Audience Atlas Aotearoa 2020 – Māori audiences and the market for ngā toi Māori

December 2021

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Audience Atlas Aotearoa 2020 – summary of Māori audiences and the market for ngā toi Māori

Research method

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, Pureprofile and Prime research.

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

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

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

Robust methodology

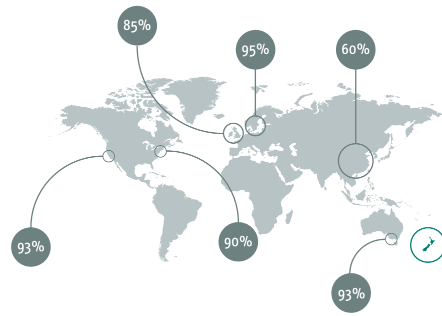
The fourth Audience Atlas study for Aotearoa

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

The full *Audience Atlas Aotearoa 2020* study represents responses from a sample of 6,743 people nationally, representative of the population's demographics of people aged 16 years and over, including those who identified having a lived experience of disability. The study includes a sample of 996 people nationally who identified as Māori. The increased number of Māori responses ensures we can confidently report on results.

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

Please refer to the research parameters at the end of this summary report for more detailed information on sampling, methodology and confidence intervals. The full *Audience Atlas Aotearoa 2020* report is available via Creative New Zealand's website.



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, San Francisco Bay Area 2017, Victoria 2019, Sweden 2020, United Kingdom 2010 and China 2014.

Understanding the culture market

576k adults in the Aotearoa arts and culture market identify as Māori

3.9 million

adults in Aotearoa New Zealand are in the market for arts and culture

576k

identify as Māori

Culture market: defined as adults aged 16 or over who've engaged with at least one arts, cultural or heritage activity within the past three years. The overall definition is inclusive; from attending a kapa haka event to going to a movie.

Photograph: David St George. Courtesy of 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.

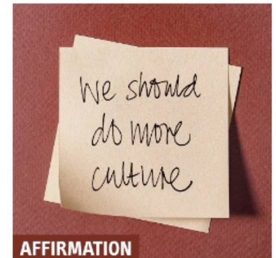
There are eight Culture Segment clusters (represented to the right), each centring around a set of shared values. The segments are named to reflect the kind of experiences they value from the arts.

ESSENCE

- Discerning
- Confident
- Independent
- Arts-essential

EXPRESSION

- Community
- Nurturing
- Generous
- Committed

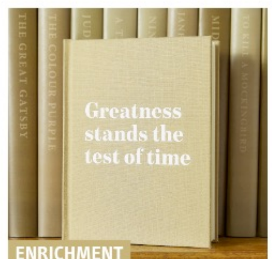


AFFIRMATION

- Self identity
- Considered
- Diligent
- Time well spent

STIMULATION

- Active
- Experimental
- Ideas
- Social



ENRICHMENT

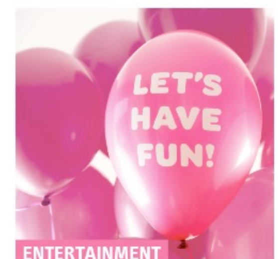
- Tradition
- History and heritage
- Nostalgic
- Learning

RELEASE

- Settled
- Self-sufficient
- Focused
- Contented

PERSPECTIVE

- Busy
- Prioritising
- Ambitious
- Escape



ENTERTAINMENT

- Mainstream
- Popular appeal
- Leisure
- Fun

The Culture Segment profile of Māori audiences

Culture Segment profile

		Culture market	Māori audiences
Essence	'in pursuit of self-actualisation'	10%	▲ 14%
Expression	'people people'	20%	22%
Affirmation	'do the right thing'	18%	17%
Enrichment	'through the lens of the past'	10%	8%
Stimulation	'all about the big idea'	12%	11%
Release	'say they're too busy'	12%	13%
Perspective	'happy in their own bubble'	9%	7%
Entertainment	'looking for fun'	9%	8%
Base		[6743]	[996]

▼▲ % for Māori audiences is significantly different from the culture market average.

The mindsets behind Culture Segments are universal, based on deep-seated human values. Therefore, the Culture Segment profile of Māori audiences in the culture market is broadly similar to the market overall, with one significant difference.

Māori audiences are significantly more likely to be Essence (14%, compared to 10% overall). This suggests, that compared to the wider culture market, a larger proportion of Māori place arts and culture as more central to their lives – part of who they are, rather than something they do.

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

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

The Culture Segment profile of Māori audiences

More than one-fifth of Māori in the culture market are Expression – the 'people people'

Expression is the largest segment for Māori audiences (22%) and nationally (20%). Expression is one of the segments most likely to engage with arts and culture regularly. They are also likely to join in, and share their experiences with others, making them great advocates.

Affirmation seek self-development

Affirmation closely follows Expression in its size (17% of Māori in the culture market). Affirmation is a segment keen on learning and self-improvement. They are conscientious and keen to grow through their engagement with arts and culture. They are cautious consumers and often engage with more mainstream artforms perceived as lower-risk, as they often lack the confidence to try new things.

14% of Māori audiences are Essence; core cultural attenders

While not as large as Expression or Affirmation, Essence are core cultural attenders, typically engaging in higher frequency than others. Essence seek peak experiences from their cultural consumption and are looking for deep, emotional connections. Māori audiences are significantly more likely to be in this segment than average (14% and 10%, respectively).

Stimulation and Release the next largest segments

Two key traits characterise Stimulation; their desire for something new and unique (and to discover this themselves) as well as being exposed to 'big ideas' in their arts and cultural consumption. Release are often people who feel unable to prioritise the arts as much as they'd like. Release prioritise seeking relaxation on their days off and can be difficult for organisations to mobilise into action.

Enrichment, Perspective and Entertainment round out the market

The remaining 23% of Māori audiences in the culture market are made up of Enrichment (8%), Perspective (7%) and Entertainment (8%).

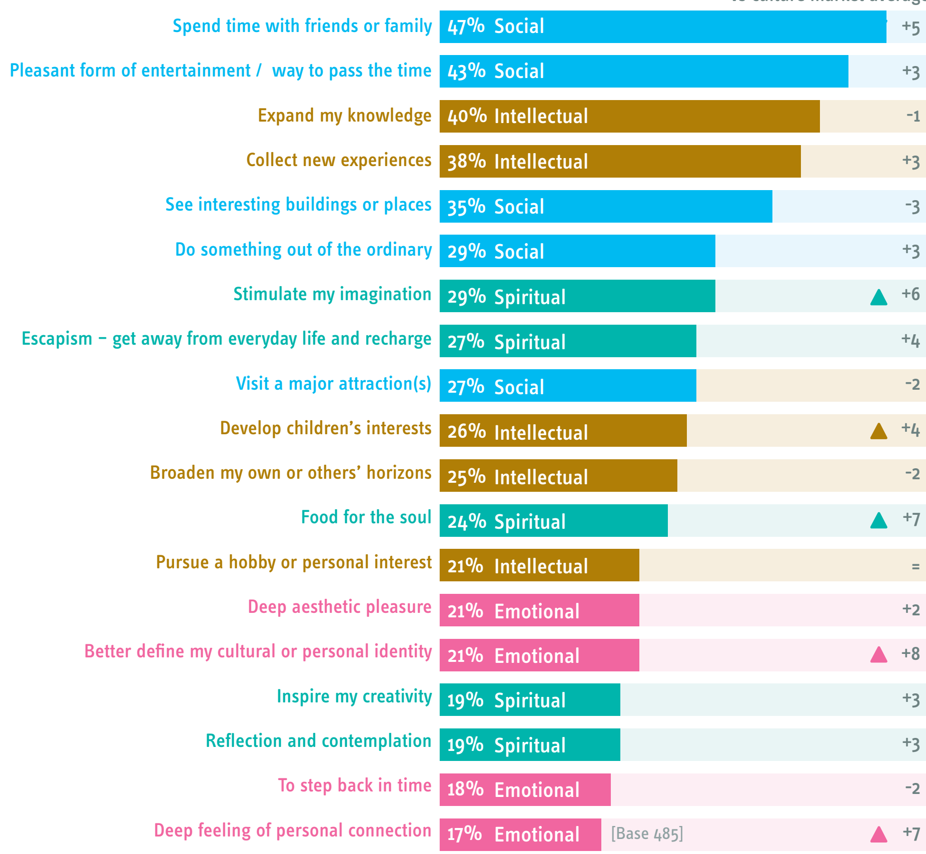
- Perspective is a more narrowly focused and introverted Essence; however, they lack the ardent appetite for the arts and are typically focused on their own personal areas of interest.
- Enrichment tends to be cautious with established tastes and less motivated by being up-to-date. Enrichment knows what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

Motivations and barriers to arts engagement for Māori audiences

Māori audiences are more likely to be seeking personal connection and identity development

Top motivations for engaging with arts and culture – all

%-point difference – Māori audiences vs culture market average



▼▲ % for Māori audiences is significantly different from the culture market average.

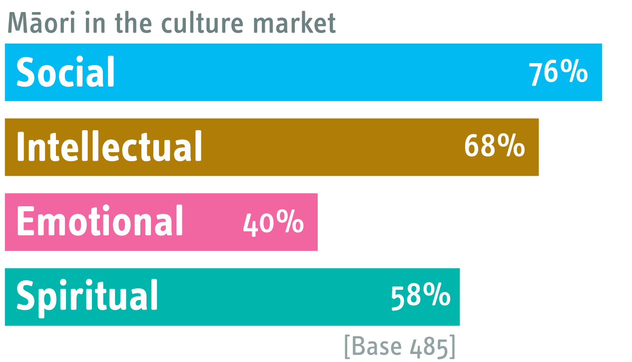
The culture market has a range of motivations for engaging with the arts and these are likely to vary for individuals, across different artforms and within different contexts. Broadly however, motivations for engagement can be clustered into four broad human needs – Social, Intellectual, Emotional and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

The most common drivers for Māori audiences to engage with arts and culture are a mix of Social – 'spending time with others' or 'passing the time in a pleasant way' – and Intellectual – 'expanding knowledge' and 'collecting new experiences'. These four drivers are universal, being as common in the wider culture market. Some motivations, however, are significantly more prominent amongst Māori audiences than the market overall:

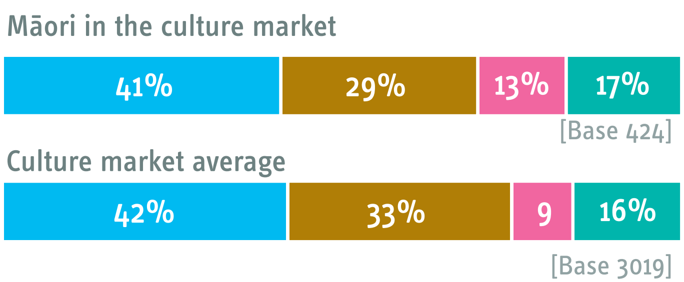
- 29% of Māori audiences are seeking to have their 'imagination stimulated' (compared to 24% overall).
- 26% of Māori a audiences re looking to 'develop a child's interests' (compared to 22% overall).
- 24% of Māori audiences want 'food for the soul' (compared to 16% overall)
- 21% of Māori audiences want to 'better define cultural or personal identity' (compared to 12% overall). This motivation is being pushed up by Māori audiences aged 35+, who, compared to peers in the wider culture market, are significantly more likely to have this motivation (21% and 11% respectively). Conversely, Māori audiences aged under 35 are as likely as their peers to have this as a driver for arts engagement.
- 17% of Māori audiences are looking for a 'deep connection' (compared to 9% overall).

Social motivations are the gateway to a deeper reward

All motivations to engage with arts and culture



Main motivations to engage with arts and culture



Overall, 76% of Māori audiences have at least one Social motivation for engaging with arts and culture, while 68% have at least one Intellectual driver, 58% Spiritual and 4 in 10 at least one Emotional reason for engaging.

Looking at the **main** drivers to engage (lower chart), Māori audiences are significantly more likely than the market overall to be mainly Emotionally driven (13%, compared to 9% overall). This is largely due to a larger proportion of Māori audiences saying they wish 'to better define their cultural or personal identity' through their arts and cultural engagement, compared to the wider market.

While Social is the most prominent main driver for Māori audiences (41%), mirroring the wider market (42%), a larger proportion in both cohorts are seeking an extension of a purely social encounter, through an Intellectual, Emotional or Spiritual return on investment for their time and money. Among Māori, as with the overall market, close to 6 in 10 seek an extension of the Social experience.

To successfully deliver what is being sought by Māori audiences and the market more broadly, the sector needs to ensure that the artistic or cultural offer is at the centre of the social experience, acting as a catalyst for connection and an entry point for deeper engagement.

Māori audiences are more likely to have been prevented from cultural engagement

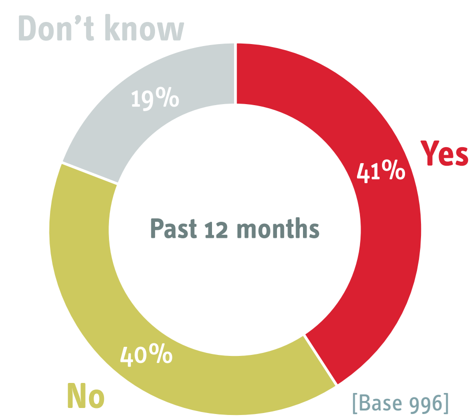
41% / 236k

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

Compared to the wider culture market, Māori audiences are significantly more likely to have been prevented from arts engagement in the last 12 months (41%, compared to 36% overall). This equates to a minimum estimated 236k missed opportunities for Māori engagement.[1]

The proportion of Māori audiences aged under 35 who were prevented from arts engagement (36%) mirrors peers in the wider market (36%). Conversely, Māori in the culture market aged over 35 are significantly more likely to have been prevented (44%) than peers in the overall market (37%).

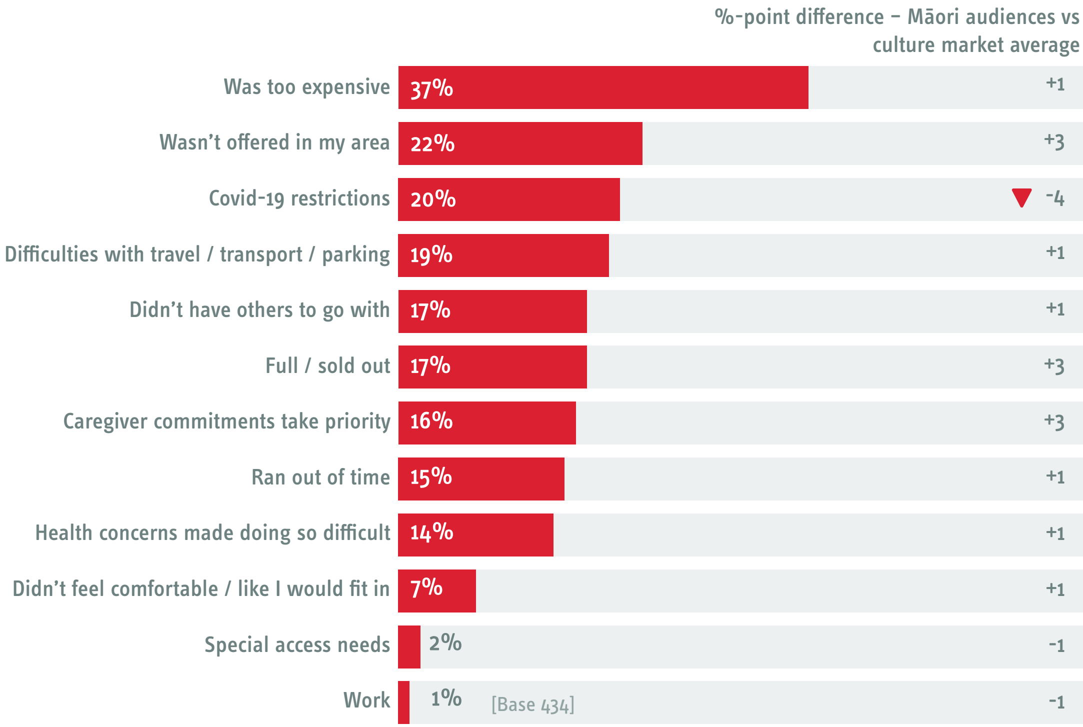
Was there an occasion you wanted to attend an arts, cultural or heritage organisation or event, and something prevented you from doing so?



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

Expense is a universal barrier to arts engagement

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



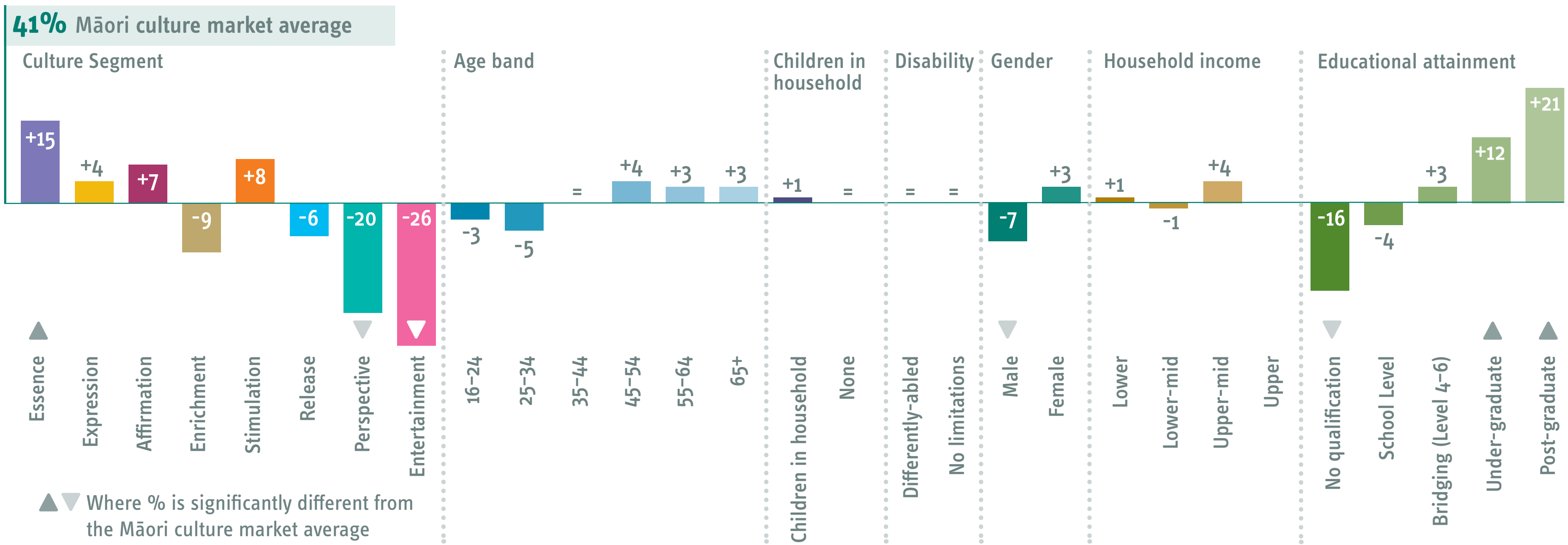
▼▲ % for Māori audiences is significantly different from the culture market average.

Expense is the most commonly cited reason someone had been prevented from attending a specific arts organisation or event. Expense is a universal barrier and results for Māori audiences mirror the wider culture market (37% and 36%, respectively).

- Around 1 in 5 Māori audiences cited provision (wasn't offered in my area), Covid restrictions, or the difficulties associated with travel, as impacting arts engagement.
- For nearly 3 in 10 aged under 35 years, caregiver commitments took priority (28%). Within the Māori cohort, this is significantly higher than the culture market average for this age band (18%).

Culturally engaged segments / those with higher education more likely to recall occasions of prevention

Māori audiences prevented from attending an arts, cultural or heritage organisation or event – %-point difference compared to Māori culture market average



Within the Māori cohort, there is little to distinguish those who've been prevented from arts engagement, from those who haven't on a demographic level. The exception being those identifying as male.

Educational attainment is a factor, however. Māori audiences who have completed higher education are significantly more likely to recall an occasion when they were prevented from arts engagement.

Similarly, as demonstrated by Culture Segments, the importance placed on the arts plays a role. Māori audiences in the four more culturally active segments (Essence, Expression, Affirmation and Stimulation) are more likely than average to recall an occasion of prevention. Conversely, the opposite is true for Māori audiences in the four less culturally active segments.

Online arts engagement among Māori audiences

Māori audiences more likely to have engaged with the arts online

Online engagement remains niche...

Just under a quarter of Māori audiences engaged with arts and culture online in the 12 months prior to the study (23%).[1] Māori audiences, however, are significantly more likely than the culture market overall (18%) to have recently engaged with the arts online.

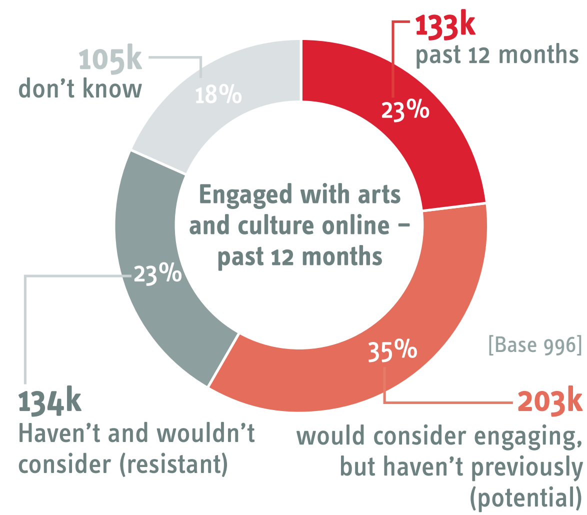
... but sizable potential

While just 23% or an estimated 133k Māori have engaged with arts and culture online in the 12 months prior to the study, a larger number (an estimated 203k) would consider this form of engagement in the future.

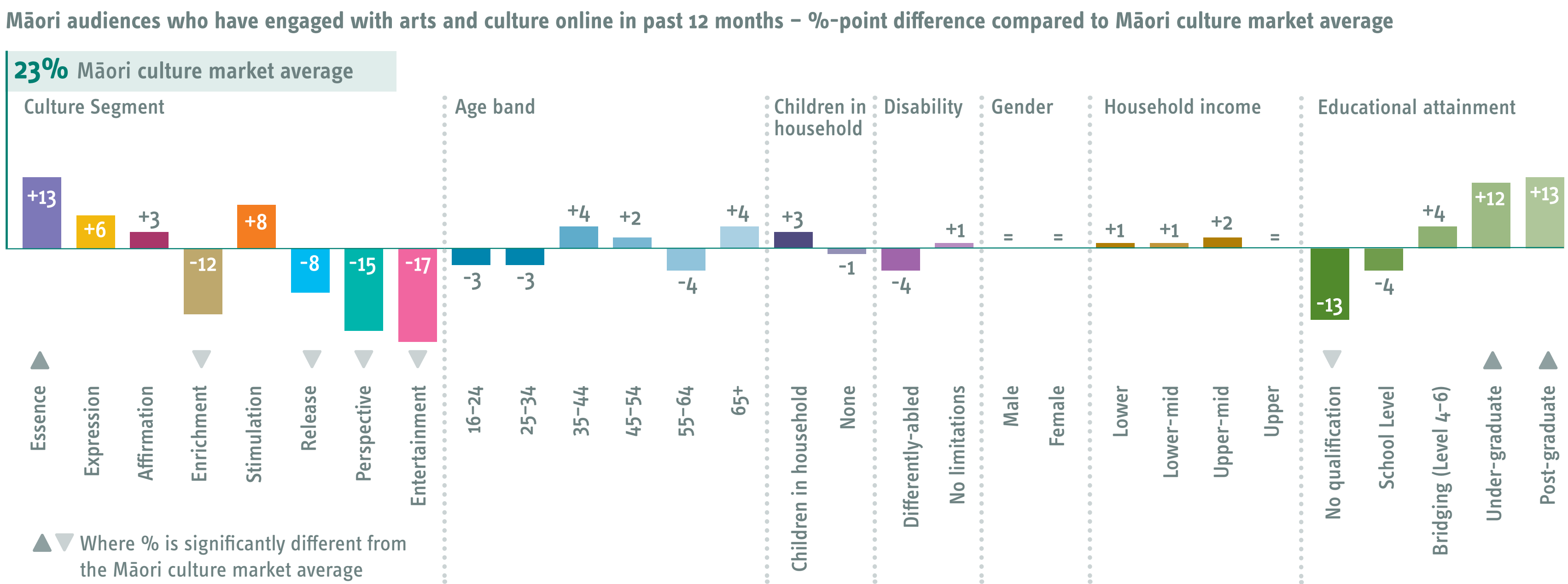
Māori audiences less resistant to online than the market overall

Nationally, 3 in 10 have no interest in engaging with arts and culture online (30% resistant). However, among Māori audiences, resistance to this form of engagement is significantly below average (23%).

1 *Audiences Atlas Aotearoa 2020* survey was in field in December 2020. Therefore, 'the 12 months prior' broadly refers to the 2020 calendar year.



Factors affecting online arts engagement



Whether Māori audiences have engaged with the arts online has little to do with demographics. For example, age, children in the household, gender identity or household income are not factors. Māori audiences these groups were as likely as average to have done so.

The value placed on engaging with the arts, as demonstrated by Culture Segments, has more correlation.

Essence is the segment most connected digitally, followed closely by Stimulation and then Expression.

In addition, Māori audiences who have completed higher education are significantly more likely than average to have engaged with the arts online. The pattern of online arts engagement amongst Māori sub-groups, mirrors the picture of the wider culture market.

Māori audiences more likely to consider paying for online arts content

10% / 58k

Have paid or donated to access arts and cultural content online

While most Māori in the culture market expect to pay for online arts content (nearly 6 in 10) few (1 in 10) had done so in the 12 months prior to the study. It is also worth noting that 18% of those who have recently paid or donated to access arts and cultural content online (an estimated 11k) wouldn't do so again. This picture isn't unique to Māori audiences, and results mirror those for the wider culture market.

Meanwhile, 31% of Māori audiences haven't, but would consider paying or donating to access arts content online, which is significantly above the overall market average (28%).

This means there are an estimated 176k Māori in the potential market for paid online arts engagement, three times the number who have paid for online arts content previously.

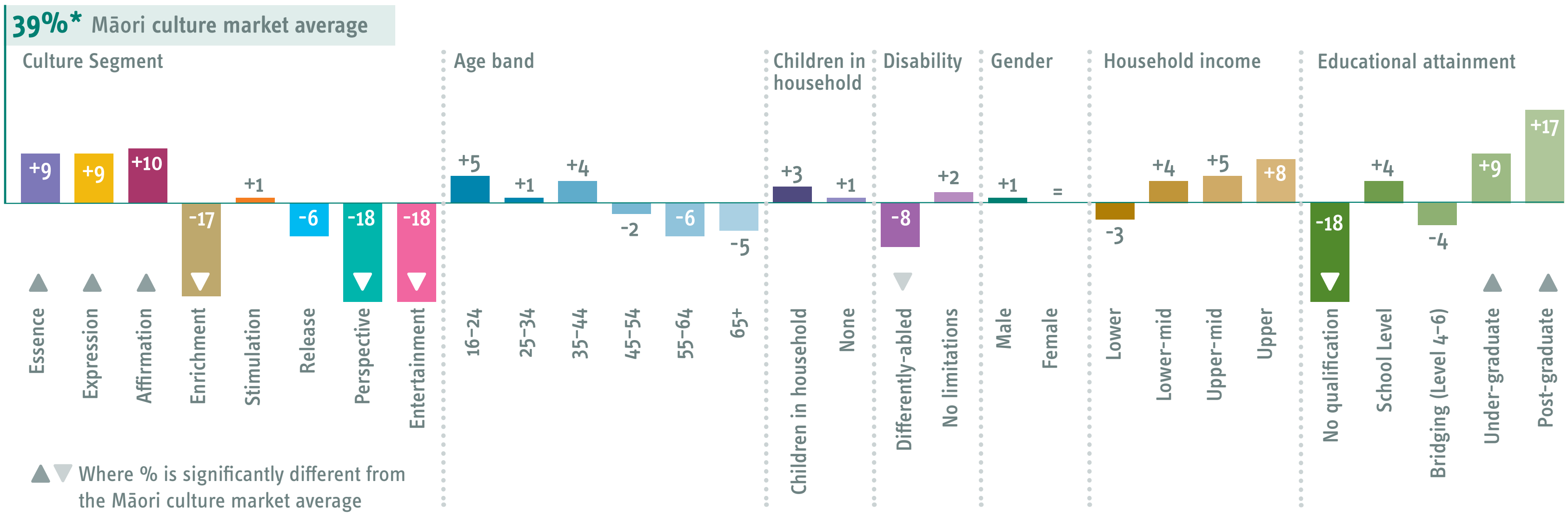
In the past 12 months have you paid or donated money to access arts and cultural content online?

	Culture market	Māori audiences	
	%	%	Estimate #
Yes, would pay again	8%	8%	48k
Yes, wouldn't do again	2%	2%	11k
Haven't but would consider (potential)	28%	▲ 31%	176k
Haven't and wouldn't consider (resistant)	51%	▼ 46%	266k
Don't know	11%	13%	76k
Base	[6743]	[996]	

▼▲ % for Māori audiences is significantly different from the culture market average.

Māori audiences with higher formal educational attainment more open to paying for online arts content

Māori audiences open to paying or donating money to access arts and cultural content online* – %-point difference compared to Māori culture market average



*have done so in past 12 months and would do again, and have not done so but would consider in the future

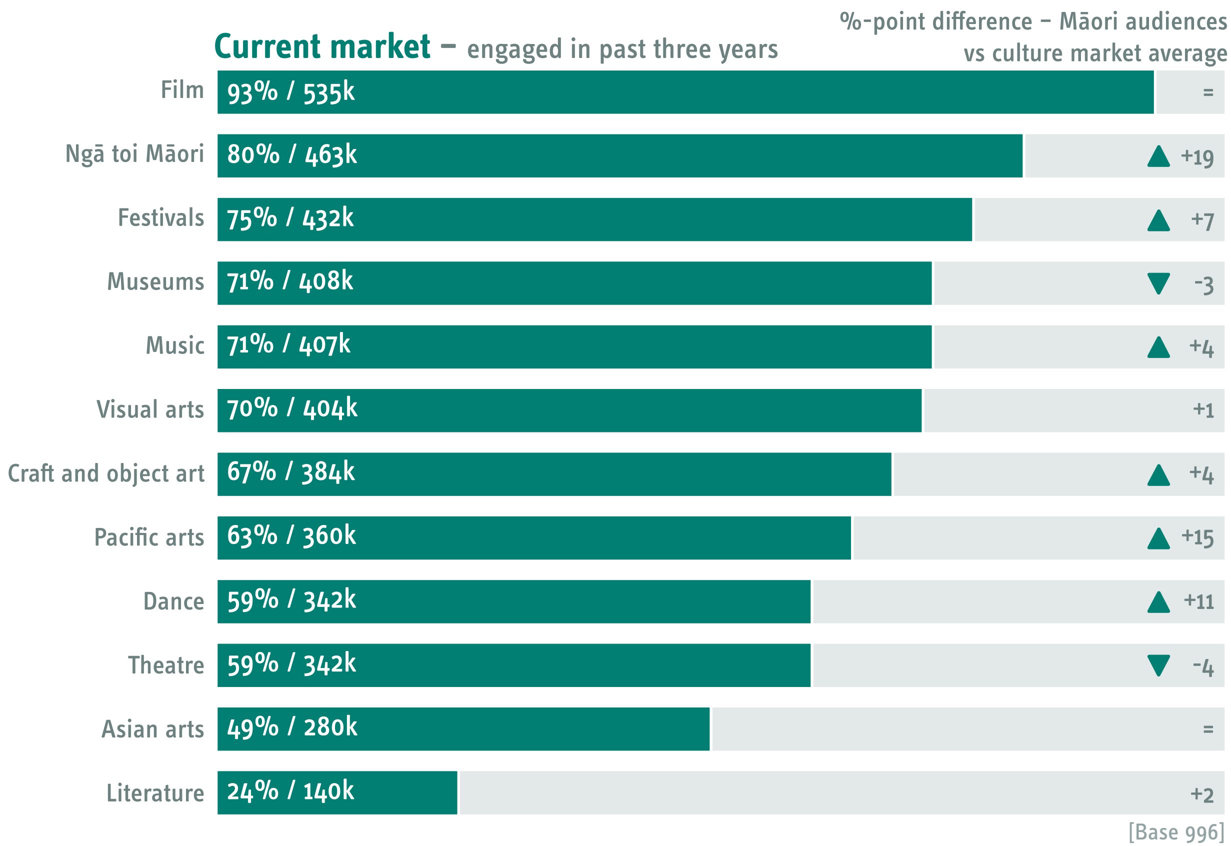
At a demographic level, there is little to distinguish Māori who are open to paying for arts or cultural content online compared to those who are not. The only statistically significant difference is amongst those with the lived experience of disability. This cohort is significantly less open to paying for online arts content than average.

Māori who have completed higher education are significantly more open to paid online arts engagement, as are Essence, Expression and Affirmation, the more culturally active segments.

Engagement with individual artforms among Māori audiences

Māori audiences more active across 6 of 12 core artforms

Current artform markets – % and real figure estimates



▼▲ % for Māori audiences is significantly different from the culture market average.

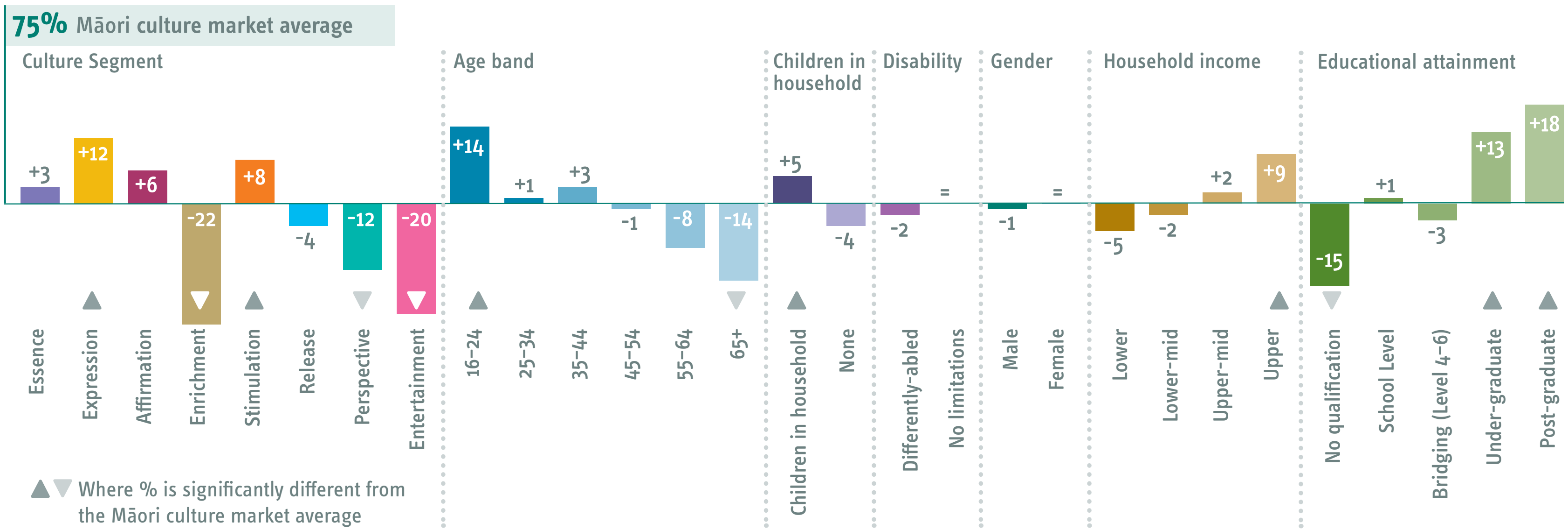
Māori audiences are more active across the core artforms, in fact, they are significantly more likely than the market overall to have engaged with 6 of the 12 core artforms in the past three years (current market).

- Behind film, Māori audiences are most likely to have engaged with ngā toi Māori [1] in the past three years (80%), 19-percentage points above the overall market average.
- In addition, Māori audiences are also significantly more likely than average to be in the current market for Pacific arts, dance, festivals, music and craft and object art.
- Conversely, Māori audiences are significantly less likely than average, to be in the current market for museums or theatre.

[1] Ngā toi Māori includes Māori customary and contemporary practice across visual arts, film, theatre, dance, and literature.

Māori whānau with tamariki and younger and those with higher education driving high engagement

Māori audiences in the current market for festivals – %-point difference compared to Māori culture market average



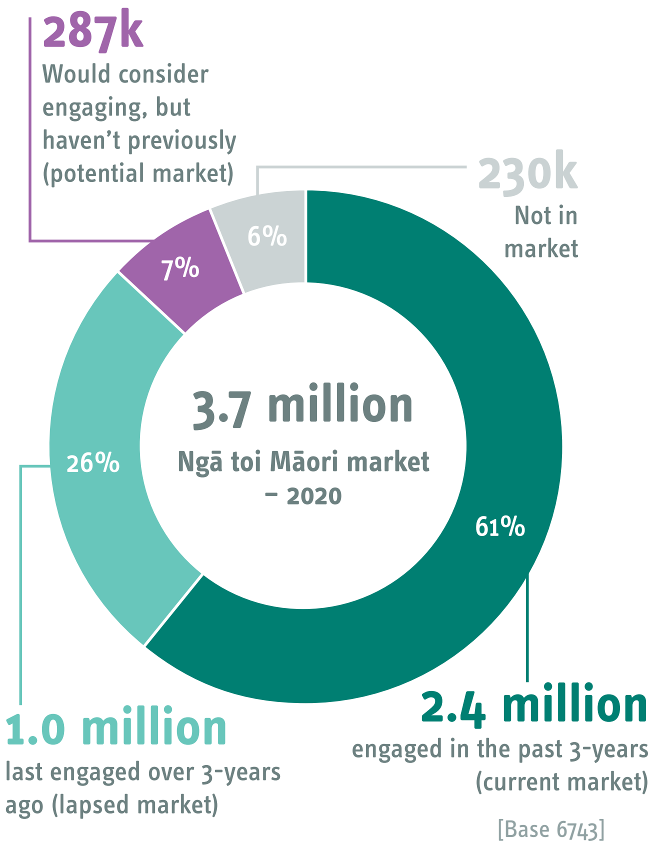
Compared to the market overall, Māori audiences are significantly more likely to be in the current market for 6 of the 12 core artforms, most notably, ngā toi Māori, Pacific arts, dance and festivals.

Looking across the sub-groups for Māori reveals it is largely younger Māori audiences, those with higher educational attainment and in the upper household income band who are driving this engagement. Similarly, Māori whānau with tamariki are significantly more likely to be in the current market for these four artforms than the Māori audiences average.

The model above looks at Māori in the current market for festivals, as an example. The pattern is similar for ngā toi Māori, Pacific arts and dance.

The culture market's engagement with ngā toi Māori

3.7 million New Zealand adults are interested in ngā toi Māori



This section explores the whole culture market in Aotearoa, as opposed to those identifying as Māori, seen in the rest of the report.

The culture market is defined as adults aged 16 or over who've engaged with at least one arts, cultural or heritage activity within the past three years. The overall definition is inclusive; from attending a kapa haka event to going to a movie.

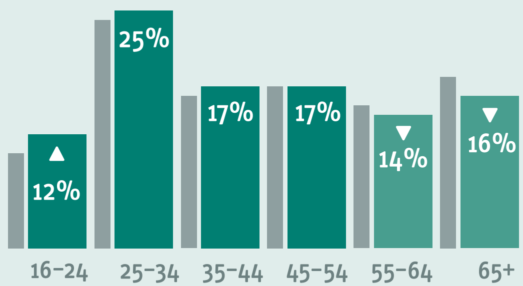
- Most in the culture market are interested in ngā toi Māori.
- 94% or an estimated 3.7 million adults have either engaged with this artform in the past, or would consider doing so in the future.
- Taking a more granular look at the market, there is a healthy current market with an estimated 2.4 million having engaged in the past three years.
- Meanwhile, the lapsed market, defined as those who last engaged over three years ago, is also sizeable, at an estimated 1 million adults.
- A further 287k would consider engaging but haven't previously.

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.

Current market for ngā toi Māori

Current – 61% / estimated 2.4 million

Age profile – ngā toi Māori current market



Gender identity

▲ **55%** female

▼ **45%** male

<1% gender diverse

▲ **36%** (33%) children in the household

Ethnic identity

▼ **73%** (76%) NZ or other European

▲ **19%** (15%) Māori

▲ **10%** (8%) Pacific Peoples

14% (15%) Asian

13% (13%) have the lived experience of disability

[Base 4195]

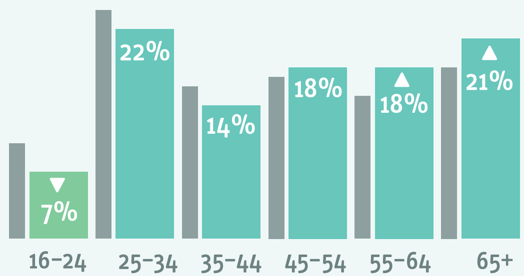
The current market for ngā toi Māori – those who've engaged in the past three years – are younger and more diverse than the culture market average.

- 36% of those in the ngā toi Māori current market are aged under 35, a significantly higher level than average (34%). Conversely, around 29% are aged 55+, significantly below average (33%).
- Skews female (55%, compared to 51% overall).
- Is more ethnically diverse, with a significantly larger proportion identifying as Māori (19%, compared to 15% overall) or Pacific Peoples (10%, compared to 8%). Conversely, there are significantly fewer in the current market for ngā toi Māori identifying as New Zealand European or European (73%, compared to 76% overall).
- More likely to have children in the household (36%, compared to 33% overall).
- Significantly more likely to have completed higher education (31%, compared to 28% overall).
- Essence (13%) and Expression (23%) are over-represented compared to the market overall (10% and 20%, respectively).

▲▼ where % is significantly different from the culture market average.
The culture market average is represented as either a grey bar or a % in brackets.

Lapsed – 26% / estimated 1 million

Age profile – ngā toi Māori lapsed market



Gender identity

51% female
49% male
<1% gender diverse

▼ 27% (33%) children in the household

Ethnic identity

▲ 84% (76%) NZ or other European
▼ 9% (15%) Māori
▼ 4% (8%) Pacific Peoples
▼ 11% (15%) Asian

▼ 10% (13%) have the lived experience of disability

[Base 1692]

Lapsed market for ngā toi Māori

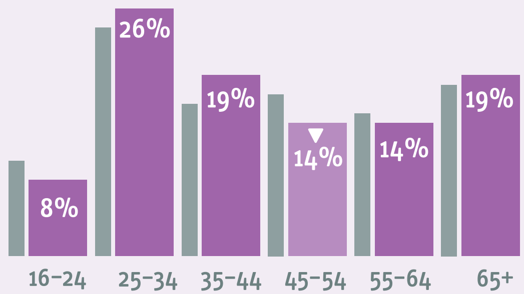
The lapsed market for ngā toi Māori – those who last engaged over three years ago – are older and less diverse than average.

- Nearly 4 in 10 are aged 55+, a significantly higher level than average (33%). Conversely, 29% are aged under 35, significantly below average (34%).
- Less ethnically diverse, with a significantly larger proportion identifying as New Zealand European or other European (84%, compared to 76% overall). Conversely, the proportion identifying as Māori (9%), Pacific Peoples (4%) or Asian (11%) are significantly below average.
- Less likely to have children in the household (27%, compared to 33% overall).
- Less likely to have a lived experience of disability (10%, compared to 13% overall).
- Less likely to have completed higher education (35%, compared to 28% overall).
- Essence (9%) and Expression (15%) are under-represented compared to the wider market (10% and 20%, respectively). Conversely, the less culturally active segments of Enrichment (13%), Perspective (13%) and Entertainment (12%) are all over-represented, compared to the wider market (10%, 9% and 9% respectively).

▲▼ where % is significantly different from the culture market average.
The culture market average is represented as either a grey bar or a % in brackets.

Potential – 7% / estimated 287k

Age profile – ngā toi Māori potential market



Gender identity

▼ 46% female

▲ 54% male

<1% gender diverse

34% (33%) children in the household

Ethnic identity

▼ 63% (76%) NZ or other European

▼ 5% (15%) Māori

8% (8%) Pacific Peoples

▲ 29% (15%) Asian

14% (13%) have the lived experience of disability

[Base 490]

Potential market for ngā toi Māori

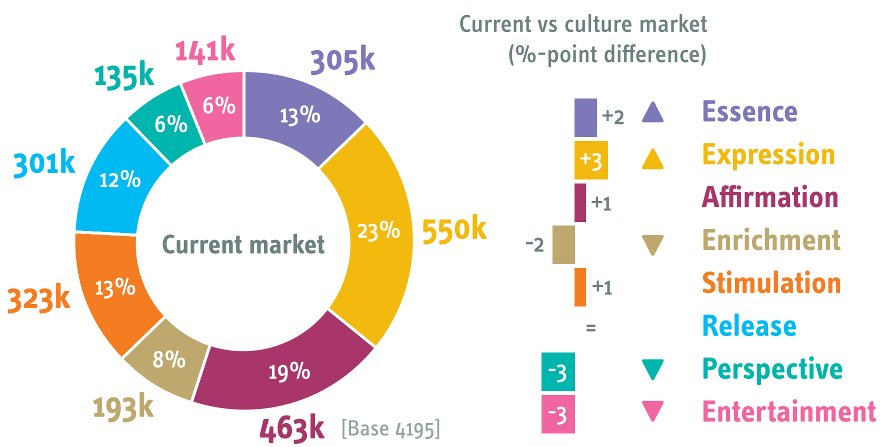
The potential market for ngā toi Māori – those who would consider engaging but haven't previously – are more likely to be male or identify as Asian than the culture market average.

- Skews male (54%, compared to 48% overall).
- A significantly larger proportion identify as Asian (29%, compared to 15% overall). Conversely, are less likely to identify as New Zealand European or other European or Māori than average.
- The less culturally active segments of Enrichment (14%) and Perspective (12%) are significantly over-represented compared to the wider culture market. However, the shift in balance is due to the absence of the more active Essence and Expression, rather than larger numbers of the less active segments. See real figure estimates explored on the following page.

▲▼ where % is significantly different from the culture market average.
The culture market average is represented as either a grey bar or a % in brackets.

Expression and Essence are over-represented in ngā toi Māori current market

Culture Segment profile and real figure estimates – ngā toi Māori



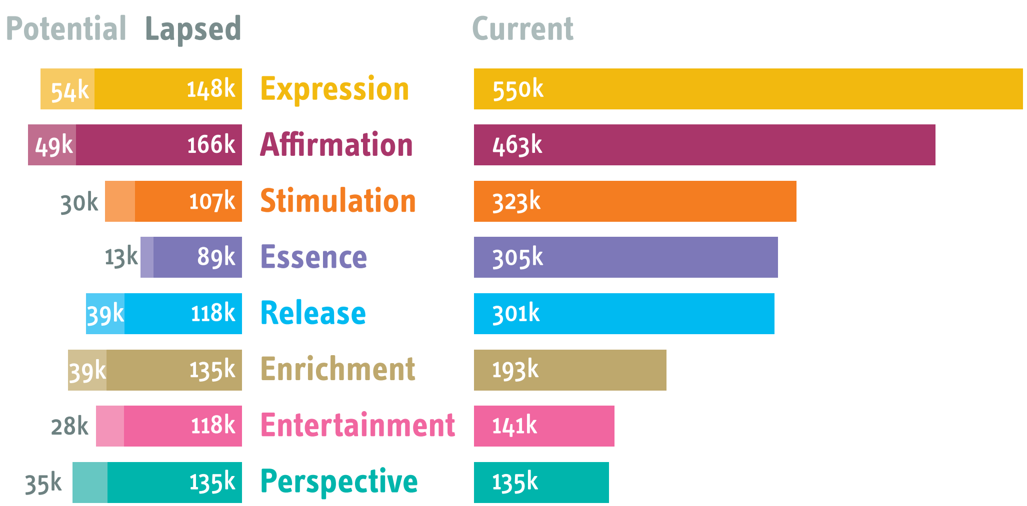
Expression are a culturally active segment, open to a broad range of experiences. Their importance to ngā toi Māori is not just that they are the most numerous, but also the value they bring. Expression enjoy shared experiences and inclusive activities. They want others to join in with them, making them great advocates. They are the segment most likely to give time and money to the causes they support.

Essence is the third largest segment in the current market for ngā toi Māori, but also significantly over-represented compared to the culture market overall. As high-frequency attenders, Essence are an important group. They are a culturally confident segment, valuing quality experiences and depth of insight.

After Expression, Affirmation is the most numerous segment in the current market for ngā toi Māori. This segment welcomes cultural engagement as a way of enjoying quality time with others and as a means of doing something worthwhile.

Less active segments are likely to have lapsed

Culture Segment profile and real figure estimates for the different ngā toi Māori market groups



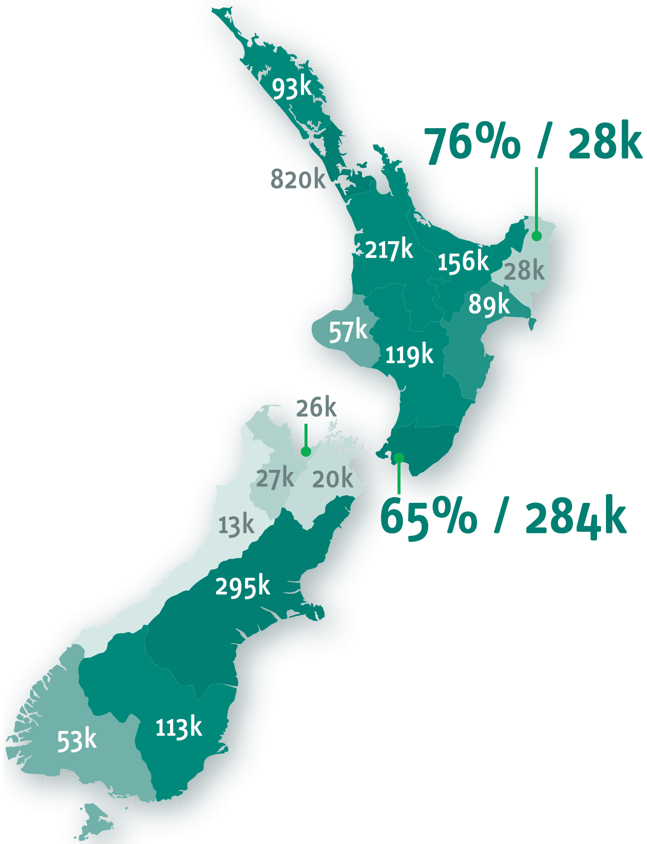
The adjacent chart looks at the Culture Segment breakdown of the ngā toi Māori current, lapsed and potential markets as real figure estimates.

While the less culturally active Enrichment, Perspective and Entertainment are more likely to have lapsed, these 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).

Because the majority of people in the culture market have engaged with ngā toi Māori at some point in the past (current and lapsed), the numbers of adults in the potential market is relatively modest, an estimated 278k adults across all the segments.

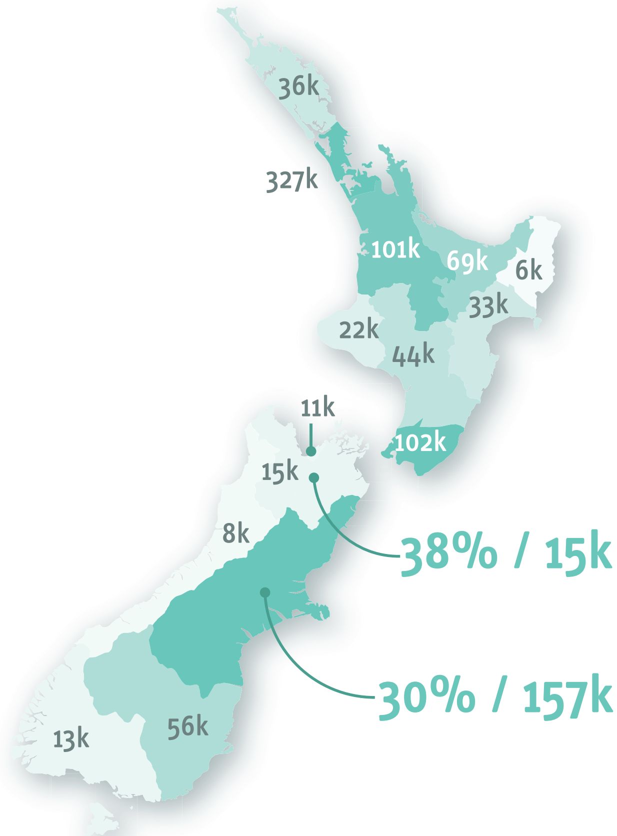
Size of the current, lapsed and potential ngā toi Māori market across Aotearoa New Zealand – real figure estimates

Current



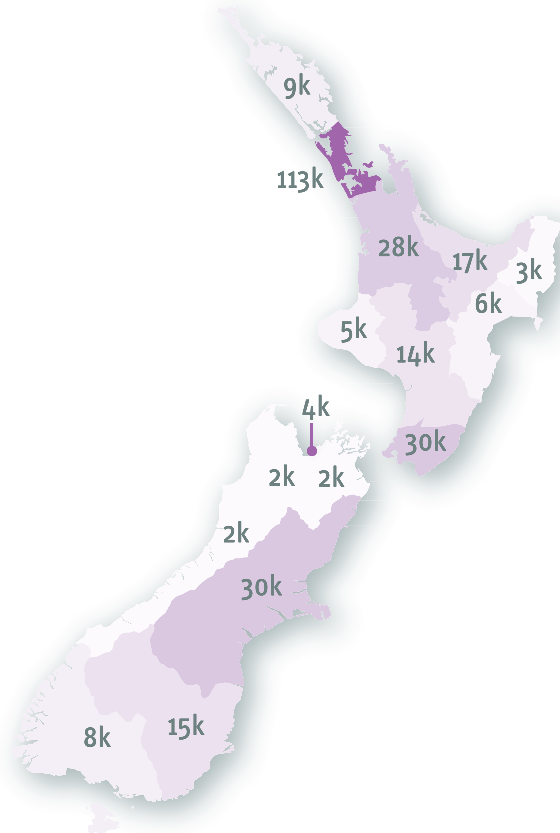
The Gisborne (76%) and Wellington (65%) regions have the highest proportion of residents in the current market for ngā toi Māori – significantly above the culture market average (61%).

Lapsed



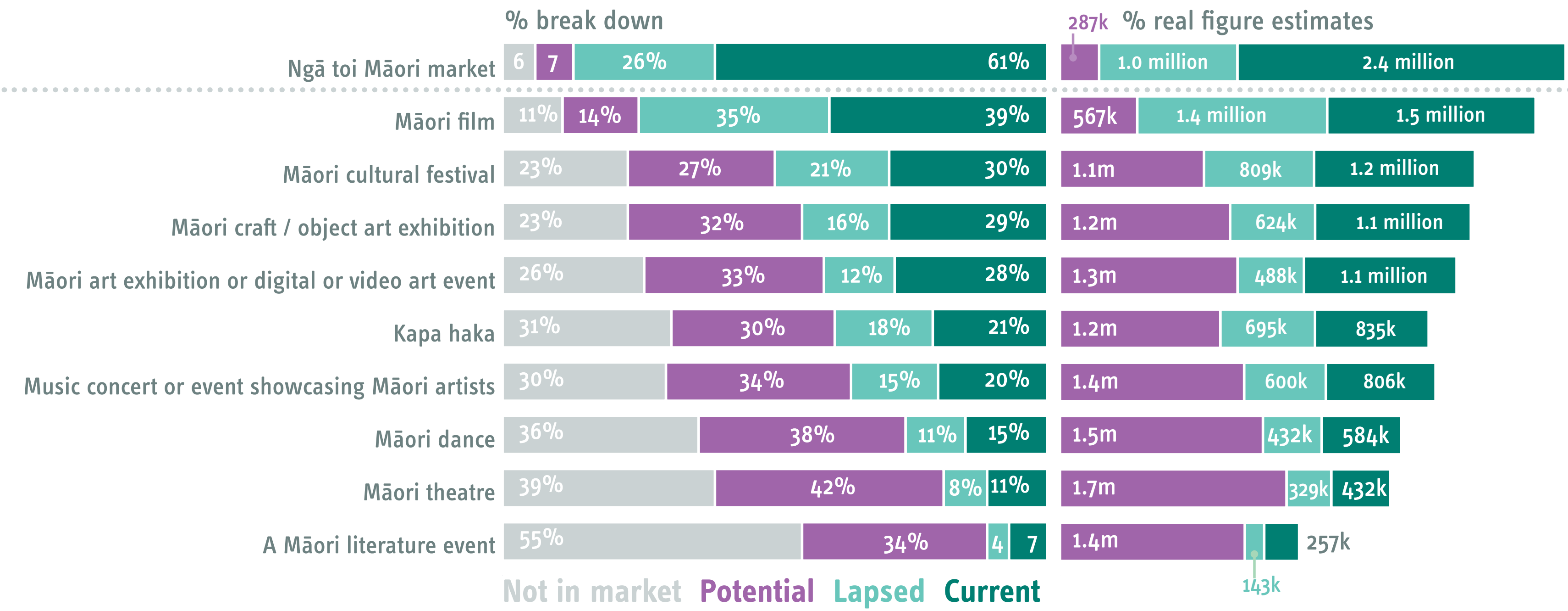
Proportionally, Marlborough (38%) and Canterbury (30%) regions are most likely to have lapsed in engagement with ngā toi Māori, significantly higher than average (26%).

Potential



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 potential market size in all regions is broadly comparable to the culture market average (7%).

Ngā toi Māori market penetration – including artforms within ngā toi Māori



Sizable potential markets for eight artforms within ngā toi Māori

Of the nine artforms which comprise ngā toi Māori for the purposes of this study, Māori film has the largest market penetration, with an estimated 1.5 million in the current market.

There is healthy potential amongst most ngā toi Māori artforms, particularly Māori theatre and dance. An estimated 1.7 and 1.5 million respectively, would consider engaging, but haven't previously. With the exception of film, there is estimated to be over 1 million adults in the potential market for all ngā toi Māori artforms.

While a Māori literature event has a strong potential market to tap into, over half the market is resistant to engaging with this particular artform (55%).

Research parameters and methods

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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