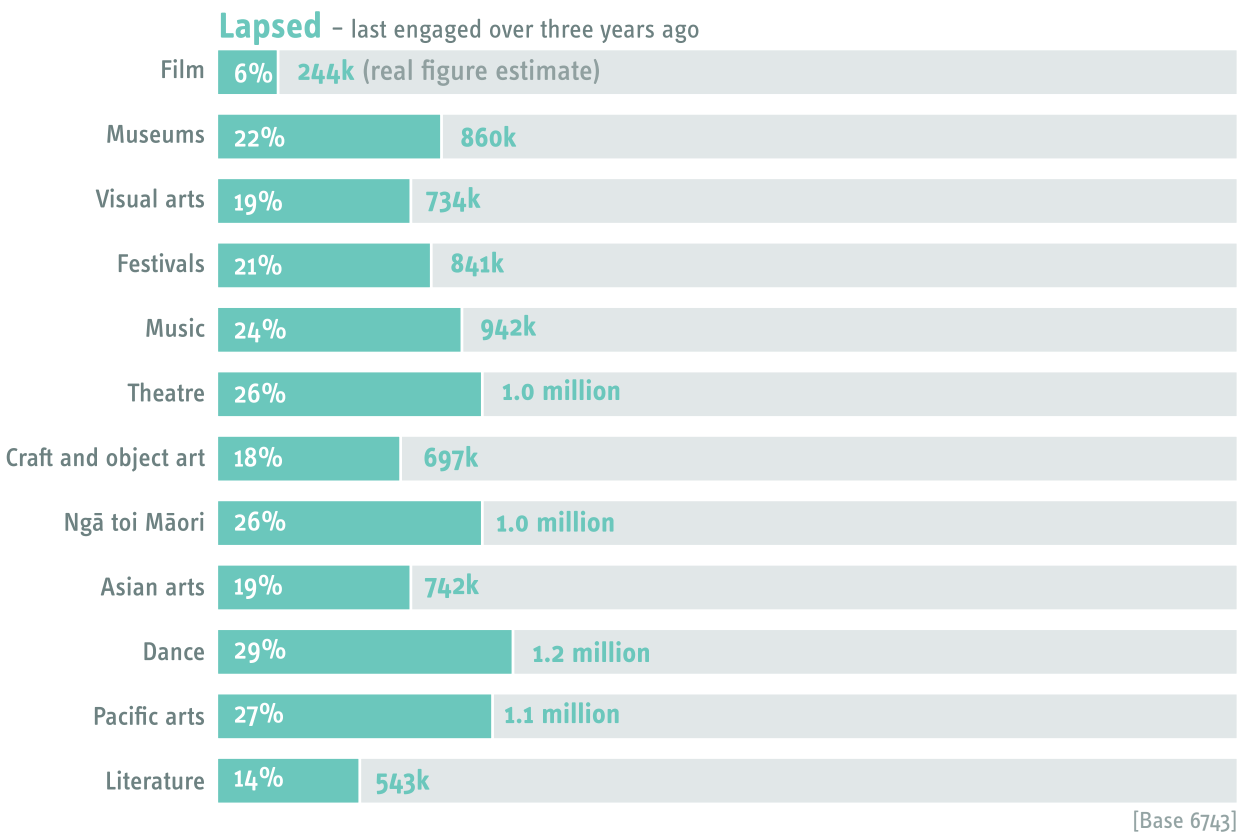
Film has near universal penetration

Engaging with film at a cinema or other venue has such high market penetration there is limited capacity for growth. An estimated 244k people in the culture market have either not engaged with film at a cinema or other venue in the past three years (lapsed), while 38k have never engaged but are open to doing so (potential). The remainder of the artforms have a sizable potential for growth.

Sizable lapsed market for dance, theatre, Pacific arts and Ngā toi Māori

The proportion of the market who last engaged with the core artforms of dance, theatre, Pacific arts and Ngā toi Māori three or more years ago (lapsed) is relatively high. Around 1 million people have lapsed in their engagement with each of these four artforms.

Lapsed artform markets – % and real figure estimates



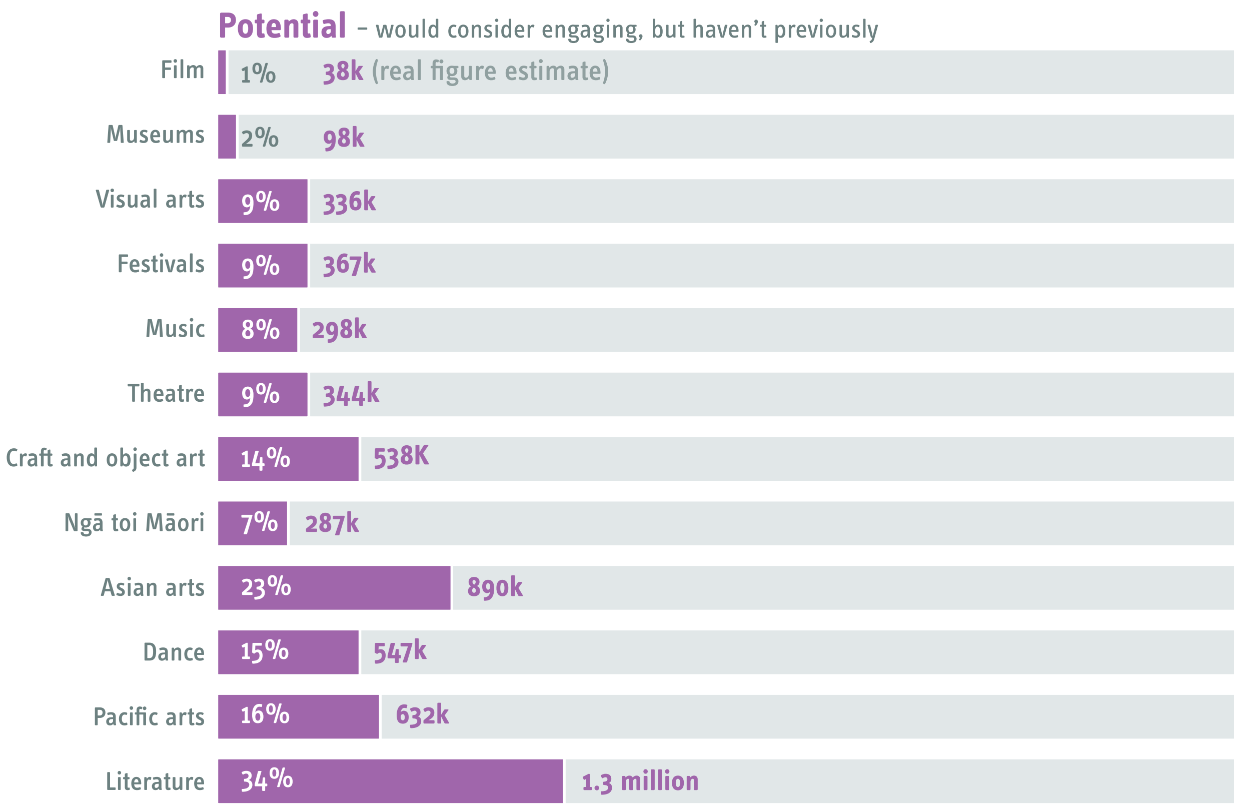
For theatre and Ngā toi Māori, the lapsed market is three times the size of the potential market and there is a similar picture for dance. This suggests the growth strategy for these artforms will come from re-activation of those who have lapsed in their engagement rather than raising awareness for those who are yet to engage.

Asian arts and literature have the largest potential

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

One aspect to unlocking the potential market is raising awareness. An estimated 1.3 million are in the potential market for literature and 890k for Asian arts; they're waiting to be enticed.

Potential artform markets – % and real figure estimates

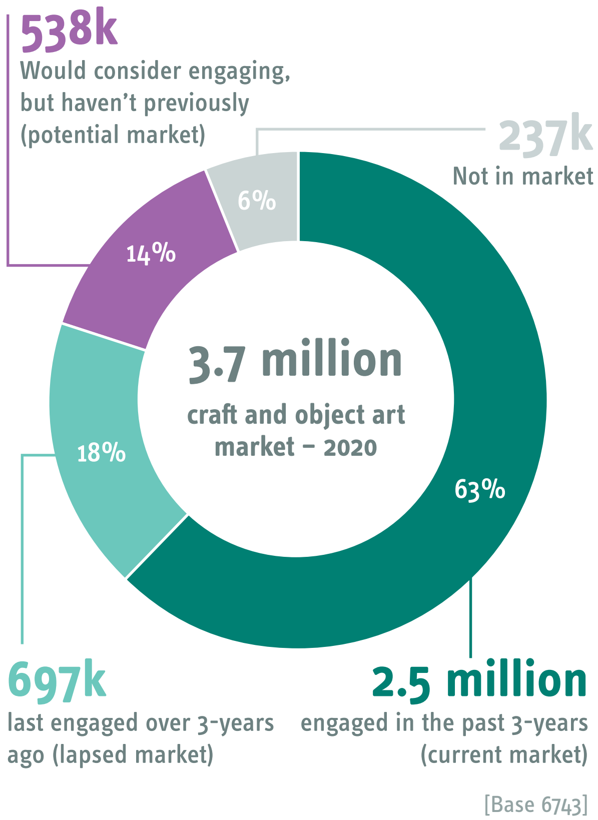


[Base 6743]

Craft and object art

Craft and object art has a relatively healthy penetration into the culture market with near universal appeal. Overall, **94%** are in the **market** for craft, equating to an estimated **3.7 million people**. The market has **potential** for growth; **1.2 million** people have either lapsed in their engagement with craft and object art or are **waiting to be activated**.

Tasman and **Southland** regions have the **largest** proportion of people in the current craft and object art **market** (85%).



Defining the craft and object market

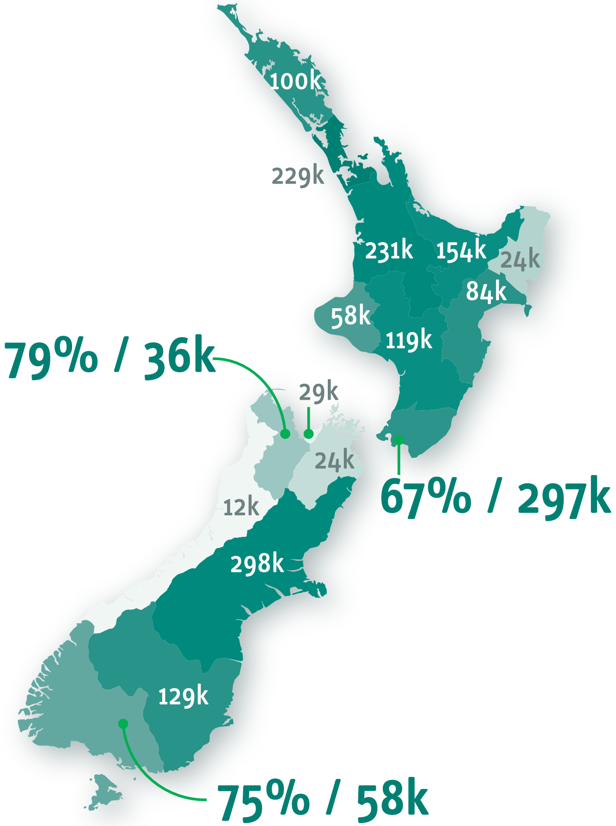
The craft and object market is defined as anyone in the culture market who has ever engaged with a craft or object art exhibition or would consider engaging but haven't previously, including a: Māori, Pasifika or Asian craft / object art exhibition.

There is little to distinguish the current craft and object art market from the culture market average. Significant differences include:

- Skews female (54% vs 51%)
- More likely to hold a post-graduate qualification (14% vs 12%)
- More likely to have spent on the arts in the past month (40% vs 32%)
- Are more active in giving to the arts, being significantly more likely to be an active member / subscriber (11%), recent volunteer (9%) or have given financially (36% donated within the past three years)
- Essence, Expression and Affirmation segments are over-represented.

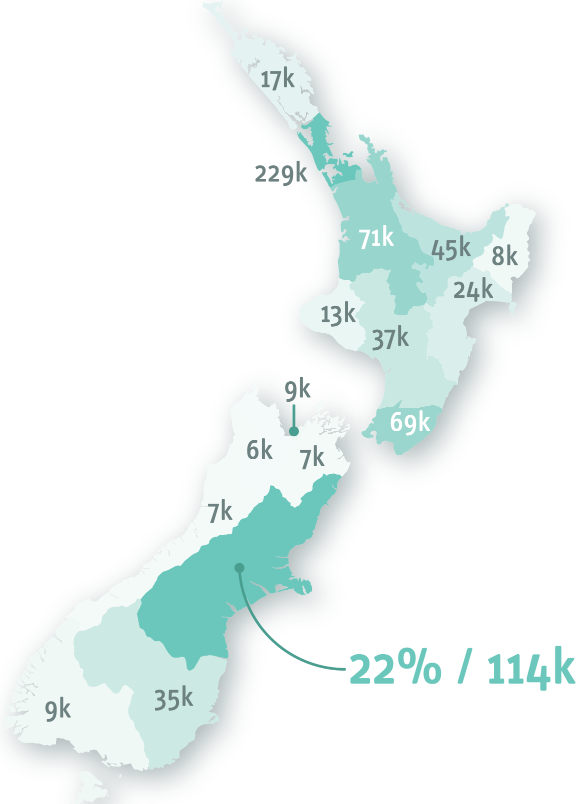
Size of the current, lapsed and potential **craft and object art** markets across New Zealand – real figure estimates

Current



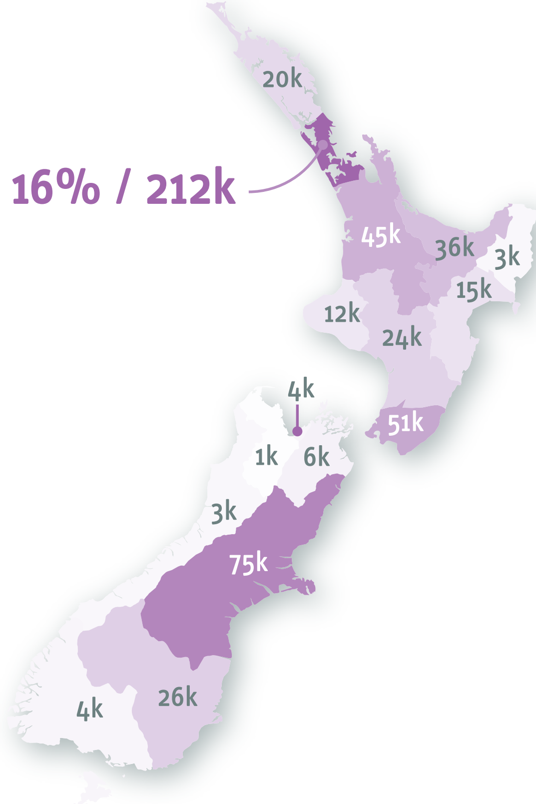
- Tasman (79%), Southland (75%) and Wellington (67%) regions have the highest market penetration for craft and object art, significantly higher than the culture market average (63%).

Lapsed



- Compared to the culture market norm, the Canterbury region (22%) has a significantly larger proportion who have lapsed in their engagement with craft.

Potential



- Proportionally, the size of the potential craft and object art market at a regional level are relatively small. Of all regions, Auckland has the largest potential market representing an estimated 212k people within the region's culture market.

Essence and Expression core to the craft art market

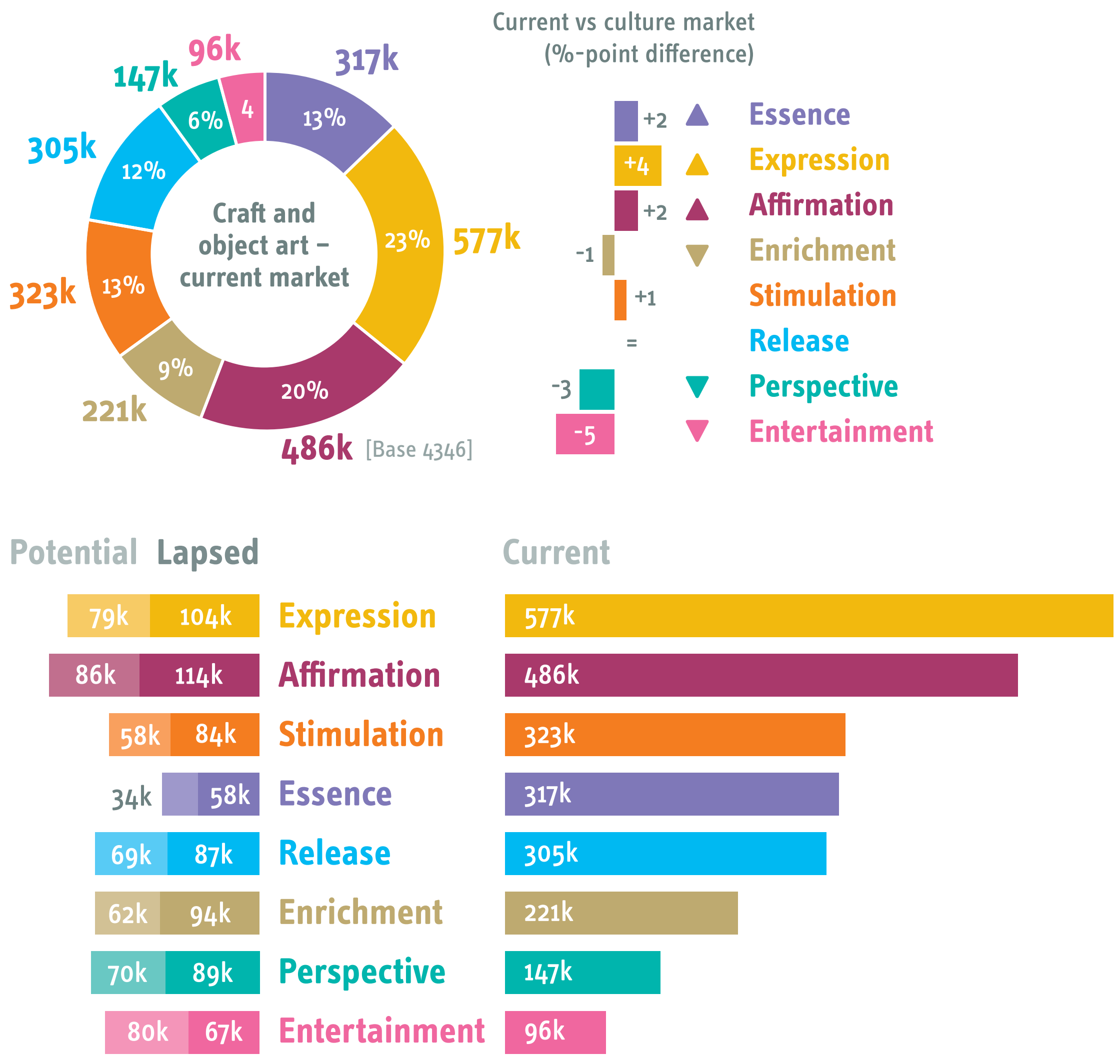
The Essence and Expression segments are core engagers with craft and object art. Over three-quarters of people in the Essence segment (77%) and 74% of Expression have engaged within the past three years (current market), which is significantly higher than the culture market average and above that of other segments.

Affirmation and Stimulation are secondary targets

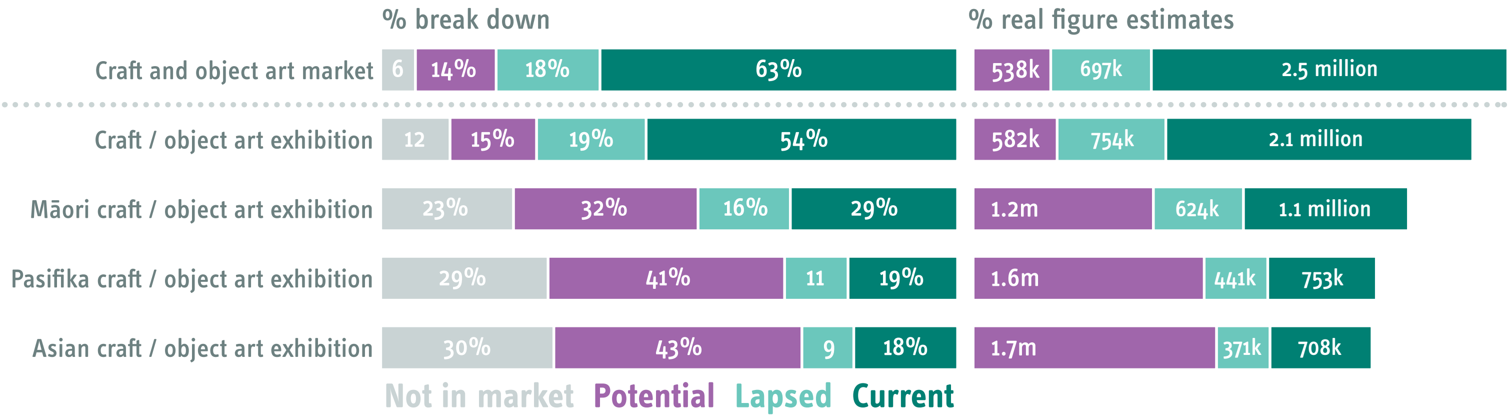
Affirmation are over-represented in the current market and, along with Stimulation, should be considered a secondary target. Seven in 10 Affirmation and 67% of Stimulation are in the current market for craft, just behind Essence and Expression.

Enrichment might be considered a development segment. Over half of those in this segment have engaged with craft in the past three years and they are more likely than average to have lapsed (55%). However, their interest mostly lies within fairly mainstream of craft and object art.

Culture Segment profile and real figure estimates – **craft and object art**



Craft and object art market penetration – including sub-artforms



Potential for Māori, Pasifika and Asian craft and object art

Over half the culture market (54%) is in the current market for a craft and object exhibitions; close to twice the size of the current market for Māori craft (29%).

For Māori, Pasifika and Asian craft and object art exhibitions, the proportion of the market who would consider engaging but haven't previously (potential market) is larger than the current market, highlighting particular market opportunity for these types of arts experience.

There is strong cross-over amongst the sub-artforms

There is a relatively strong shared market. Excluding the more generic craft and object art exhibition, the current market for Pasifika craft has the most cross-over with Māori craft and object art; 84% have engaged with both within the past three years (current).

Meanwhile, amongst those in the current Asian craft and object art market, 72% have engaged with Māori craft and 65% with Pasifika in the past three years.

3.0 million in the market for Māori craft and object art

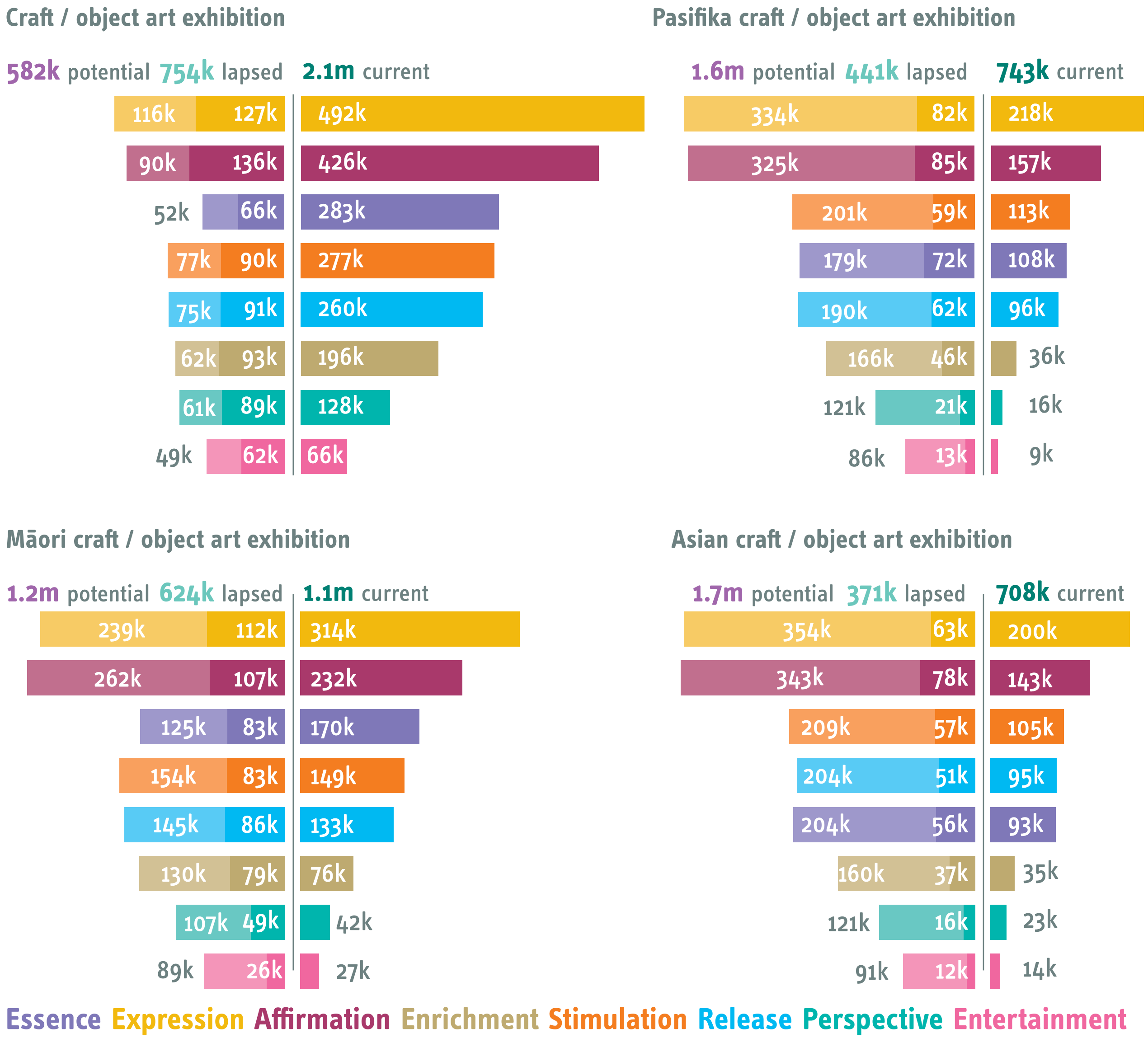
Of the four sub-artforms, the current craft and object art exhibition market is largest (2.1 million people) followed by Māori craft and object art (1.1 million). The current markets for Pasifika and Asian craft and object art are smaller but this means there is greater potential for growth, around 3.3 million people are waiting to be enticed.

Expression and Affirmation are active in the market

Compared to other segments, Expression and Affirmation are the most common in all three market groups and across all four sub-artforms; unsuprising as they represent a larger proportion of the culture market. However, it makes sense for Expression to be well represented here as this segment appreciates other's artistic expression and admire craft skills.

Essence are fewer in number but are over-represented in all sub-artforms compared to the average; Essence are typically higher engagers so while there are fewer of them in the market they typically engage at a higher frequency compared to other segments.

Sub-artform for the craft and object art market by culture segment – real figure estimates



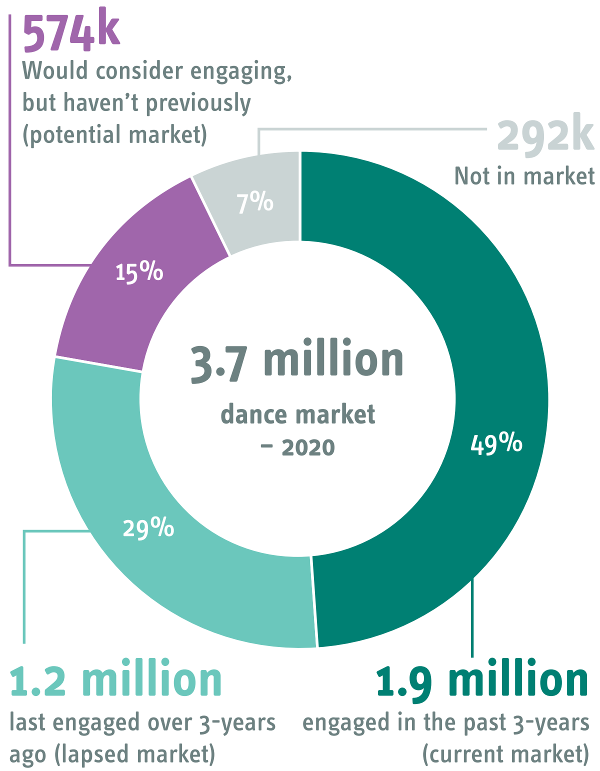
Dance

93% of the culture market are in the market for dance, equating to an estimated **3.7 million people**. The current dance market has seen a continued **upward trend**, with **1.9 million** adults having engaged with dance in the **past three years**, compared to 1.5 million in 2017.

There is real **opportunity for growth**; 1.2 million people have either lapsed or haven't previously engaged with dance, but would consider doing so. **Waikato**, **Otago** and the **West Coast** show significant development potential.

Defining the dance market

The dance market is defined as anyone in the culture market who has ever engaged with dance or would consider engaging but haven't previously, including: contemporary, ballet, cabaret or burlesque, urban, Māori, Pasifika or Asian dance, a dance festival or another kind of dance event.

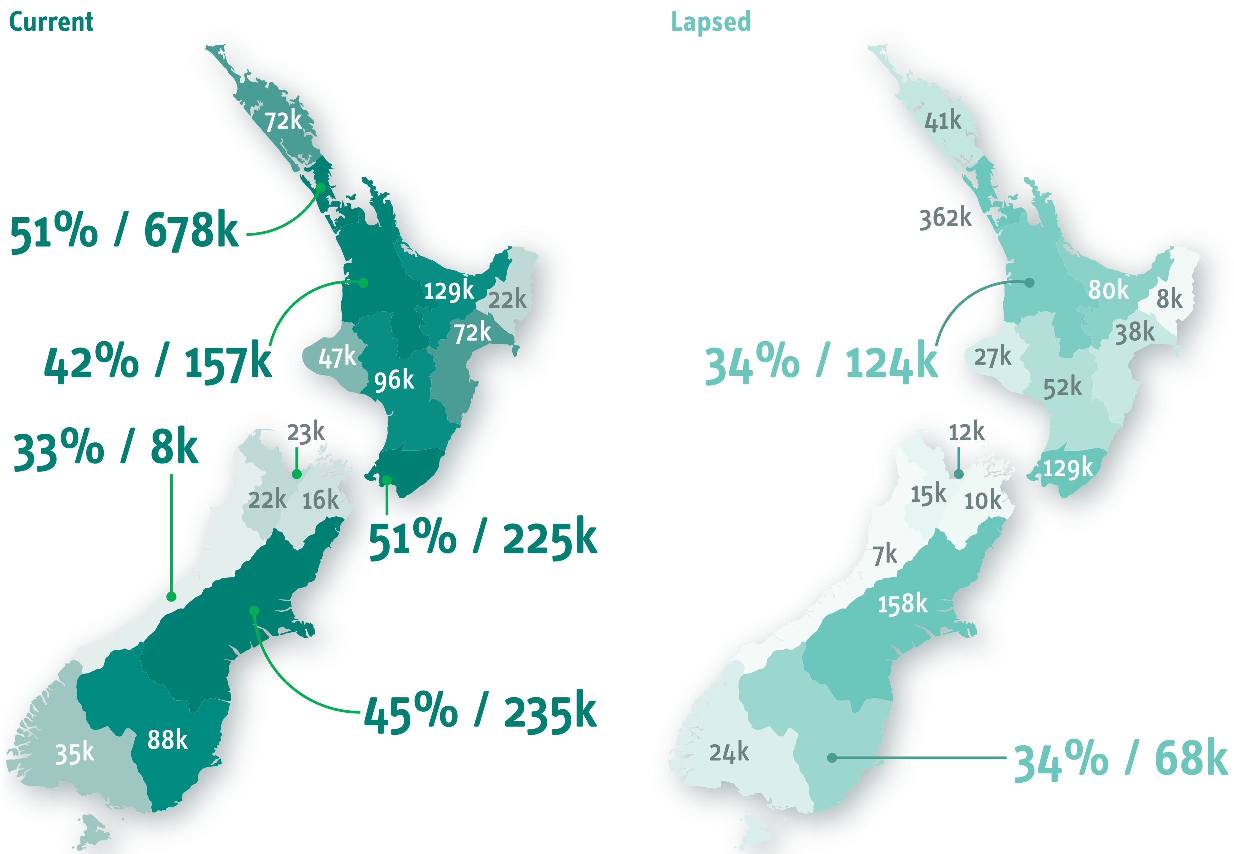


[Base 6743]

The current dance market has the highest female to male ratio and is one of the artform markets most likely to have spent on the arts in the past month, compared to the culture market average. Significant differences include:

- Skews female (56% vs 51%)
- More diverse market, and more likely to identify as Māori, Pacific Peoples or Asian (46% vs 37%)
- More likely to hold a post-graduate qualification (14% vs 12%)
- More likely to have spent on the arts in the past month (46% vs 32%)
- Are more active in giving to the arts, being significantly more likely to be an active member / subscriber (12%), recent volunteer (10%) or have given financially (40% donated within the past three years)
- Essence, Expression and Affirmation segments are over-represented.

Size of the current, lapsed and potential **dance** markets across New Zealand – real figure estimates



- The proportion of a region's culture market in the current market for dance is broadly comparable to the norm across the regions. The exceptions being Waikato (42%) and the West Coast (33%), where the penetration is significantly below average (49%).
- Waikato and Otago (both 34%) have a significantly larger proportion of people who have lapsed in their engagement with dance compared to the culture market norm, indicating scope to reactivate these audiences.
- Proportionally, the West Coast (29%) has a significantly larger potential market, representing an estimated 7k people within the region's culture market.

Essence, Expression and Affirmation are core segments

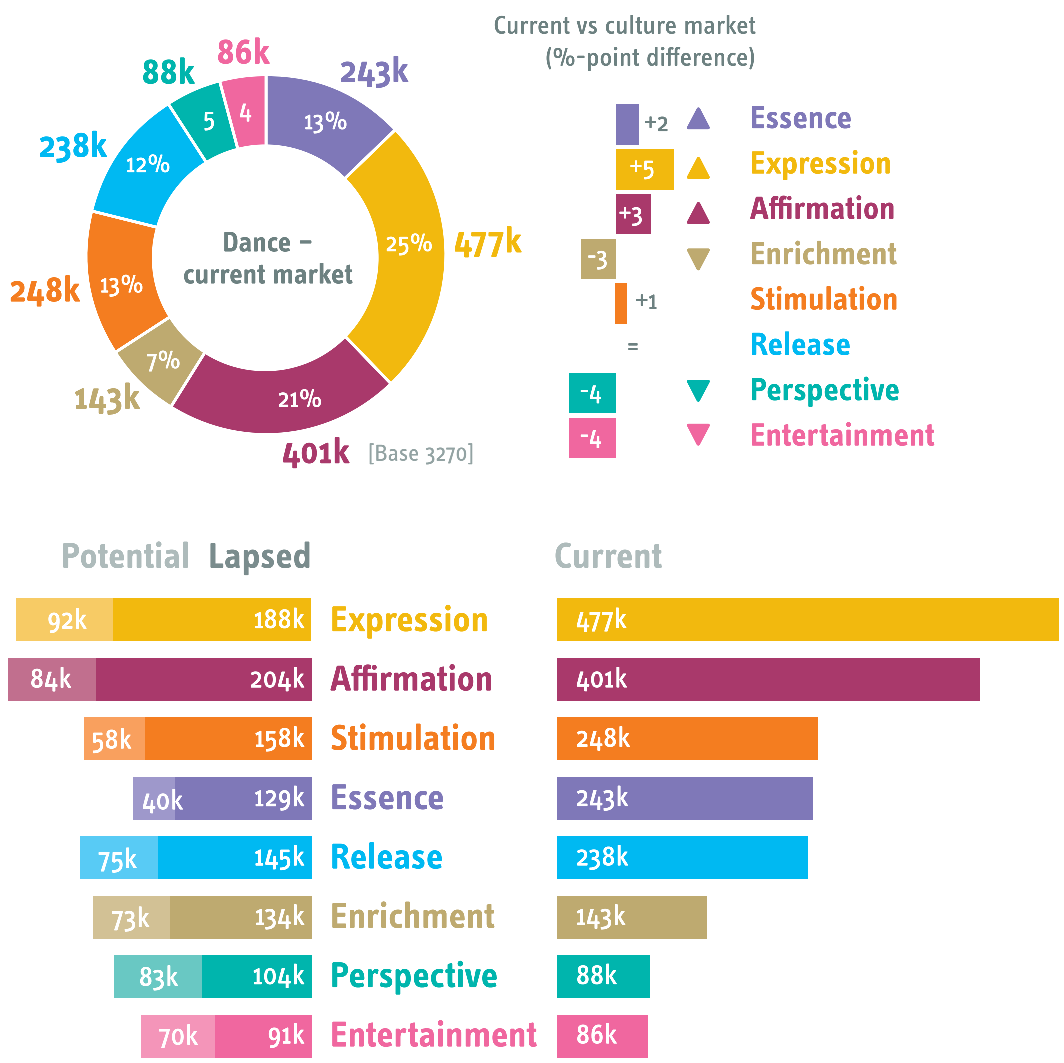
Essence, Expression and Affirmation are significantly more prominent in the current dance market compared to the culture market average. Combined, these segments represent 57% of the current dance market or an estimated 1.2 million people.

The Expression segment is the most open to dance as an artform. They're the segment most likely to have attended all of the dance sub-artforms in the past three years. Although, they are closely matched by Essence for ballet and contemporary dance.

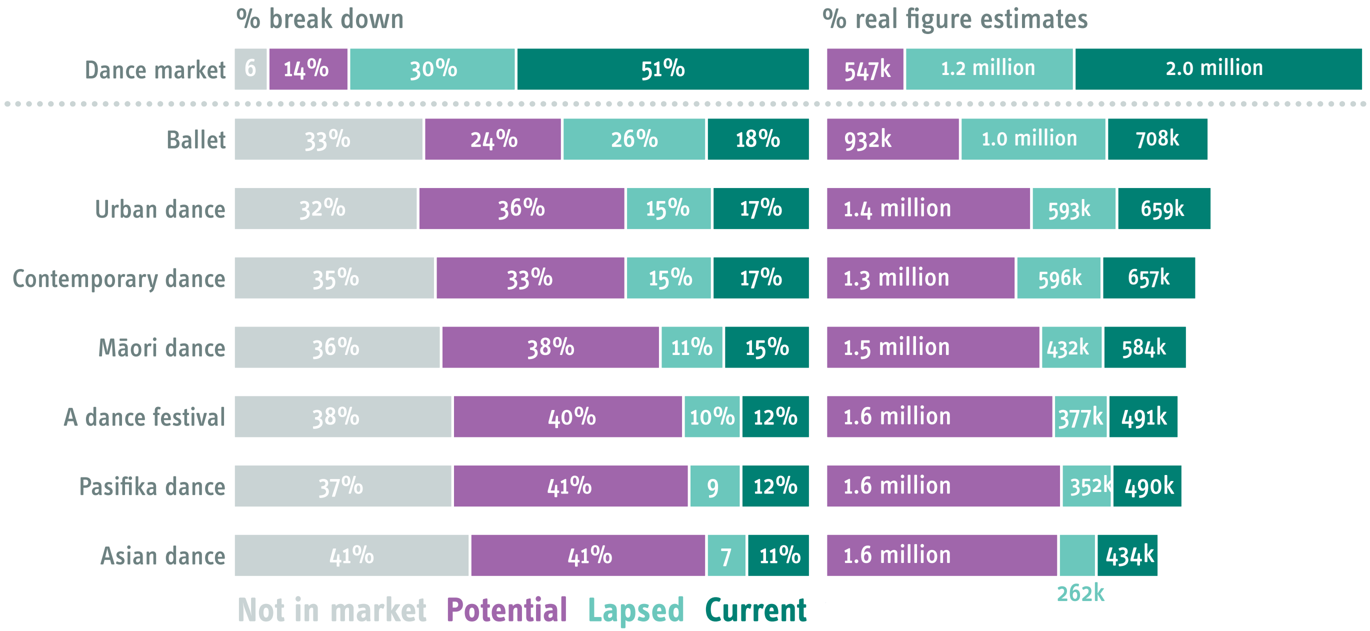
Stimulation is a development segment

Looking at those in the Stimulation segment, there is a higher than average proportion who would consider engaging with the dance sub-artforms but haven't previously (potential market). Release also holds potential, although they are typically harder to reach and persuade. Similarly, while the numbers of Enrichment, Perspective and Entertainment in the potential market are also healthy, these segments are significantly more likely to be resistant to dance.

Culture Segment profile and real figure estimates – dance



Dance market penetration – including sub-artforms



Scope to grow the market for dance

Nearly one-fifth of the culture market is in the current market for ballet (18% or an estimated 708k people) and the current urban dance market is a similar size. The proportion resistant is similar for both. However, there is greater potential for growth for urban dance (36%) than ballet (24%).

There is generally a strong potential market amongst most dance artforms. Pasifika and Asian dance have the largest proportion of the market who would consider engaging but haven't previously (both 41%). Māori dance (38%) also has a strong potential market to tap into.

Strong cross-over for ballet and contemporary dance

The current market for Pasifika dance has the most cross-over with Māori dance; 74% have engaged with both within the past three years (current).

Amongst those in the current contemporary dance market, 66% have engaged with ballet in the past three years, while 62% of the current ballet market have engaged with contemporary dance.

Current ballet, urban and contemporary dance markets are a similar size

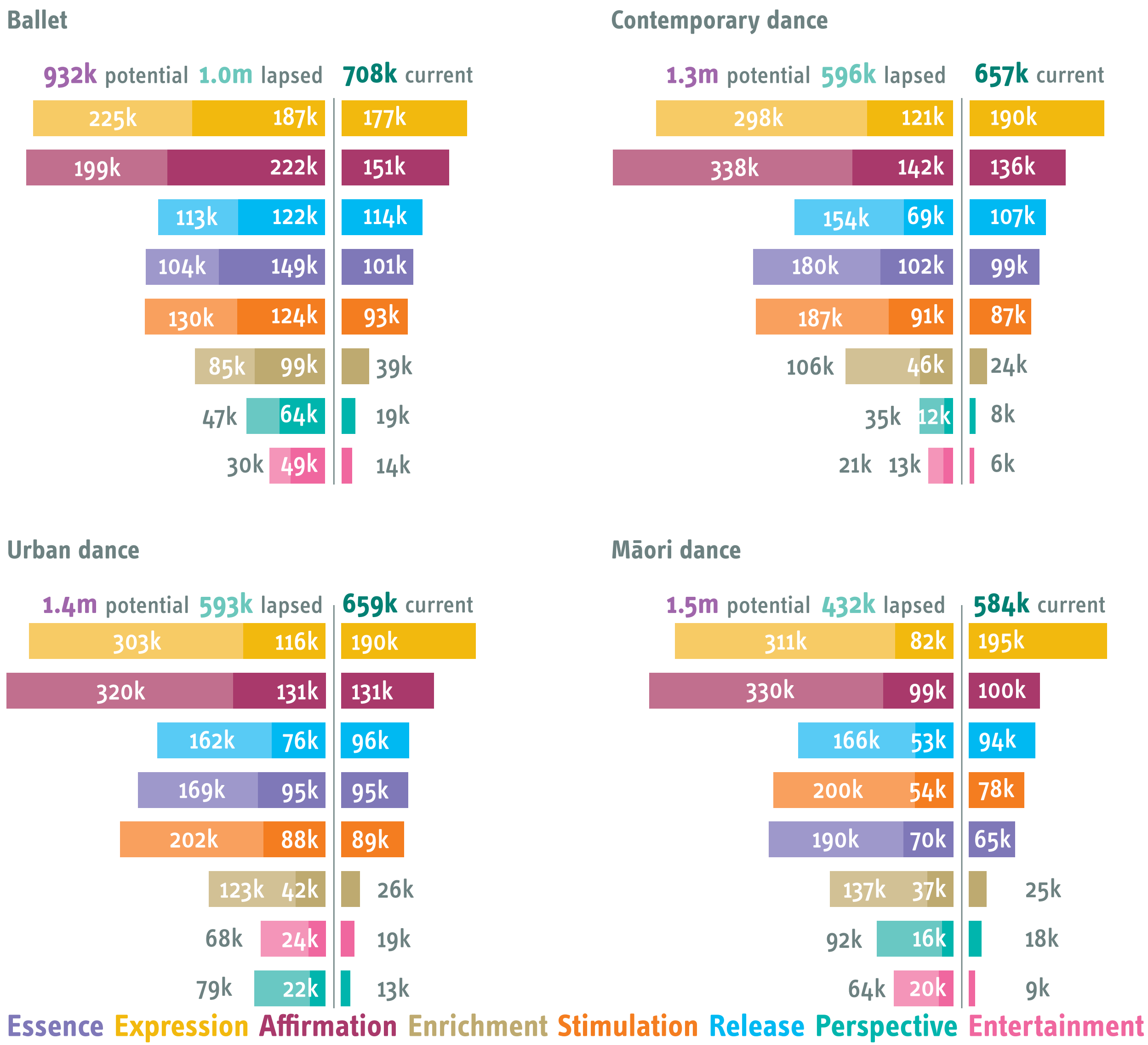
Of the sub-artforms for dance, the current ballet market is largest (an estimated 708k people) followed by urban dance (659k) and contemporary dance (657k)

The potential market for each dance sub-artform is broad. Dance festivals, and Pasifika and Asian dance boast large potential markets at 1.6 million each.

Expression and Affirmation hold significant value for the dance market

The current market is heavily weighted to Expression and Affirmation across all dance sub-artforms. The potential market for each sub-artform is also dominated by Expression and Affirmation. Expression are culturally active and tend to be open to a broad range of experiences, while Affirmation may need informing early about events to help them feel ‘in the know.’ Given their underlying desire for self-development, they are generally willing to consider more experimental performances, particularly if recommended by trusted sources.

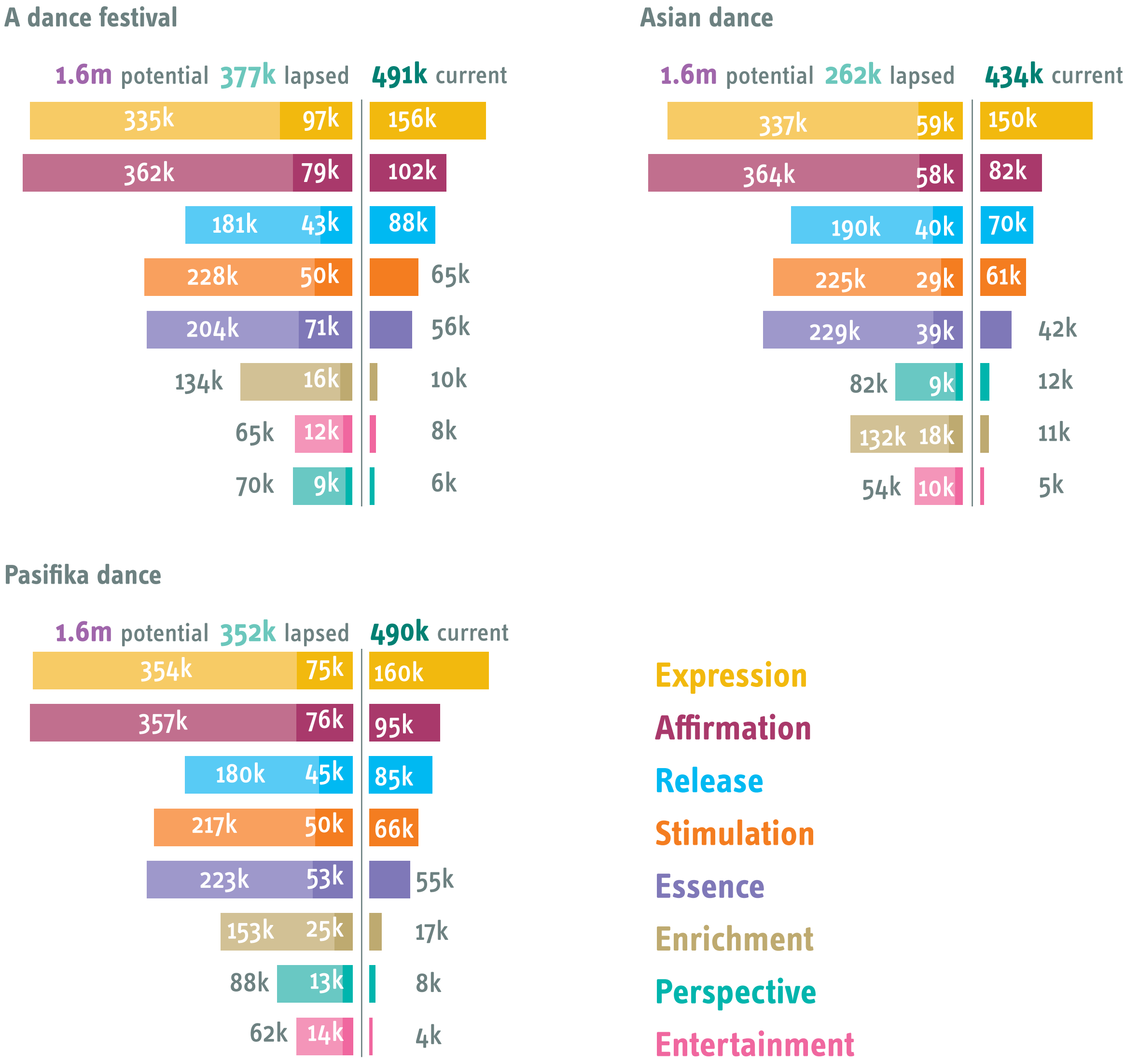
Sub-artform for the dance market by culture segment – real figure estimates



Growth opportunity for Stimulation and Essence in the Asian dance market

There is scope to diversify the dance market further, by reaching out to segments who are under-represented in the current market. Stimulation and Essence are fewer in number in the current market, however both segments are well-represented in the potential market for several sub-artforms, particularly Asian and Pasifika dance. Stimulation are fascinated by connecting ideas and have a keen eye for unusual twists, while Essence appreciate the opportunity for thoughtful engagement in relation to both their aesthetic and intellectual needs.

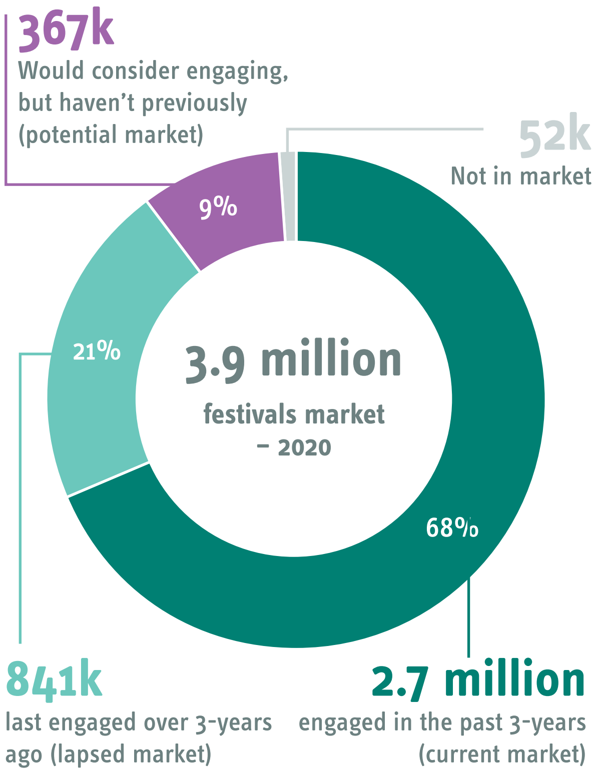
Sub-artform for the **dance** market by culture segment – real figure estimates



Festivals

The definition of festivals is broad. Overall, nearly everyone (99%) in the culture market is in the **market** for an **arts or cultural festival** generally, an estimated **3.9 million** people.

There is **scope to develop** the festivals market further. However, **1.2 million** people have either **lapsed** or haven't previously engaged with a festival but would consider doing so (potential).



[Base 6743]

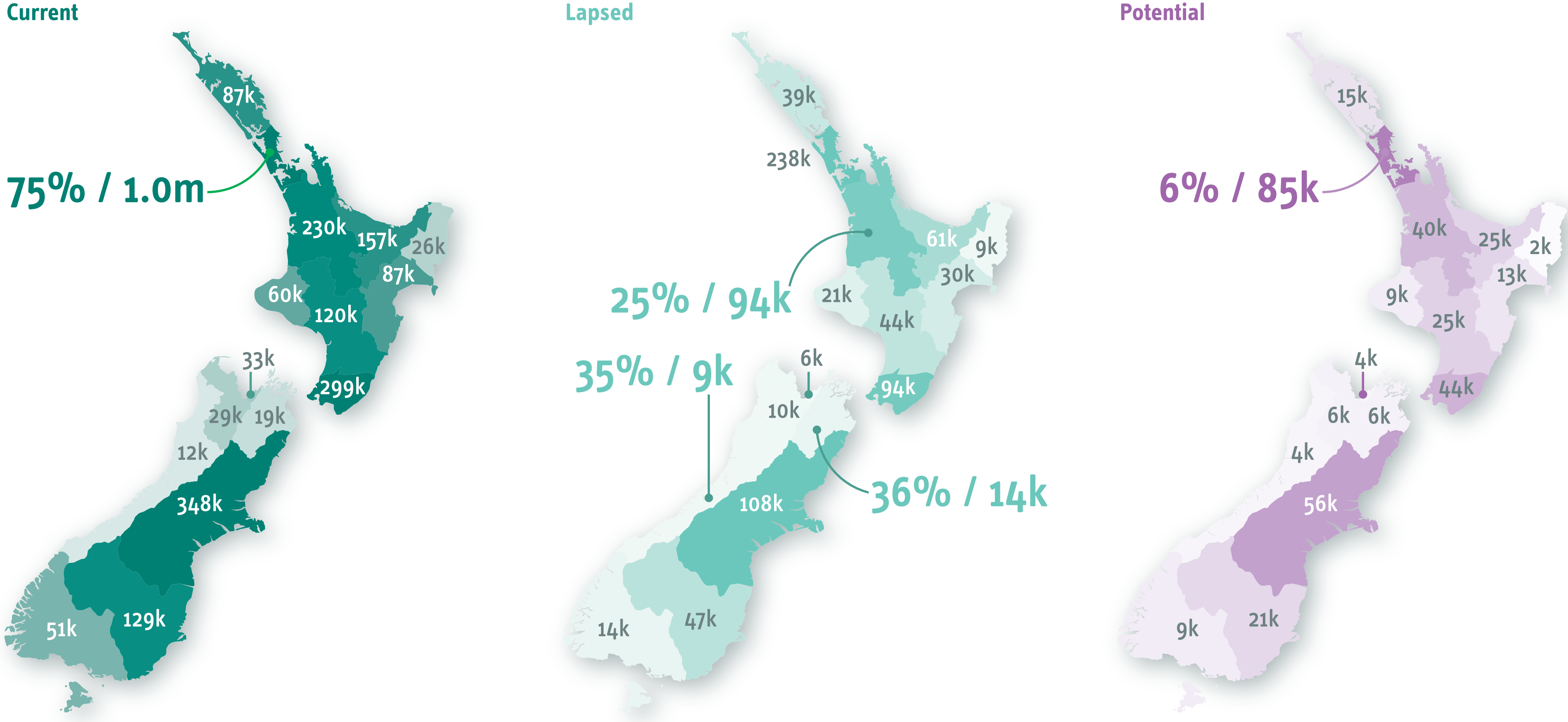
The current festivals market has a broad Culture Segment profile and is typically younger compared to the culture market average. Significant differences include:

- More likely to be younger, aged 16–24 (12% vs 10%)
- More likely to originate from the Auckland Region (36% vs 33%)
- More diverse market, and more likely to identify as Māori, Pacific Peoples or Asian (44% vs 37%)
- More likely to hold a post-graduate qualification (14% vs 12%)
- More likely to have spent on the arts in the past month (41% vs 32%)
- Are more active in giving to the arts, being significantly more likely to be an active member / subscriber (11%), recent volunteer (9%) or have given financially (36% donated within the past three years)
- Essence, Expression, Affirmation and Stimulation segments are over-represented.

Defining the festivals market

The festivals market is defined as anyone in the culture market who has ever engaged with a festival or would consider engaging but haven't previously, including: any film at a film festival, visual arts festival, Māori, Pasifika or Asian cultural festival, an arts, literature, contemporary / popular music or other music festival.

Size of the current, lapsed and potential festivals markets across New Zealand – real figure estimates



- The Auckland region has the highest penetration into the festivals market; three-quarters are in the current market for festivals equating to an estimated 1 million people.
- The proportion of the culture market in Marlborough (36%), the West Coast (35%) and the Waikato (25%) are the regions with where the proportion of people who have lapsed in their engagement with festivals is significantly above the culture market norm (21%).
- The proportion in the potential festivals market is broadly comparable to the norm (9%) in most regions. The exception is Auckland, where 6% of the region's culture market would consider engaging with festivals but haven't previously, significantly below average.

Essence, Expression and Stimulation are core segments

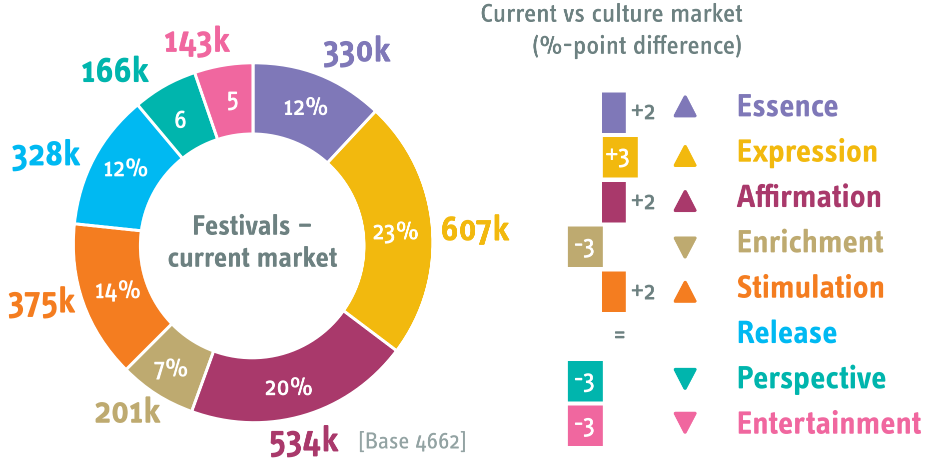
The four most culturally active segments are all over-represented in the festivals market compared to the culture market average. Combined, these segments represent 69% of the current market. Conversely, the more traditional Enrichment segment who appreciates nostalgia and more traditional artforms is under-represented, as is Perspective and Entertainment.

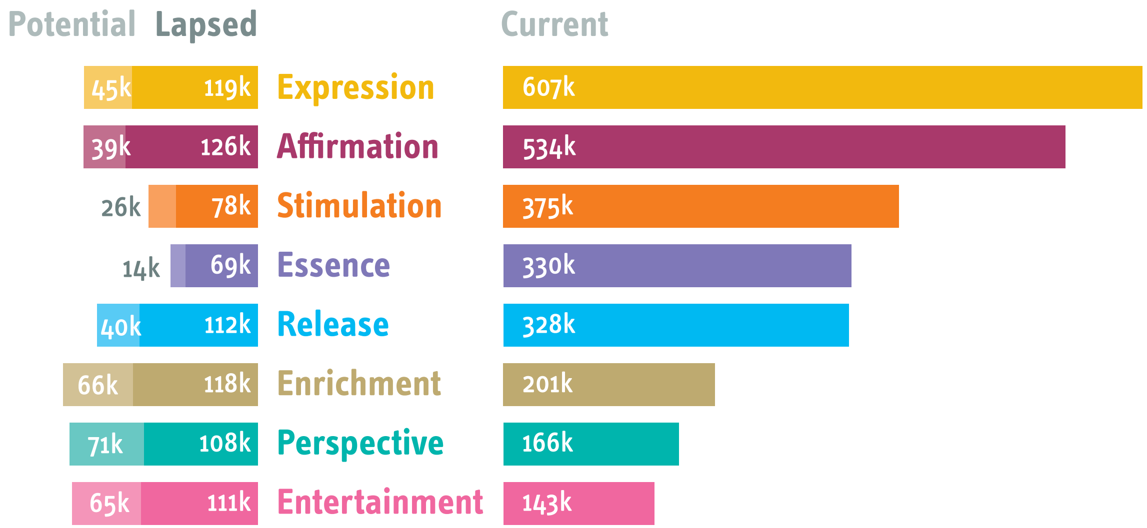
Scope to reach more Enrichment, Perspective and Entertainment

Looking at the percentage of each segment in the four market groups (current, lapsed, potential and not in market), around one-fifth of those in the Enrichment, Perspective and Entertainment segments are in the potential market for festivals meaning they may open to persuasion.

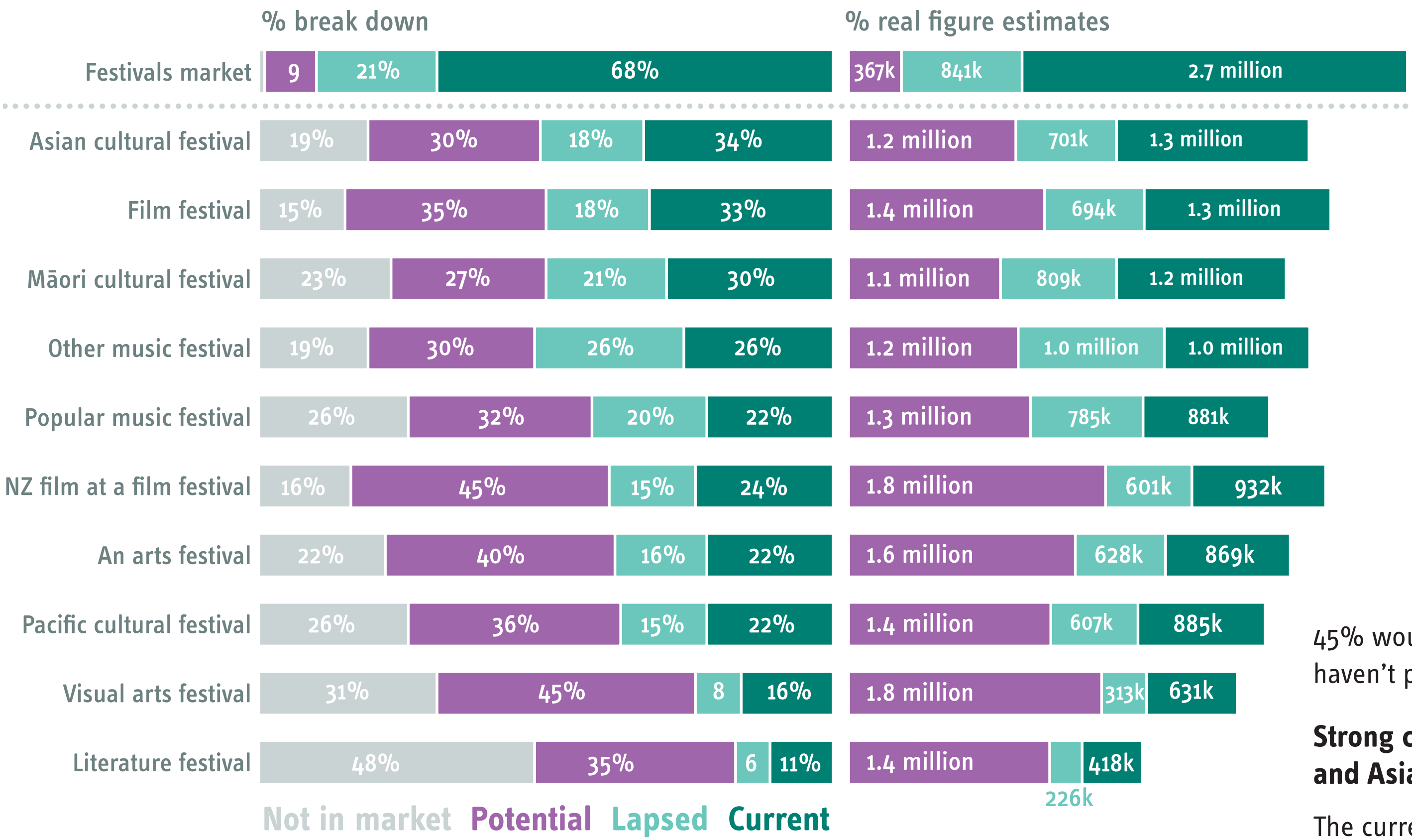
Festivals can provide something for everyone and may offer a gateway for the harder to convert segments of Enrichment, Perspective and Entertainment. However, the likelihood of them being in the potential market is a consequence of their under-representation in the current and lapsed markets.

Culture Segment profile and real figure estimates – festivals





Festivals market penetration – including sub-artforms



Potential to develop festivals market further

Around one-third of the market is in the current Asian cultural festival or film festival market. This is double the size of the current visual arts festivals market (16%).

Visual arts and New Zealand film at a film festival have the largest potential; 45% would consider engaging, but haven't previously (potential market).

Strong cross-over between the literature and Asian cultural festival markets

The current market for Pacific cultural festivals has the largest cross-over with Māori cultural festivals; 79% have engaged with both within the past three years (current).

Meanwhile, 73% of those in the current literature festival market has engaged with an Asian cultural festival in the past three years.

1.8 million in the potential market for a visual arts festival

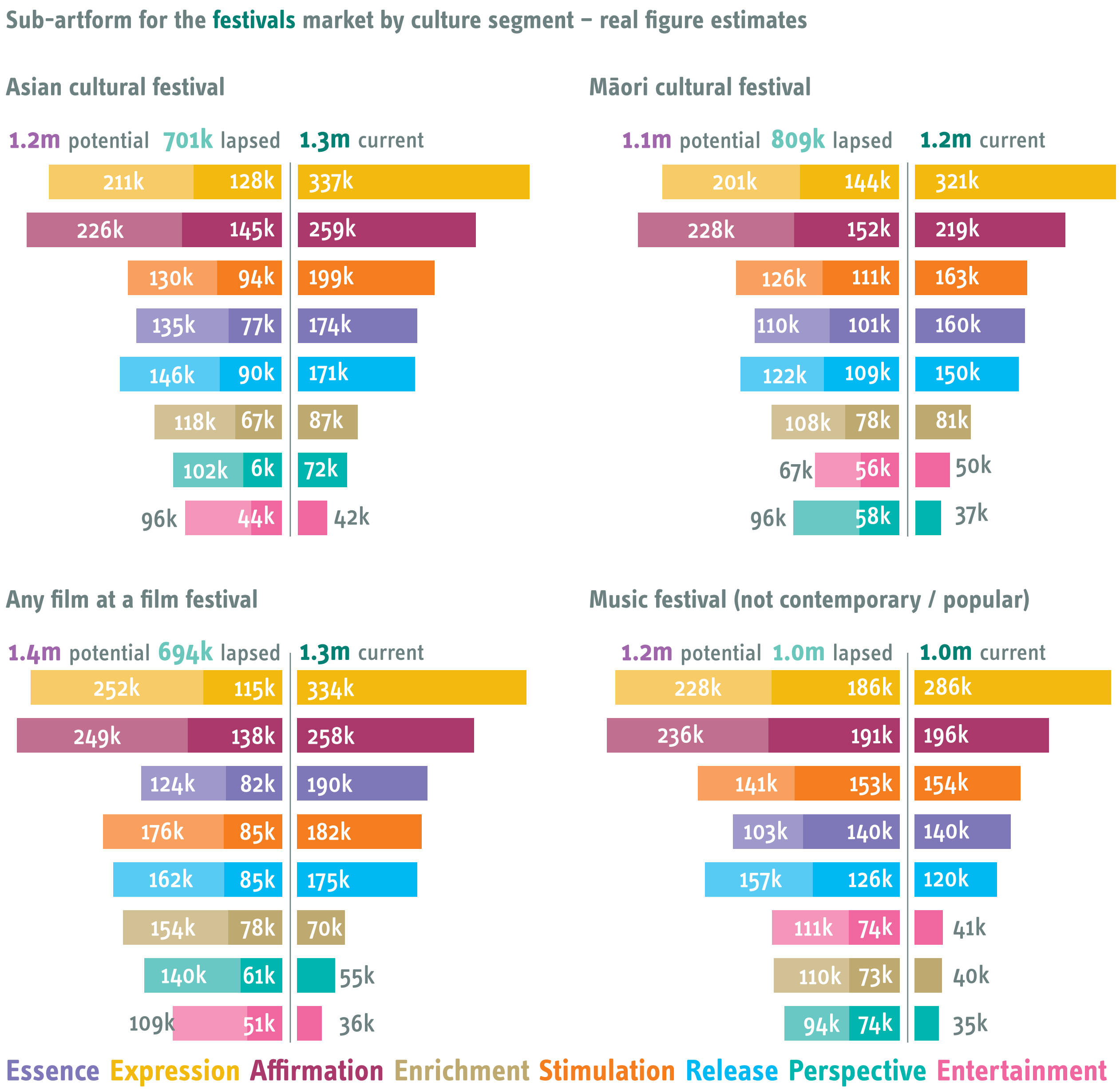
Of the festival sub-artforms, the current Asian cultural festival market is largest (an estimated 1.3 million), followed by the current film festival market (1.3 million) and current Māori cultural festival market (1.2 million).

By comparison, the current visual arts festival market is relatively small (an estimated 631k people). However, there is greater potential for growth. An estimated 1.8 million would consider engaging, but haven't previously (potential market).

Affirmation open to persuasion for literature festivals

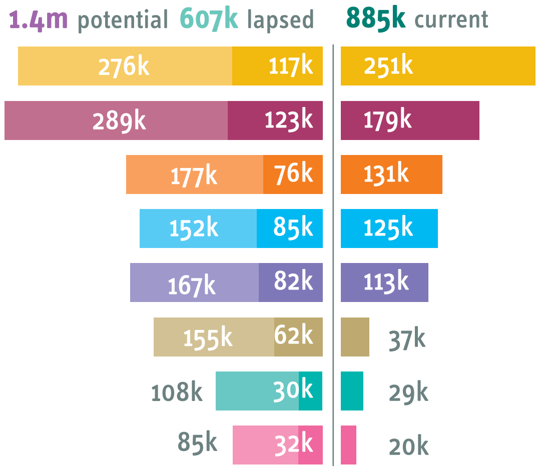
Affirmation is the second largest market group across the majority of festival sub-artforms. In particular, there is scope to develop Affirmation in the literature festival market. The experience needs to be accessible and positioned in a way that won't make them feel out of their depth.

There is also significant development potential within the Expression, Essence and Stimulation segments.

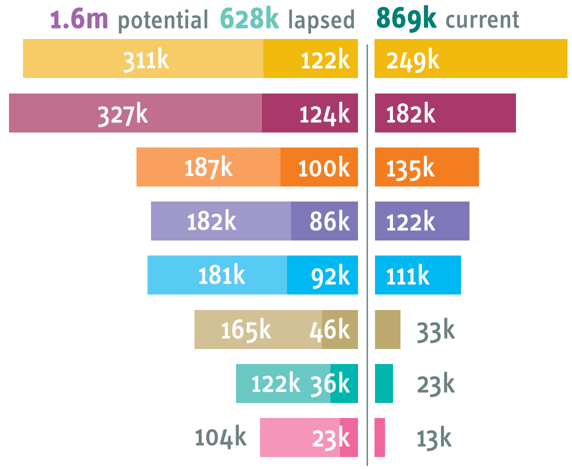


Sub-artform for the festivals market by culture segment – real figure estimates

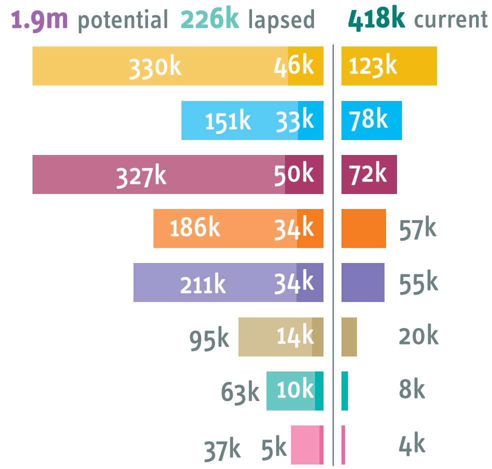
Pacific cultural festival



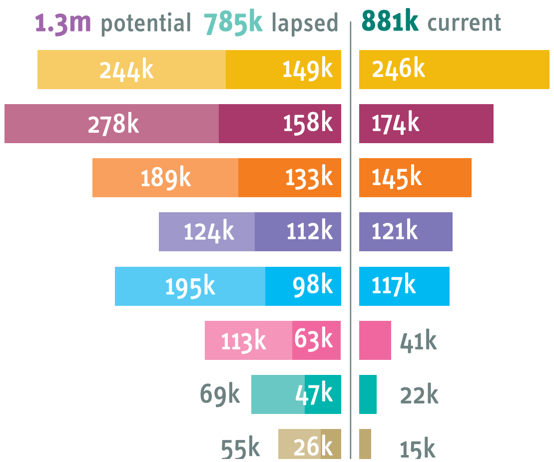
An arts festival



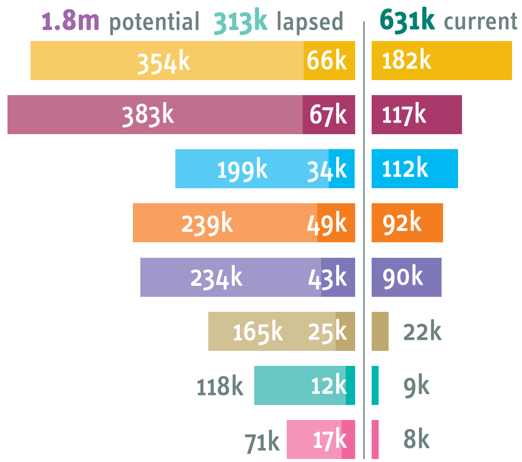
Literature festival



Contemporary / popular music festival



Visual arts festival

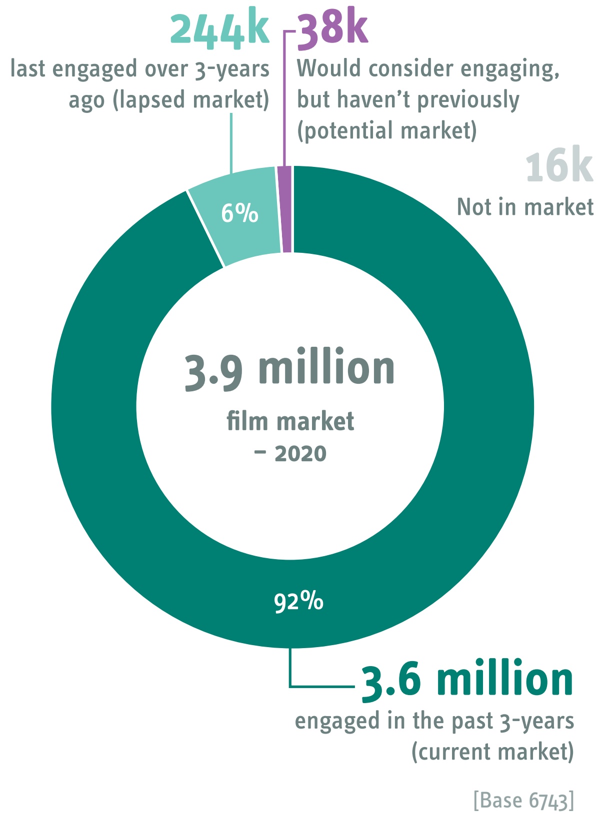


Expression
Affirmation
Release
Essence
Stimulation
Enrichment
Perspective
Entertainment

Film

Not surprising, the film market has **consistent**, **universal appeal** to the entire culture market. Overall, 92% have seen at least one film at a cinema or another venue in the past three years.

There is **potential** to **activate** the market to engage with film festivals. An estimated **1.8 million** people are the potential market for **New Zealand-made film** at a **festival**. The **Māori** and **Pacific film** markets both have **sizeable lapsed** markets open to reactivation.

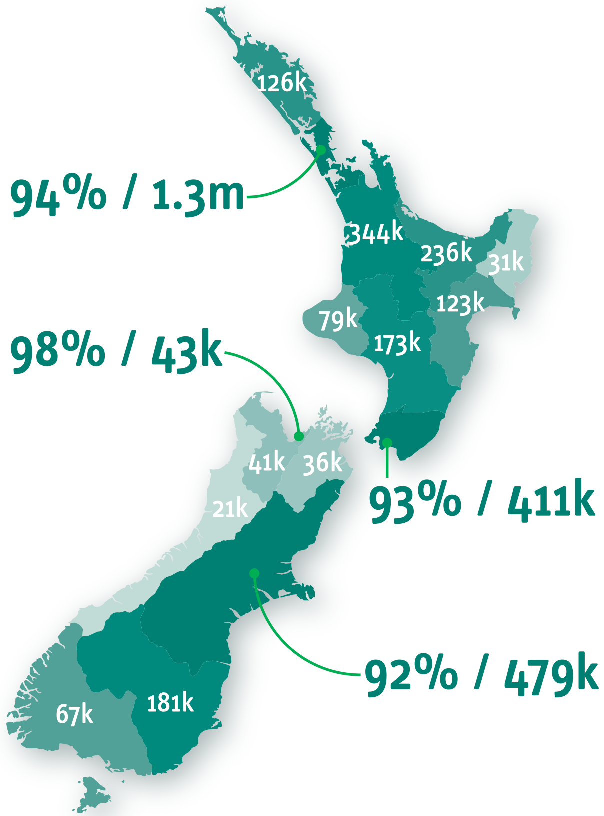


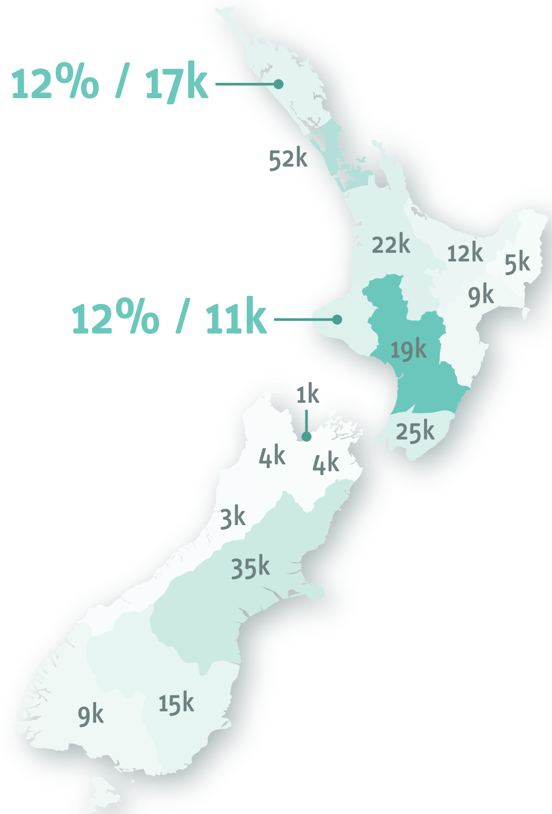
Defining the film market

The film market is defined as anyone in the culture market who has engaged with film, or would consider engaging but haven't previously, including: any film at a cinema or another venue, an New Zealand film at a cinema or another venue, Māori, Pacific, or Asian film, any film at a film festival, or New Zealand film at a film festival.

Due to the high market penetration for film, the overall profile of the current film market there is little to distinguish it from culture market norm.

Size of the current, lapsed and potential **film** markets across New Zealand – real figure estimates



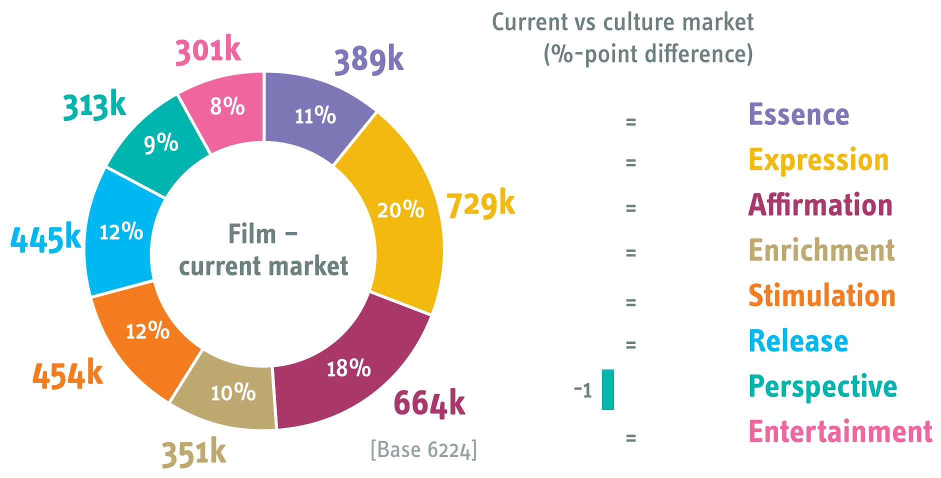


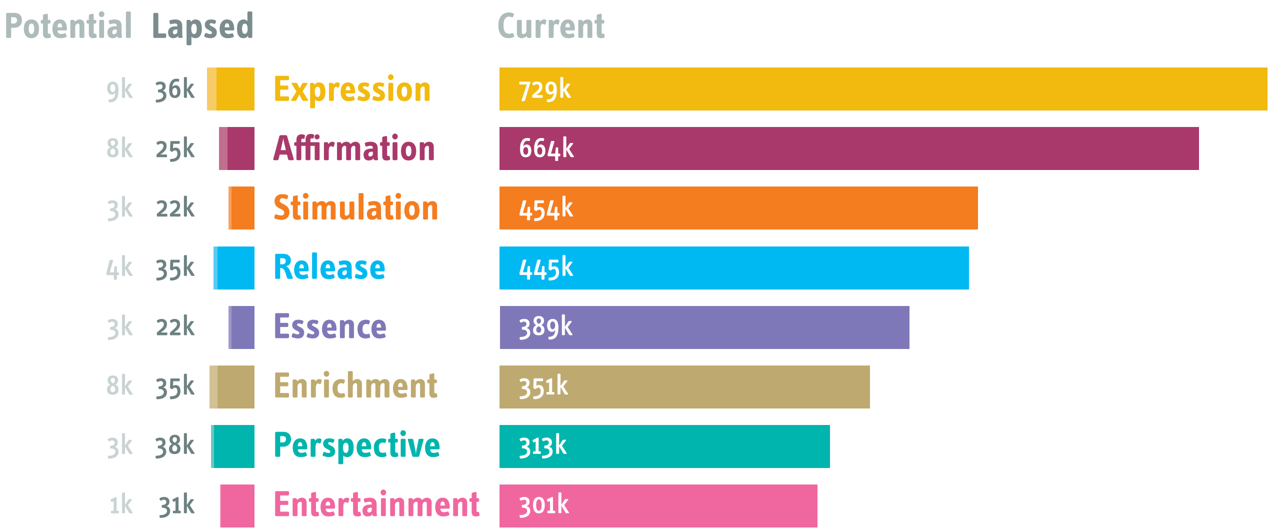
- Nelson (98%) and Auckland (94%) have particularly high penetration for the film market, significantly higher compared the culture market norm.
- Northland and Taranaki (both 12%) have a significantly higher proportion who have lapsed in their engagement with film, representing an estimated 17k and 11k people, respectively.
- Film has one of the largest current markets and consequently has the smallest potential markets at a regional level; therefore, has not been included in the above heat map.

Culture Segment profile for film comparable to average

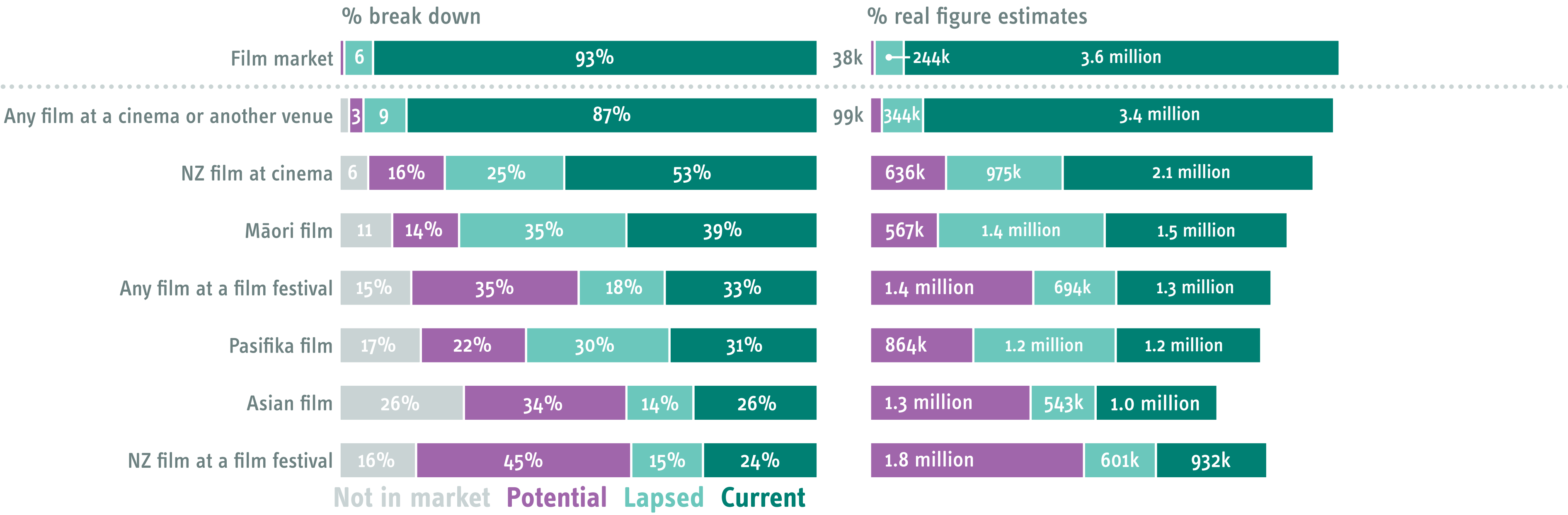
Due to high market penetration for film, the Culture Segment profile for the current film market is nearly identical to the overall culture market. The lapsed market for film is notably different, however, with higher levels of Enrichment and Perspective and a small proportion of Expression and Affirmation.

Culture Segment profile and real figure estimates – film





Film market penetration – including sub-artforms



Over one-third open to attending a film festival for the first time

Within the film market, 87% of the culture market have seen a film at a cinema or another venue in the past three years, while over half (53%) are in the current market for a New Zealand film at a cinema.

There is opportunity for growth of the film festival market. For the general film festival market, the proportion of the potential market is almost equal to the current market at 35%.

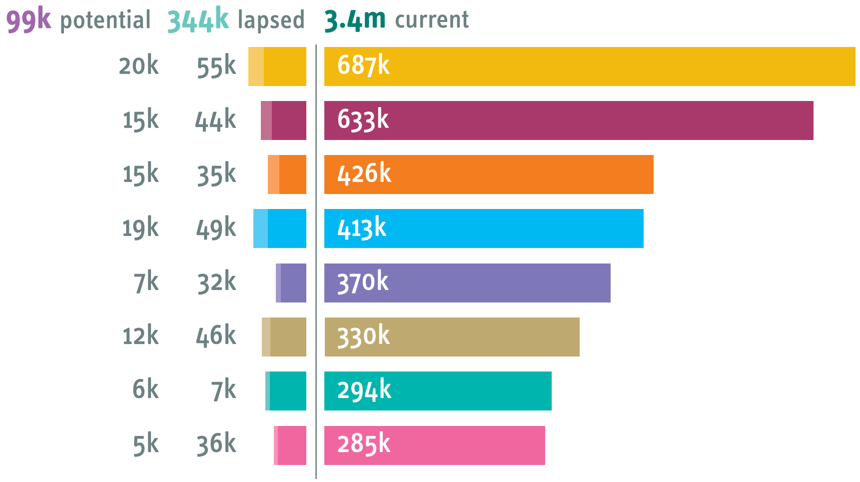
Film festivals with a particular focus on New Zealand film have the largest proportion of the market who would consider engaging but haven't previously (45% are in the potential market).

Strong crossover between film festivals with focus on New Zealand and Māori film

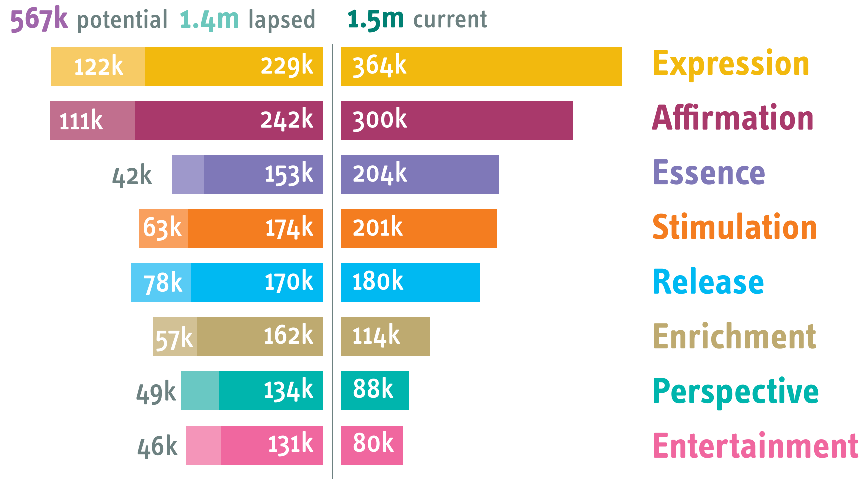
Excluding seeing a film at a cinema or another venue generally, amongst those in the current New Zealand-specific film festival market, 65% have engaged with Māori film in the past three years, 59% with Pasifika film and 54% with Asian film.

Sub-artform for the film market by culture segment – real figure estimates

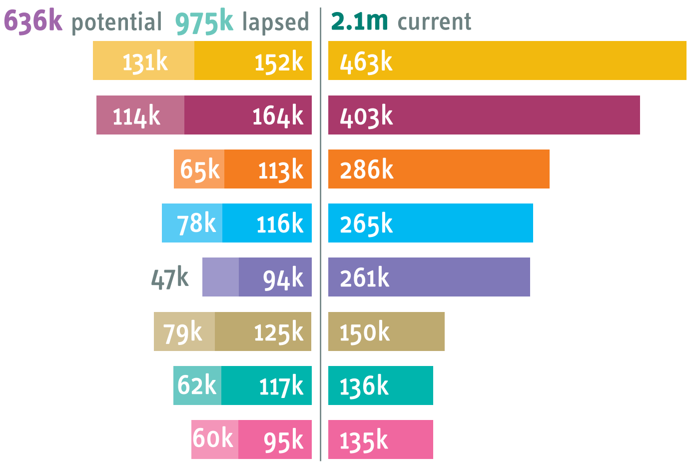
Film at cinema or other venue



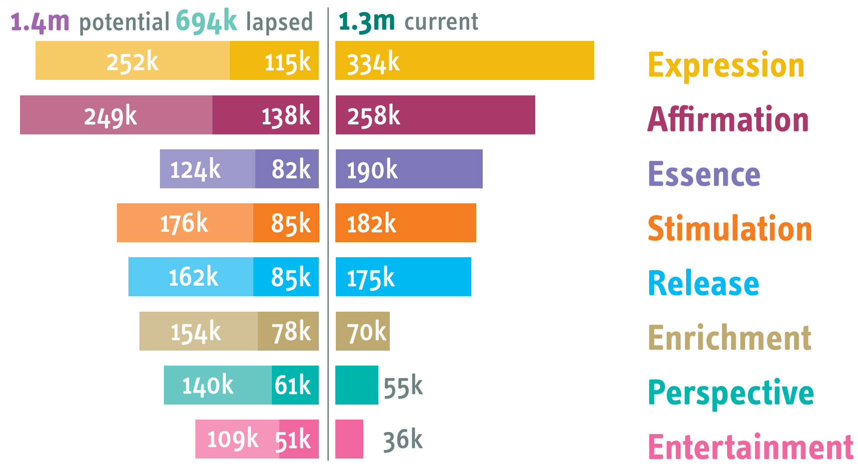
Māori film



New Zealand film at cinema



Film at a film festival



1.8 million open to engaging with NZ film at a festival

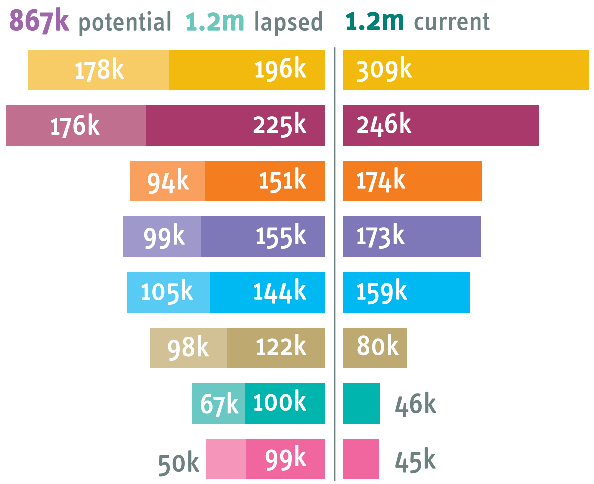
The current market for New Zealand film at a cinema is an estimated 2.1 million. There is also a sizeable active market for Māori film (1.5 million).

There is strong growth potential in most sub-artforms for film, particularly film festivals with a focus on New Zealand film; an estimated 1.8 million are open to engaging for the first time and the Expression, Affirmation, and Stimulation segments are most numerous in the potential market.

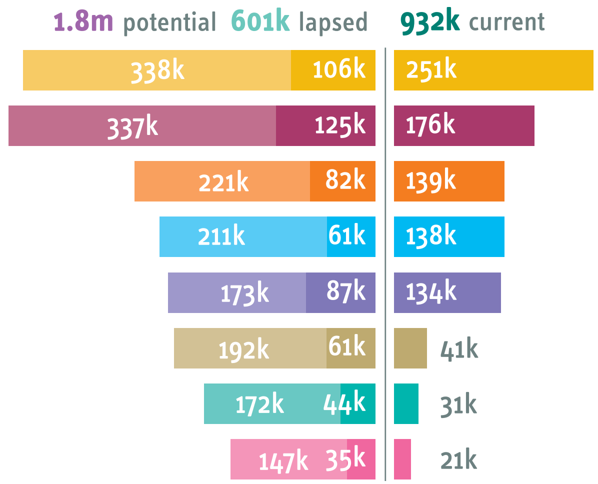
Scope to grow the film festival market

As with the other artforms, there are high numbers of Expression and Affirmation across most film market groups. There is significant opportunity, however, to engage Affirmation in the Asian film market for the first time. There is also scope to grow the market for film festivals with consistent interest amongst all segments in attending a film festival. Enrichment and Perspective are both over-represented in particular.

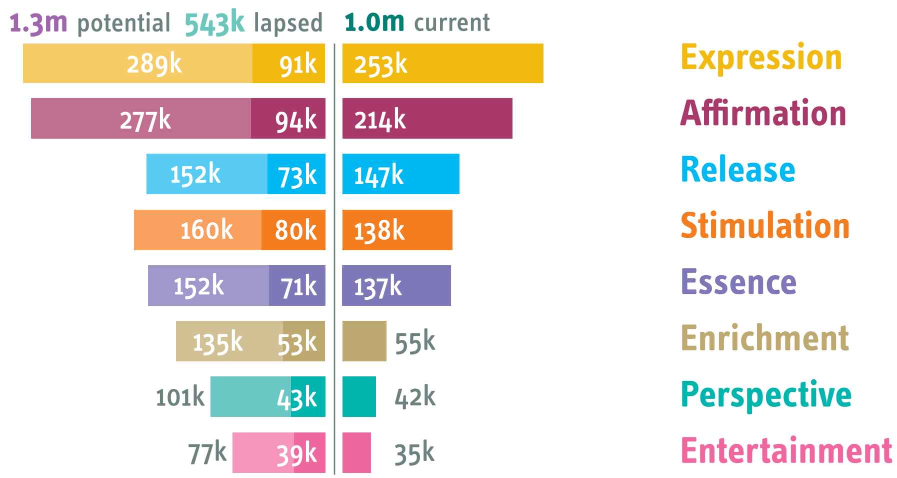
Pasifika film



New Zealand film at a film festival



Asian film



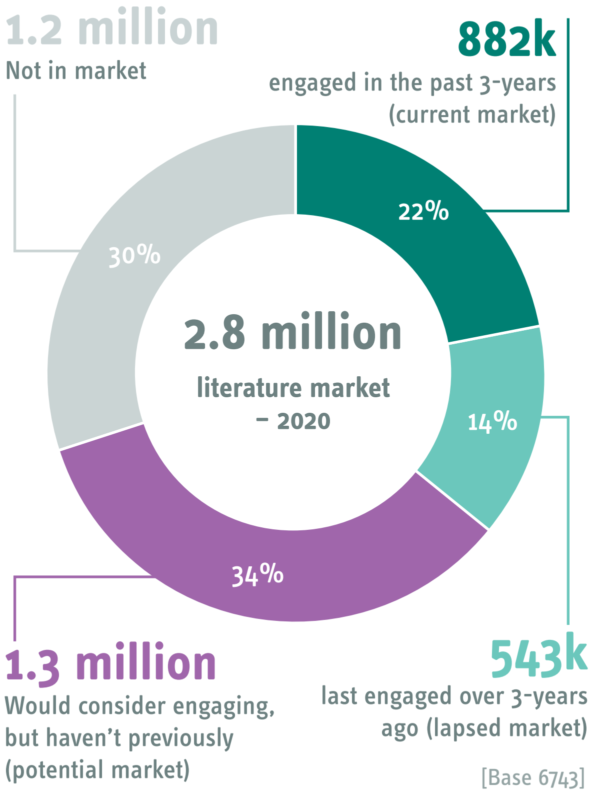
Literature

The **current market** for literature is the **smallest** of all artforms tested. However, there is sizable **opportunity for growth**; an estimated 1.3 million are in the **potential market**. The number of people in the potential market for literature is nearly as many people as the current and lapsed markets combined (1.4 million). However, 3 in 10 are resistant, the highest level amongst the tested artforms.

Essence and **Expression** dominate the current market, but there's still **opportunity to extend the reach**.

Defining the literature market

The literature market is defined as anyone in the culture market who has engaged with literature, or would consider engaging but haven't previously, including: a literature festival, other event connected with poetry or spoken word, other event connected with books, other literature event, a Māori, Pasifika or Asian literature event or writer(s) at a writers festival.

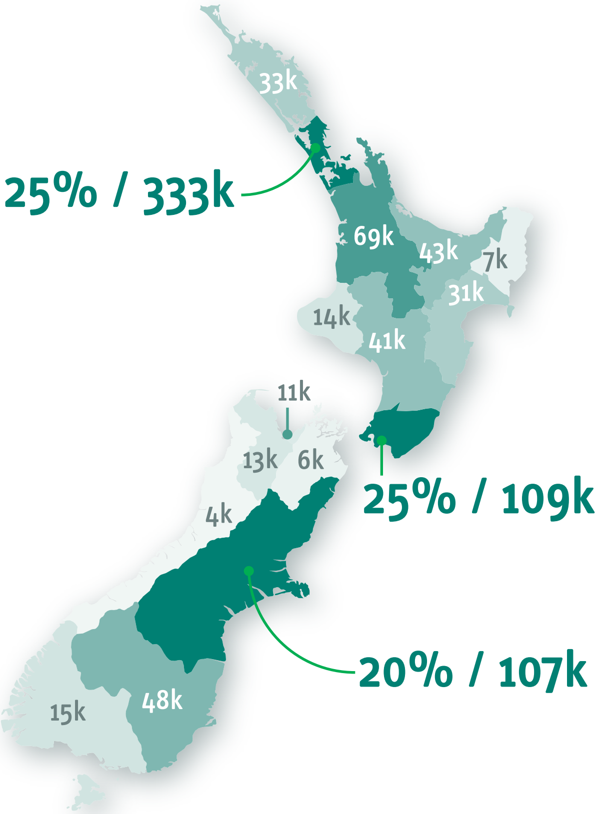


The current literature market is the most highly educated artform market, and significantly more diverse compared to the culture market average. Significant differences include:

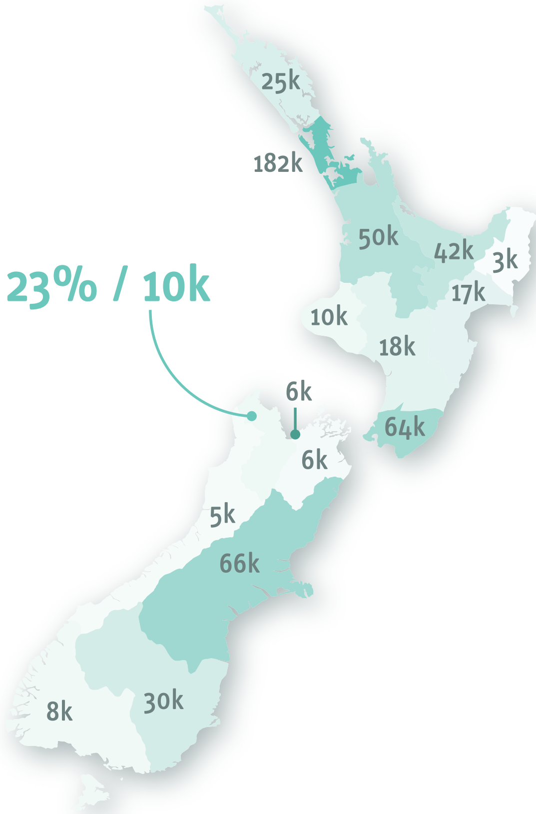
- More likely to be younger, aged 16–24 (14% vs 10%)
- More likely to originate from the Auckland region (37% vs 33%)
- More diverse market, and more likely to identify as Māori, Pacific Peoples or Asian (47% vs 37%)
- More likely to hold a post-graduate qualification (20% vs 12%)
- More likely to have spent on the arts in the past month (61% vs 32%)
- Are more active in giving to the arts, being significantly more likely to be an active member / subscriber (21%), recent volunteer (16%) or have given financially (54% donated within the past three years)
- Essence and Expression segments are over-represented.

Size of the current, lapsed and potential **literature** markets across New Zealand – real figure estimates

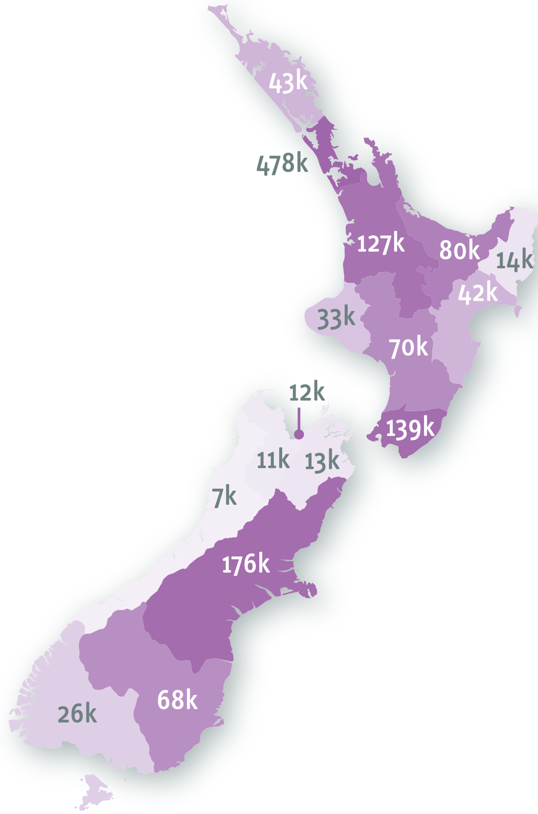
Current



Lapsed



Potential



- One quarter of the Auckland region's culture market are in the current market for literature, significantly higher than average (22%).

- The proportion of the culture market in the Tasman region who have lapsed in their engagement with literature (23%)is significantly above the market average (14%), representing an estimated 10k people ripe for reactivation.

- The potential market for literature is healthy, and across most regions, the proportion of the cultural market in the potential market for literature is broadly comparable to the norm (34%).

Essence and Expression key to the market

The Essence and Expression segments are significantly over-represented in the current literature market, collectively representing 43% or an estimated 380k people.

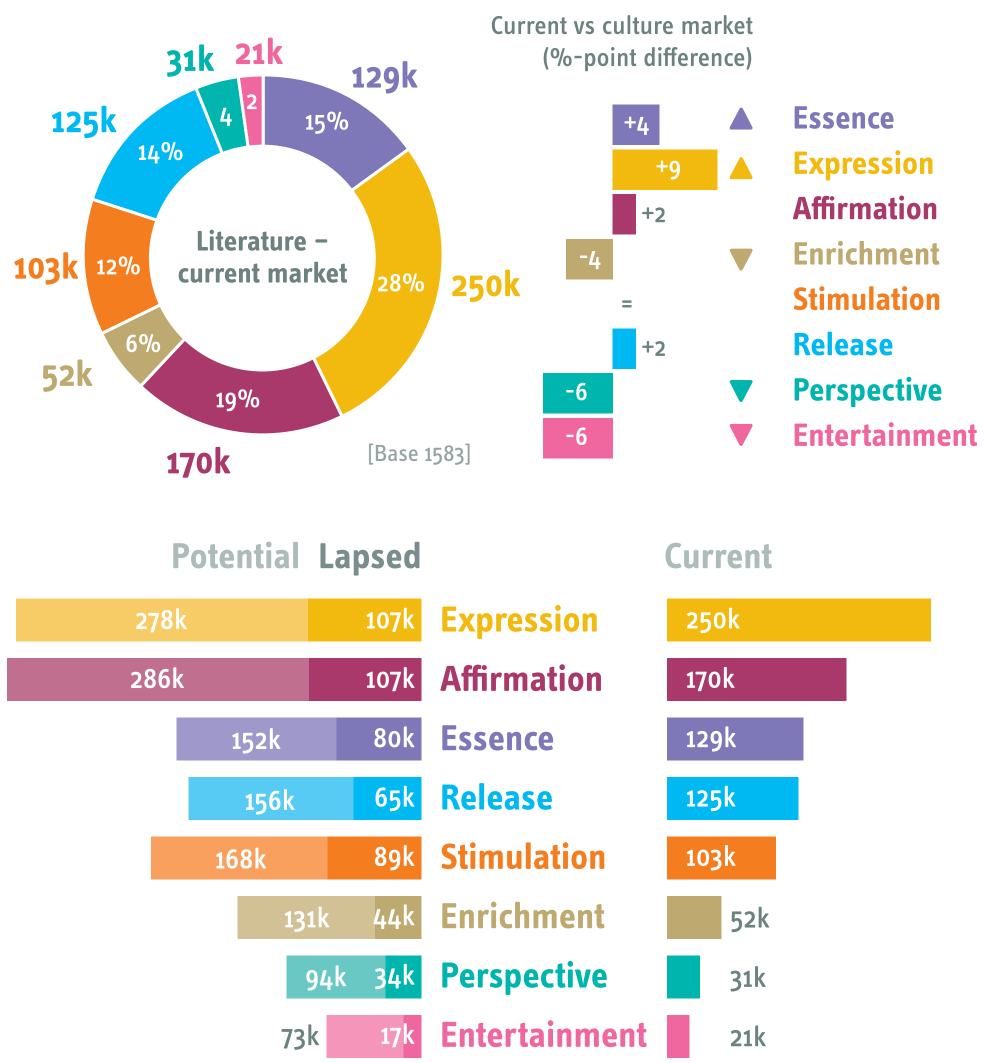
Most other segments are more likely than not closed to this artform: the majority of those in the Enrichment, Perspective and Entertainment segments are resistant to all the sub-artforms that make up the literature market.

Potential to re-engage Essence and Stimulation

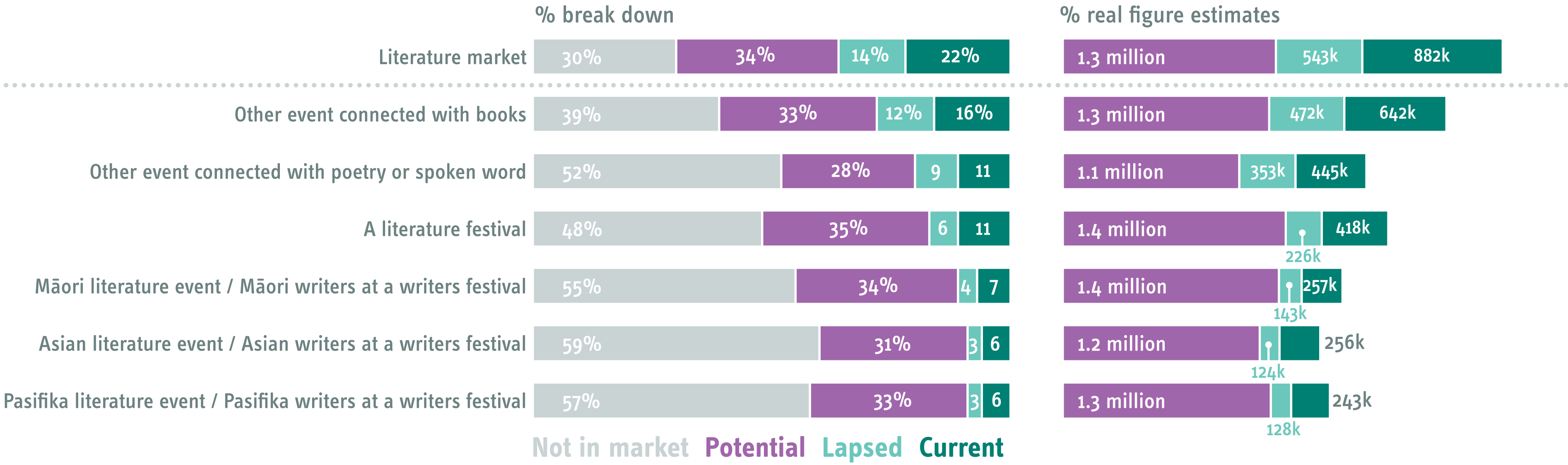
Although Essence are over-represented in the current literature market, there is significant untapped potential. Around 1 in 5 have lapsed, having last attended a literature event over three years ago.

Affirmation also demonstrates potential and should be considered a secondary segment. Looking at the Affirmation segment, 41% are yet to attend a literature event but would be interested.

Culture Segment profile and real figure estimates – **literature**



Literature market penetration – including sub-artforms



A small market with considerable potential

The current market for the literature sub-artforms is considerably smaller compared to the other artforms tested. However, the literature market displays real opportunity for growth.

Overall, 35% would consider attending a literature festival but haven't previously (potential market). This is closely followed by Māori (34%) and Pasifika literature events or Pasifika writers at a writers festival (33%). The strategy should focus on raising awareness to extend the reach to these potential markets.

Similar market penetration across Māori and Pasifika literature events

Amongst those in the current Māori literature market, 73% have engaged with Pasifika literature. Conversely, 77% of the active Pasifika literature market have engaged with Māori literature within the past three years.

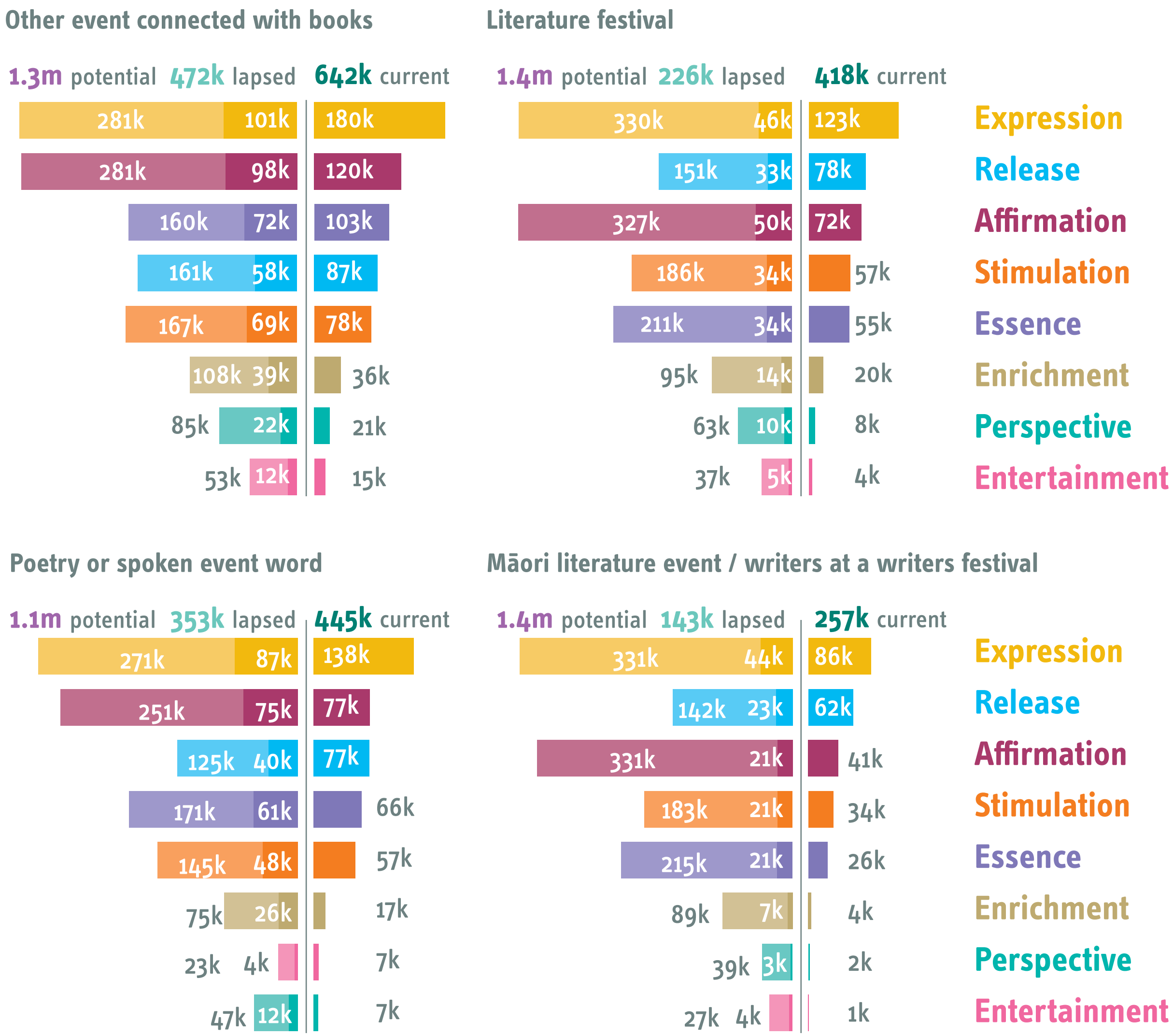
Potential to grow literature events and festivals

Of the literature sub-artforms, the current book events market is the largest (an estimated 642k), followed by a poetry or spoken word event (445k). Although the current markets are generally smaller than other artforms, this also offers greater opportunity for growth. Literature festivals and Māori literature events both have a sizeable potential market at 1.4 million each. The challenge will be activating this latent interest through differentiated messaging.

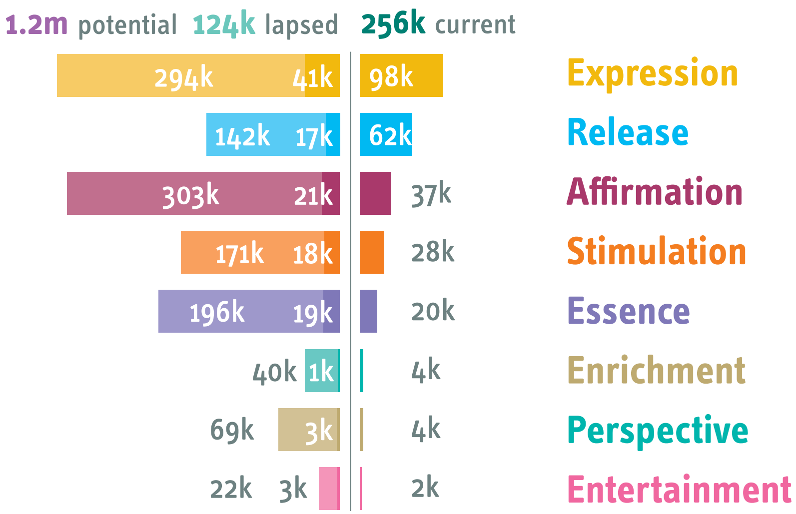
Essence and Affirmation show significant growth potential

Expression are particularly active in the literature market, and are over-represented in all sub-artforms. Essence are significantly more likely to be open to engaging with Māori, Pacific and Asian literature events for the first time. Affirmation also demonstrates potential for growth. Literature events have scope for differentiation by segment. Essence will prefer intimate literary event settings, whereas Expression will enjoy the shared experience with like-minded creatives.

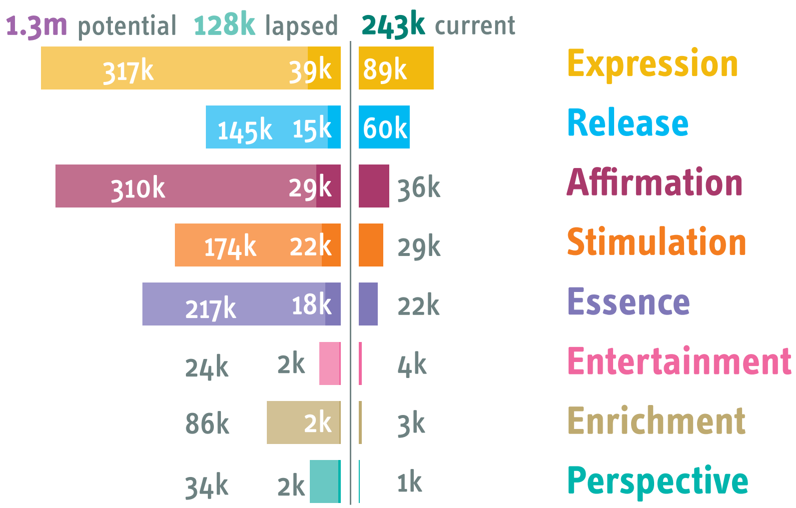
Sub-artform for the literature market by culture segment – real figure estimates



Asian literature event / writers at a writers festival



Pasifika literature event / writers at a writers festival

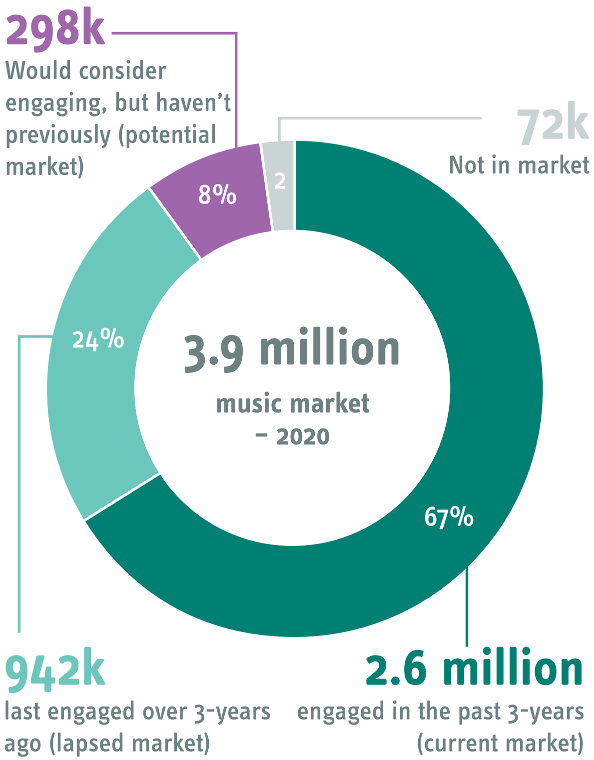


Music

Music is one of the larger artform markets; **98%** are in the **market** for music. While there is a sizeable current music market, there is **potential growth** opportunity. An estimated **1.2 million** people have either **lapsed** or are **waiting to be activated**.

Defining the music market

The music market is defined as anyone in the culture market who has engaged with music, or would consider engaging but haven't previously, including: a contemporary popular music concert, classical concert, jazz or blues concert, choral concert, country or folk music concert, contemporary popular music festival, other music festival, dance and electronic music, music concert or event showcasing Māori, Pasifika or Asian artists, opera or operetta, contemporary classical, sound art event or another kind of live music event.

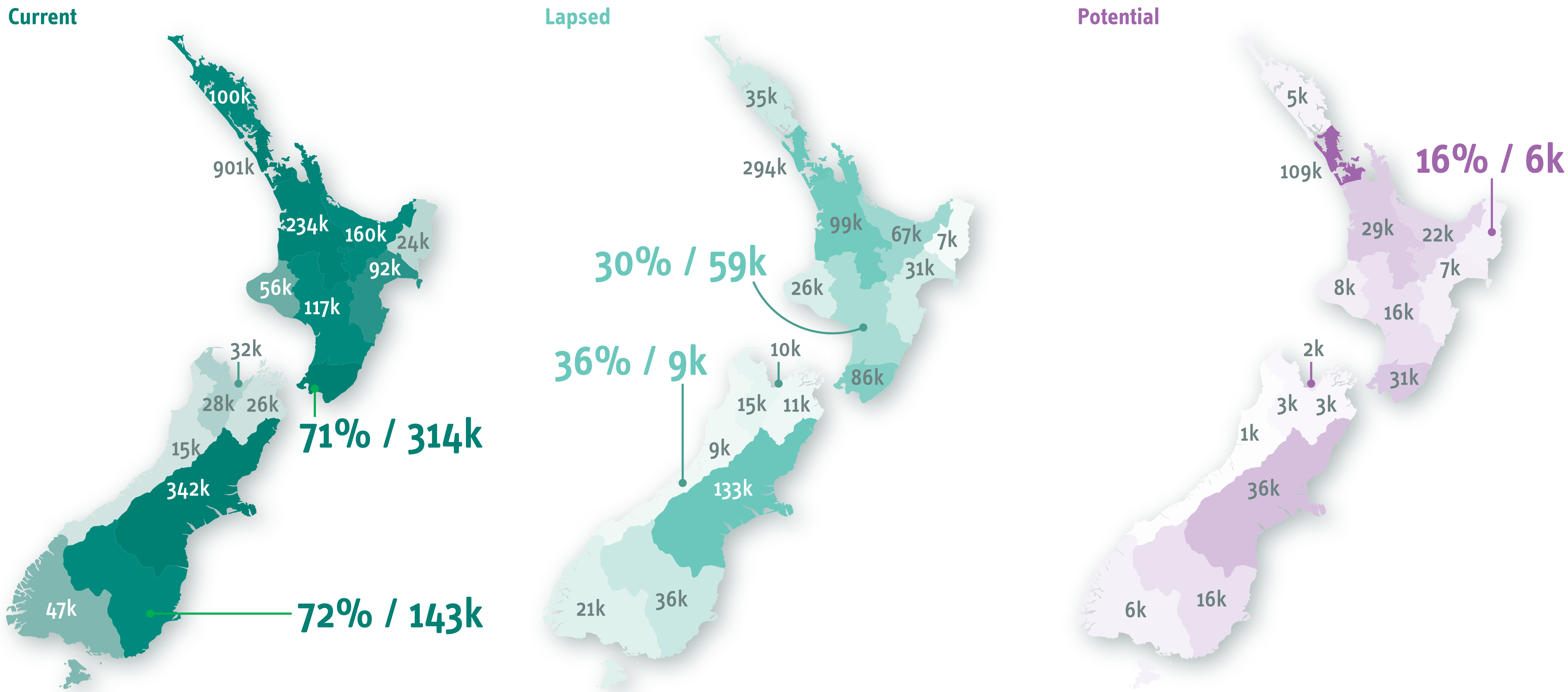


[Base 6743]

The current music market is broadly comparable to the culture market average. Significant differences include:

- Skews female (53% vs 51%)
- More likely to be younger, aged 16-24 (12% vs 10%)
- More likely to have spent on the arts in the past month (41% vs 32%)
- Are more active in giving to the arts, being significantly more likely to be an active member / subscriber (11%), recent volunteer (9%) or have given financially (36% donated within the past three years)
- Essence, Expression and Stimulation segments are over-represented.

Size of the current, lapsed and potential **music** markets across New Zealand – real figure estimates



- Otago (72%) and Wellington (71%) are the regions that have significantly higher market penetration for music compared to the culture market average (67%).

- The West Coast (36%) and Manawatū-Whanganui (30%) have significantly higher representation in the lapsed markets compared to the norm (24%).

- Proportionally, the size of the potential music market at a regional level is relatively small. Gisborne (16%) has a significantly larger potential market than average (8%), although this represents a modest number of people in real terms (an estimated 6k).

Expression is core to the music market

Expression is a group with eclectic tastes and they are significantly more likely than average to be in the current market for the majority of music sub-artforms. Meanwhile, Essence are more likely to be in the current classical concert, opera and choral concert, jazz and blues markets and also a music concert showcasing Māori or Pasifika artists than average.

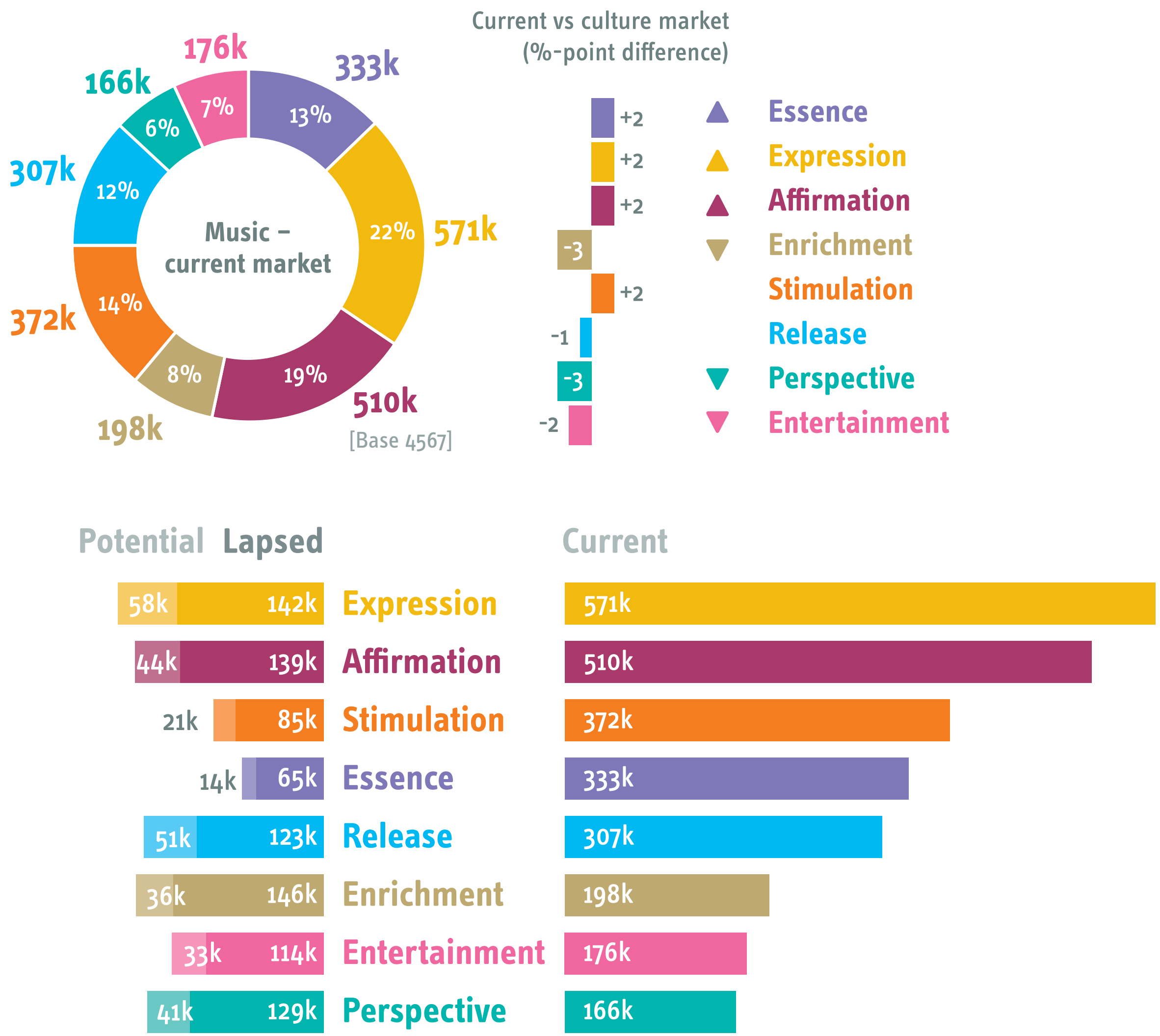
Stimulation are important to the market and tend to be over-represented in the current dance and electronic music, jazz markets and for music events featuring Māori, Pasifika and Asian artists.

With the exception of contemporary popular music, the majority of Enrichment, Perspective and Entertainment are resistant to the different music sub-artforms.

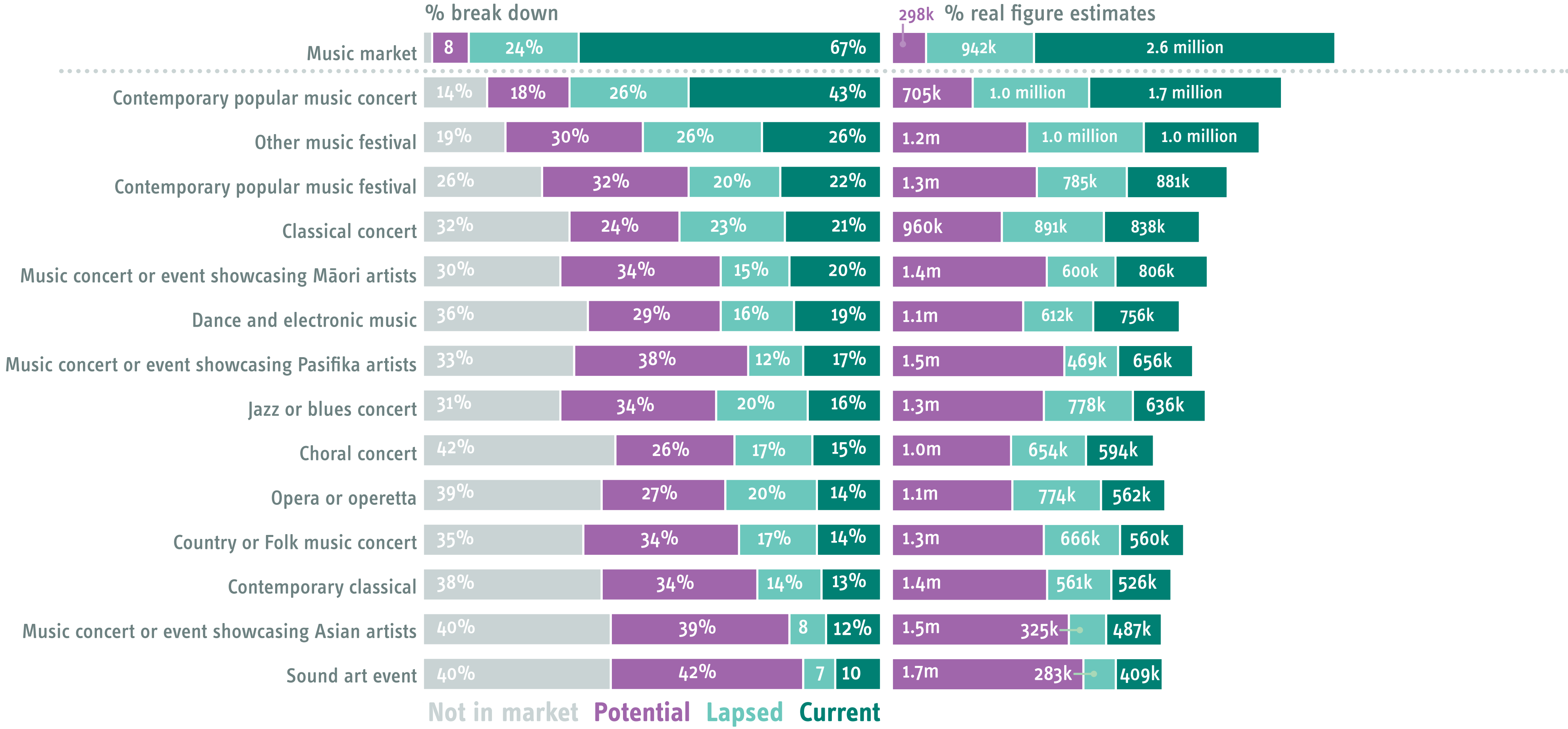
Affirmation is a development segment

Affirmation has a tendency to gravitate to accessible and more mainstream arts events. However, they are well represented in the potential market for all the sub-artforms, from an event showcasing Māori artists to a choral concert.

Culture Segment profile and real figure estimates – **music**



Music market penetration – including sub-artforms

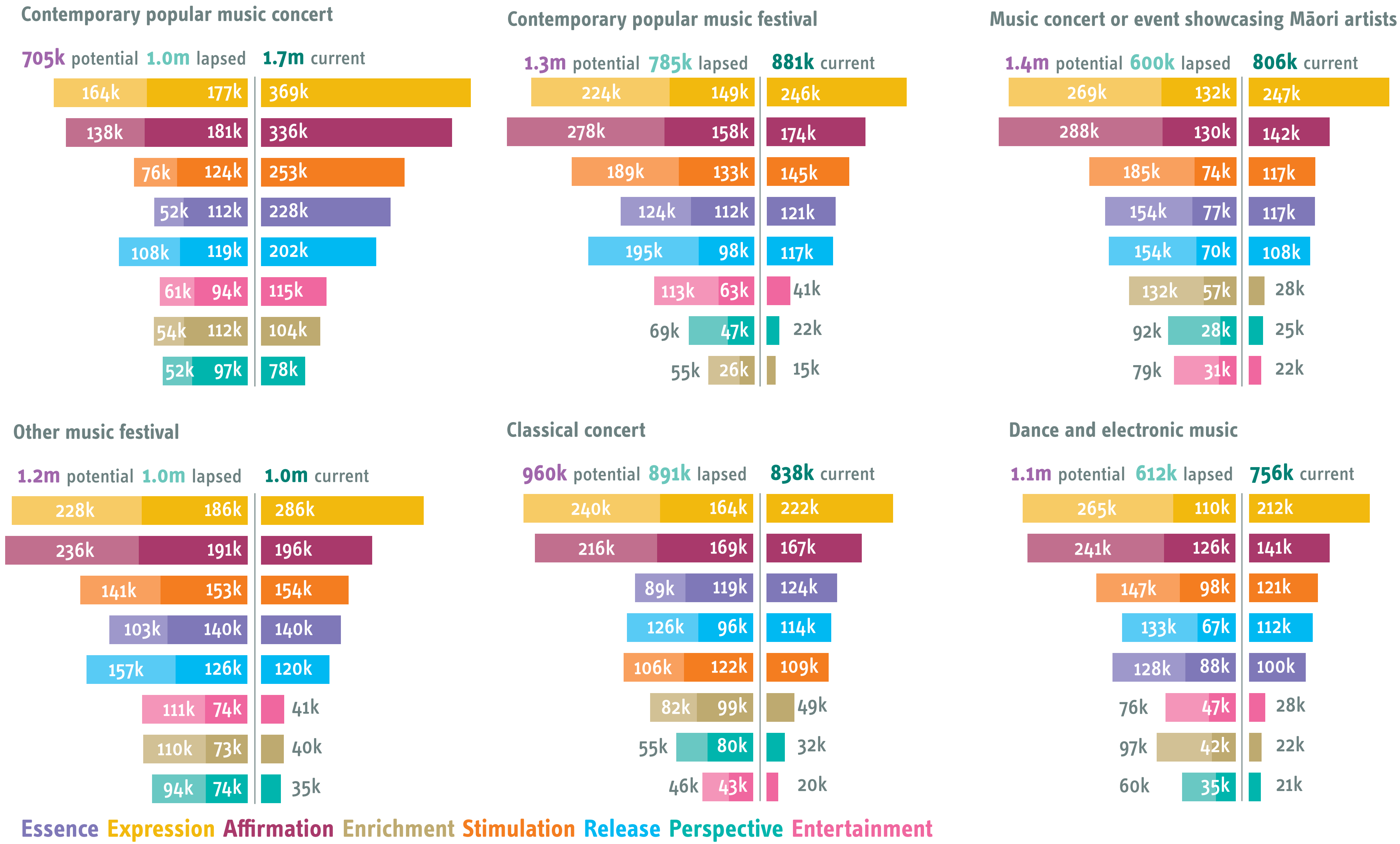


Contemporary popular music concerts have the highest penetration

Across the music sub-artforms, contemporary popular music concerts have the largest penetration at 43% of the music market. There is also a sizeable lapsed cohort at 26%.

Although sound art events have the smallest current market, it has the largest proportion of the market who would consider engaging but haven't previously (42%). There is significant scope to re-activate and reach new audiences across the majority of music sub-artforms.

Sub-artform for the music market by culture segment – real figure estimates



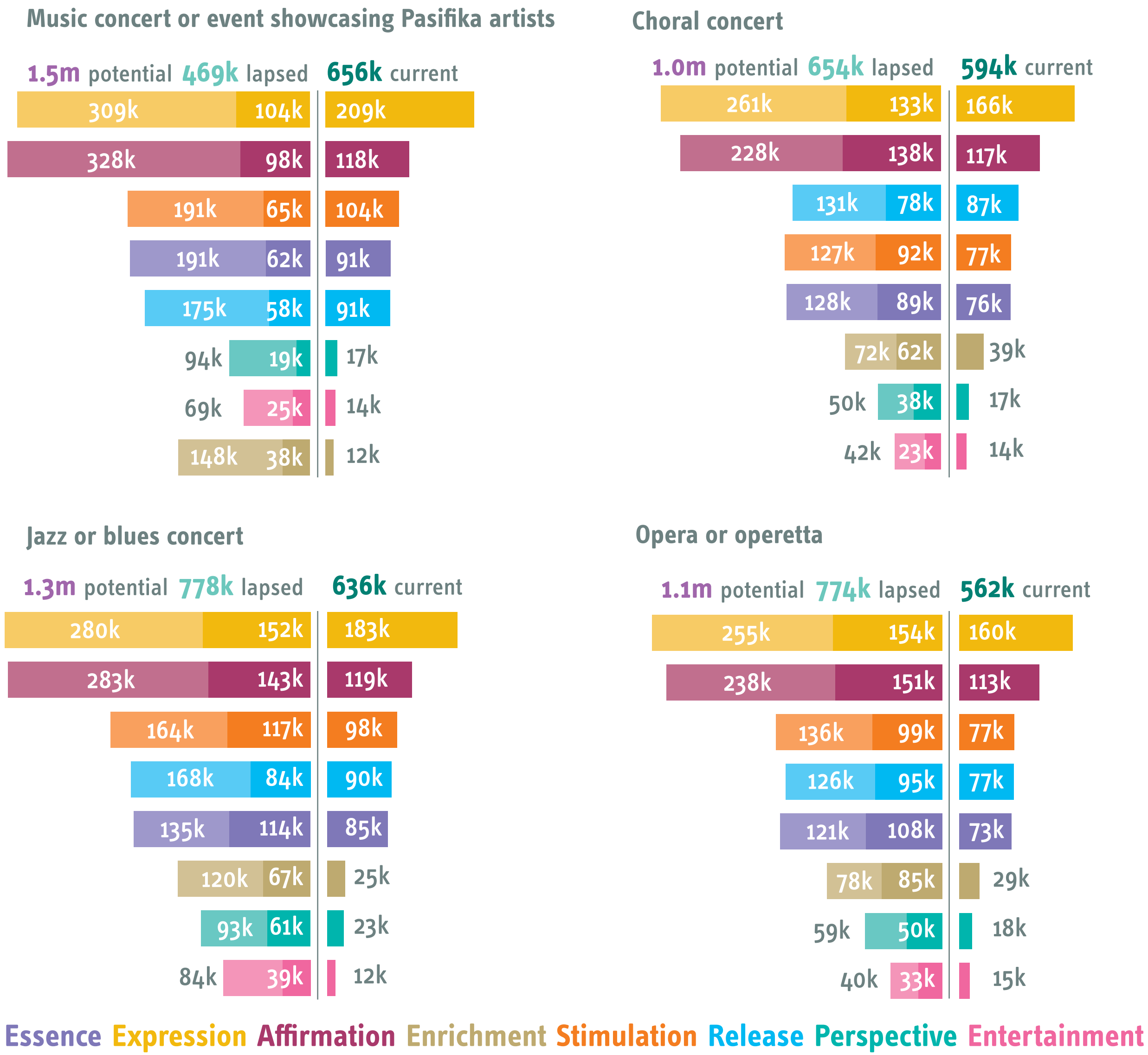
Strong potential for growth across all music sub-artforms

The current contemporary popular music concert market is the largest of the music sub-artforms (an estimated 1.7 million people). Meanwhile, 881k are in the current market for a contemporary popular music festival, followed by an estimated 838k in the classical concert market. There is a sizable potential for growth across all genres, even those with relatively small markets compared to contemporary popular music.

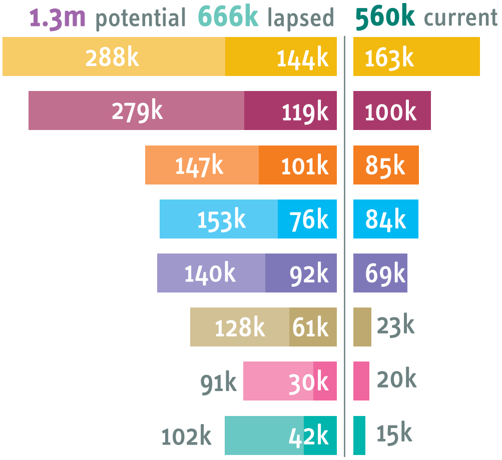
Large potential markets for contemporary classical and sound art

Expression and Affirmation are the most numerous across the sub-artform groups. Both Essence and Stimulation are over-represented in several sub-artform markets, particularly music concerts showcasing Māori, Pasifika or Asian artists.

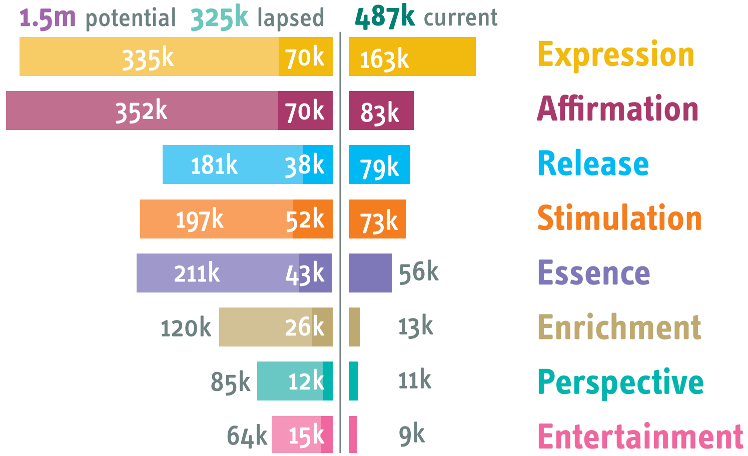
For choral concerts, contemporary classical and sound art events, there is significant scope to reach new Essence, Expression and Affirmation audiences with the right messaging and growth strategies.



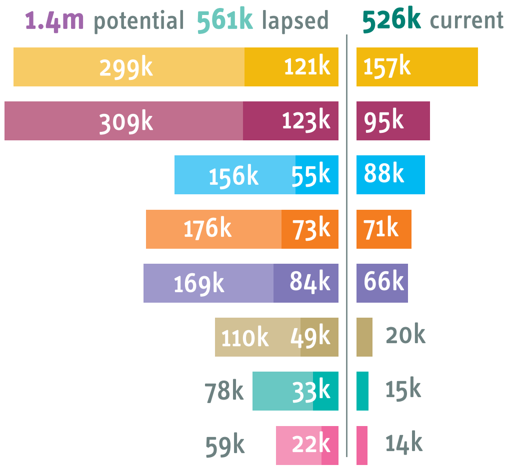
Country or Folk music concert



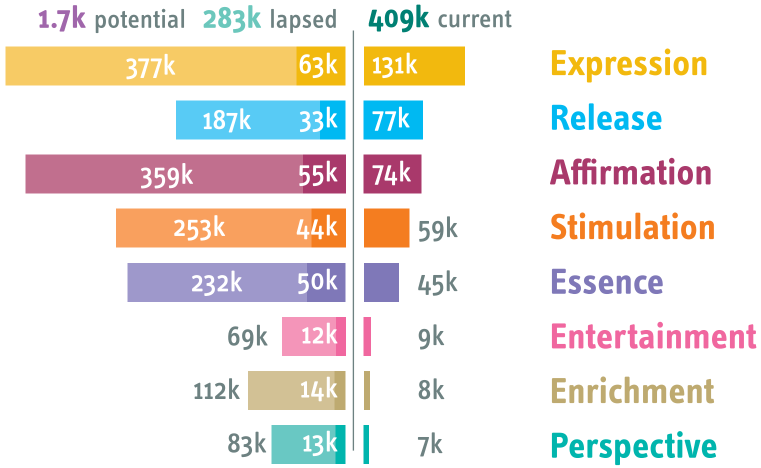
Music concert or event showcasing Asian artists



Contemporary classical



Sound art event



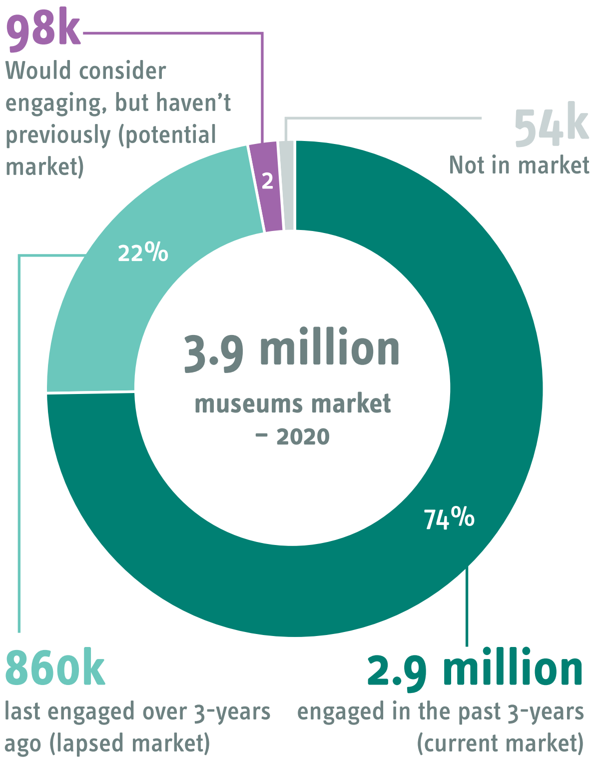
Museums

The **museums** market is one of the **largest artform** markets. Nearly three-quarters have visited a museum in the past three years. However, the **lapsed** market is relatively large with **860k people** ripe for reactivation.

Wellington and **Otago** have the most **active markets** followed by Canterbury. In the **Bay of Plenty** and **Northland** regions, there is scope to increase engagement by re-activating the lapsed market.

Defining the museums market

The museums market is defined as anyone in the culture market who has engaged with museums or would consider engaging but haven't previously.

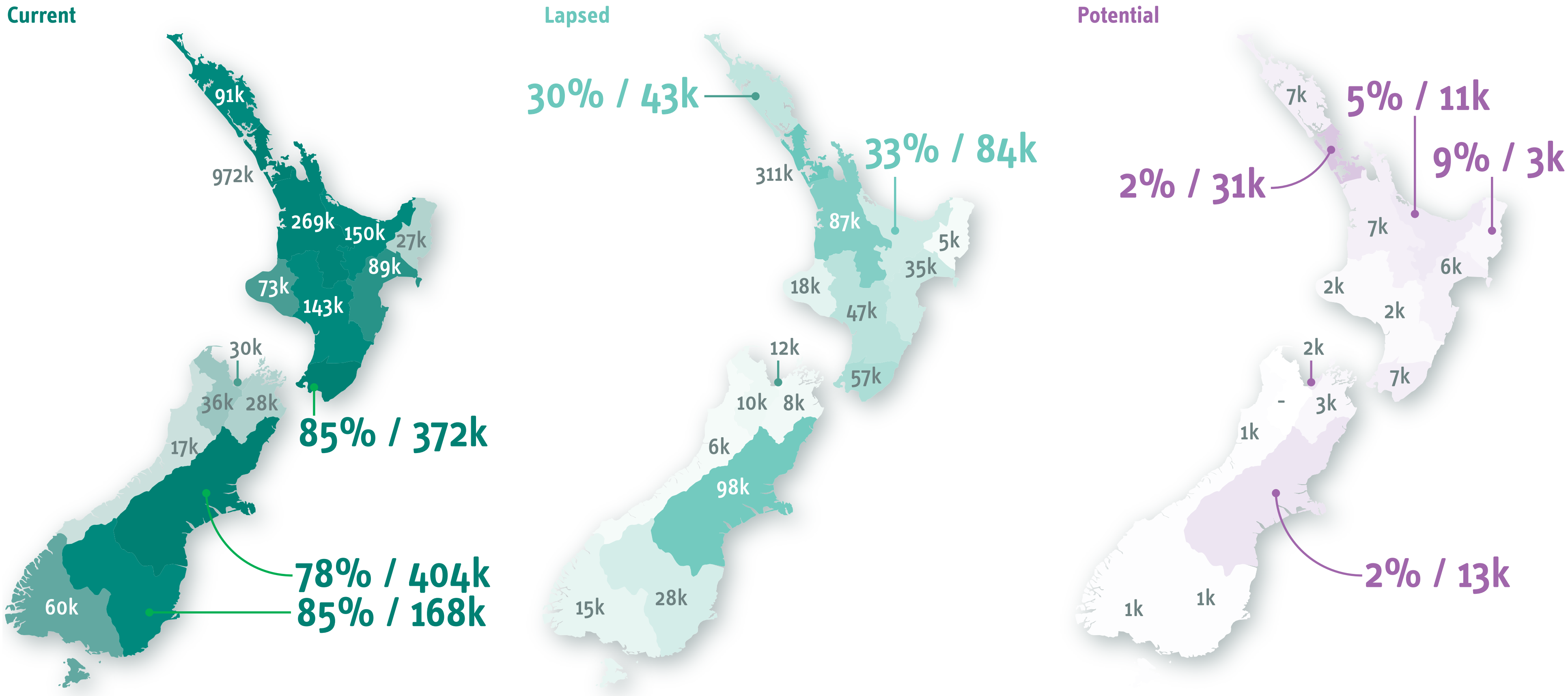


[Base 6743]

The overall demographic of the current museums market is similar to the culture market average. Significant differences include::

- More likely to originate from the Wellington region (13% vs 11%)
- More likely to hold a post-graduate qualification (14% vs 12%)
- More likely to have spent on the arts in the past month (37% vs 32%)
- Are more active in giving to the arts, being significantly more likely to be an active member / subscriber (11%), recent volunteer (8%) or have given financially (34% donated within the past three years)
- Essence and Expression segments are over-represented.

Size of the current, lapsed and potential **museums** markets across New Zealand – real figure estimates



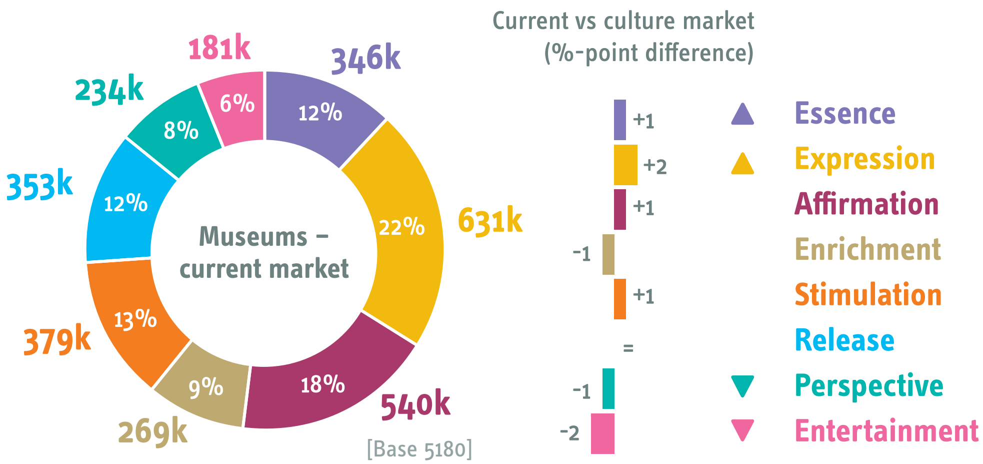
- Otago, Wellington (both 85%) and Canterbury (78%) have the most active museums markets, with significantly higher proportions in the current market compared to the national average (74%).
- Compared to the culture market norm (22%), residents of the Bay of Plenty (33%) and Northland (30%) regions are significantly more likely to have lapsed in their engagement with museums.
- The size of the potential museums market at a regional level is relatively small. While not statistically different from the norm, Gisborne has the largest proportion of residents in the potential museums market (9%), equating to a modest 3k people (estimated). It in real terms, the numbers are larger in Auckland (31k), the Bay of Plenty (11k) and Canterbury (13k).

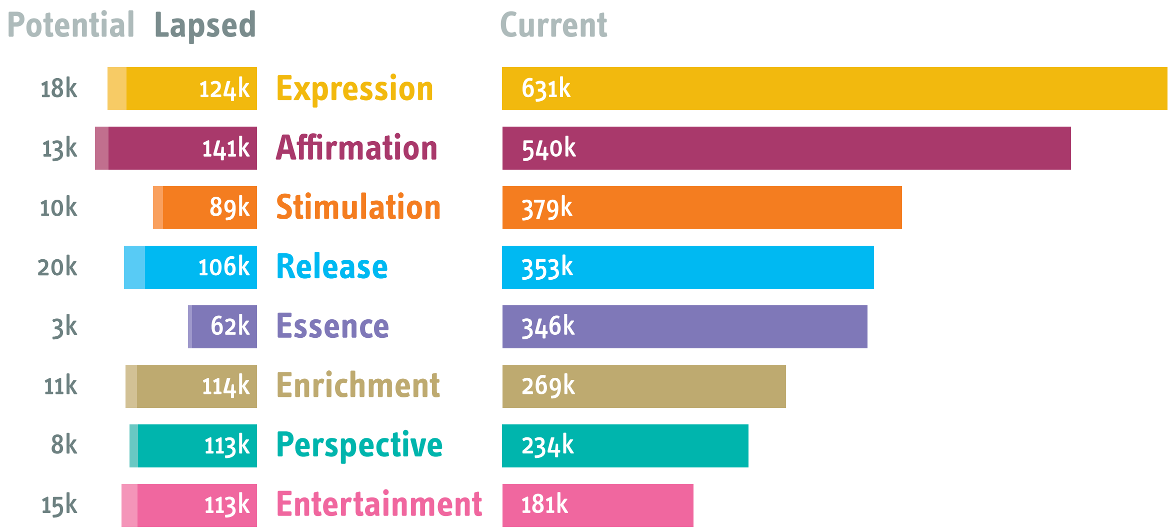
A range of segments to target

Museums are a fairly mainstream cultural activity, and the Culture Segment profile largely mirrors that of the culture market overall. However, the more culturally active segments of Essence and Expression are over-represented in the current museum market.

The majority of people in all eight segments are in the market for museums, so there is potential to broaden reach by activating some of the less culturally active segments: particularly Enrichment, Perspective and Entertainment. These segments are most likely to have lapsed in their engagement – around 1 in 3 haven't done so for three years or more – suggesting re-activation potential with these particular groups. Providing an emphasis on learning could convince Enrichment that a visit is worthwhile. A deep dive into specific topics will appeal to Perspective while Entertainment will be looking for everyone in their group to have a good time.

Culture Segment profile and real figure estimates – **museums**



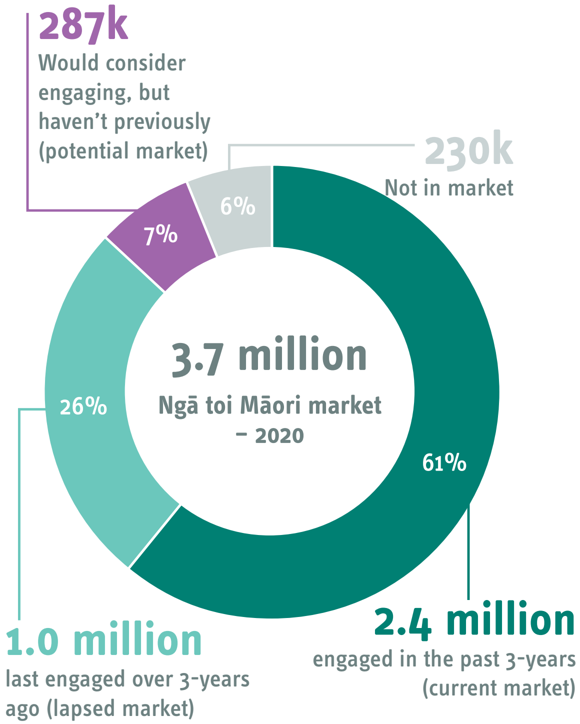


Ngā toi Māori

Most people are interested in Ngā toi Māori; **3.7 million** people in real terms.

2.4 million are in the **current market** have engaged in the past three years. There is a sizable lapsed market. Therefore, market **development efforts** should focus on **reactivation**. At a sub-artform level, however, **around one-third** of the market would consider engaging but haven't previously, suggesting **raising awareness** is **needed**.

Māori theatre and **dance** artforms have **sizeable potential** markets to tap into.



[Base 6743]

The current market for Ngā toi Māori is highly distinguishable from the culture market average, typically younger and more diverse. Significant differences include:

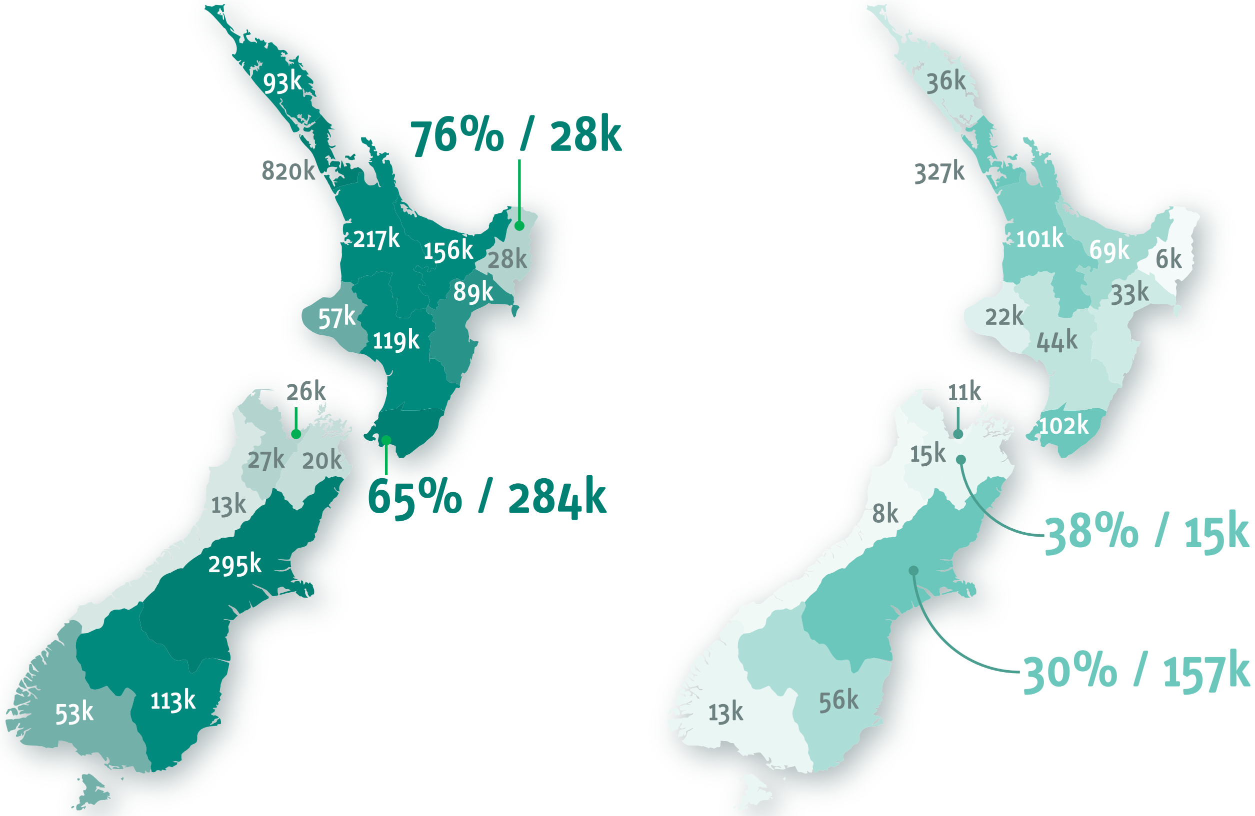
- Skews female (55% vs 51%)
- More likely to be younger, aged 16-24 (12% vs 10%)
- More diverse market: Māori (19% vs 15%) or Pacific Peoples (10% vs 8%)
- More likely to hold a post-graduate qualification (14% vs 12%)
- More likely to have spent on the arts in the past month (40% vs 32%)
- Are more active in giving to the arts, being significantly more likely to be an active member / subscriber (11%), recent volunteer (9%) or have given financially (37% donated within the past three years)
- Essence and Expression segments are over-represented.

Defining the Ngā toi Māori market

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

Size of the current, lapsed and potential Ngā toi Māori market across New Zealand – real figure estimates

Current **Lapsed** **Potential**



- The Gisborne (76%) and Wellington (65%) regions have the highest proportion of residents in the current market for Ngā toi Māori – significantly above the culture market average (61%).
- Proportionally, Marlborough (38%) and Canterbury (30%) regions are most likely to have lapsed in engagement with Ngā toi Māori, significantly higher than average (26%).
- The proportion of residents who would consider engaging with Ngā toi Māori but haven't previously (potential market) is relatively low across all regions. Proportionally, the size of the potential market, in all regions, is broadly comparable to the culture market norm (7%).

Essence and Expression are key segments

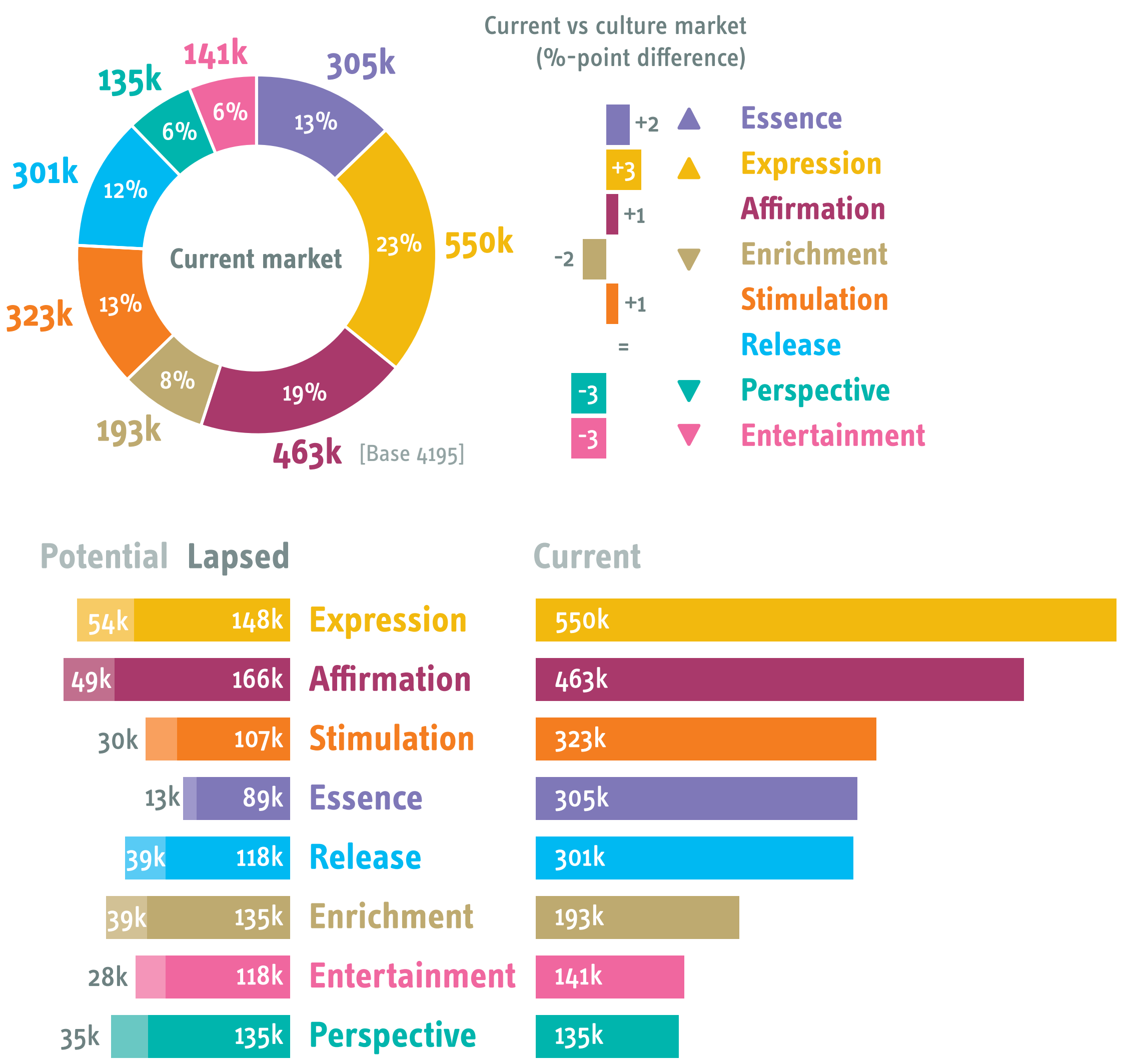
The typically culturally active segments, Essence and Expression, are over-represented in the current Ngā toi Māori market. Conversely, Enrichment, Perspective and Entertainment are under-represented.

Looking at the percentage of each segment who are in the current market for Ngā toi Māori, the majority of Essence, Expression, Affirmation and Stimulation have engaged within the past three years.

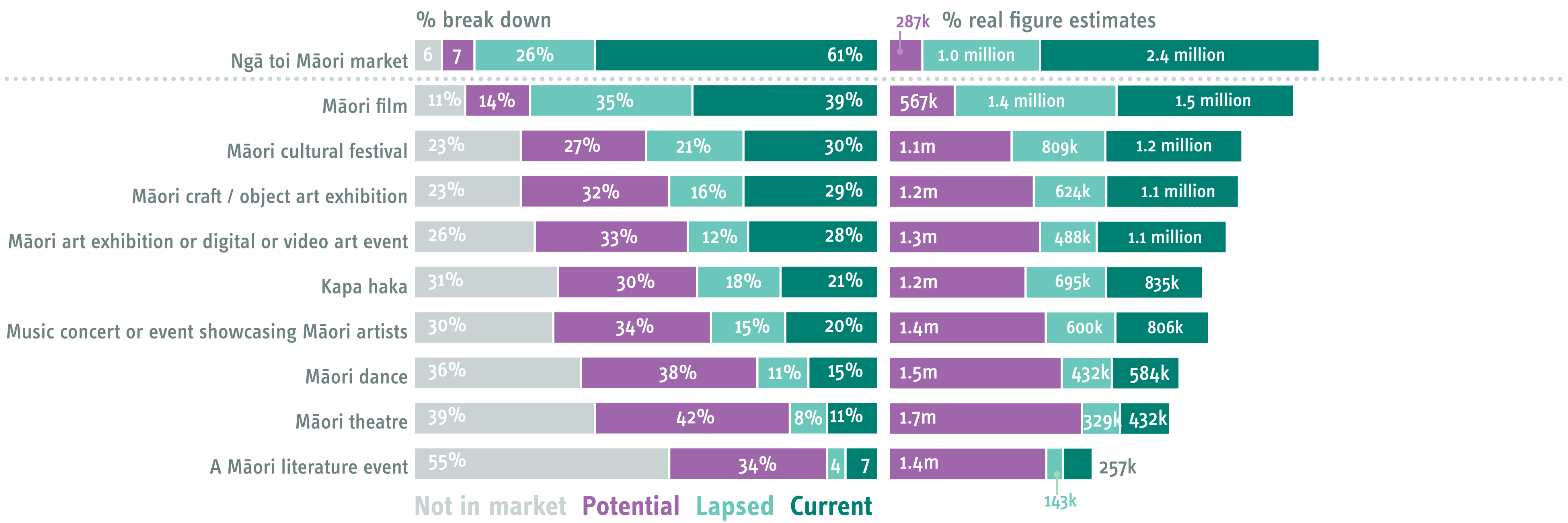
Less active segments are likely to have lapsed

Meanwhile, the proportion of Enrichment, Perspective and Entertainment who have lapsed in their engagement is significantly larger than average. These less culturally active segments may be harder to attract and a better strategy might be to target lapsing Expression (148k), Affirmation (166k), Stimulation (107k) and even Essence (89k).

Culture Segment profile and real figure estimates – Ngā toi Māori



Ngā toi Māori market penetration – including sub-artforms



Large potential markets for Māori theatre and dance

Of the Ngā toi Māori sub-artforms, Māori film has the largest market penetration (39% are in the current market).

There is a relatively healthy potential amongst most Ngā toi Māori sub-artforms, particularly Māori theatre and dance (42% and 38% respectively who would consider engaging but haven't previously). A Māori literature event has a strong potential market to tap into, but note that over half the market is resistant to engaging (55%).

Cross-over between the sub-artforms

The current market for Kapa haka has the most cross-over with Māori cultural festivals; 84% have engaged with both within the past three years. Within the active Māori literature, 83% have also engaged with a Māori cultural festival in the past three years.

2.7 million in the market for kapa haka

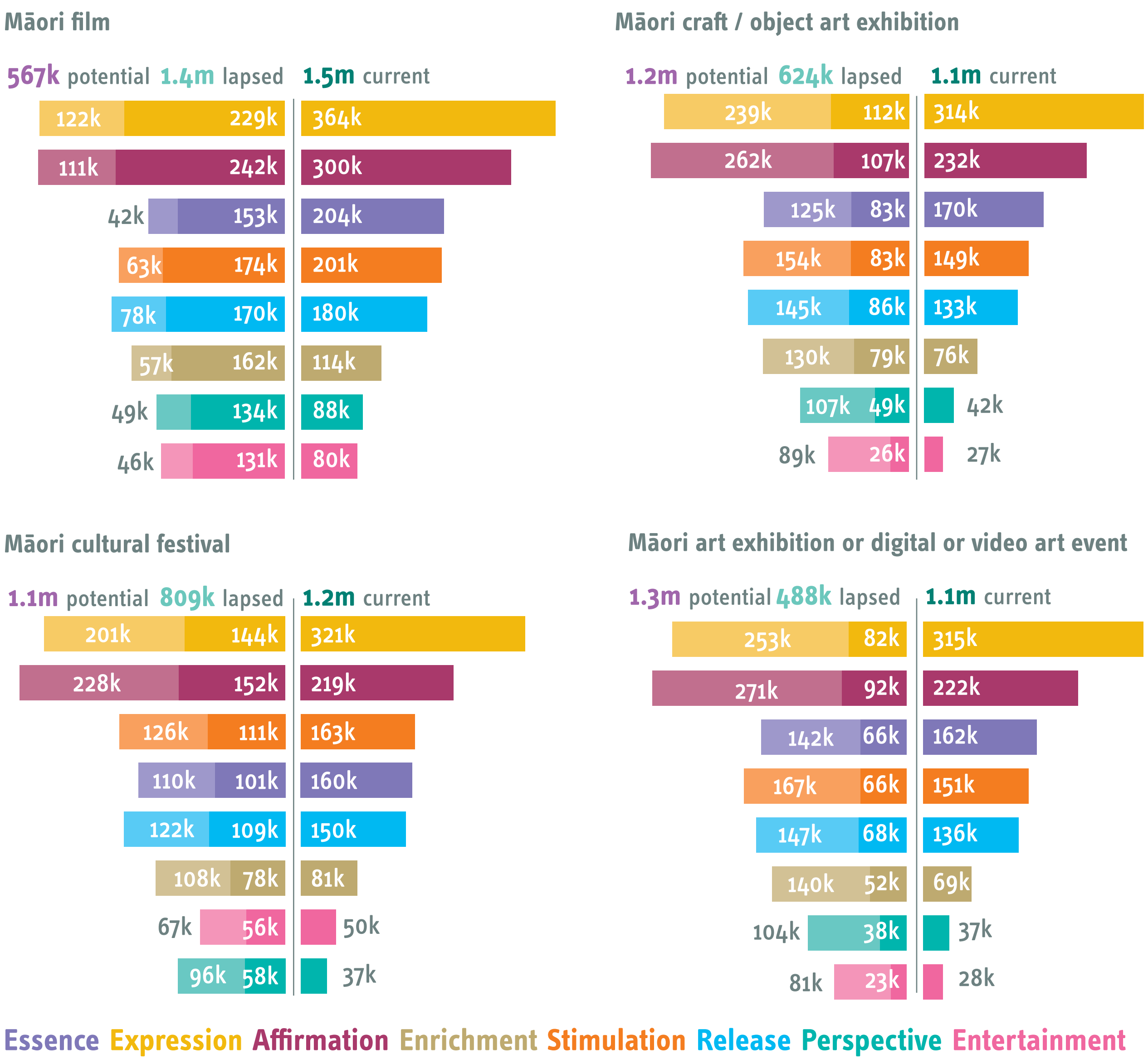
Māori film has the largest current market of the Ngā toi Māori sub-artforms (an estimated 1.5 million people). This artform also has the largest lapsed market at 1.4 million. The current market for Kapa haka is an estimated 835k. However, the potential market is much larger, 1.2 million are waiting to be persuaded.

Affirmation holds real value within the Ngā toi Māori market

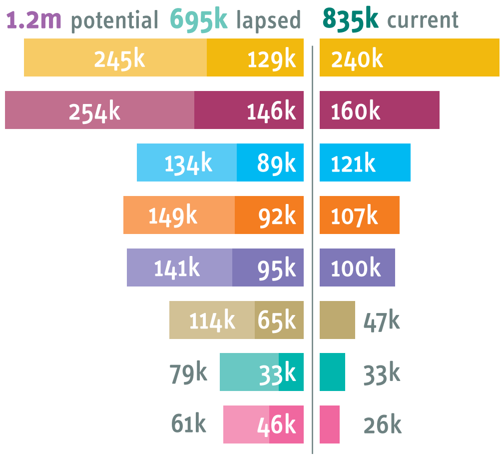
There is strong growth potential amongst the Affirmation segment. Affirmation may need a direct invitation or induction; they'll worry everyone is an expert and, as such, need encouragement and reassurance that they will not feel out of place.

More than other segments, Essence and Affirmation are significantly more likely to be in the potential markets for Kapa haka and Māori dance.

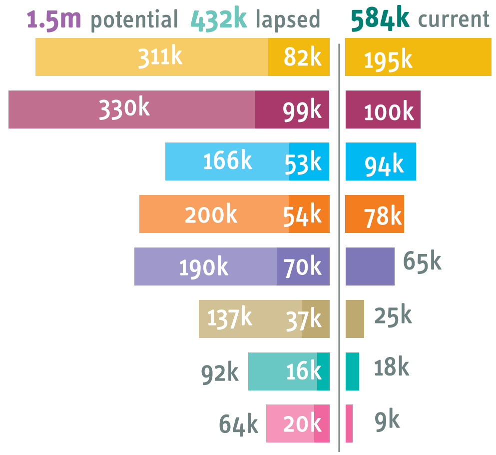
Sub-artform for the Ngā toi Māori market by culture segment – real figure estimates



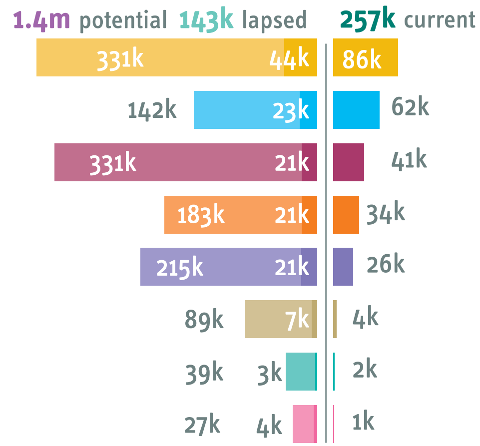
Kapa haka



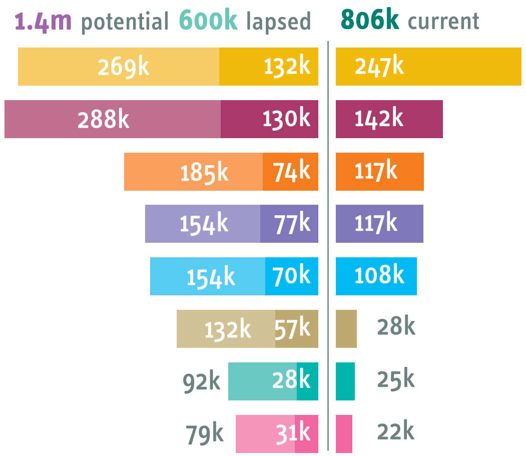
Māori dance



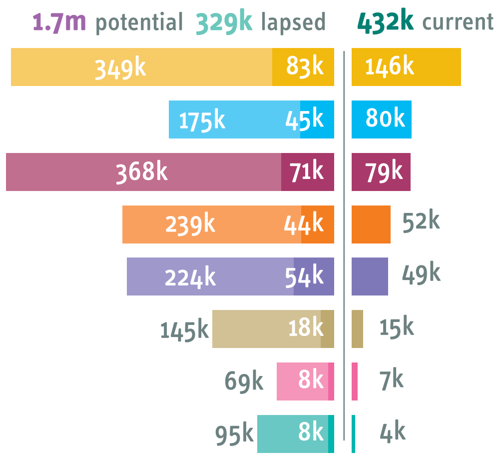
A Māori literature event



Music concert or event showcasing Māori artists



Māori theatre



Expression
Release
Affirmation
Stimulation
Essence
Enrichment
Entertainment
Perspective

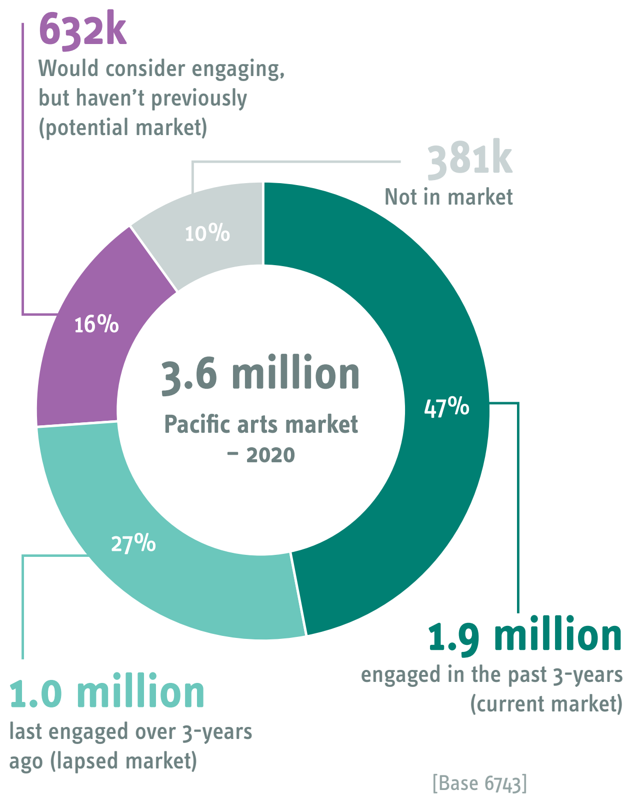
Pacific arts

Nine in ten are in the Pacific arts **market**, equating to **3.6 million** people. The **current** Pacific arts market has seen **notable growth** since 2017, from 1.0 million to **1.9 million** people.

There is a **sizeable lapsed** and **potential** market which shows scope for growth with **1.7 million** people having visited over three years ago or waiting to be activated.

Defining the Pacific arts market

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

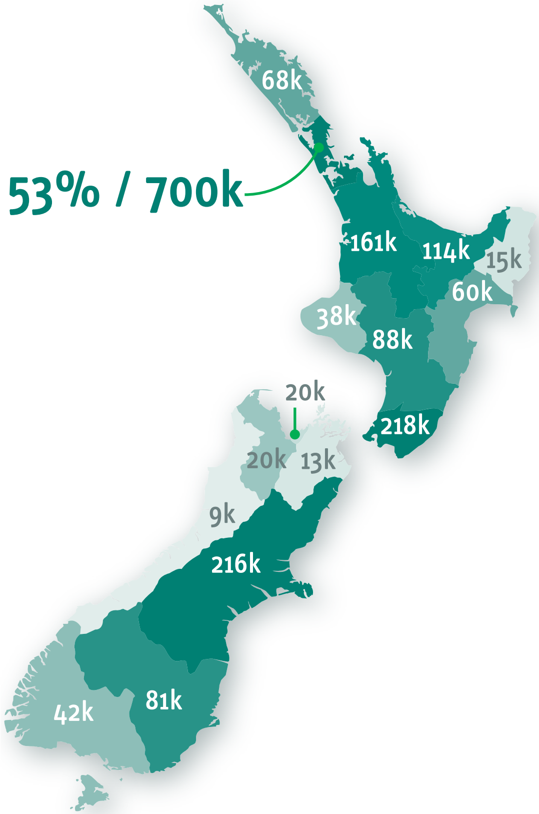


The current Pacific arts market is one of the most diverse artform markets. Significant differences from the culture market include:

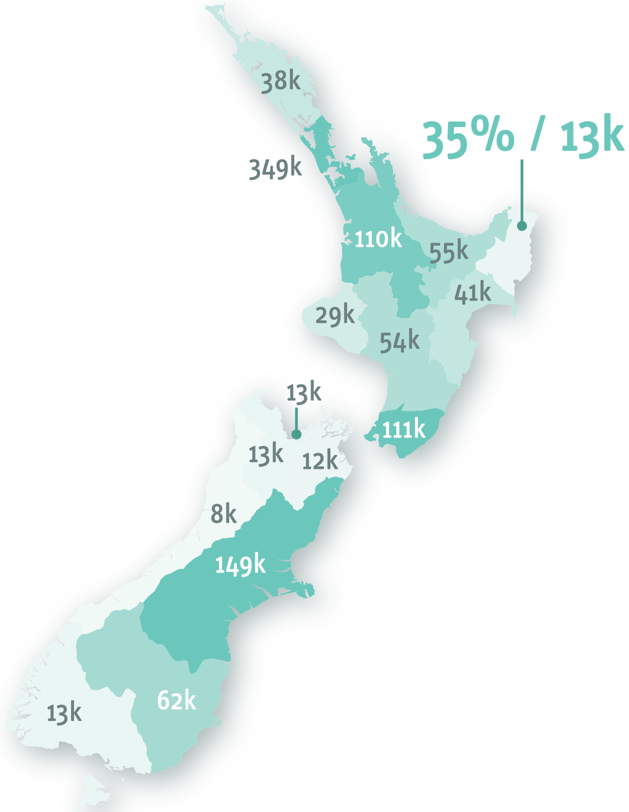
- Skews female (55% vs 51%)
- More likely to be younger, aged 16–24 (13% vs 10%)
- More likely to originate from the Auckland Region (36% vs 33%)
- More diverse market: Māori (19% vs 15%) or Pacific Peoples (14% vs 8%)
- More likely to hold a post-graduate qualification (14% vs 12%)
- More likely to have spent on the arts in the past month (46% vs 32%)
- Are more active in giving to the arts, being significantly more likely to be an active member / subscriber (12%), recent volunteer (10%) or have given financially (41% donated within the past three years)
- Essence, Expression and Stimulation segments are over represented.

Size of the current, lapsed and potential **Pacific arts** market across New Zealand – real figure estimates

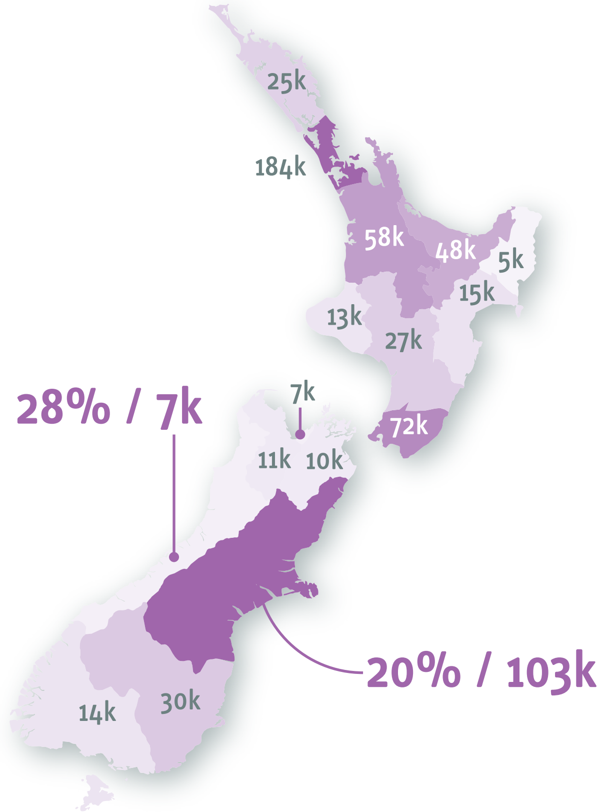
Current



Lapsed



Potential



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

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

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

Essence and Expression core to the Pacific arts

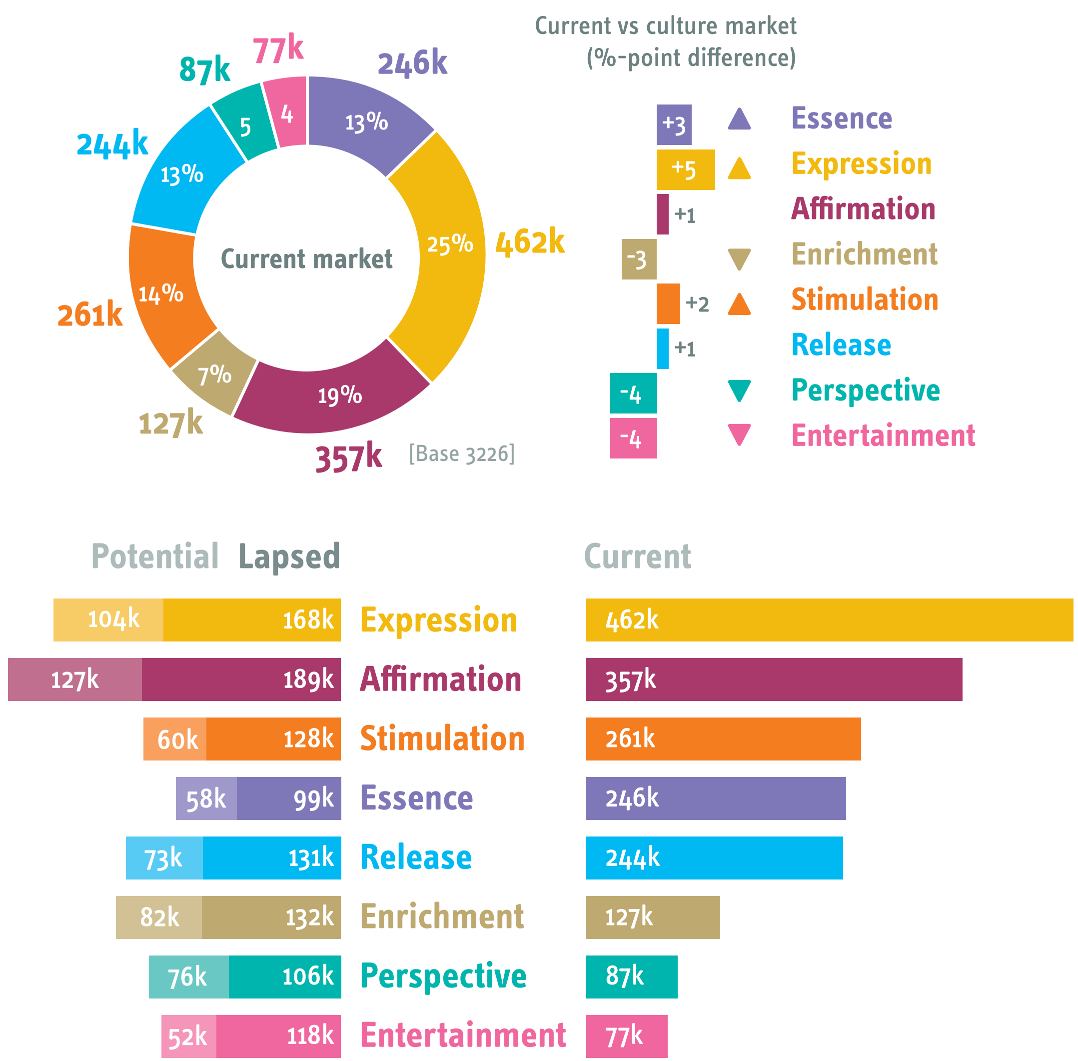
Expression makes up one-quarter of the Pacific arts' current market. Compared to all other segments, they're more likely to have engaged with a Pacific art exhibition, craft or object art exhibition and cultural festivals within the past three years.

Essence, Affirmation and Stimulation are development segments

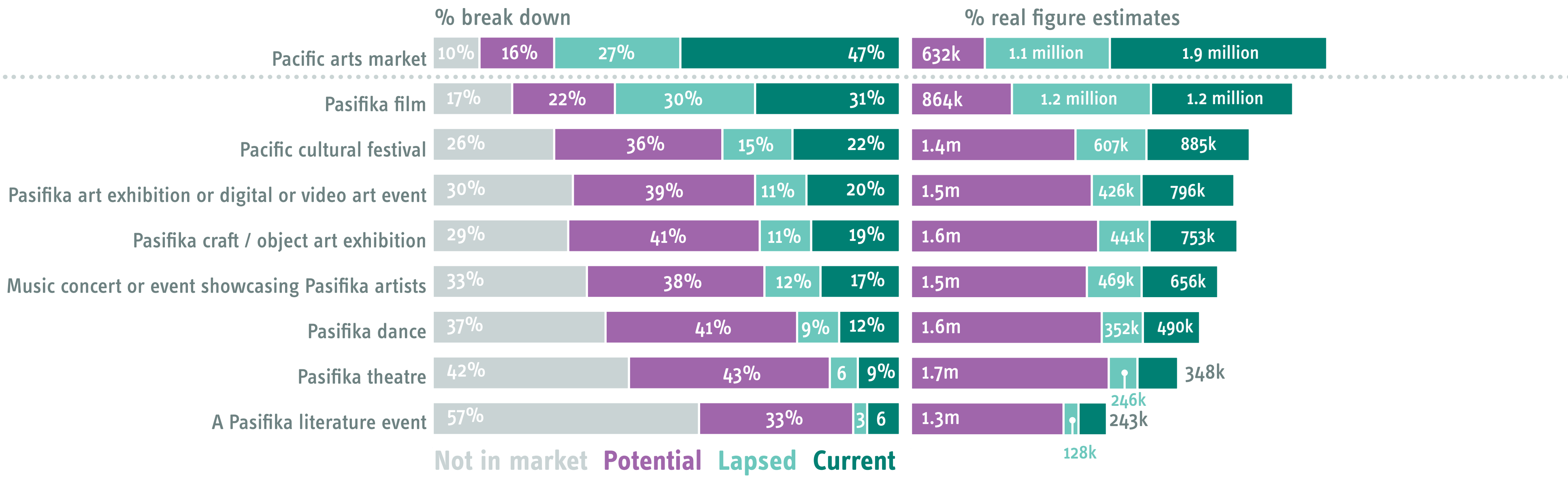
Essence, Affirmation and Stimulation all have strong representation in the current market for Pacific arts overall. However, looking at a more granular level, we see there is significant potential to engage those new to the artform, and these segments hold the most potential for the market.

Excluding film, there are more people in the potential market than the lapsed and current market at a sub-artform level.

Culture Segment profile and real figure estimates – Pacific arts



Pacific arts market penetration – including sub-artforms



A large potential market

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

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

High level of cross-over

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

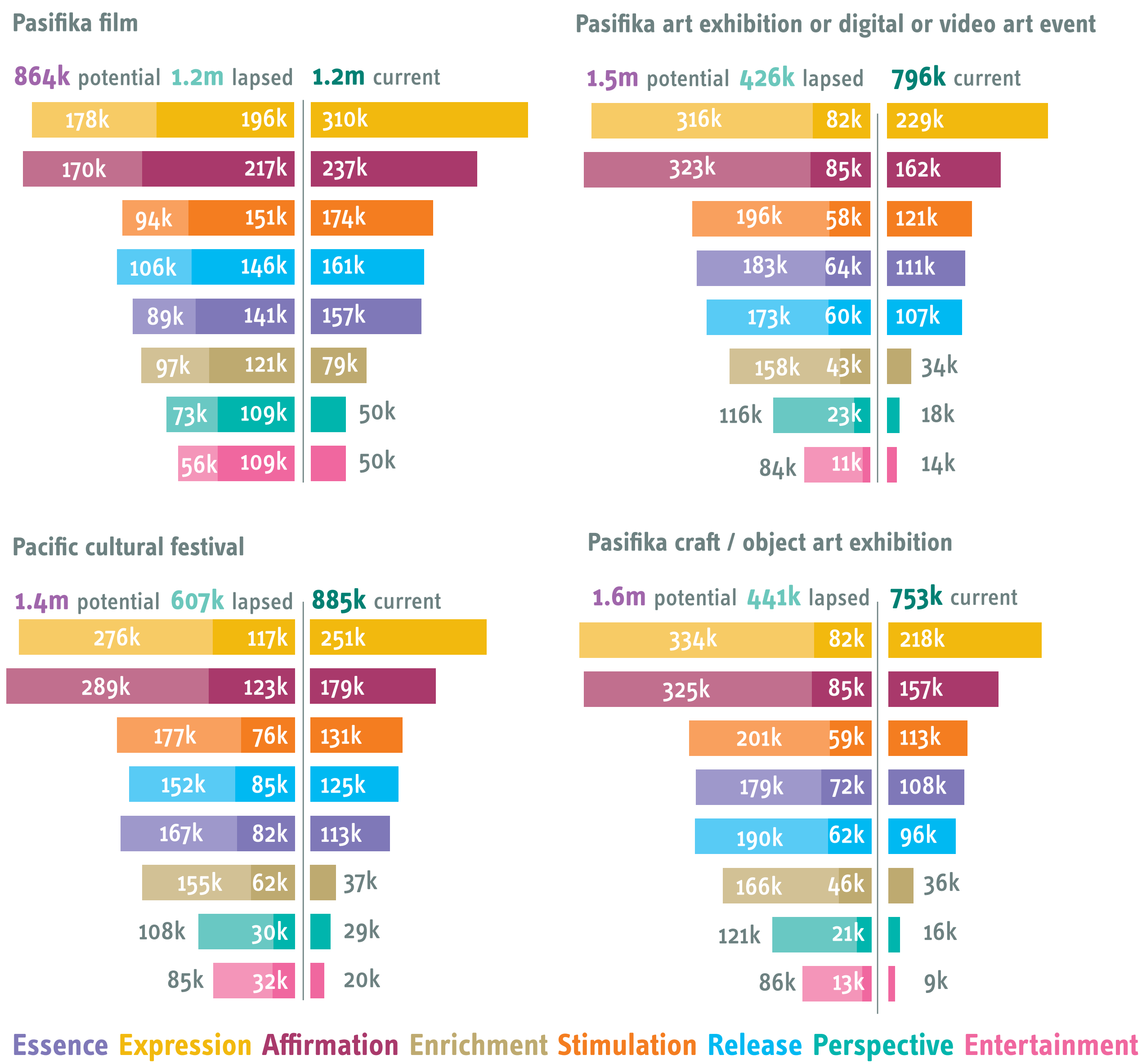
2.9 million in the market for Pacific cultural festivals

Of the Pacific arts sub-artforms, Pasifika film has the largest active market (an estimated 1.2 million people), followed by Pacific cultural festivals (885k). There is potential for growth across all the sub-artforms, in particular, theatre (an estimated 1.7 million), dance and craft and object art exhibitions (both 1.6 million).

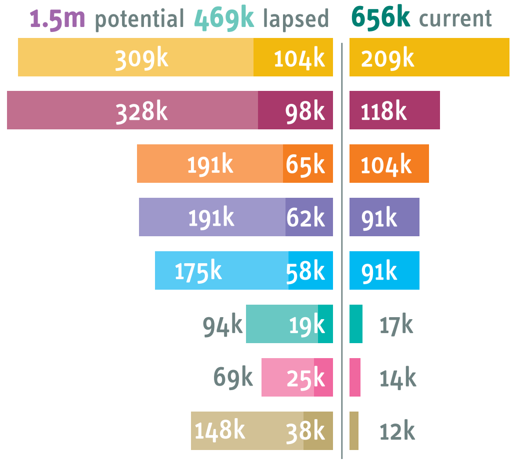
Essence are prevalent in the market

Expression are most common in all of the Pacific arts markets. However, Essence are particularly over-represented in the potential: Pasifika art exhibition, cultural festival, dance, theatre, literature and music concert sub-artform markets. Essence are typically able to place arts and cultural work in critical and historical context. They have a deep appreciation for underlying ideas and enjoy connecting with artists and performers. In real terms, Affirmation are numerous in the potential market. Affirmation often have underlying social motivations as well as looking for self-development. They want to feel good about themselves. Activate this segment by promoting educational and entertainment benefits of engaging.

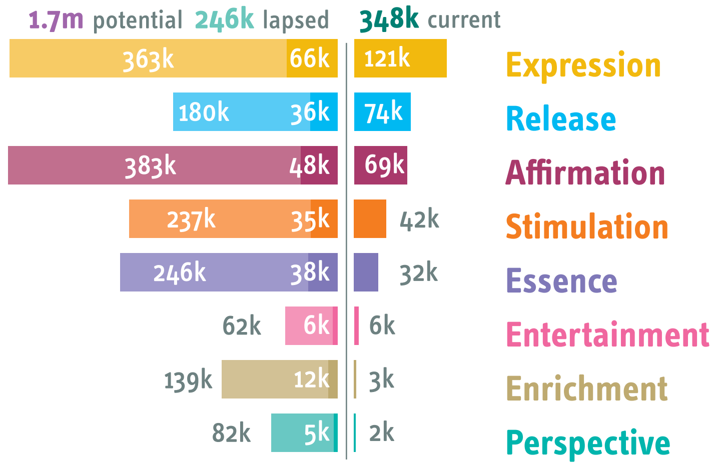
Sub-artform for the Pacific arts market by culture segment – real figure estimates



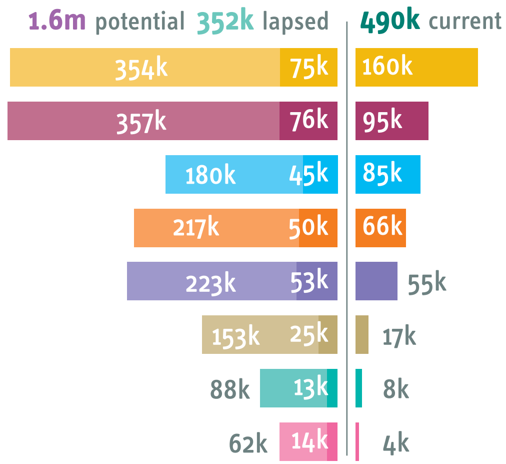
Music concert or evening showcasing Pasifika artists



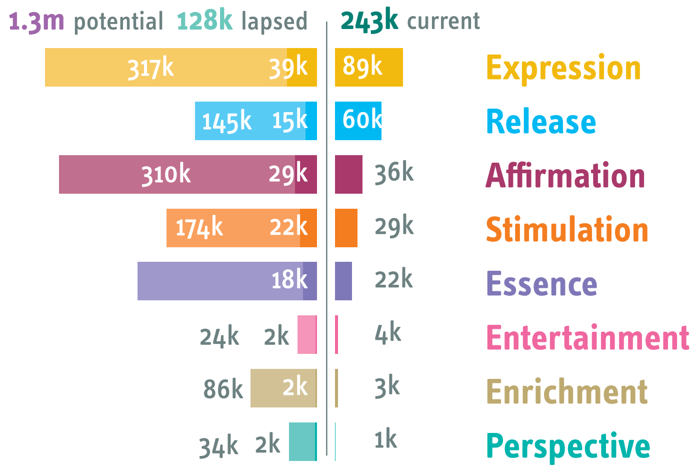
Pasifika theatre



Pasifika dance



A Pasifika literature event



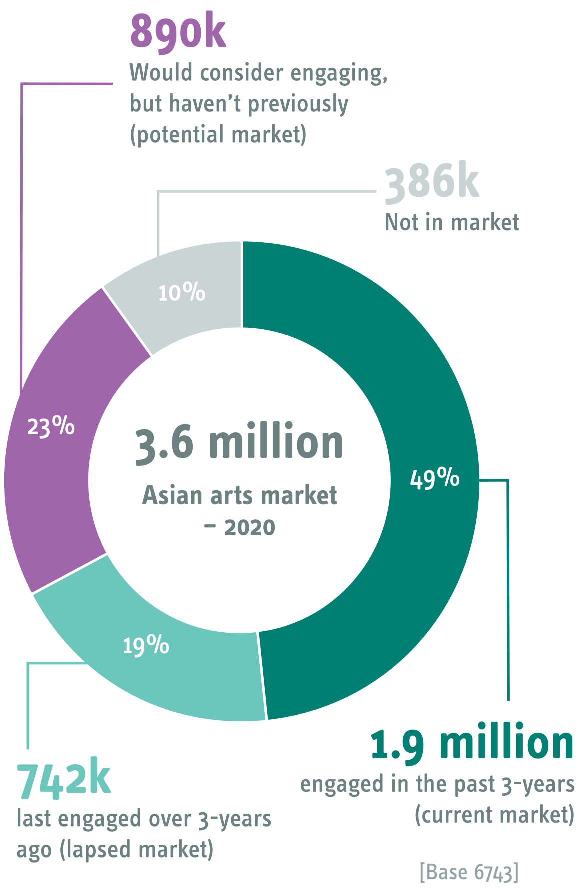
Asian arts

Nearly **half** of the culture market have **engaged** with **Asian arts** in the past three years. There is opportunity to **extend the reach** to a further **1.6 million** people who have either **lapsed** in their engagement or would consider engaging, but haven't previously (**potential**).

Auckland and **Wellington** are home to the majority of the country's Asian population, so unsurprisingly have the **most active markets** for Asian arts.

Defining the Asian arts market

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

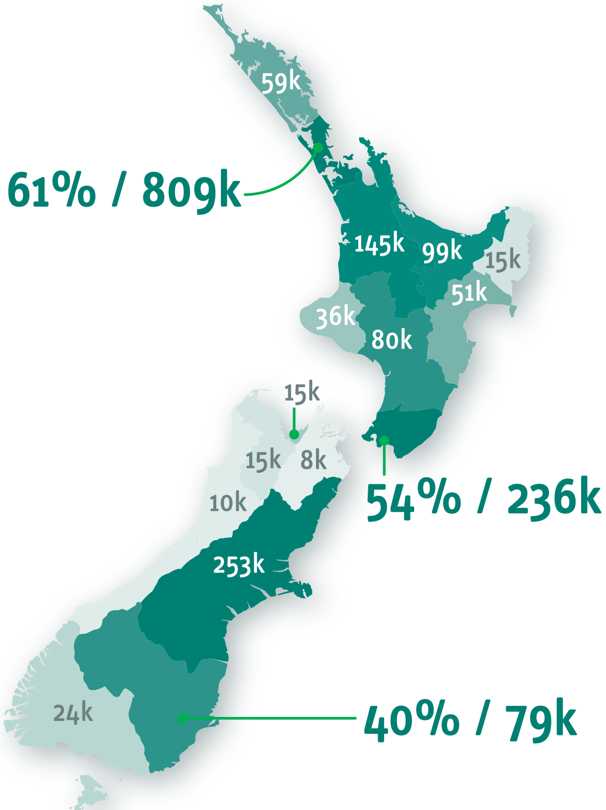


There are visible differences in the demographic profile of the current Asian arts market compared to the current market average. Significant differences include:

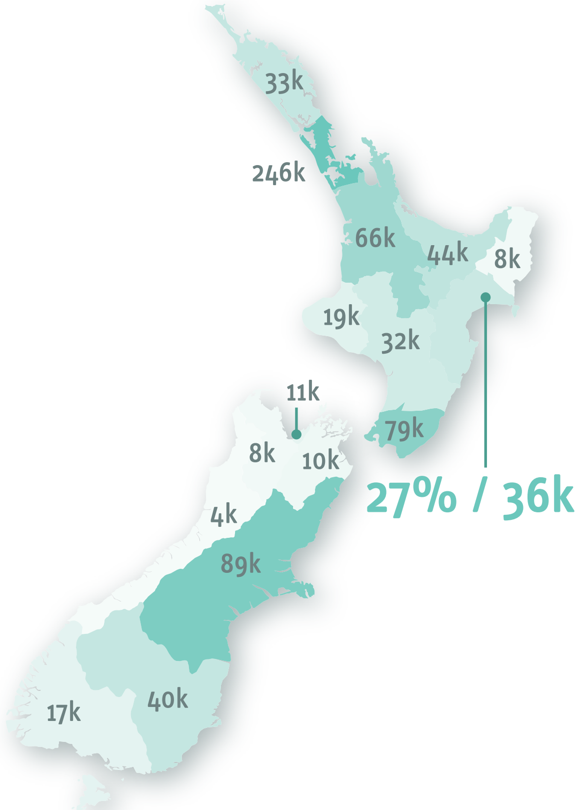
- More likely to be younger, aged 16-24 (13% vs 10%)
- More likely to originate from the Auckland (41% vs 33%) and Wellington Regions (13% vs 11%)
- More diverse market: Pacific Peoples (12% vs 8%) or Asian (23% vs 15%)
- More likely to hold a post-graduate qualification (16% vs 12%)
- More likely to have spent on the arts in the past month (46% vs 32%)
- Are more active in giving to the arts, being significantly more likely to be an active member / subscriber (12%), recent volunteer (10%) or have given financially (39% donated within the past three years)
- Essence, Expression, Affirmation and Stimulation segments are over-represented.

Size of the current, lapsed and potential **Asian arts** market across New Zealand – real figure estimates

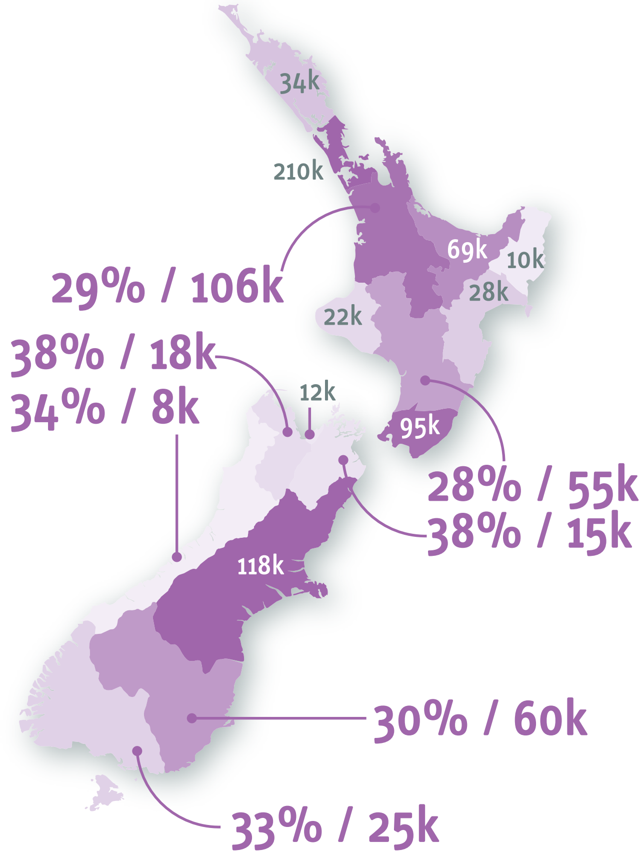
Current



Lapsed



Potential



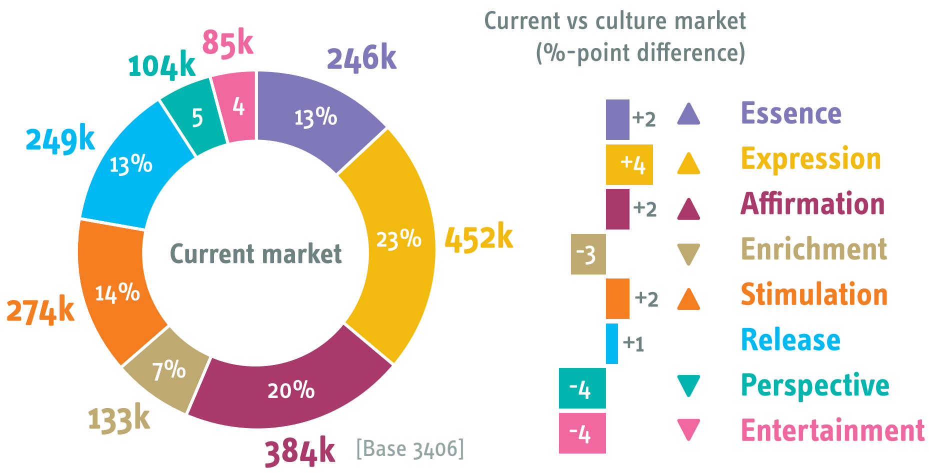
- The Auckland (61%) and Wellington regions (54%) have a significantly larger proportion of residents who have engaged with Asian arts in the past three years compared to the norm (49%).
- The Hawke's Bay (27%) has a significantly larger proportion who have lapsed in their engagement with Asian arts compared to the norm (19%).
- There is potential to introduce new audiences to Asian arts. A number of regions have a significantly larger proportion of people in the potential market compared to the market average (23%).

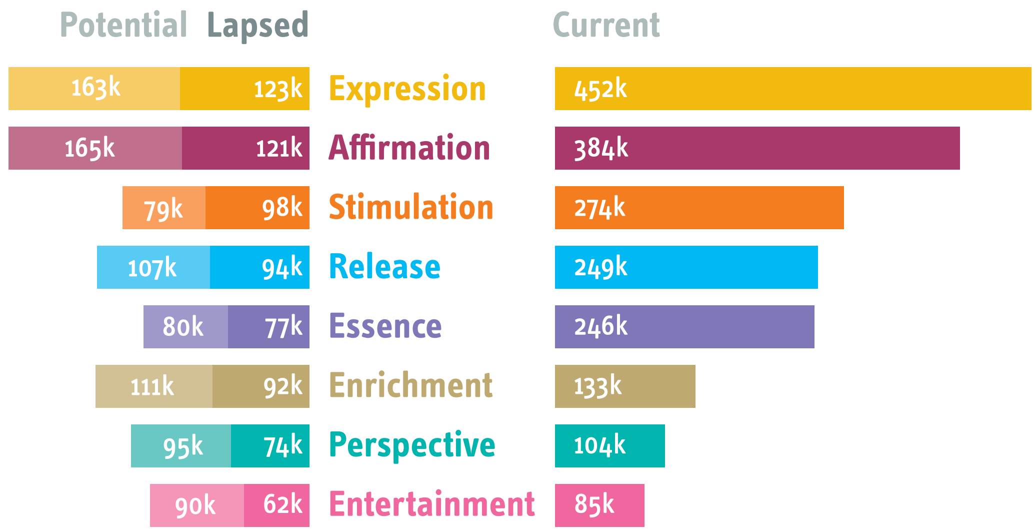
Expression core and Enrichment ripe for developing

Essence, Expression and Stimulation are the segments most likely to have engaged with Asian arts in the past three years, and along with Affirmation, are over-represented compared to the culture market average. While the less active segments of Enrichment, Perspective and Entertainment are less likely to be in the current market.

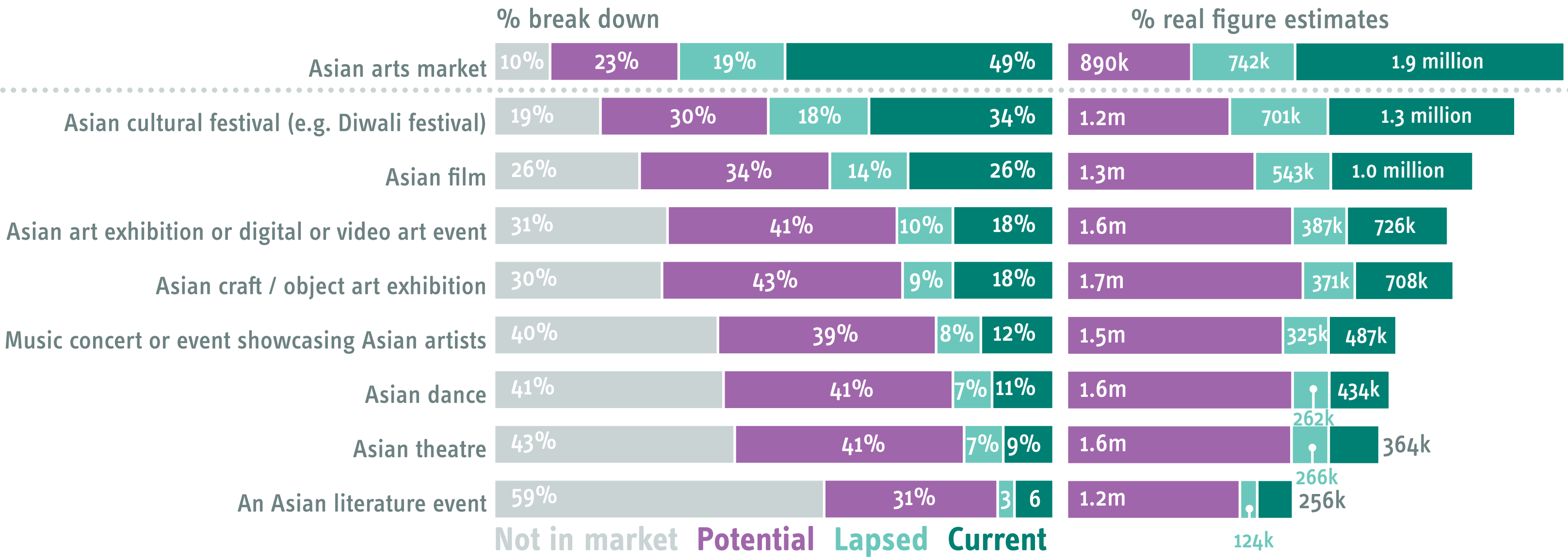
Looking at the engagement of Enrichment, this is the segment most likely to have lapsed and nearly 3 in 10 people in this segment would consider engaging, but haven't previously. Enrichment tend to be a cautious and price sensitive and when it comes to arts and culture and favour things that have stood the test of time. They like things that talk about our identity – who we are, where we're from. This suggests they will favour more traditional aspects of this artform. Their resistance to Asian dance, theatre and literature events is relatively high compared to Asian cultural festivals and film.

Culture Segment profile and real figure estimates – Asian arts





Asian arts market penetration – including sub-artforms



1.7 million in the potential market for Asian craft and object art exhibitions

All sub-artforms within the Asian arts market demonstrate sizeable untapped potential.

An Asian cultural festival market has the largest current market (an estimated 1.3 million people have engaged within the past three years), and there is a similar potential market waiting to engage (1.2 million).

Meanwhile, the Asian craft and object art exhibition market has one of the smaller current markets (an estimated 708k), but it also has the largest potential for growth, an estimated 1.7 million people would consider engaging but haven't previously.

A strong, shared market

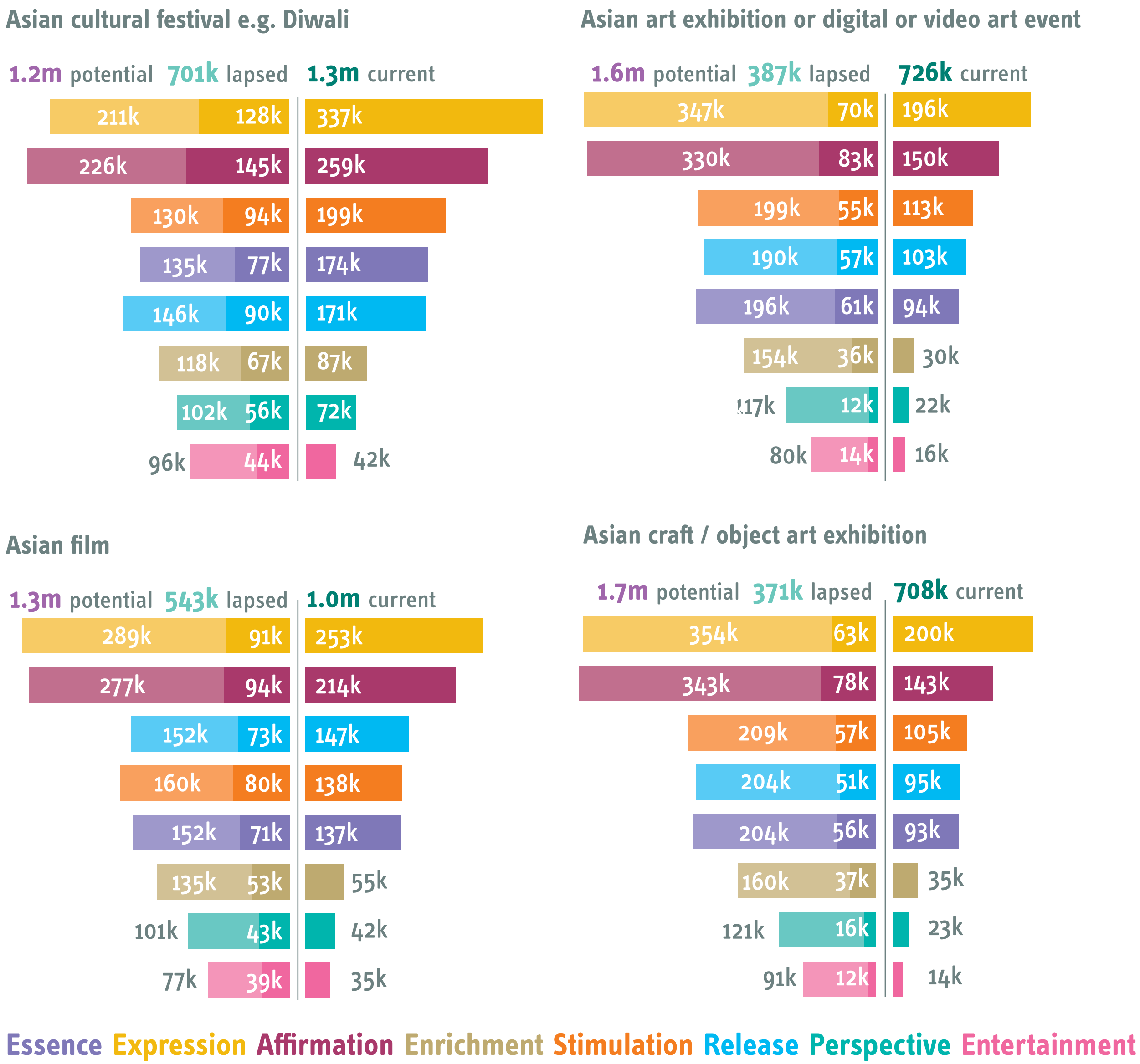
Amongst those in the current Asian craft and object art exhibition market, 86% have engaged with an Asian art exhibition, digital or video art event in the past three years, while 83% of the current Asian art exhibition, digital or video art event market have engaged with an Asian craft and object art exhibition.

Essence and Affirmation have a high level of cultural appetite

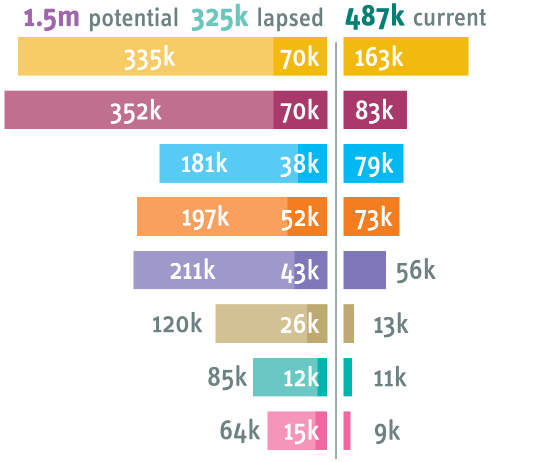
Expression is core to the culture market generally, which is not surprising given their varied and eclectic cultural tastes. In addition to Expression, Essence and Affirmation are established segments in the potential Asian arts market and are significantly over-represented for many Asian arts sub-artforms.

Essence will engage at a higher frequency. However, there is also real scope to reach even more Affirmation audiences. In real terms, there is a greater number of Affirmation in the potential market for the majority of sub-artforms compared to other segments.

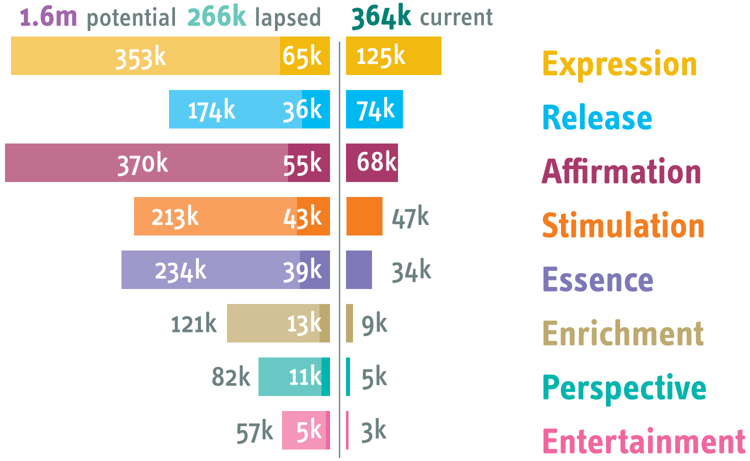
Sub-artform for the Asian arts market by culture segment – real figure estimates



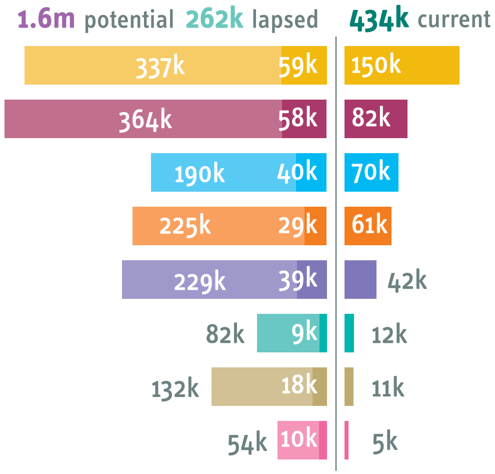
Music concert or evening showcasing Asian artists



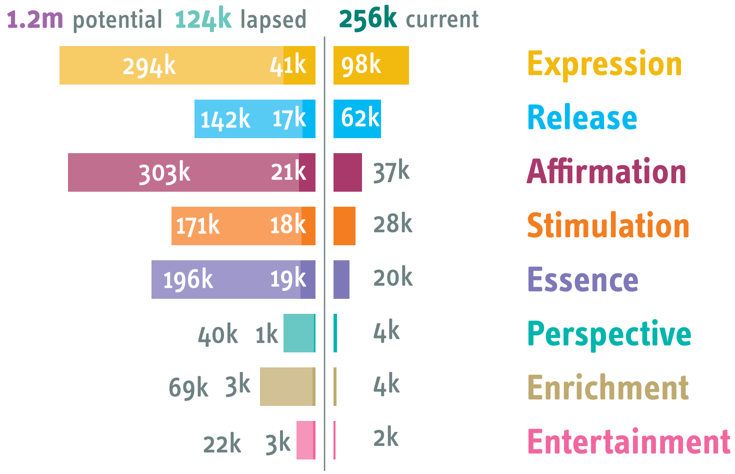
Asian theatre



Asian dance



An Asian literature event



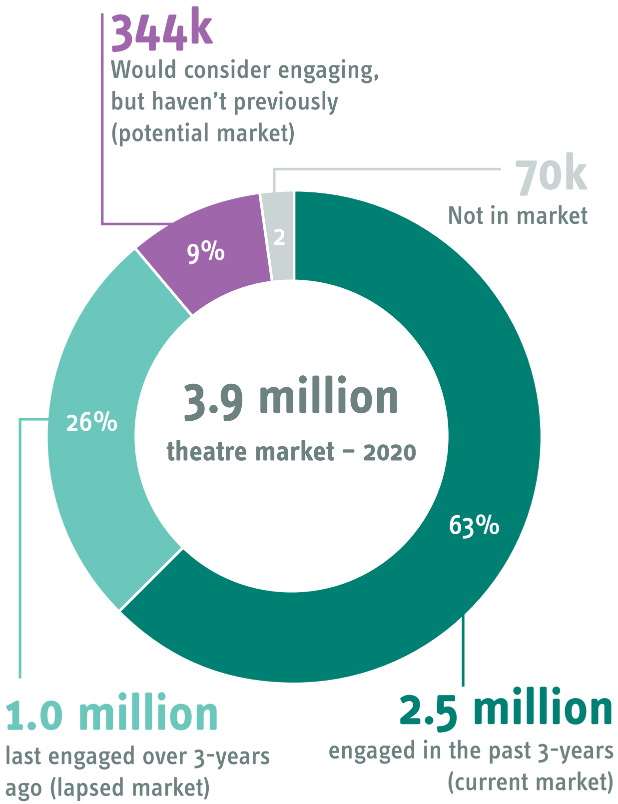
Theatre

Just over **6 in 10** are in the **current market** and the **lapsed market** is relatively large compared to most other artforms. An estimated **1.0 million** people have **lapsed** in their engagement and are waiting for a reason to return.

Auckland and **Wellington** have the **most active** theatre **markets**. Meanwhile, residents of the **Waikato** and **Bay of Plenty** are significantly more likely to have **lapsed** than average.

Defining the theatre market

The theatre market is defined as anyone in the culture market who has ever engaged with theatre or would consider engaging but haven't previously, including: a play or drama, cabaret or burlesque comedy, Māori, Pasifika or Asian theatre, musical theatre or another kind of theatre event.

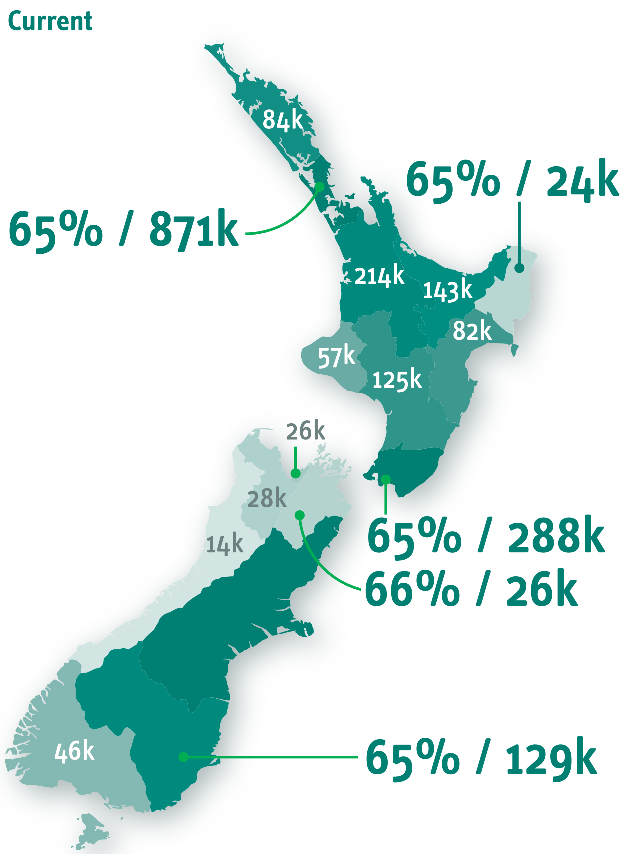


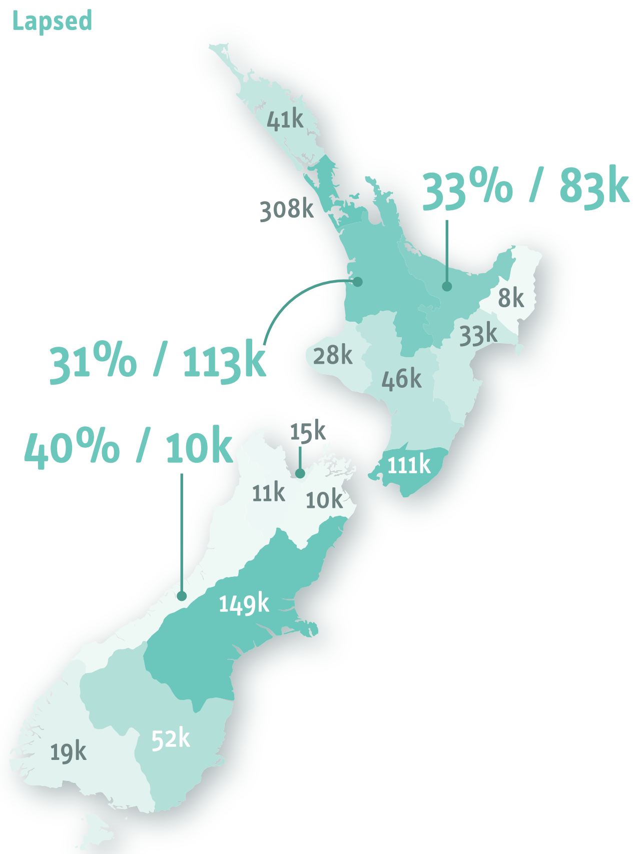
[Base 6743]

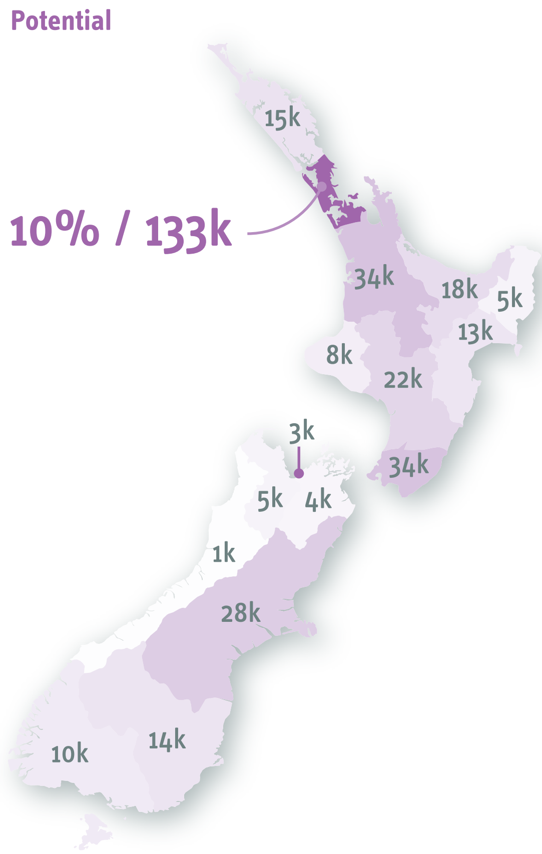
The current theatre market is one of the most active artform markets in terms of membership. Significant differences from the culture market average include:

- Skews female (53% vs 51%)
- More likely to hold a post-graduate qualification (14% vs 12%)
- More likely to have spent on the arts in the past month (41% vs 32%)
- Are more active in giving to the arts, being significantly more likely to be an active member / subscriber (12%), recent volunteer (9%) or have given financially (38% donated within the past three years)
- Essence, Expression and Stimulation segments are over-represented.

Size of the current, lapsed and potential **theatre** market across New Zealand – real figure estimates







- The current theatre market enjoys high penetration. Marlborough (66%), Auckland, Gisborne, Wellington and Otago (all 65%) have the largest proportion of residents in the current theatre market. Although, the current market across all regions is broadly comparable to the norm (63%).

- Compared to the culture market average, the West Coast (40%), Bay of Plenty (33%), and Waikato (31%) regions are significantly more likely to have lapsed in their engagement with theatre. Suggesting that at a regional level, there is a market looking for a reason to return.

- The potential market for theatre is relatively small, due in part to the high penetration of the current market and substantial lapsed markets. Compared to the norm (9%), Canterbury has a significantly lower proportion in the potential market for theatre (5%). Meanwhile, in Auckland an estimated 133k would consider engaging but haven't previously.

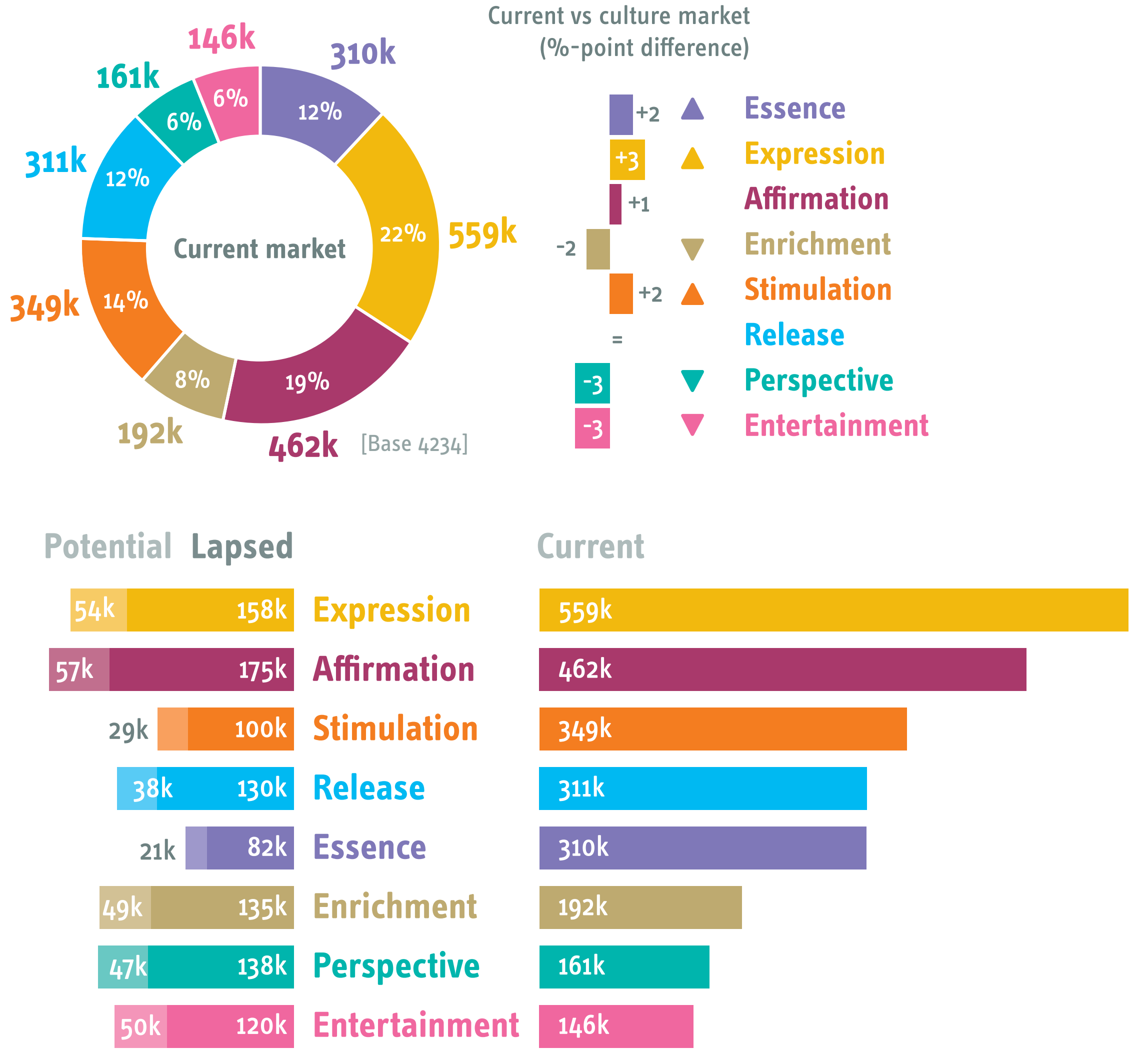
Essence, Expression and Stimulation are core

Looking at the percentage of each segment in the four market groups (current, lapsed, potential and not in market), the Essence, Expression and Stimulation segments are significantly more active in the current theatre market. Three-quarters of Essence and 71% of Expression and Stimulation have engaged with theatre in the past three years. Affirmation should be considered a secondary target. Two-thirds of people in this segment are in the current theatre market.

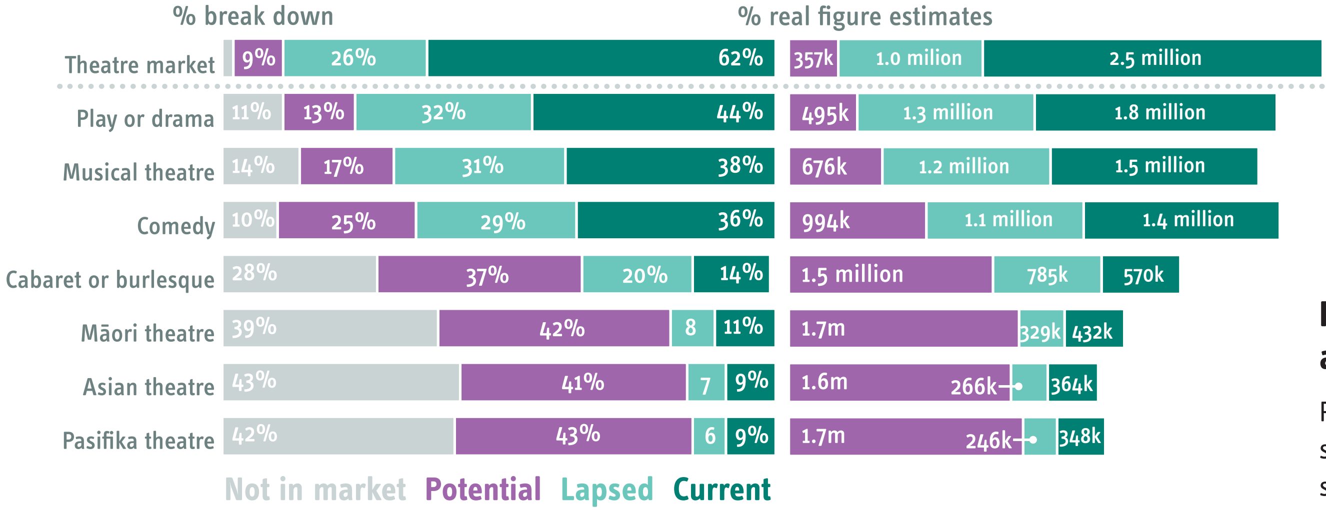
Enrichment, Perspective and Entertainment more likely to have lapsed

The profile of the lapsed theatre market indicates the less culturally active segments of Enrichment, Perspective and Entertainment are significantly more likely to have lapsed than average.

Culture Segment profile and real figure estimates – theatre



Theatre market penetration – including sub-artforms



Comedy has the largest market

While some genres within the theatre artform have larger active markets, for example, a play or drama (44%) or musical theatre (38%), an estimated 3.5 million people are in the market for comedy (90% of the market). However, over half have either lapsed in their attendance or would consider engaging but haven't previously (potential market).

Comedy also has a relatively small portion of the market who are resistant: just one in ten have never been and are not interested, similar to a play or drama (11%) or musical theatre (14%).

An estimated 1.8 million in the current play or drama market

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

The size of the current market for musical theatre and comedy closely follow drama. Strategy for these markets should focus on retention, in addition to re-activation of their relatively large lapsed markets.

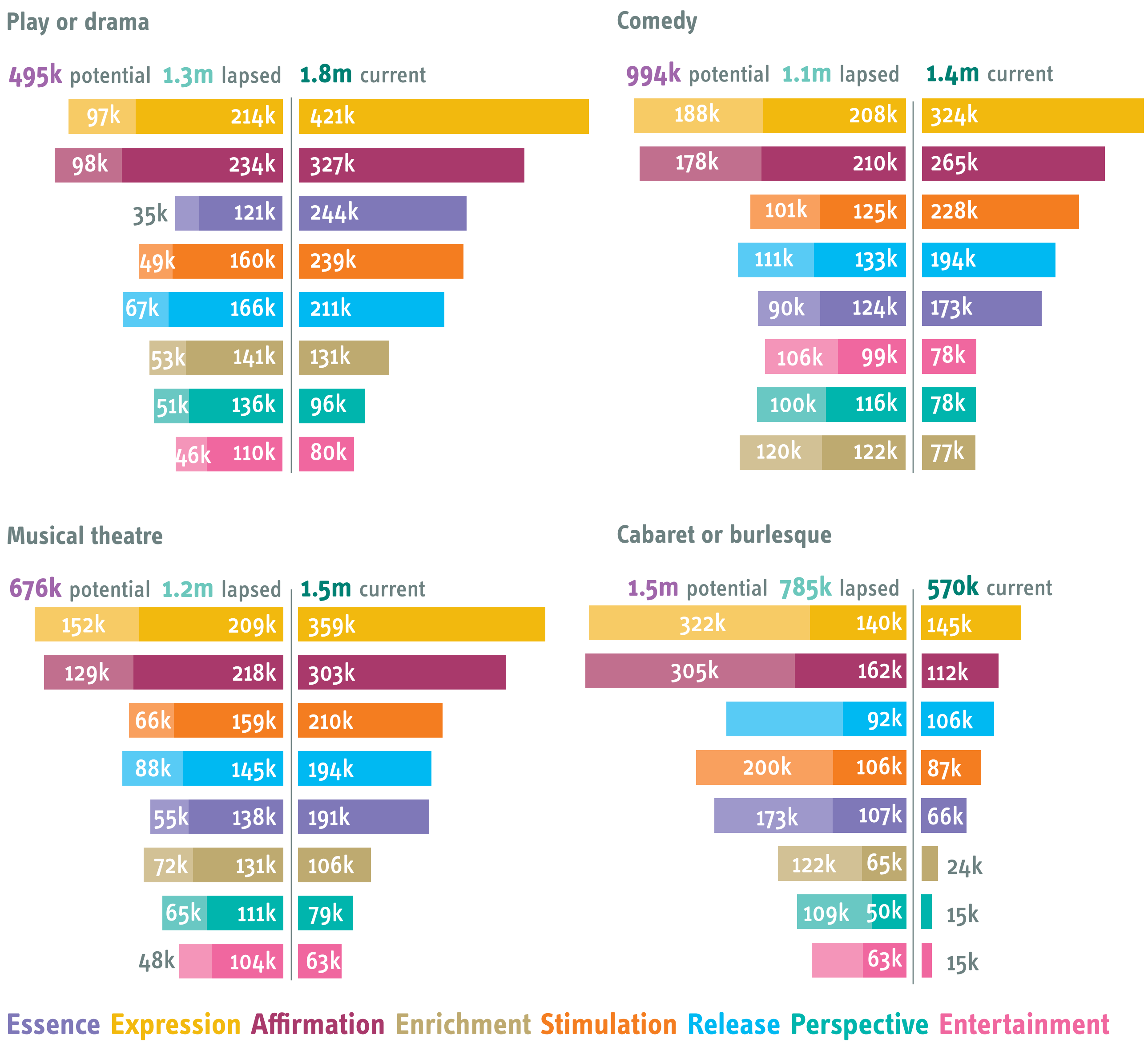
Potential for Pasifika, Asian and Māori theatre

Pasifika, Asian and Māori theatre have the smallest current markets. However they have strong, latent potential with a large proportion of the market open to engaging but not having done so previously. As such, raising awareness will be a key growth strategy. However, a relatively large proportion of the market is resistant.

Cross-over between Māori and Pasifika theatre and play or drama

The current market for Māori and Pasifika theatre has the most cross-over with plays or drama; 86% have engaged with both within the past three years (current). Within the current Māori and Pasifika theatre markets, a large proportion have also engaged with musical theatre in the past three years (81% and 83% respectively).

Sub-artform for the theatre market by culture segment – real figure estimates



Different segments are seeking different theatre experiences

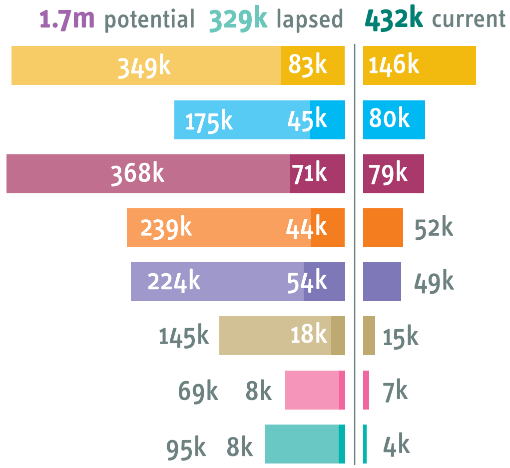
At an artform level, the overall profile is fairly similar to the market as a whole with the more culturally active segments of Essence, Expression, Affirmation and Stimulation all more likely than average to be in the current market for theatre.

The diversity of genres within the theatre artform means that organisations that produce or show a range of work can do fairly sophisticated targeting by Culture Segments. For example, Essence are more literary and able to place each work in a critical and historical context. Expression seek the narrative arch and empathise deeply with characters, they enjoy connecting with performers and playwrights (living and dead) and above all want to be part of an audience community. Stimulation are seeking real drama through intrigue, spectacle and surprise and appreciate the visual presentation of the work.

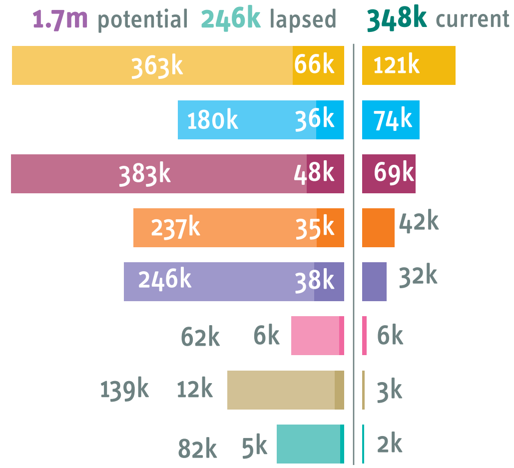
Potential to reach new Essence, Expression and Affirmation audiences

While Expression and Affirmation are active in the theatre market, a relatively large number of the Release segment are in the current markets for Māori, Pasifika and Asian theatre. Essence, Expression and Affirmation are over-represented in the potential markets for each of these theatre sub-artforms, indicating there is real scope to reach out to engage these segments.

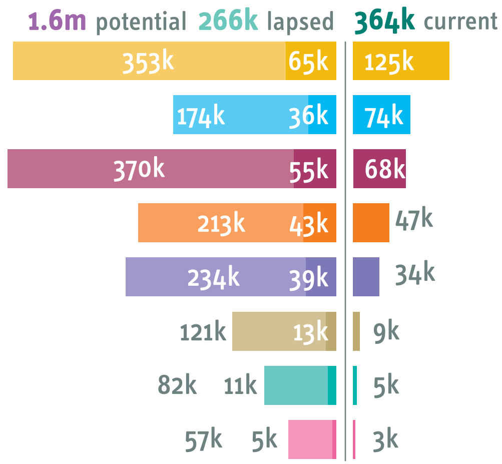
Māori theatre



Pasifika theatre



Asian theatre

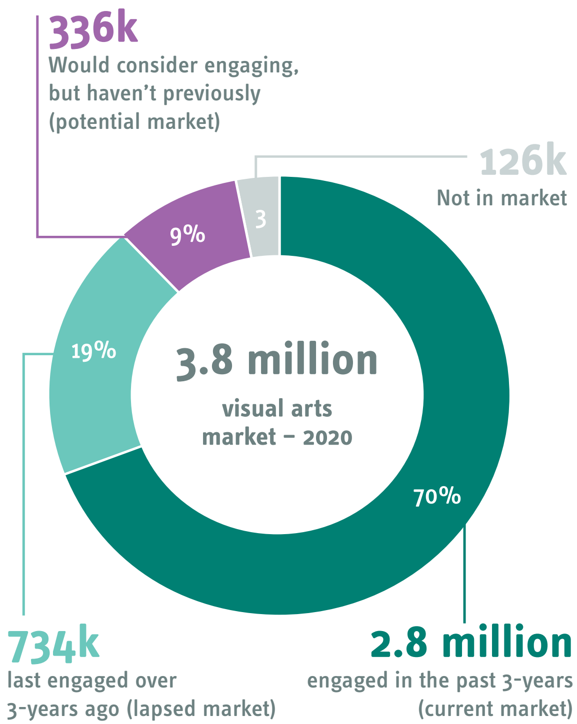


Expression
Release
Affirmation
Stimulation
Essence
Enrichment
Perspective
Entertainment

Visual arts

Seven in ten have attended a **visual arts** event in the **past three years**, equating to an estimated 2.8 million people.

The potential lies in **re-engaging lapsed** attenders, particularly in the **art gallery or exhibition** market. Encouraging engagement with new types of visual arts will be **key strategies**. There is **potential** to introduce new audiences to **digital or video** arts, **Māori**, **Pasifika** and **Asian** art exhibitions.



[Base 6743]

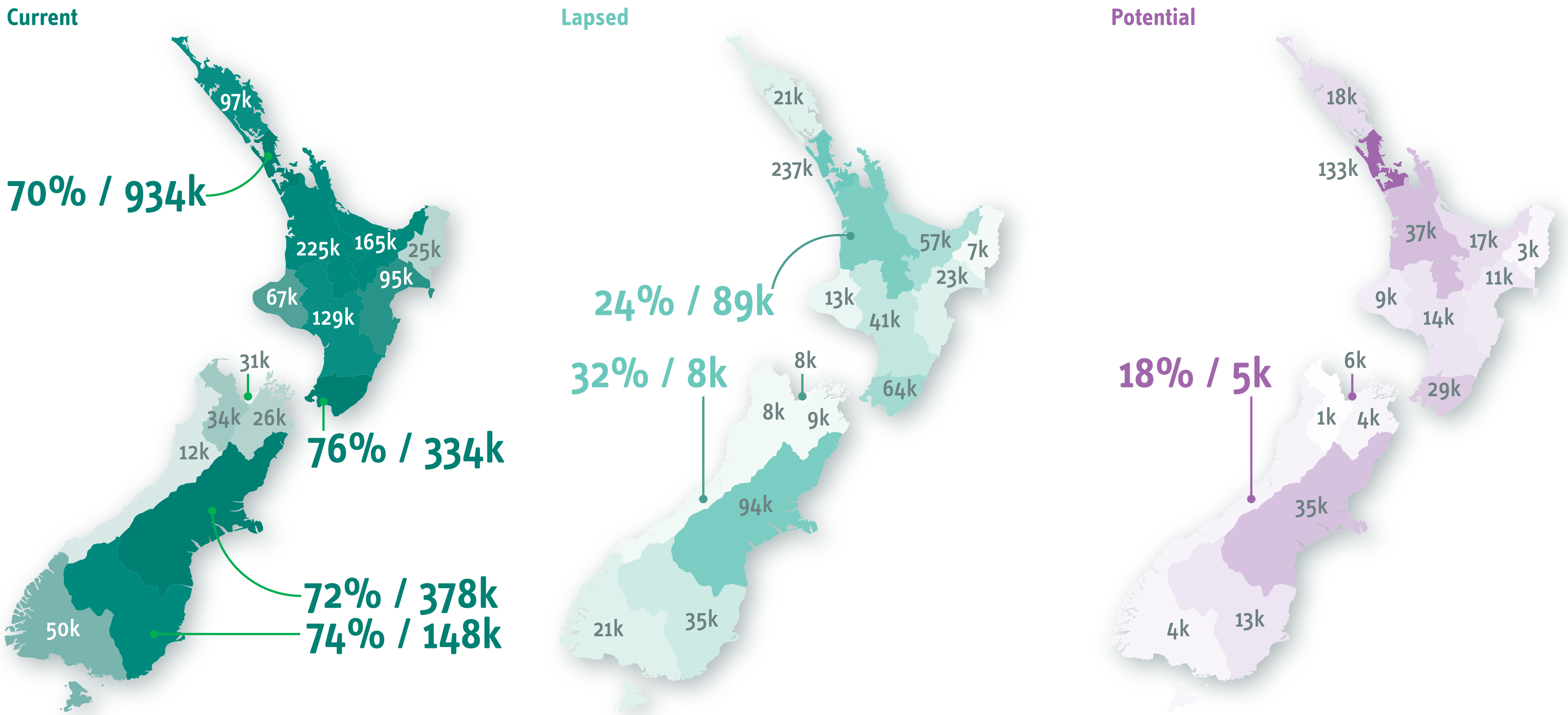
The current visual arts market boasts a broad Culture Segment profile. The overall demographic is relatively comparable to the culture market average. Significant differences include:

- More likely to reside in the Wellington Region (13% vs 11%)
- More likely to hold a post-graduate qualification (14% vs 12%)
- More likely to have spent on the arts in the past month (40% vs 32%)
- Are more active in giving to the arts, being significantly more likely to be an active member / subscriber (11%), recent volunteer (9%) or have given financially (35% donated within the past three years)
- Essence, Expression, Affirmation and Stimulation segments are over-represented.

Defining the visual arts market

The visual arts market is defined as anyone in the culture market who has ever engaged with visual arts or would consider engaging but haven't previously, including: an art gallery or art exhibition, digital or video art event, Māori, Pasifika, or Asian art exhibition or digital or video art event, or a visual arts festival.

Size of the current, lapsed and potential **visual arts** market across New Zealand – real figure estimates



- All regions enjoy healthy penetration into the current visual arts market. In particular, Wellington (76%) and Otago (74%) have a significantly higher proportion of the market who have engaged with visual arts compared to the norm (70%).
- The proportion of people who have lapsed in their engagement with visual arts is significantly higher in the West Coast (32%) and the Waikato (24%) compared to the culture market average (19%).
- In real terms, development potential is limited across the regions. While nearly 1 in 5 residents of the West Coast would consider engaging but haven't previously, at 18% this is significantly above average (9%). However, in real terms, this represents a modest 5k people.

Essence are core engagers with the visual arts market

Compared to the culture market average, the more culturally active segments are all over-represented in the current visual arts market.

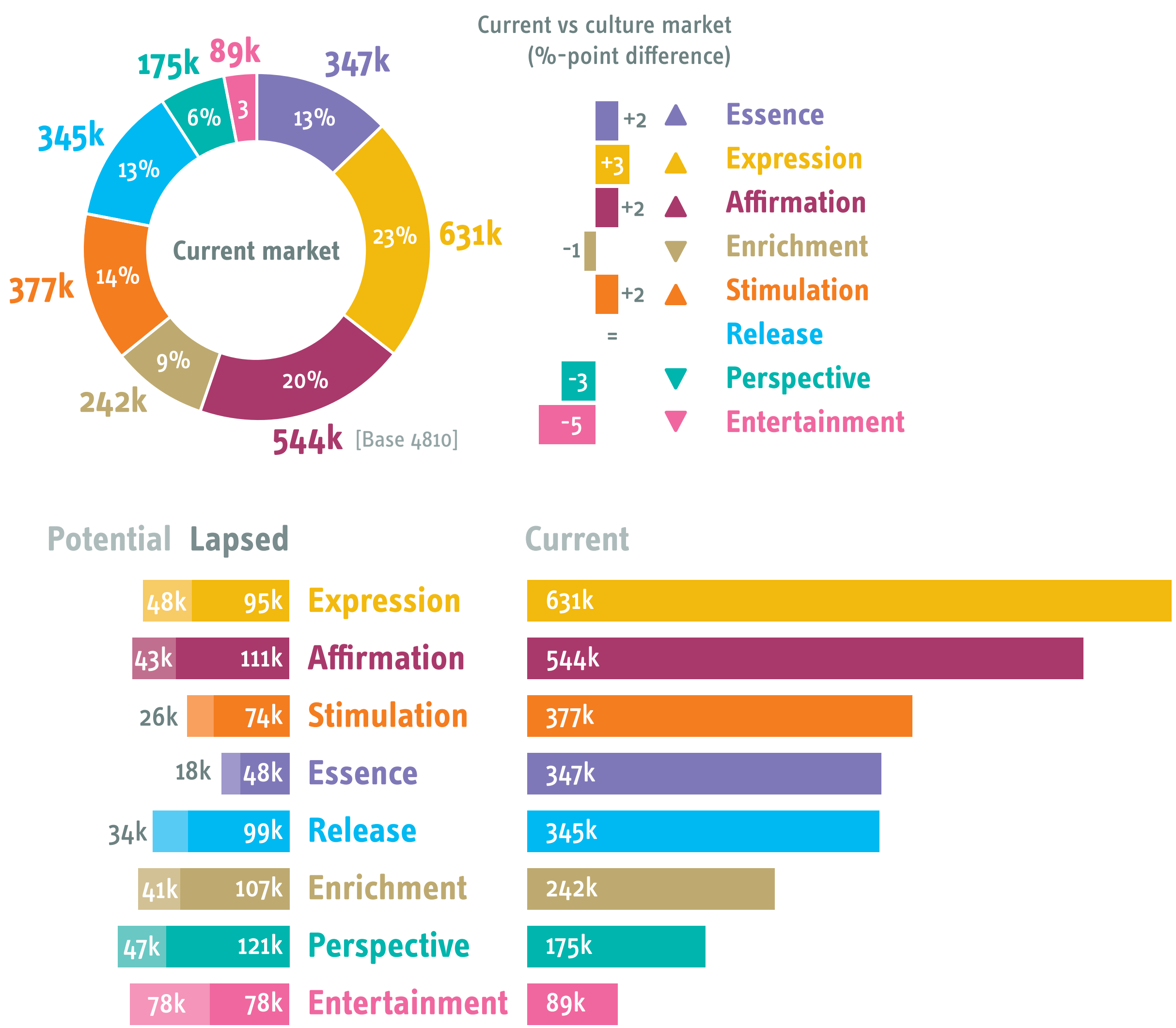
Essence are core engagers with the visual arts; 84% of those in the Essence segment have done so in the past three years, followed closely by Expression (81%), Stimulation (79%) and Affirmation (78%).

Enrichment, Release and Perspective are typically open to going to art galleries and exhibitions, although they visit less frequently, being significantly more likely to have lapsed, last visiting over three years ago.

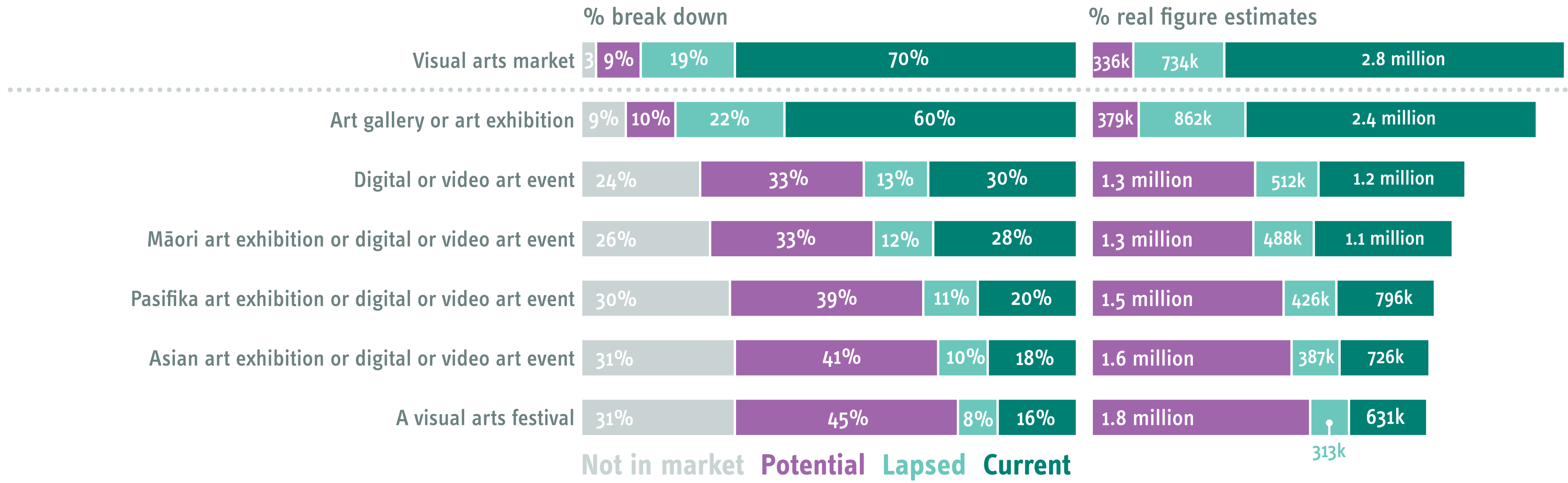
Entertainment is under-represented

The Entertainment segment is particularly under-represented in the visual arts market, however, representing just 3% of the current visual arts market.

Culture Segment profile and real figure estimates – visual arts



Visual arts market penetration – including sub-artforms



Potential to introduce audiences to new artforms

Art galleries or art exhibitions have the largest level of penetration. The current market is twice the size of digital or video art event (60% and 30%, respectively).

The potential market for a digital or video art event (33%) is higher than its current market, indicative of the potential to grow this market further.

There is a similar pattern for Māori, Pasifika and Asian digital or video art events.

Strong cross-over between genres

The current market for visual arts festivals has the most cross-over with art galleries or art exhibitions; 87% have engaged with both within the past three years (current). Within the current visual arts festival market, 77% have also engaged with a digital or video art event in the past three years.

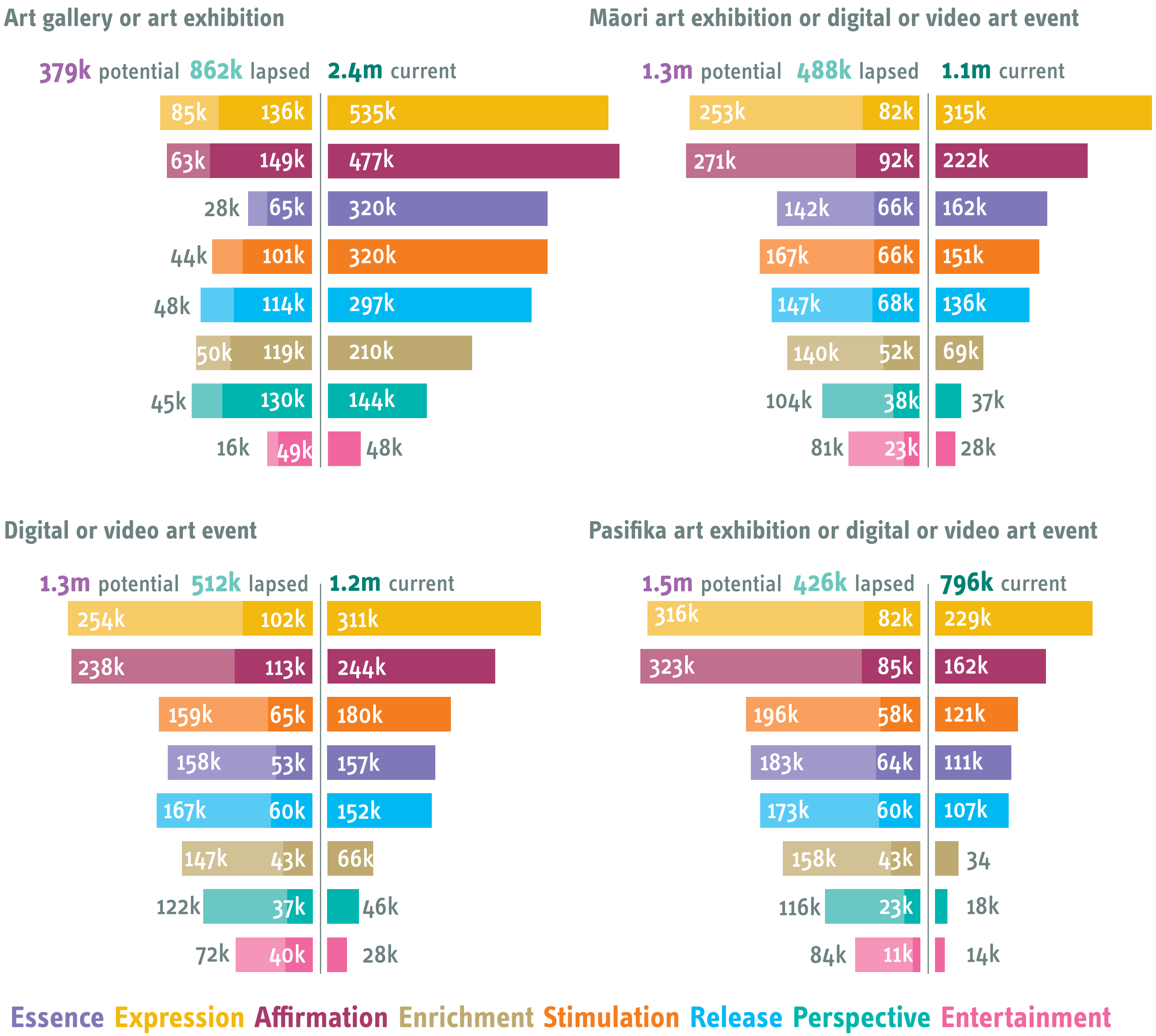
2.7 million in the market for visual arts festivals

Of the sub-artforms for visual arts, the current art gallery or art exhibition market is the largest at 2.4 million people. Digital or video art events follow at 1.2 million. The current market for visual arts festivals is the smallest of all sub-artforms. However it has the largest potential market at 1.8 million.

A broad set of segments to engage with digital or video art

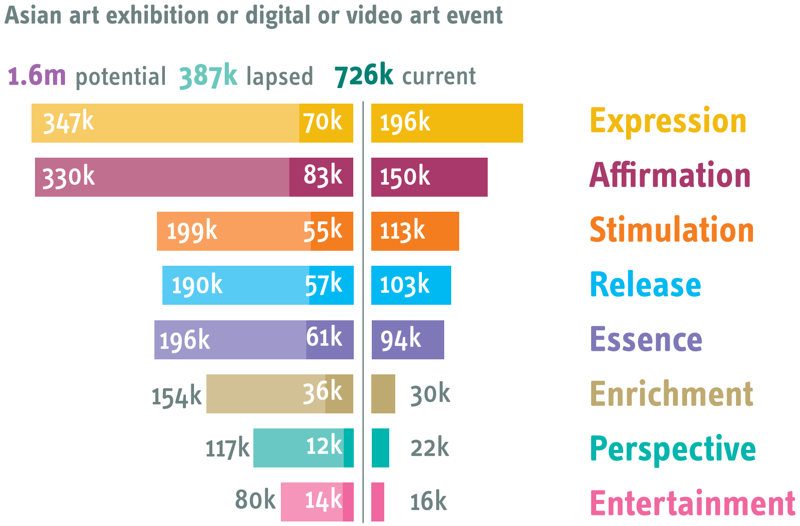
Overall, there is a broad set of segments in the potential market for digital or video art events. Essence, Expression, Affirmation and Stimulation are particularly over-represented in the Māori, Pasifika and Asian art exhibition, digital or video art event potential markets.

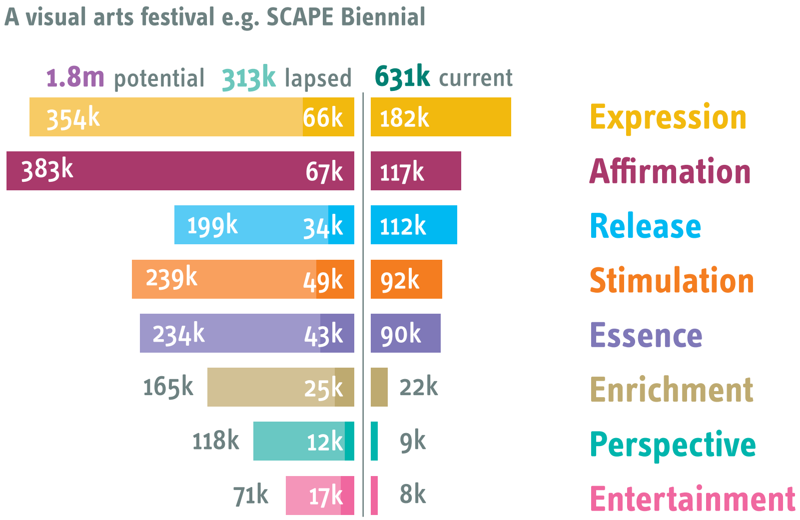
Sub-artform for the **visual arts** market by culture segment – real figure estimates

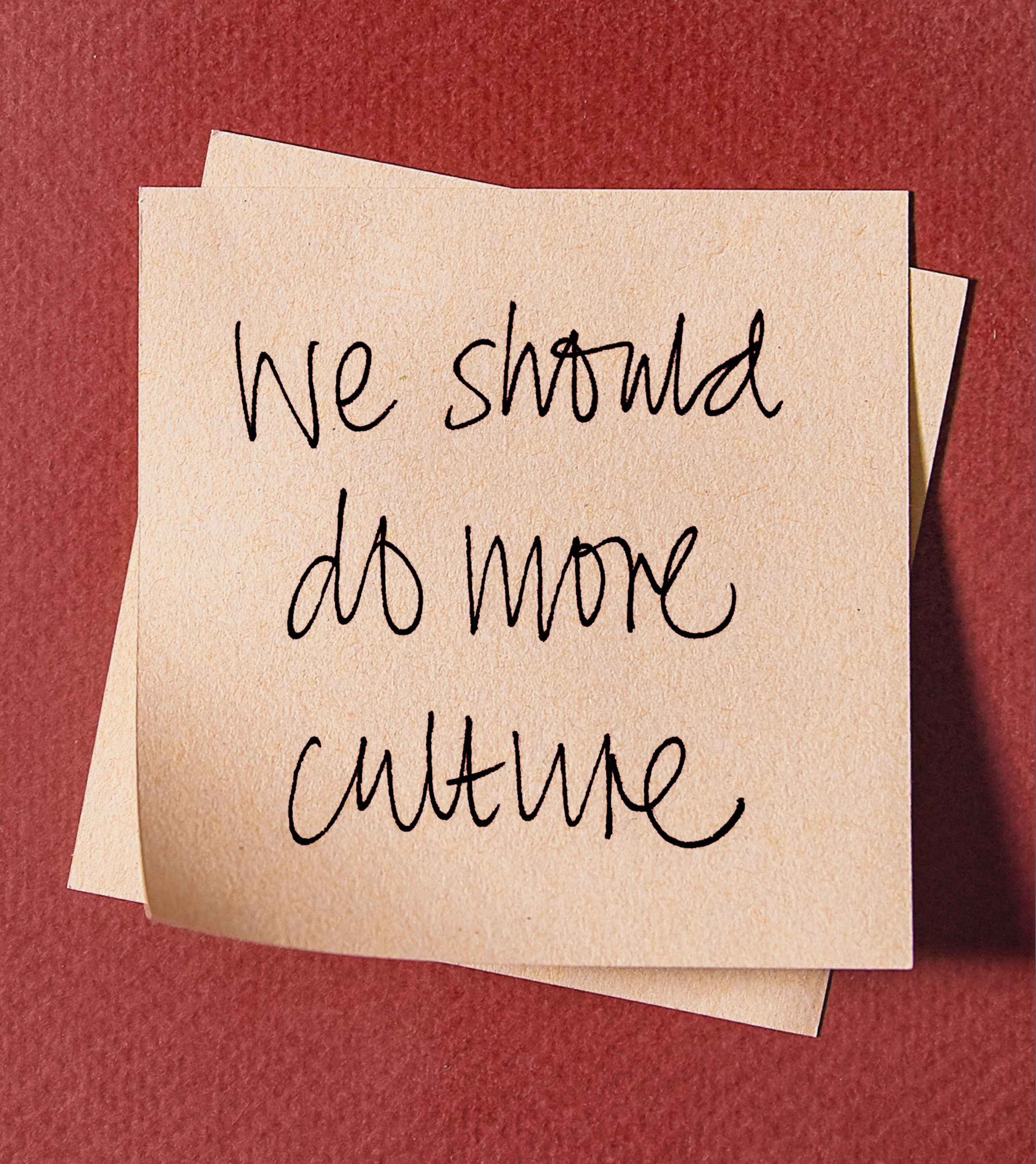


Scope to differentiate elements of the offer

The visual arts market has scope to differentiate elements of its offer to appeal to different segments. Essence would prefer the gallery space to themselves for a close personal encounter and, similarly, small intimate events with artists and curators. Expression would love the gallery to be thronged by people from every background and persuasion and prefer events to be communal. Entertainment and Release want to enjoy themselves without too much mental taxation, whereas Affirmation are prepared to put in the effort to get the reward of learning and Enrichment have come to worship at the cathedral of art. Understanding these motivations and matching them not only to the offer but also to the proposition and correct channel will help organisations unlock their full potential.







Appendix 1:

Culture Segment pen portraits

morris hargreaves mcintyre

Appendix 1: Culture Segment pen portraits

Appendix 1 includes **detailed pen portraits** for each of the eight Culture Segments. These provide **key information** to help you really **get to know each segment**, and use the system for **strategic audience development** activity.

Getting to the heart of why people engage

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, for example, in demographic terms, Culture Segments is a tool you can use to influence 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 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: 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.

Segment yourself here: https://mhminsight.com/culture-segments/survey

Essence

Essence consider the arts and culture **essential to their very being**.

They are highly discerning and confident – **high quality culture** is their primary concern.

Core cultural attenders

Essence is the segment most likely to say...

'I'll be the judge of that'

and least likely to say...

'What would you recommend?'

10% / 413k
of adults in Aotearoa

35% (33%)
have children in the household

36% (28%)
have an undergraduate degree or higher

45% (46%)
are employed full time

13% (16%)
are retired

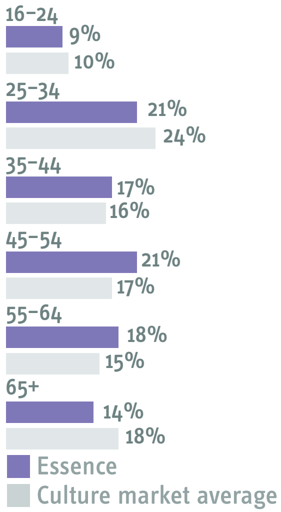
75% (74%)
were born in Aotearoa

19% (15%)
identify as Māori

5% (8%)
identify as Pacific Peoples

10% (15%)
identify as Asian

Age profile



Culture market average is shown in brackets

Attitudes and life priorities

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

What role does culture play?

Culture is an essential part of their lives

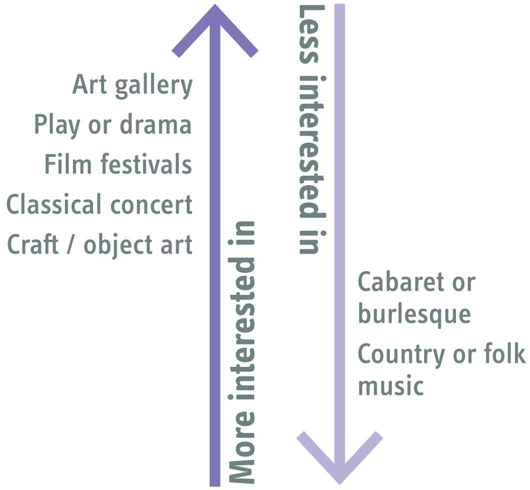
This segment is called Essence because culture is essential to their identity. They're the one segment for whom the arts isn't just something they do, it's a fundamental part of who they are. It's the very fibre of their being. If you were to take the arts away from them, it would be like taking oxygen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

61% (42%)

place 'higher importance' on engaging, with arts and culture

72% (50%)

agree that engaging with arts and culture has a positive effect on their personal wellbeing



The arts are a way of exploring the world and reflecting on meaning, as well as providing deep emotional connections. They will experience it with or without others.

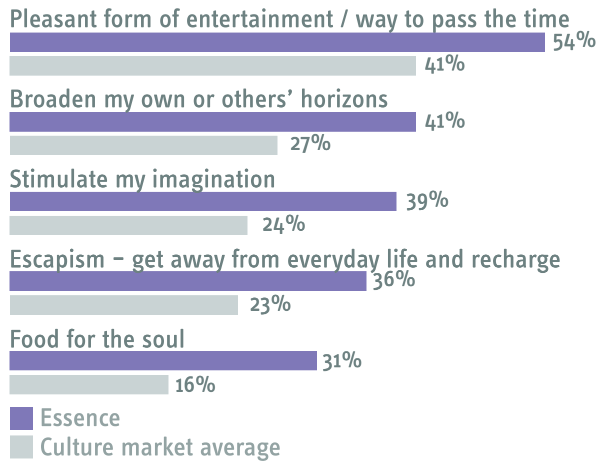
Top Tip

None of us wants to put Essence off – they are a small but core arts audience. Be assured, they neither attend because of the marketing nor stay away if they don't like it. Make sure the facts are available but it is unlikely they will read the body text. They are driven by their own agenda and quickly decide what is worthy of their interest. So use marketing copy to encourage less confident and knowledgeable audiences.

How do they approach arts and culture?

Essence are typically confident, experienced and knowledgeable. They've seen lots of other art before and understand how it works. It's important that organisations recognise this; Essence won't need much explanation about a show or event in the copy and can perceive too much explanation as 'dumbing down'. Essence have a deep appreciation for the way the art is made, and they're able to access the underlying ideas and context.

Where Essence's motivations for engaging differ most from the norm



How do you reach them?

As arts and culture is at the very heart of what they do, they're highly proactive in keeping themselves up to date about cultural events. That being said, this doesn't mean they turn to marketing for recommendations on what to choose. They almost make a virtue out of not being influenced. They might even quite enjoy not liking something everybody else likes.

How do Essence choose?

When choosing what to see or do, Essence's primary concern 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 are fiercely independent, and as such, may not be persuaded to see something based on marketing alone – in fact, they view marketing as something for other people, not for them.

Key messages:

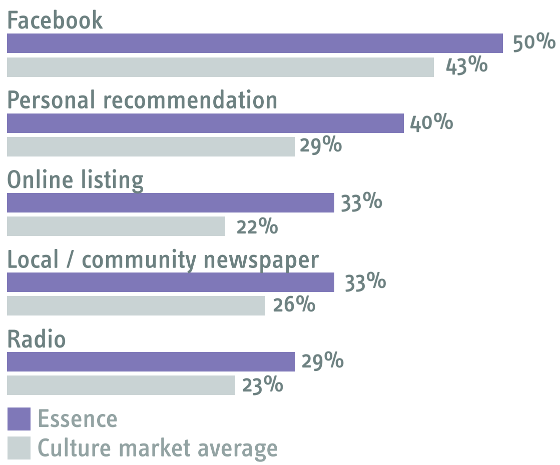
The programming team has credentials

It's seriously high quality

It has depth, substance and intellectual rigour

Not mainstream entertainment

Top five ways Essence find out about arts, cultural and heritage events or organisations



28% (18%)

engaged with arts and culture online in the past 12 months

10% (9%)

paid or donated money in the past 12 months to access arts and cultural content online

How Essence engage with the arts online:

It will only ever be an extra: a wrap-around enhancement

The internet is a rich, extensive resource that feeds Essence's thirst for knowledge and learning. A means to an ends, they use it to research, extend their knowledge and keep up with current affairs.

Essence use the internet to support their culture habit but not as an alternative form of distribution. They'll engage with video content to understand more about a show / exhibition but it won't replace live interaction. So they are using online resources to plan / research their real-world visits.

Building relationships with them

Essence are not natural joiners in that they don't feel a need to be communally engaged. If they do join a membership program, they will do so to access the benefits the program offers, such as priority booking or early seat selection. It may be because of this, that Essence are more likely than average to be an active member of a cultural organisation.

14% (9%)
are an active member / subscriber or friend of an arts, cultural or heritage organisation

18% (14%)
have volunteered for an arts or cultural organisation in the past 3 years

40% (28%)
have donated money to an arts or cultural organisation in the past 3 years

Essence are the segment most likely to have donated in the past, reflecting the importance of arts and culture in their lives.

Top reasons for donating money to the arts

How do you develop them?

Because of the major role it plays in their lives, Essence are highly proactive and will actively seek out arts and culture. Marketers won't need to do much to reach this group – as long as the organisation has a reputation for high quality programming, Essence will find it on their own. When writing copy, ensure the technical details are present and avoid 'marketing speak' as this may give them the wrong impression. Signposts of quality, sophistication and credentials will increase their likelihood of engagement.

Icons by Flaticon

Key focuses:

Quality and sophistication

Acknowledging their discerning interests

Opportunities for taste development and challenge

Expression

Creative **Expression** see culture as a way of **broadening horizons** and expressing themselves.

They are **community-minded** and like to be sure everyone can enjoy the benefits of arts and culture.

'people people'

Expression is the segment most likely to say...

'Art's for everyone'

and least likely to say...

'But what's in it for me?'

20% / 776k
of adults in Aotearoa

34% (33%)
have children in the household

32% (28%)
have an undergraduate degree or higher

45% (46%)
are employed full time

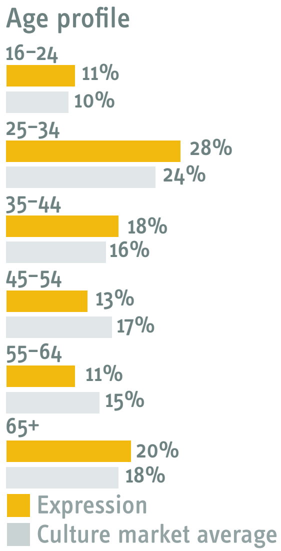
18% (16%)
are retired

72% (74%)
were born in Aotearoa

16% (15%)
identify as Māori

13% (8%)
identify as Pacific Peoples

19% (15%)
identify as Asian



Culture market average is shown in brackets

Attitudes and life priorities

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

What role does culture play?

Culture is a communal experience

Culture is not a private thing for Expression; it's a communal thing. A good experience for Expression is when others are also having a great time; they thrive off this, rather than keeping the arts a secret.

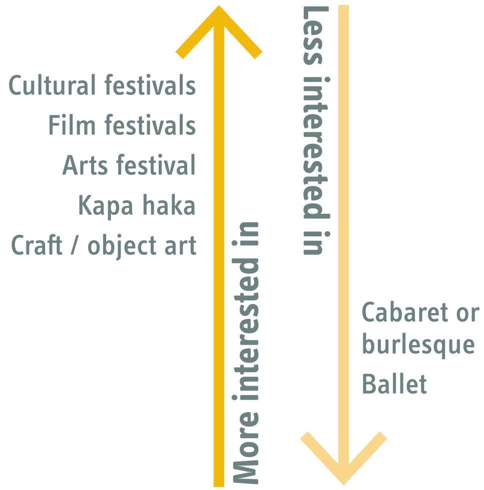
They want the masses to go and enjoy things – to share them and reflect on them together. Because of this, they're more likely to gravitate towards free events as a broader group of people will be able to engage.

61% (42%)

place 'higher importance' on engaging, with arts and culture

66% (50%)

agree that engaging with arts and culture has a positive effect on their personal wellbeing



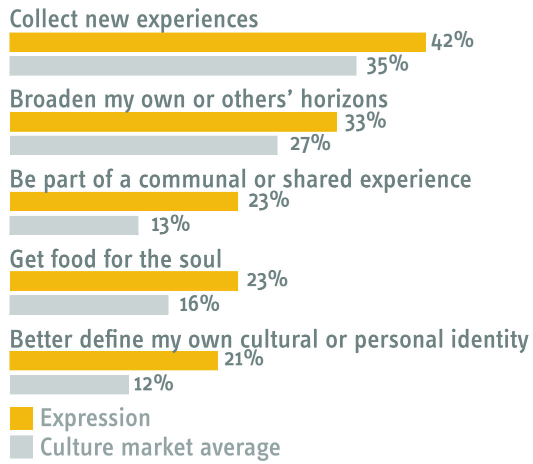
Top Tip

Expression are often visually driven. Organizations must make sure marketing has beautiful, natural images. Being people people they also like to see close up faces of artists and a range of people in all their diversity. Organisations who are doing something that promote egalitarianism, access and democracy command more of their support.

How do they approach arts and culture?

This is the segment that makes the least distinction between professional and amateur art. They'll absolutely appreciate the 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'd love an opportunity to be hands-on themselves, be it meeting makers or expressing their creative side by making something.

Where Expression's motivations for engaging differ most from the norm



How do you reach them?

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.

How do Expression 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 because it feels too impersonal to them. They want emotional, personal connection with organisations – more like a friend. This segment is highly visual, so ensure the artwork used in any sort of collateral is bright, eye-catching and tells a story.

Key messages:

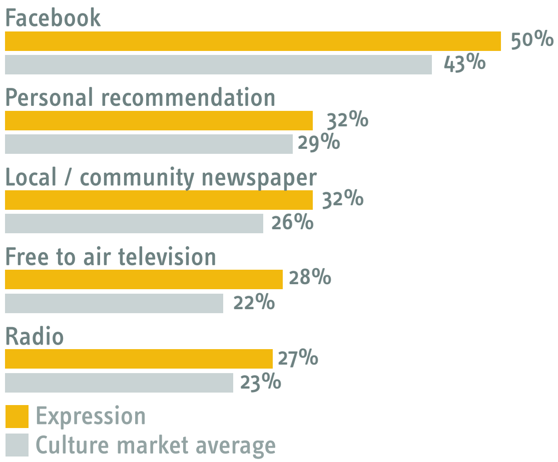
It will be immersive, emotional escapism

Everyone will enjoy a shared experience

It will be something to discuss

You'll appreciate the artistic expression – and maybe have the opportunity to express yourself

Top five ways Expression find out about arts, cultural and heritage events or organisations



24% (18%)
engaged with arts and culture online in the past 12 months

16% (9%)
paid or donated money in the past 12 months to access arts and cultural content online

How Expression engage with the arts online:

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

Expression typically have high online use and really embrace the internet as a tool for sharing experiences, networking and connecting. The internet is another equally valid way of expressing themselves creatively. They appreciate how the internet can essentially democratise culture.

Expression are looking for content that brings a subject to life: human stories, real voices, interactivity and audio-visual help deliver this.

Building relationships with them

Rather than joining for tangible benefits, Expression see membership as a way to support an organisation they love, so will respond best to messages about how their membership is helping the organisation. They'll be even more willing to join if there are social events where they can meet like-minded people.

Expression are natural networkers, and along with Essence are the segment most likely to be a member of an arts, culture or heritage organisation.

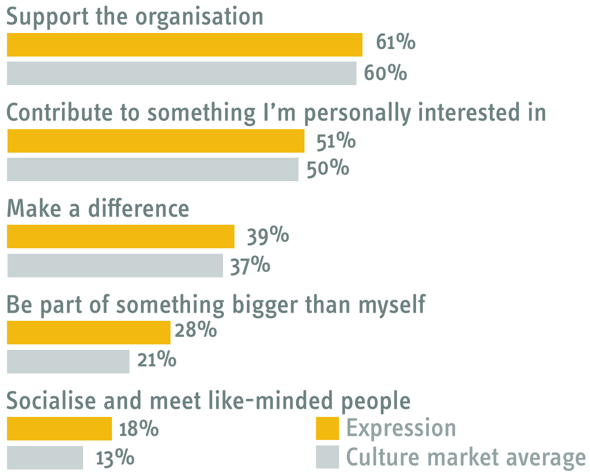
14% (9%)
are an active member / subscriber or friend of an arts, cultural or heritage organisation

21% (14%)
have volunteered for an arts or cultural organisation in the past 3 years

37% (28%)
have donated money to an arts or cultural organisation in the past 3 years

Expression are naturally hard-wired to support arts organisations and after Essence are the segment most likely to have donated money or time in the past.

Top reasons for donating money to the arts



How do you develop them?

Expression talk about the arts organisations they love in terms of their diversity, creativity and inclusivity. They can be wary of organisations who may appear to place quality above inclusion, so organisations need to be conscious of the way they talk about upcoming shows and events so that this group feels that everyone is welcome, not just those in the know. Ensure marketing copy highlights the human stories behind the art in a way that everyone can understand – this will appeal to Expression's human need to make emotional connections, and they'll feel everyone is welcome.

Icons by Flaticon

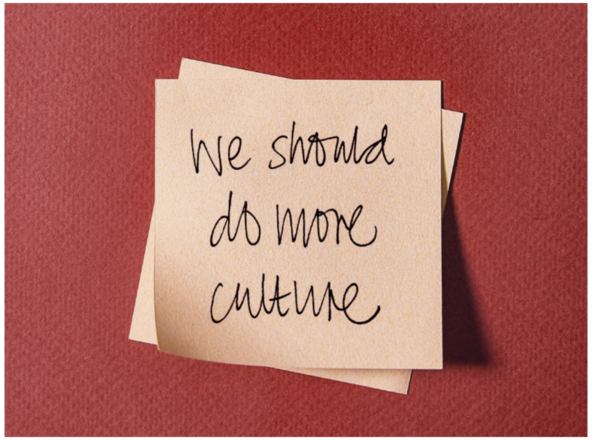
Key focuses:

Human stories behind the art

Opportunities to join in

A chance to meet like-minded people

Affirmation



Affirmation believe that **culture** is an important and **worthwhile activity**, and makes their lives better.

They make considered, **measured choices** and are adventurous in the arts, but need **assurance** they've done the right thing.

Nothing happens by accident

18% / 699k
of adults in Aotearoa

34% (33%)
have children in the household

35% (28%)
have an undergraduate degree or higher

48% (46%)
are employed full time

15% (16%)
are retired

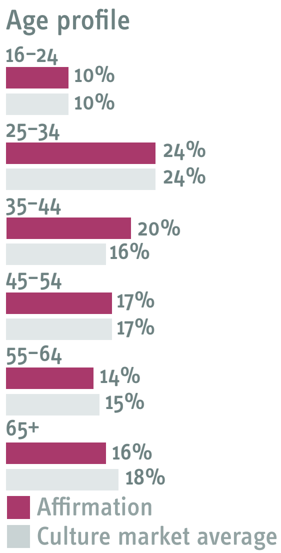
Culture market average is shown in brackets

71% (74%)
were born in Aotearoa

14% (15%)
identify as Māori

8% (8%)
identify as Pacific Peoples

18% (15%)
identify as Asian



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!'

Attitudes and life priorities

Personal development

Doing the right thing

Quality experiences

Learning and enjoyment

What role does culture play?

Culture is self-improving

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.

They will, however, be aware of other commitments that may also demand time, so don't exclusively spend their leisure time in arts and cultural activities.

51% (42%)
place 'higher importance' on engaging, with arts and culture

58% (50%)
agree that engaging with arts and culture has a positive effect on their personal wellbeing

More interested in

Craft and object art exhibiton
Art gallery
Popular music
Musical theatre

Less interested in

Country or folk music
Contemporary classical music
Visual arts festival

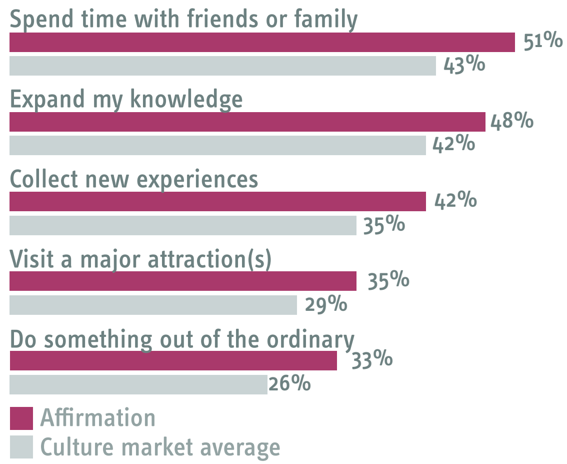
Top Tip

Part of getting things right (and feeling in control) includes not being ripped off. This is one of the reasons culture makes the cut in their leisure choices – it does hold real value. 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. When Affirmation are weighing up the options, a discount or offer could just put the final tick in the 'pros' column.

How do they approach arts and culture?

They may have been on 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; wanting to try things, but on the other hand, 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.

Where Affirmation's motivations for engaging differ most from the norm



How do you reach them?

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. They need plenty of endorsement and supporting evidence that a show or event is worth their time. Word-of-mouth from a trusted friend would be the ultimate. But online user reviews, such as TripAdvisor or similar sources will assure Affirmation it will be worth their time.

How do Affirmation choose?

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. The devil is in the detail for Affirmation. Sending out pre-show information, either via email or text, will provide Affirmation with valuable information to plan their experience and help ease any insecurity or anxieties.

Key messages:

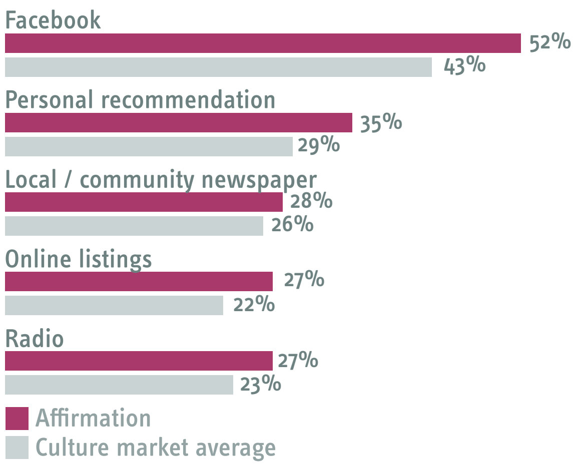
It will be worth your while – good value for money

It has good reviews

You'll get something out of it

It is modern and relevant (but not 'out there')

Top five ways Affirmation find out about arts, cultural and heritage events or organisations



20% (18%)
engaged with arts and culture online in the past 12 months

10% (9%)
paid or donated money in the past 12 months to access arts and cultural content online

How Affirmation engage with the arts online:

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

The internet offers several qualities that suit the Affirmation mindset: allowing them to give consideration to all options in one place; and thorough research, sense-checking and risk elimination.

If they aren't visit planning, Affirmation want to feel as though they have learnt something. But this needs to be enjoyable so online content that is too dense or academic will not capture them.

They are happy to defer to you as an authority in your area, expecting you to identify and signpost highlights for them on your website.

Building relationships with them

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 fosters a sense of affiliation and helps them feel they are personally helping organisations they care about.

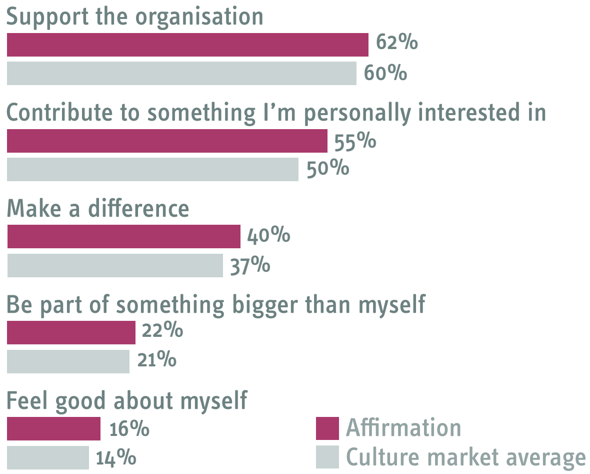
8% (9%)
are an active member / subscriber or friend of an arts, cultural or heritage organisation

15% (14%)
have volunteered for an arts or cultural organisation in the past 3 years

30% (28%)
have donated money to an arts or cultural organisation in the past 3 years

Affirmation are more open than average to making a one-off donation. Along with Essence, they are the segment most likley to have made an in-person donation during a visit.

Top reasons for donating money to the arts



How do you develop them?

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. Highlighting how organisations offer 'wholesome leisure' – something that is both fun and educational – resonates strongly with Affirmation. Conversely, they are likely to be alienated if something is positioned as too experimental or risky. This group needs a gentle, non-intimidating 'way in', for example, first-timer programming or introductory tours.

Key focuses:

Promoting learning outcomes

Wraparound offers to plan their whole experience

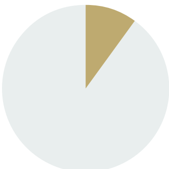
Early notice for events

Icons by Flaticon

Enrichment

Enrichment tend to be **lovers of history** with a respect for the past. They have **established tastes** and tend to veer to arts and culture that have stood the test of time and command respect.

Seeing the present through the lens of the past



10% / 398k
of adults in Aotearoa

27% (33%)
have children in the household

25% (28%)
have an undergraduate degree or higher

39% (46%)
are employed full time

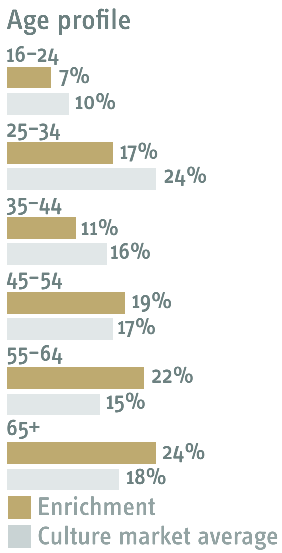
22% (16%)
are retired

75% (74%)
were born in Aotearoa

12% (15%)
identify as Māori

6% (8%)
identify as Pacific Peoples

13% (15%)
identify as Asian



Culture market average is shown in brackets

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'

Attitudes and life priorities

- Understanding the past
- Arts and crafts
- Home life
- Lifelong learners

What role does culture play?

Looking to the past to make sense of the world

Enrichment are drawn to arts and cultural experiences that connect with existing interests. They have reverence for the past and a value for 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.

22% (42%)

place 'higher importance' on engaging, with arts and culture

43% (50%)

agree that engaging with arts and culture has a positive effect on their personal wellbeing

Enrichment love to learn more about the areas they've an interest in. Cultural visits offer pleasant escapism as well as greater fulfilment within their lives.

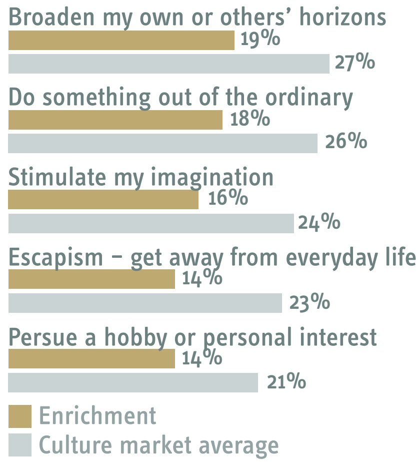
Top Tip

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

How do they approach arts and culture?

Enrichment are drawn to arts and cultural experiences that connect with existing interests. While they don't all-out reject change, they also believe we shouldn't throw away everything we once cherished, so enjoy escapism and nostalgia. Their distrust of the rewriting of history also means they may be less persuaded by updated productions if there was nothing wrong with the original. They are one of the least digitally-focused segments and often prefer physical collateral and programs.

Where Enrichment's motivations for engaging differ most from the norm



How do you reach them?

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. This segment are also keen planners and will want thorough information to plan their experience.

How do Enrichment choose?

Like their appetite for culture, their media consumption is lower and narrower than the average and reflect Enrichment's tendency toward the 'tried and true'.

Due to their cautious nature, anything that can lower risk will pay off. Opportunities to try before you buy, clips or excerpts from the show 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.

Key messages:

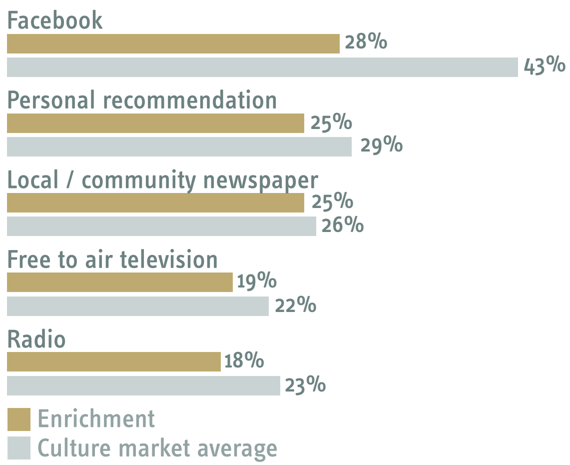
There are familiar or classic themes or features

It offers good value for money

It will evoke a sense of nostalgia

It will be well done and enjoyable

Top five ways Enrichment find out about arts, cultural and heritage events or organisations



11% (18%)

engaged with arts and culture online in the past 12 months

4% (9%)

paid or donated money in the past 12 months to access arts and cultural content online

How Enrichment engage with the arts online:

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

The Enrichment segment have no need to be early adopters, but their online activity is catching up with others, and they can appreciate the efficiency this offers. They are more likely to engage online where there is a digital version of something they are familiar with offline.

While keen learners, they do look for atmosphere and experience online, so don't appreciate too much dense reading on a website. They find overt marketing and some 'modern' elements on websites disruptive to the experience.

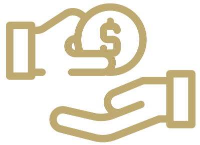
Building relationships with them

Enrichment are not natural supporters and tend to be less likely to have donated or volunteered in the past or be willing to do so.

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% (9%)
are an active member / subscriber or friend of an arts, cultural or heritage organisation

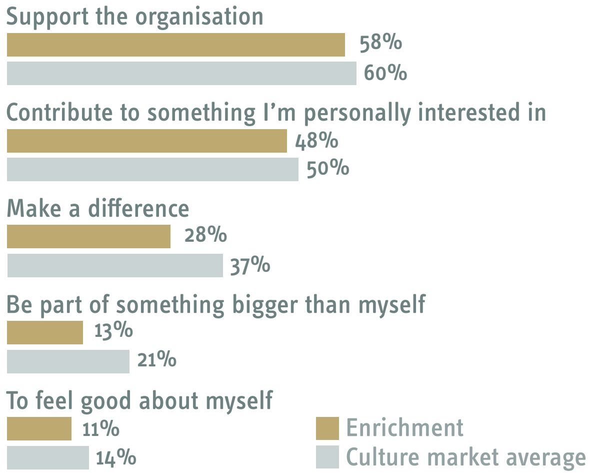
8% (14%)
have volunteered for an arts or cultural organisation in the past 3 years



19% (28%)
have donated money to an arts or cultural organisation in the past 3 years

Enrichment are as likely as average to *consider* making a one-off donation, however, they are significantly less likely to have actually done so.

Top reasons for donating money to the arts



How do you develop them?

Depending on your offer, Enrichment may be under-represented in your audiences. Enrichment are likely to have a small number of organisations they know will cater to their needs. Reaching this segment will rely on convincing them of the personal relevance to them. Positioning events as contemporary, experimental or cutting-edge is likely to turn them off. Instead, venues need to appeal to more traditional tastes that align with their interests in history, heritage and nature.

Icons by Flaticon

Key focuses:

Nostalgia

Highlighting the traditional and established

Providing good value for money

Stimulation

Stimulation are **highly active** and love new experiences. They're after the **big ideas** and out of the ordinary experiences.

They like to make their own discoveries and want to be **ahead of the curve**.

The innovators

12% / 479k
of adults in Aotearoa

31% (33%)
have children in the household

30% (28%)
have an undergraduate degree or higher

52% (46%)
are employed full time

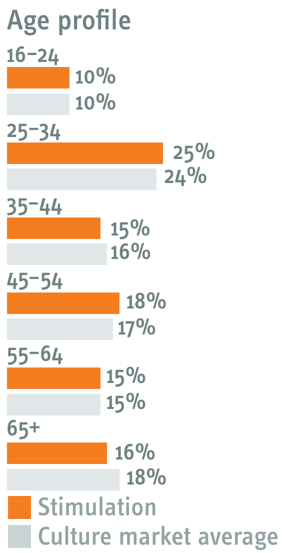
14% (16%)
are retired

75% (74%)
were born in Aotearoa

14% (15%)
identify as Māori

9% (8%)
identify as Pacific Peoples

13% (15%)
identify as Asian



Culture market average is shown in brackets

Stimulation is the segment most likely to say...

'What's the big idea'

and least likely to say...

'Are you sure it's safe?'

Attitudes and life priorities

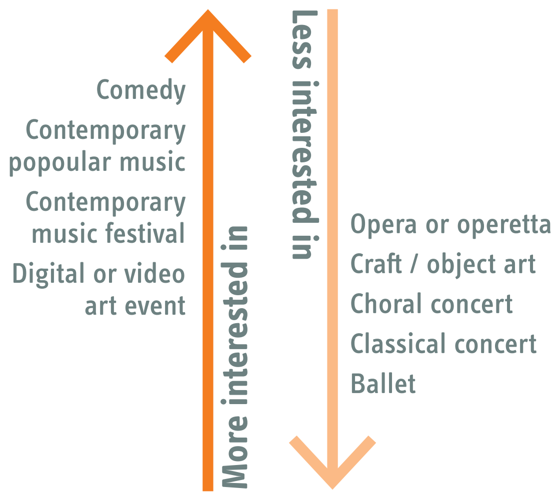
- Enjoying life, going out
- Taking risks
- Contemporary culture
- Food & drink
- Live music

What role does culture play?

New perspectives

For Stimulation, their motivation to engage with culture appears quite cerebral – it's about big ideas. These can be historical, they can political, they can be societal. But they also want to do this with their friends and a beer in hand. Ultimately, they want to be moved emotionally and challenged intellectually but consume culture socially.

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 that don't necessarily go together.



49% (42%)
place 'higher importance' on engaging, with arts and culture

53% (50%)
agree that engaging with arts and culture has a positive effect on their personal wellbeing

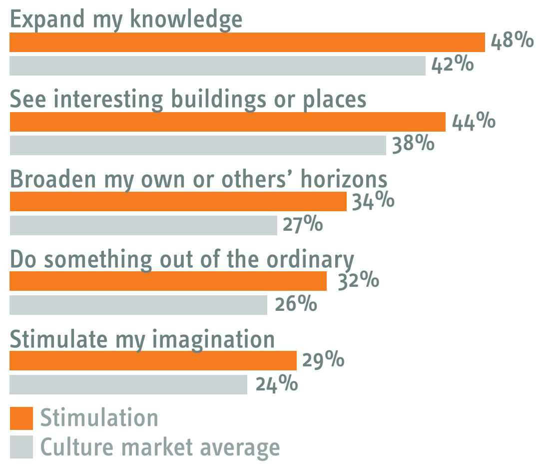
Top Tip

Clear articulation of what makes your experiences special and a strong, confident brand is needed. Grab their attention by doing something different. Stimulation like spectacle, they like happenings, they like fireworks are going off, they like it pop-up. They like it to be after-dark, on the roof or in the basement, starting at 10 o'clock. Do something that makes them stop and reconsider.

How do they approach arts and culture?

Stimulation want to be the first to know and they pride themselves on 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 would prefer it if they were the ones who dragged their friends along, or for their friends to see them as the adviser; the person who'll tell them about something new and astonishing. This early adopter nature also means they make good brand ambassadors.

Where Stimulation's motivations for engaging differ most from the norm



How do you reach them?

Highly visual with a preference for short, punchy content, Stimulation want to be the first to make discoveries about arts and culture. Marketing needs to highlight the hook or the twist; the thing that makes it incredible and different and 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.

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 rave about it and share it with friends. But if it misses the mark or seems behind the times, they'll also share it with everyone – but not in a good way.

How do Stimulation choose?

Events listings sites provide a route to up-to-date information and a variety of options. Curiosity means this segment proactively uses search, and as early adopters they'll experiment with smaller, newer channels to seek out interesting things to do. Social media offers these same qualities and ensures they're keeping up.

Key messages:

New, unusual, different

Like nothing you've seen before

Best kept secret – see it before everyone catches on

It offers new perspectives and shows you're in the know

Top five ways Stimulation find out about arts, cultural and heritage events or organisations

21% (18%)

engaged with arts and culture online in the past 12 months

11% (9%)

paid or donated money in the past 12 months to access arts and cultural content online

How Stimulation engage with the arts online:

They've discovered new sources to feed their habit.

Stimulation are digitally plugged-in, early adopters with high online usage. The internet is more than a means to an end – it is a world full of adventure and possibility that they fully embrace. It also allows them to keep up-to-date in real-time, keeping tabs with new developments as they happen.

Building relationships with them

While Stimulation are as likely as average to be an active member of a cultural organisation, loyalty does not come naturally to this segment. Membership that doubles as a pass into new and extraordinary experiences may increase the loyalty of an otherwise promiscuous segment.

Stimulation are as likely as average to have volunteered for arts organisations but significantly more likely to have donated in the past.

10% (9%)
are an active member / subscriber or friend of an arts, cultural or heritage organisation

14% (14%)
have volunteered for an arts or cultural organisation in the past 3 years

32% (28%)
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 three years and are the segment most likely to have made an add-on donation when purchasing a ticket.

Top reasons for donating money to the arts

How do you develop them?

Alerting Stimulation to potentially interesting arts events at a sufficiently early juncture, and focusing on the new, experimental, quirky and one-off, will encourage attendance. There is little point in targeting the Stimulation segment with mainstream or blockbuster events, but letting them know about less well-known, riskier events is a good way to generate interest. Grab their attention by doing something different.

Key focuses:

Events with a quirky hook or theme

Promoting social element

Highlighting the unexpected or new perspectives

Icons by Flaticon

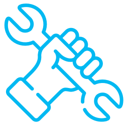
Release

The Release segment is looking for **escape from the stresses** of everyday life. For some, these conflicts may be a reality, but often, being in the Release segment is more a **state of mind**.

'always feel too busy'

12% / 485k
of adults in Aotearoa

32% (33%)
have children in the household



27% (28%)
have an undergraduate degree or higher

46% (46%)
are employed full time

12% (16%)
are retired

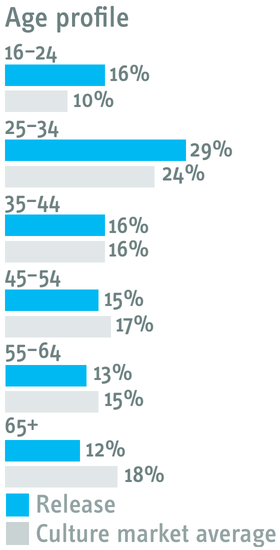
Culture market average is shown in brackets

74% (74%)
were born in Aotearoa

15% (15%)
identify as Māori

12% (8%)
identify as Pacific Peoples

18% (15%)
identify as Asian



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'

Attitudes and life priorities

Work, home and family

Relaxation

Juggling commitments

Live music

What role does culture play?

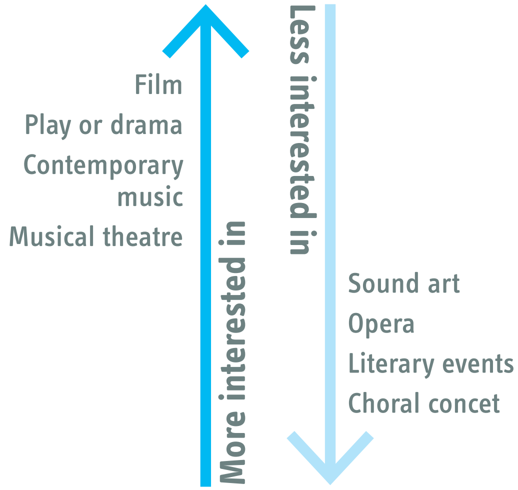
Culture is a way to escape

Culture can be a means of staying in the loop with things that are current and contemporary. However, when day-to-day life is busy, it is easy to become switched off to this optional pastime, with other things jostling for priority. This means Release 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.

31% (42%)
place 'higher importance' on engaging, with arts and culture

36% (50%)
agree that engaging with arts and culture has a positive effect on their personal wellbeing



Due to the competing priorities in their lives, Release are not especially culturally active. Release are in the current market for most artforms at similar, or lower, levels to the market average.

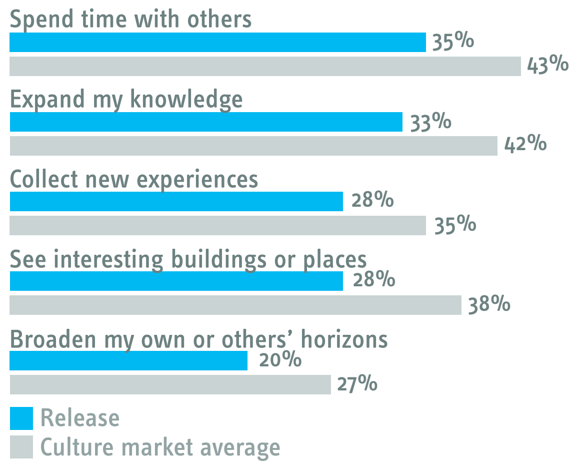
Top Tip

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 mind-set: "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 approach arts and culture?

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. 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. Release feel time-poor, so make things irresistibly easy for them by reducing the effort.

Where Release's motivations for engaging differ most from the norm



How do you reach them?

For Release, organisations should imagine they have one shot at capturing their attention. Provide all the necessary information on a silver platter, 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.

How do Release choose?

Overall, like their cultural consumption, Release engage with media less than average. This is particularly the case for mediums that require a bit more cognitive load or time, such as print or online newspapers.

Highlight multiple benefits – may be 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). This will help make Release feel like it really is an unmissable event, as it ticks all the boxes.

Key messages:

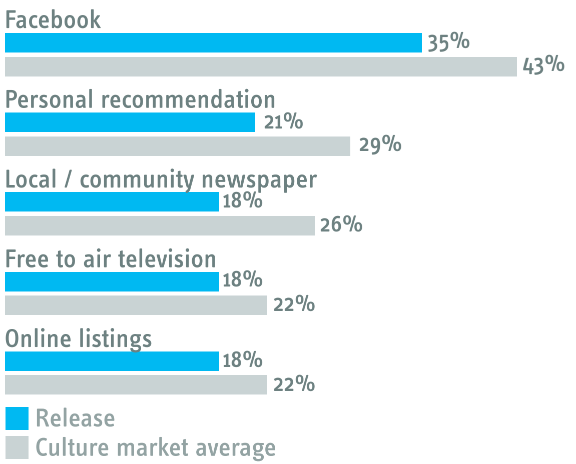
It will be relaxing

If you do only one thing this month it should be this

The venue has everything you need

It will tick all the boxes for a fun time out

Top five ways Release find out about arts, cultural and heritage events or organisations



15% (18%)
engaged with arts and culture online in the past 12 months

10% (9%)
paid or donated money in the past 12 months to access arts and cultural content online

How Release engage with the arts online:

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

The efficiency of digital channels and in-home / on-the-go entertainment appeals to Release.

Release use online resources to plan / research their in-person visits; however, they don't have the time to refer to multiple sources so are less likely to check things out. In fact, they don't spend a lot of time looking for what's on at all. Release will find out what's on if it lands in their lap and is literally unmissable.

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.

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.

7% (9%)
are an activve member / subscriber or friend of an arts, culture or heritage organisation

16% (14%)
have volunteered for an arts or cultural organisation in the past 3 years

25% (28%)
have donated money to an arts or cultural organisation in the past 3 years

Top reasons for donating money to the arts

How do you develop them?

There are significant numbers of Release in the cultural market who are currently not convinced that cultural engagement can sufficiently meet their needs and the effort will be worth it. They need to be reminded what they are missing out on and that time spent enjoying arts and culture is time well spent. Risk reduction is key for activating Release; they want assurances of a guaranteed good time. Affiliate marketing, list purchase and endorsements through known brands, individuals and organisations that the Release segment is already engaged with will be key to reaching them.

Icons by Flaticon

Key focuses:

Packaging experiences on a plate – easy to consume

Endorsements through well recognised brands

Special offers and discounts

Perspective

9% / 359k
of adults in Aotearoa New Zealand

31% (33%)
have children in the household

19% (28%)
have an undergraduate degree or higher

45% (46%)
are employed full time

24% (16%)
are retired

Culture market average is shown in brackets

Perspective are **very focused** on a **limited number** of interests and have a low appetite for expanding this repertoire. They're highly **self-sufficient** and are driven by their desire to learn about their key interests.

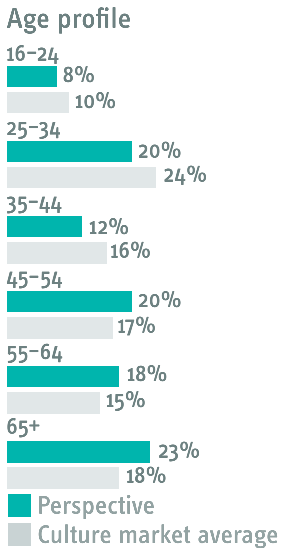
Happy in their bubble

74% (74%)
were born in Aotearoa New Zealand

12% (15%)
identify as Māori

3% (8%)
identify as Pacific Peoples

8% (15%)
identify as Asian



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'

Attitudes and life priorities

Reading

Learning

Personal space

The outdoors

What role does culture play?

A way to peruse their interests

Perspective tend to 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.

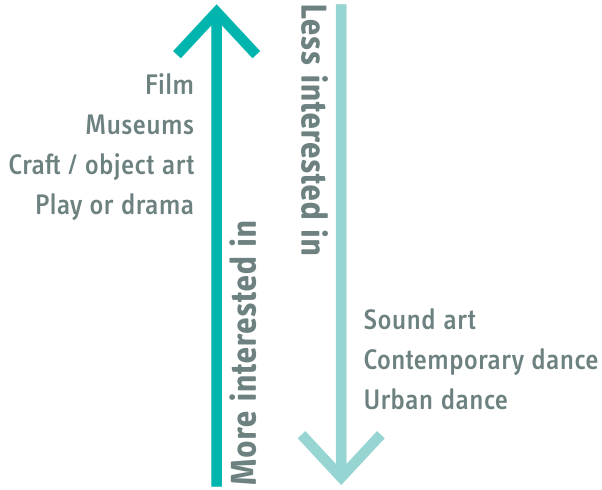
They typically have a particular thing they pursue, enjoy, and are knowledgeable about. The externalisation of this is not so relevant – that it is rewarding to them is what matters.

17% (42%)

place a 'higher importance' on engaging, in-person, with arts and culture

27% (50%)

agree that engaging with arts and culture has a positive effect on their personal wellbeing



Not particularly culturally active, among the eight segments, Perspective have the second lowest proportion in the 'higher importance' group, and under-index in the current market for every artform.

Top Tip

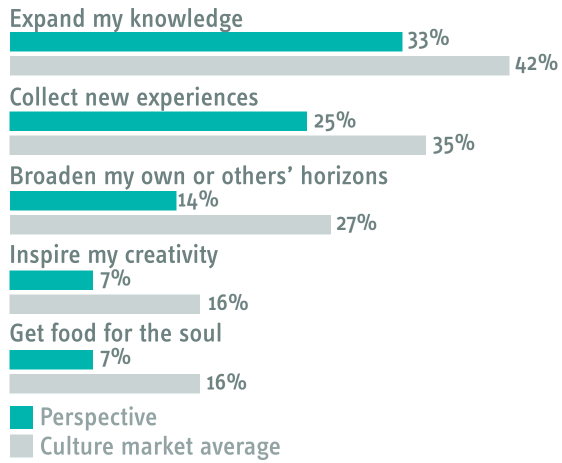
Given that Perspective have a relatively small set of activities they turn to, their loyalty can be valuable to those able to win it. Membership will provide them with access under their own terms, giving them the functional benefits of flexibility and good value. They're not, however, interested in being part of something collective.

How do they approach arts and culture?

Perspective are thinkers, so it's 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.

Think of Perspective as a much more narrowly focused and introverted breed of Essence. They lack the ardent appetite for cultural fixes and have honed in on their personal specialist subject. They pay even less attention to what others think and are serious about their interests and confident in their choices.

Where Perspective's motivations for engaging differ most from the norm



How do you reach them?

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 it, so they're not looking.

How do Perspective choose?

Perspective are less engaged with media than the majority of the other segments. They tend to use a narrower set of information sources – perhaps are looking for deep dives into their personal passions rather than broad brush or generic days out information.

Given their focused nature, if what you're doing aligns with their pre-existing interests and ignites their passion, then they will be motivated to engage. However, they won't be influenced by messaging; it will be for them to discern its relevance to them.

Key messages:

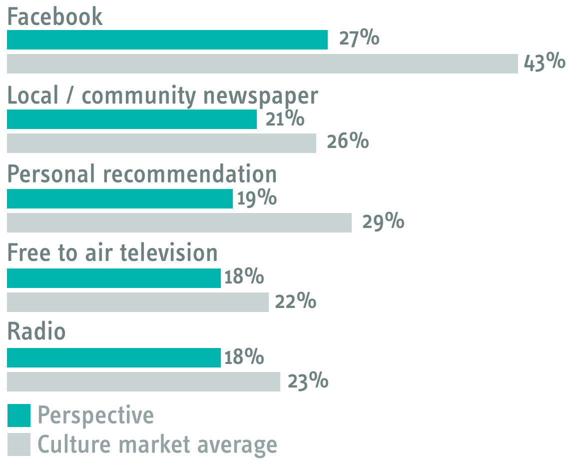
It will be personally rewarding

It's nice to do something special occasionally

It will be interesting, engaging and spark your imagination

It will help you dive deeper into your interests

Top five ways Perspective find out about arts, cultural and heritage events or organisations



7% (18%)
engaged with arts and culture online in the past 12 months

3% (9%)
paid or donated money in the past 12 months to access arts and cultural content online

How Perspective engage with the arts online:

They've discovered new sources to feed their habit.

Perspective are not against the idea of digital cultural engagement, which can provide an appealing self-affecting bubble to engage with their interests rather than attending in person and among the crowds.

They have the confidence and knowledge to dive in and sift for themselves, so are not intimidated by lots of text. They are very much content-led; delivery style is secondary.

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.

Perspective are not especially interested in developing a relationship with arts organisations, and only Entertainment are less likely to be an active member of an arts, cultural or heritage organisation, to have volunteered or donated to the arts in the past three years.

5% (9%)
are an active member / subscriber or friend of an arts, culture or heritage organisation

7% (14%)
have volunteered for an arts or cultural organisation in the past 3 years

18% (28%)
have donated money to an arts or cultural organisation in the past 3 years

Top reasons for donating money to the arts

How do you develop them?

There are significant numbers of Release in the cultural market who are currently not convinced that cultural engagement can sufficiently meet their needs and the effort will be worth it. They need to be reminded what they are missing out on and that time spent enjoying arts and culture is time well spent. Risk reduction is key for activating Release; they want assurances of a guaranteed good time. Affiliate marketing, list purchase and endorsements through known brands, individuals and organisations that the Release segment is already engaged with will be key to reaching them.

Icons by Flaticon

Key focuses:

Respecting their individuality and encouraging exploration

Tapping into existing interests

Entertainment

Entertainment tend to see arts and culture as very much on the **periphery of their lives**. Leisure time is **for fun**, and this segment is looking for **entertainment** and escapism.

Enjoy mainstream entertainment

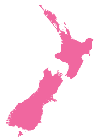
9% / 336k
of adults in Aotearoa New Zealand

38% (33%)
have children in the household

13% (28%)
have an undergraduate degree or higher

50% (46%)
are employed full time

16% (16%)
are retired

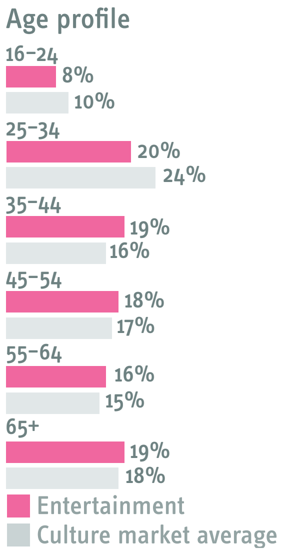


79% (74%)
were born in Aotearoa New Zealand

13% (15%)
identify as Māori

5% (8%)
identify as Pacific Peoples

10% (15%)
identify as Asian



Culture market average is shown in brackets

Entertainment is 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'

Attitudes and life priorities

Home and pub

TV, celebrity, sports

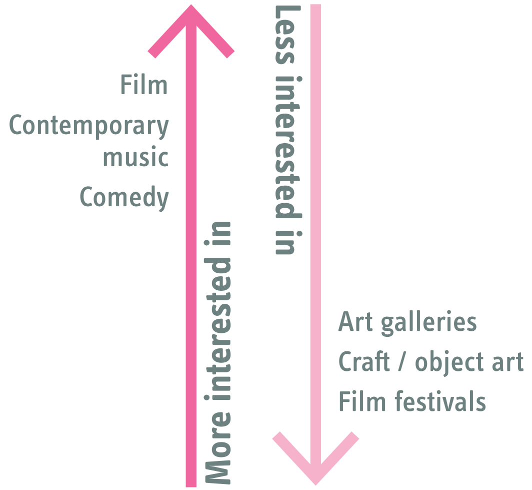
Thrill and spectacle

Priorities close to home

What role does culture play?

Not a priority for their leisure time

If asked, Entertainment 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.



The emphasis is on having fun with other people rather than intellectual pursuit and the meaning behind the art.

8% (42%)

place 'higher importance' on engaging, with arts and culture

21% (50%)

agree that engaging with arts and culture has a positive effect on their personal wellbeing

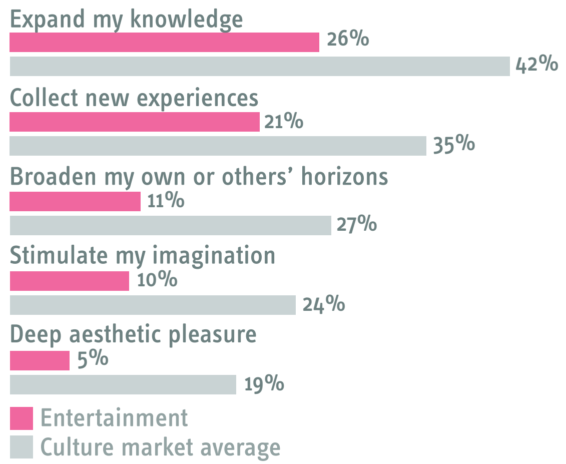
Top Tip

This is not a segment to target for membership or support. Instead, try to increase spend while they're onsite through catering, retail and added extras. And at the same time help them make a real day or night of it.

How do they approach arts and culture?

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. Therefore, culture and the arts are literally competing against everything.

Where Entertainment's motivations for engaging differ most from the norm



How do you reach them?

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.

How do Entertainment choose?

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.

Use other online channels to reach this segment who will not be looking for culture online. Social media channels can be a space where it finds them. So this segment is more likely to happen across events on these platforms, than find them elsewhere online. But if you have guaranteed entertainment on offer, they will recognise it.

Key messages:

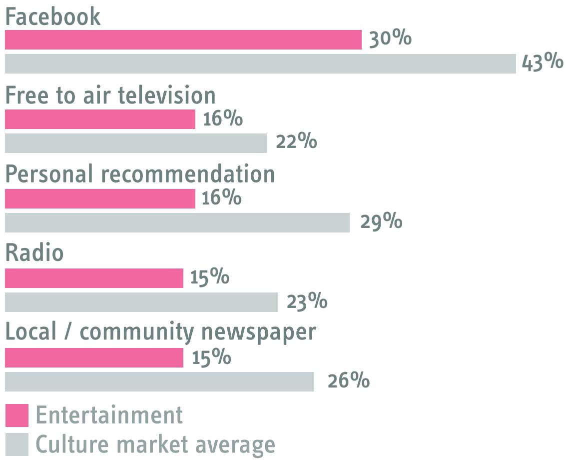
It's popular

There's a celebrity in it

It will be fun and enjoyable for everyone

It's a great night out and an 'easy sell' to others

Top five ways Entertainment find out about arts, cultural and heritage events or organisations



5% (18%)

engaged with arts and culture online in the past 12 months

2% (9%)

paid or donated money in the past 12 months to access arts and cultural content online

How Entertainment engage with the arts online:

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

For Entertainment, online is just another provider of entertainment. Fill your website with social proof to convince them this is worthwhile; state your popularity and evidence mass endorsement to convince them.

Building relationships with them

Entertainment are not natural supporters and have comparatively low propensity to donate or volunteer.

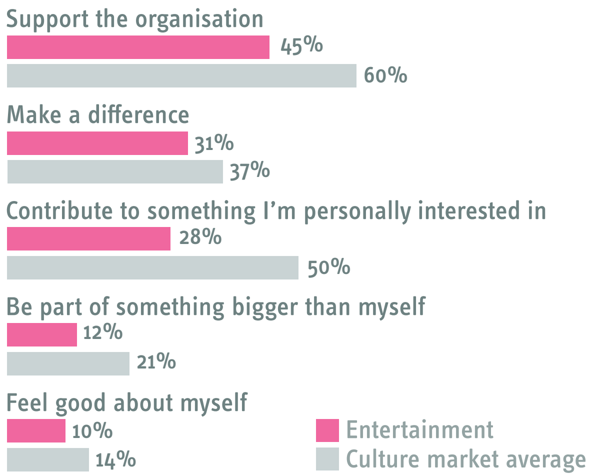
Entertainment very rarely invest in a supportive way, and therefore should not be targeted for membership. They don't see culture as contributing to the community or society at large. Benefits-driven transactional membership schemes aren't going to work either – purely because they wouldn't make much use of it so it's unlikely to feel relevant or worth it.

1% (9%)
are an active member / subscriber or friend of an arts, culture or heritage organisation

3% (14%)
have volunteered for an arts or cultural organisation in the past 3 years

12% (28%)
have donated money to an arts or cultural organisation in the past 3 years

Top reasons for donating money to the arts



How do you develop them?

The Entertainment segment is only willing to spend on leisure and recreation if they believe it will meet all of their needs. The deciding factors are most likely to be around "will it be entertaining?", "do the facilities meet our needs?" - fairly simple hygiene factors. While they may not see a value in the arts and culture per se, the right type of event has the potential to provide exactly what they want – primarily escapism and thrill. They are heavily influenced by advertising via mainstream media. 'Culture' needs to be downplayed in the marketing, with messaging emphasising the 'must-see', 'thrill' and 'blockbuster' parts of the offer.

Icons by Flaticon

Key focuses:

Mainstream through TV, sports and celebrity

One-off, must-see events

Promoting escapism and excitement

A Fine Balance Adapted by Sudha Bhuchar and Kristine Landon-Smith. Image courtesy of Auckland Theatre Company. Photograph: Rashmi Pilapitiya.

Appendix 2: Media tables

morris hargreaves mcintyre

Sources of information for cultural activities: Culture Segments

	Culture market	Essence	Expression	Affirmation	Enrichment	Stimulation	Release	Perspective	Entertainment
Social media									
Facebook	43%	▲ 50%	▲ 50%	▲ 52%	▼ 28%	▲ 50%	▼ 35%	▼ 27%	▼ 30%
YouTube	17%	16%	▲ 24%	18%	▼ 12%	19%	17%	▼ 9%	▼ 9%
Instagram	14%	16%	▲ 19%	▲ 17%	▼ 6%	▲ 19%	13%	▼ 6%	▼ 6%
Twitter	3%	3%	4%	4%	▼ 1%	4%	4%	▼ 1%	▼ 1%
Online sources									
Online listings	22%	▲ 33%	▲ 25%	▲ 27%	▼ 16%	▲ 26%	▼ 18%	▼ 11%	▼ 10%
Online news site or app	19%	▲ 24%	▲ 24%	21%	▼ 14%	22%	17%	▼ 11%	▼ 12%
Specific organisation website	15%	▲ 24%	17%	17%	▼ 11%	17%	14%	▼ 10%	▼ 8%
Online user reviews	8%	8%	▲ 12%	9%	6%	9%	9%	▼ 5%	▼ 3%
Specific organisation's enews	6%	▲ 9%	▲ 8%	6%	4%	6%	6%	▼ 4%	▼ 1%
Blog	2%	3%	▲ 4%	2%	▼ 1%	3%	3%	▼ 1%	▼ 1%
Base	[6743]	[778]	[1324]	[1240]	[687]	[819]	[816]	[561]	[518]

Continued on following page

Culture market average

▲ % significantly higher than the culture market average

▼ % significantly lower than the culture market average

Sources of information for cultural activities: Culture Segments

	Culture market	Essence	Expression	Affirmation	Enrichment	Stimulation	Release	Perspective	Entertainment
Recommendation									
Personal recommendation	29%	▲ 40%	▲ 32%	▲ 35%	▼ 25%	▲ 33%	▼ 21%	▼ 19%	▼ 16%
Professional recommendation	8%	▲ 11%	▲ 12%	8%	▼ 3%	8%	▼ 6%	▼ 5%	▼ 3%
Recommendation via a streaming platform	4%	4%	▲ 6%	4%	▼ 1%	5%	4%	▼ 2%	▼ 1%
Online and offline print media									
Local / community newspaper (print)	26%	▲ 33%	▲ 32%	28%	25%	27%	▼ 18%	▼ 21%	▼ 15%
National newspaper (print)	14%	16%	▲ 21%	14%	12%	16%	▼ 10%	12%	▼ 9%
Magazine (print or online)	11%	▲ 15%	▲ 16%	11%	▼ 8%	12%	9%	▼ 6%	▼ 4%
Other media									
Radio (streamed or live)	23%	▲ 29%	▲ 27%	▲ 27%	▼ 18%	25%	▼ 16%	▼ 18%	▼ 15%
Free to air television	22%	22%	▲ 28%	▲ 25%	▼ 19%	25%	▼ 18%	▼ 18%	▼ 16%
Brochures or flyers	19%	▲ 25%	▲ 25%	▲ 23%	▼ 14%	18%	▼ 15%	▼ 14%	▼ 10%
On demand television	9%	10%	▲ 12%	10%	▼ 5%	10%	8%	▼ 4%	▼ 4%
Outdoor media	7%	▲ 12%	▲ 10%	7%	▼ 4%	7%	7%	▼ 4%	▼ 3%
Base	[6743]	[778]	[1324]	[1240]	[687]	[819]	[816]	[561]	[518]

Culture market average

▲ % significantly higher than the culture market average

▼ % significantly lower than the culture market average

Tables for sources of information for cultural activities by region are on following pages.

Sources of information for cultural activities: North Island

	Culture market	North Island – by region								
		Northland	Auckland	Waikato	Bay of Plenty	Gisborne	Hawke's Bay	Taranaki	Manawatū-Whanganui	Wellington
Social media										
Facebook	43%	46%	41%	43%	45%	45%	▼ 33%	46%	47%	44%
YouTube	17%	18%	▲ 20%	▼ 14%	15%	11%	15%	15%	13%	16%
Instagram	14%	11%	▲ 18%	11%	14%	10%	17%	11%	▼ 9%	14%
Twitter	3%	3%	▲ 4%	▼ 1%	▼ <1%	2%	1%	4%	3%	▲ 4%
Online										
Online listings	22%	▼ 15%	▲ 25%	20%	19%	25%	19%	17%	22%	▲ 26%
Online news site or app	19%	18%	20%	16%	18%	13%	19%	16%	▼ 14%	▲ 22%
Specific organisation website	15%	14%	14%	16%	14%	11%	20%	▼ 9%	14%	▲ 19%
Online user reviews	8%	8%	9%	9%	8%	▼ 2%	5%	13%	6%	8%
Specific organisation's enews	6%	8%	7%	▼ 4%	5%	9%	4%	6%	4%	6%
Blog	2%	▼ <1%	▲ 3%	2%	2%	2%	2%	2%	▼ 1%	3%
Base	[6743]	[167]	[2046]	[661]	[264]	[63*]	[151]	[126]	[256]	[1303]

Continued on following page. *Due to sample size resuslts for Gisborne should be seen as indicative only. Sample has been taken into consideration for significance testing.

Culture market average
▲ % significantly higher than the culture market average
▼ % significantly lower than the culture market average

Sources of information for cultural activities: North Island

	Culture market	North Island – by region								
		Northland	Auckland	Waikato	Bay of Plenty	Gisborne	Hawke's Bay	Taranaki	Manawatū-Whanganui	Wellington
Recommendation										
Personal recommendation	29%	28%	27%	26%	28%	32%	24%	34%	27%	▲ 34%
Professional recommendation	8%	5%	9%	6%	10%	▼ 3%	5%	6%	8%	8%
Recommendation via a streaming platform	4%	▼ 2%	▲ 5%	3%	3%	2%	3%	2%	3%	4%
Online and offline print media										
Local / community newspaper (print)	26%	26%	▼ 20%	29%	29%	23%	25%	33%	29%	26%
National newspaper (print)	14%	14%	13%	13%	13%	15%	15%	15%	13%	▲ 18%
Magazine (print or online)	11%	10%	11%	10%	12%	▼ 2%	11%	12%	▼ 7%	12%
Other media										
Radio (streamed or live)	23%	17%	21%	20%	25%	16%	27%	26%	24%	24%
Free to air television	22%	17%	21%	22%	21%	▼ 10%	21%	26%	28%	24%
Brochures or flyers	19%	21%	▲ 17%	18%	17%	22%	21%	20%	21%	▲ 22%
On demand television	9%	8%	▼ 10%	7%	▼ 5%	4%	7%	11%	▼ 5%	9%
Outdoor media	7%	6%	8%	▼ 5%	8%	6%	6%	5%	5%	7%
Base	[6743]	[167]	[2046]	[661]	[264]	[63*]	[151]	[126]	[256]	[1303]

Culture market average

▲ % significantly higher than the culture market average

▼ % significantly lower than the culture market average

Sources of information for cultural activities: South Island

	Culture market	South Island – by region						
		Tasman	Nelson	Marlborough	West Coast	Canterbury	Otago	Southland
Social media								
Facebook	43%	▼ 32%	47%	38%	38%	45%	46%	43%
YouTube	17%	24%	11%	▼ 10%	18%	16%	15%	16%
Instagram	14%	▼ 3%	▼ 8%	16%	8%	▼ 10%	12%	▼ 8%
Twitter	3%	4%	▼ 1%	3%	4%	▼ 1%	3%	7%
Online								
Online listings	22%	22%	22%	18%	19%	21%	20%	15%
Online news site or app	19%	24%	16%	16%	17%	20%	22%	15%
Specific organisation website	15%	18%	17%	13%	18%	16%	16%	14%
Online user reviews	8%	7%	5%	8%	7%	9%	7%	▼ 4%
Specific organisation's enews	6%	10%	8%	6%	8%	6%	4%	3%
Blog	2%	5%	▼ <1%	2%	3%	2%	2%	▼ <1%
Base	[6743]	[89*]	[86*]	[74*]	[75*]	[722]	[552]	[108]

Continued on following page. *Due to sample size resuslts for some regions should be seen as indicative only. Sample has been taken into consideration for significance testing.

Culture market average

▲ % significantly higher than the culture market average

▼ % significantly lower than the culture market average

Sources of information for cultural activities: South Island

	Culture market	South Island – by region						
		Tasman	Nelson	Marlborough	West Coast	Canterbury	Otago	Southland
Recommendation								
Personal recommendation	29%	32%	33%	34%	28%	31%	31%	31%
Professional recommendation	8%	6%	6%	15%	10%	7%	7%	9%
Recommendation via a streaming platform	4%	2%	3%	5%	4%	4%	4%	5%
Online and offline print media								
Local / community newspaper (print)	26%	▲ 43%	▲ 39%	▲ 51%	▲ 44%	26%	▲ 33%	▲ 40%
National newspaper (print)	14%	12%	12%	10%	14%	15%	▲ 18%	19%
Magazine (print or online)	11%	11%	▲ 23%	12%	16%	10%	11%	9%
Other media								
Radio (streamed or live)	23%	23%	30%	22%	21%	25%	23%	24%
Free to air television	22%	15%	21%	21%	27%	25%	22%	29%
Brochures or flyers	19%	28%	▲ 30%	29%	28%	17%	21%	30%
On demand television	9%	12%	8%	7%	▼ 4%	8%	7%	14%
Outdoor media	7%	6%	9%	6%	10%	7%	▼ 5%	4%
Base	[6743]	[89*]	[86*]	[74*]	[75*]	[722]	[552]	[108]

Culture market average

▲ % significantly higher than the culture market average

▼ % significantly lower than the culture market average

*Due to sample size resuslts for some regions should be seen as indicative only. Sample has been taken into consideration for significance testing.

Research parameters

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 Panel Base. 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.

Region	Sample
North Island	
Northland	167
Auckland	2046
Waikato	661
Bay of Plenty	264
Gisborne	63
Hawke's Bay	151
Taranaki	126
Manawatu-Whanganui	256
Wellington	1303
South Island	
Tasman	89
Nelson	86
Marlborough	74
West Coast	75
Canterbury	722
Otago	552
Southland	108

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%).

Results based on sub-groups Where results are based on sub-groups of respondents, this is clearly indicated in the body of the report.

North Island

The data for the **Northland regional market** has a confidence interval (margin of error) of **+/-7.58%** at 50% (ie, where the result is 50%, the actual result may fall between 42.42% and 57.58%).

The data for the **Auckland regional market** has a confidence interval (margin of error) of **+/-2.16%** at 50% (ie, where the result is 50%, the actual result may fall between 47.84% and 52.16%).

The data for the **Waikato regional market** has a confidence interval (margin of error) of **+/-3.81%** at 50% (ie, where the result is 50%, the actual result may fall between 46.19% and 53.81%).

The data for the **Bay of Plenty regional market** has a confidence interval (margin of error) of **+/-6.03%** at 50% (ie, where the result is 50%, the actual result may fall between 43.97% and 56.03%).

The data for the **Gisborne regional market** has a confidence interval (margin of error) of **+/-12.34%** at 50% (ie, where the result is 50%, the actual result may fall between 37.66% and 62.34%).

The data for the **Hawke's Bay regional market** has a confidence interval (margin of error) of **+/-7.97%** at 50% (ie, where the result is 50%, the actual result may fall between 42.03% and 57.97%).

The data for the **Taranaki regional market** has a confidence interval (margin of error) of **+/-8.72%** at 50% (ie, where the result is 50%, the actual result may fall between 41.28% and 58.72%).

The data for the **Manawatū-Whanganui regional market** has a confidence interval (margin of error) of **+/-6.12%** at 50% (ie, where the result is 50%, the actual result may fall between 43.88% and 56.12%).

The data for the **Wellington regional market** has a confidence interval (margin of error) of **+/-2.71%** at 50% (ie, where the result is 50%, the actual result may fall between 47.29% and 52.71%).

South Island

The data for the **Tasman regional market** has a confidence interval (margin of error) of **+/-10.38%** at 50% (ie, where the result is 50%, the actual result may fall between 39.62% and 60.38%).

The data for the **Nelson regional market** has a confidence interval (margin of error) of **+/-10.56%** at 50% (ie, where the result is 50%, the actual result may fall between 39.44% and 60.56%).

The data for the **Marlborough regional market** has a confidence interval (margin of error) of **+/-11.38%** at 50% (ie, where the result is 50%, the actual result may fall between 38.62% and 61.38%).

The data for the **West Coast regional market** has a confidence interval (margin of error) of **+/-11.30%** at 50% (ie, where the result is 50%, the actual result may fall between 38.70% and 61.30%).

The data for the **Canterbury regional market** has a confidence interval (margin of error) of **+/-3.64%** at 50% (ie, where the result is 50%, the actual result may fall between 46.36% and 53.64%).

The data for the **Otago regional market** has a confidence interval (margin of error) of **+/-4.17%** at 50% (ie, where the result is 50%, the actual result may fall between 44.83% and 54.17%).

The data for the **Southland regional market** has a confidence interval (margin of error) of **+/-9.42%** at 50% (ie, where the result is 50%, the actual result may fall between 40.58% and 59.42%).

Key sub-groups

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

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

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

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

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