



#cnzbigconvo

LEARNING TO LOVE INFREQUENT ATTENDERS

Audience Atlas New Zealand 2014

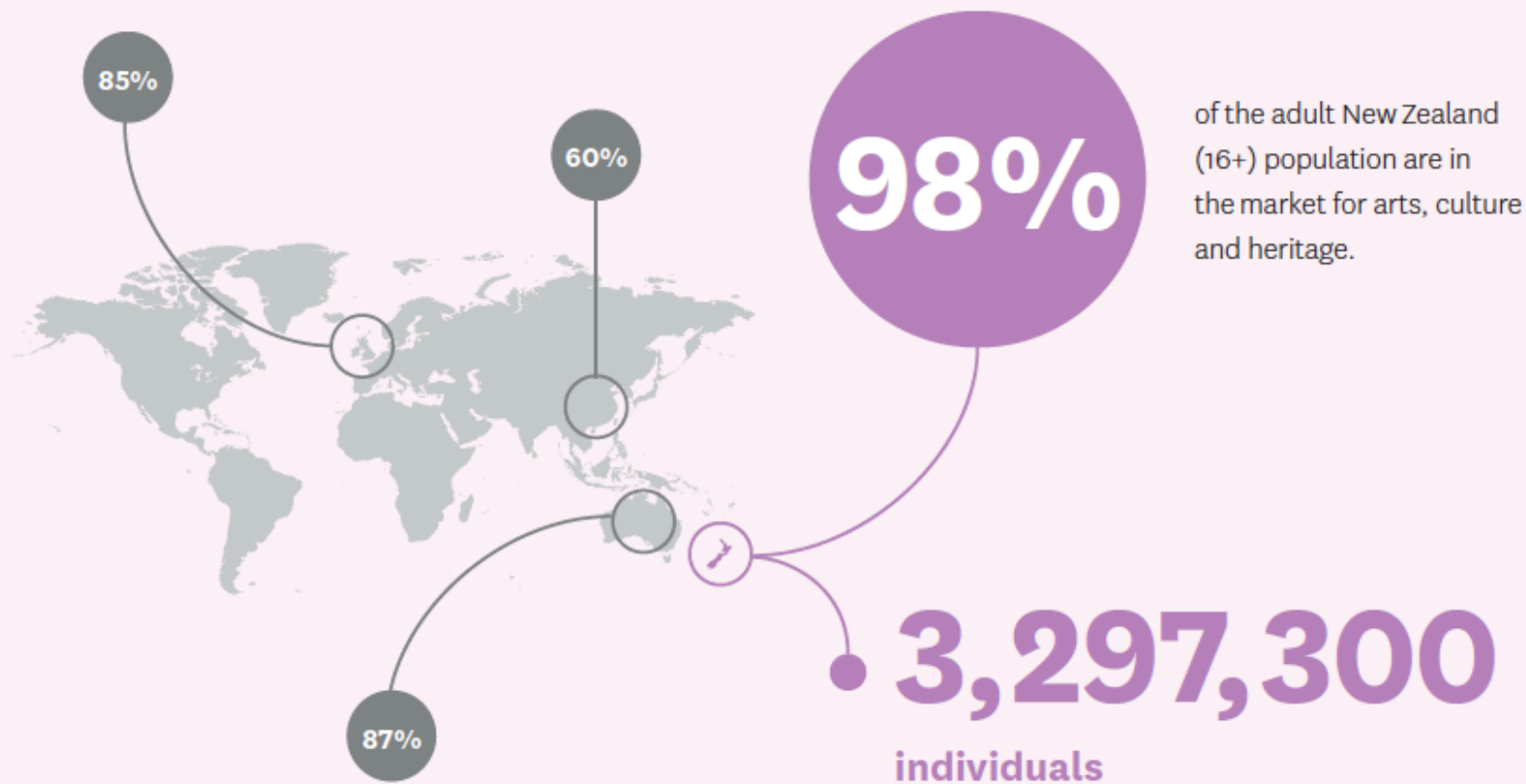
- The 2014 survey builds on the 2011 edition and measures trends in how New Zealanders engage with arts and cultural activities, including:
 - Arts attendance (43 artforms surveyed)
 - Expenditure
 - Volunteering, membership and donation behaviour
 - Media consumption
 - Engaging with the arts online

What the Audience Atlas Tells Us

- **We have a growing, shallow mass market:** more people are attending fewer events and they're less committed to any organisation
 - We see this not only in attendance, but lower expenditure, membership, donation and volunteering behaviour
- **We need to pay attention to this audience:** infrequent attenders are just as important as that small, committed cohort
- **An organisation's digital presence is key to growing an audience,** and doesn't replace the real-life experience

They're dipping their toes in the water





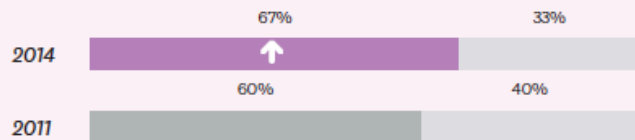
This figure compares favourably with 87% of Australian adults who are in the market for arts, culture and heritage, 85% of adults in the United Kingdom and 60% of adults in China³.

² For a full list of all artforms surveyed, please see page 118.

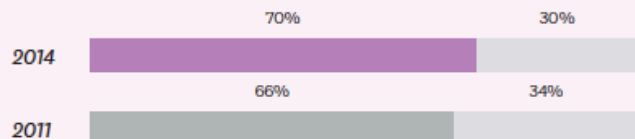
³ As measured in *Audience Atlas Australia 2011*, *United Kingdom 2010* and *China 2014*.

Percentage of culture market in current market 2014

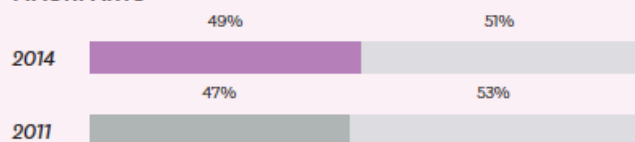
CRAFT AND OBJECT ART



VISUAL ARTS



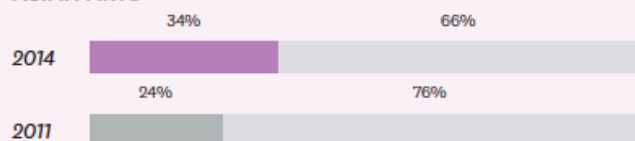
MĀORI ARTS



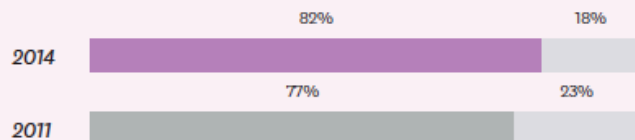
PACIFIC ARTS



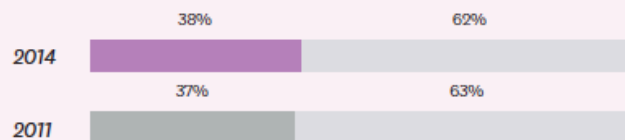
ASIAN ARTS



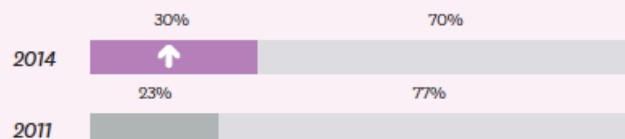
THEATRE



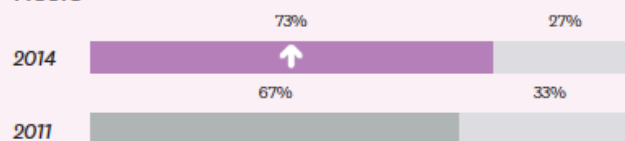
DANCE



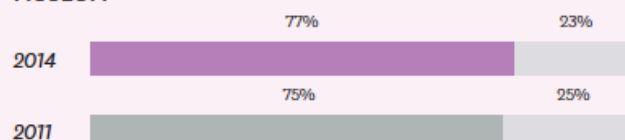
LITERATURE



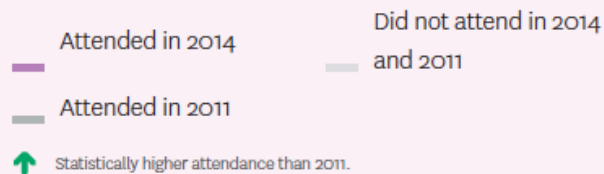
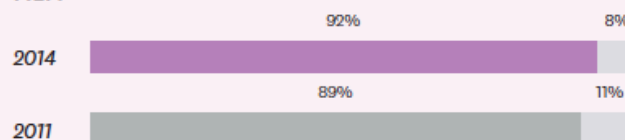
MUSIC



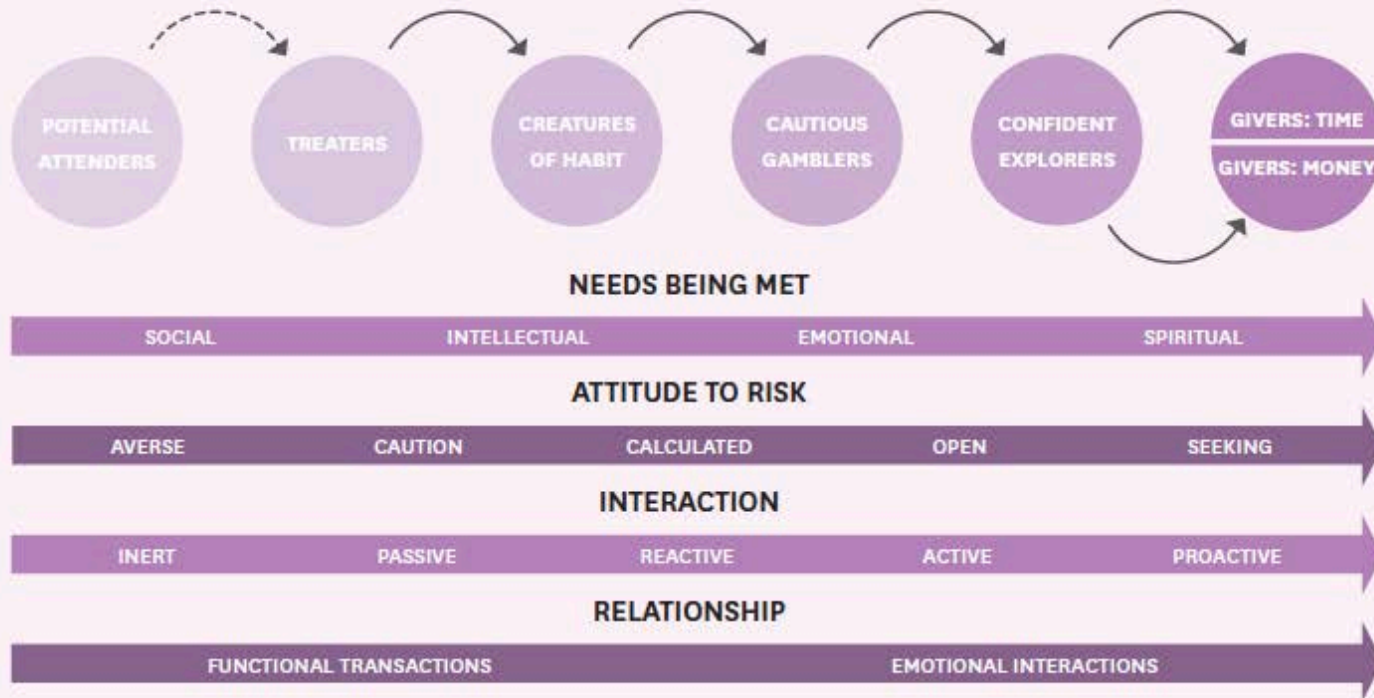
MUSEUM



FILM



Levels of Engagement



The Emergence of the Shallow Market

- Fewer Givers
- Far more Treaters – arts are seen as an ‘event’, and just one option of many

Levels of Engagement	2011	2014
Giver (time)	6%	4%
Giver (\$)	6%	2%
Confident Explorers	12%	14%
Cautious Gamblers	17%	15%
Creatures of Habit	25%	24%
Treaters	31%	38%
Potential attenders	4%	2%



GROWING AUDIENCES: ATTENDANCE

How can we use the Audience Atlas?

- Organisations can use the Audience Atlas to:
 - Understand their current market
 - Reactivate their lapsed market
 - Reach their potential market
 - Evaluate touring potential
 - Grow their member, volunteer and donor base

CRAFT AND OBJECT ART



VISUAL ARTS



MĀORI ARTS



PACIFIC ARTS



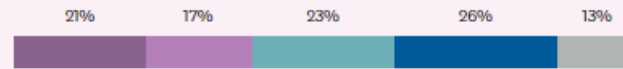
ASIAN ARTS



THEATRE



DANCE



LITERATURE



MUSIC



MUSEUM



FILM



Current market:

Last attended in the past 12 months

Current market:

Last attended 1-3 years ago

Lapsed market:

Last attended more than 3 years ago

Potential market:

Haven't attended but would be interested

Haven't attended and would not be interested

Craft and Object Art

Visual Arts

Art gallery or art exhibition

Digital or video art event

Māori Arts

Māori Performance or Kapa haka

Māori cultural festival

Māori arts exhibition

Another kind of Māori arts, cultural event or celebration

Pacific Arts

Pacific performance

Pacific cultural festival

Pacific arts exhibition

Another kind of Pacific arts, cultural event or celebration

Asian Arts

Asian cultural festival

Dance

Contemporary Dance

Ballet

Another kind of dance event

Theatre

Play or drama

Musical theatre

Comedy

Pantomime

Cabaret or Burlesque

Circus

Street performance

Another kind of theatre event

Music

Opera or operetta

Choral concert

Contemporary classical, electronic music or sound art

Rock or pop concert

Rock or pop music festival

Other music festival

Jazz or blues concert

Country or folk music concert

Hip hop concert

Another kind of live music event

Literature

Literary event as part of a festival

Other event connected with poetry

Other event connected with books

Other literature event

Museum

Film

Any film at a cinema or other venue

Any film shown as part of a film festival

New Zealand film at a cinema (not including *The Hobbit*)

New Zealand film shown as part of a film festival

Culture Segments

- A way to understand our audiences in ways that are deeper than demographics: why people attend, what their expectations are and their core values and needs
- Allows us to customise our communication and create hooks that appeal to our audiences at a deep level

Culture Segments



Essence

*Discerning, Spontaneous,
Independent, Sophisticated*

Key marketing messages

The programming team has credentials
It has depth
Seriously high quality
Not mainstream entertainment



Expression

*Receptive, Confident,
Community, Expressive*

Key marketing messages

It will be immersive,
emotional escapism
Everyone will enjoy a shared experience
It will be something to discuss
You'll appreciate artistic expression



Affirmation

*Self-identity, Aspirational,
Quality time, Improvement*

Key marketing messages

It's had good reviews – best of the crop
You'll get something out of it
It is modern and relevant
(but not 'out there')
It will be something to tell others I did



Enrichment

Mature, Traditional, Heritage, Nostalgia

Key marketing messages

Familiar or classic themes or features
It will be well done and enjoyable
The evening out will be a success
It offers good value

Culture Segments



Stimulation

*Active, Experimental,
Discovery, Contemporary*

Key marketing messages

New, unusual, different
Like nothing you've seen before
Best kept secret – see
before they catch on
It offers new perspectives and
shows you're in the know



Release

Busy, Ambitious, Prioritising, Wistful

Key marketing messages

It will be a relaxing trip
If you only do one thing this month
it's this – guaranteed pleasure
The venue has everything needed
Online booking is quick,
easy and free



Perspective

*Settled, Self-sufficient,
Focused, Contented*

Key marketing messages

It will be personally rewarding
It's nice to do something
special occasionally
It will be interesting, engaging
and spark the imagination



Entertainment

*Consumers, Popularist,
Leisure, Mainstream*

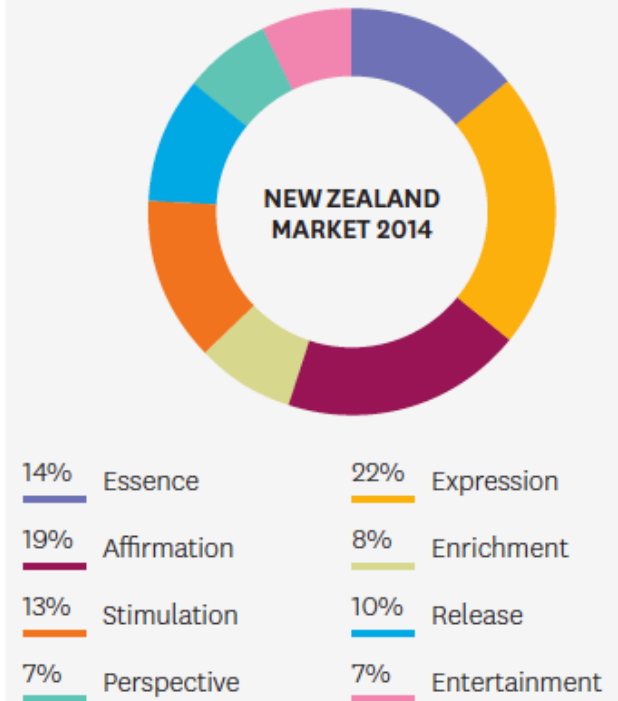
Key marketing messages

It's popular
It's a great night out and
'easy sell' to others
It's got a celebrity in it
It will be fun

Culture Segments

- New Zealand:
 - 22% Expression
 - 19% Affirmation

CULTURE SEGMENTS PROFILE OF NEW ZEALAND ADULTS IN THE MARKET FOR ARTS, CULTURAL AND HERITAGE



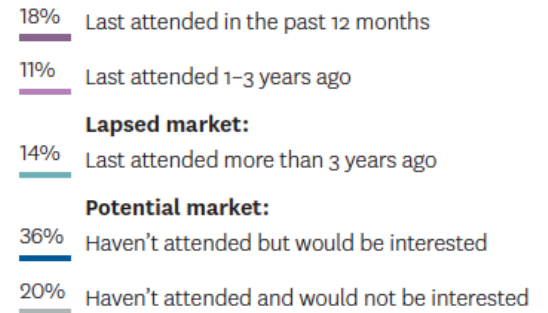
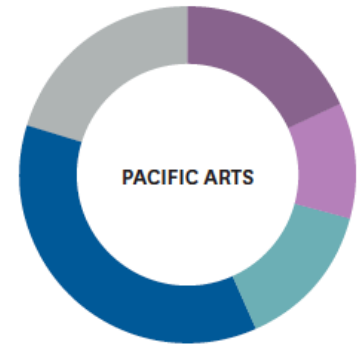
PERCENTAGE POINT DIFFERENCE BETWEEN 2014 AND 2011



Base: (4008).

Pacific Arts

- Pacific Arts have seen the lowest growth over the past three years
- This is not for want of interest: it also has the greatest potential market (1218.6k). So what's stopping people from attending?



PACIFIC PERFORMANCE



PACIFIC CULTURAL FESTIVAL



PACIFIC ARTS EXHIBITION



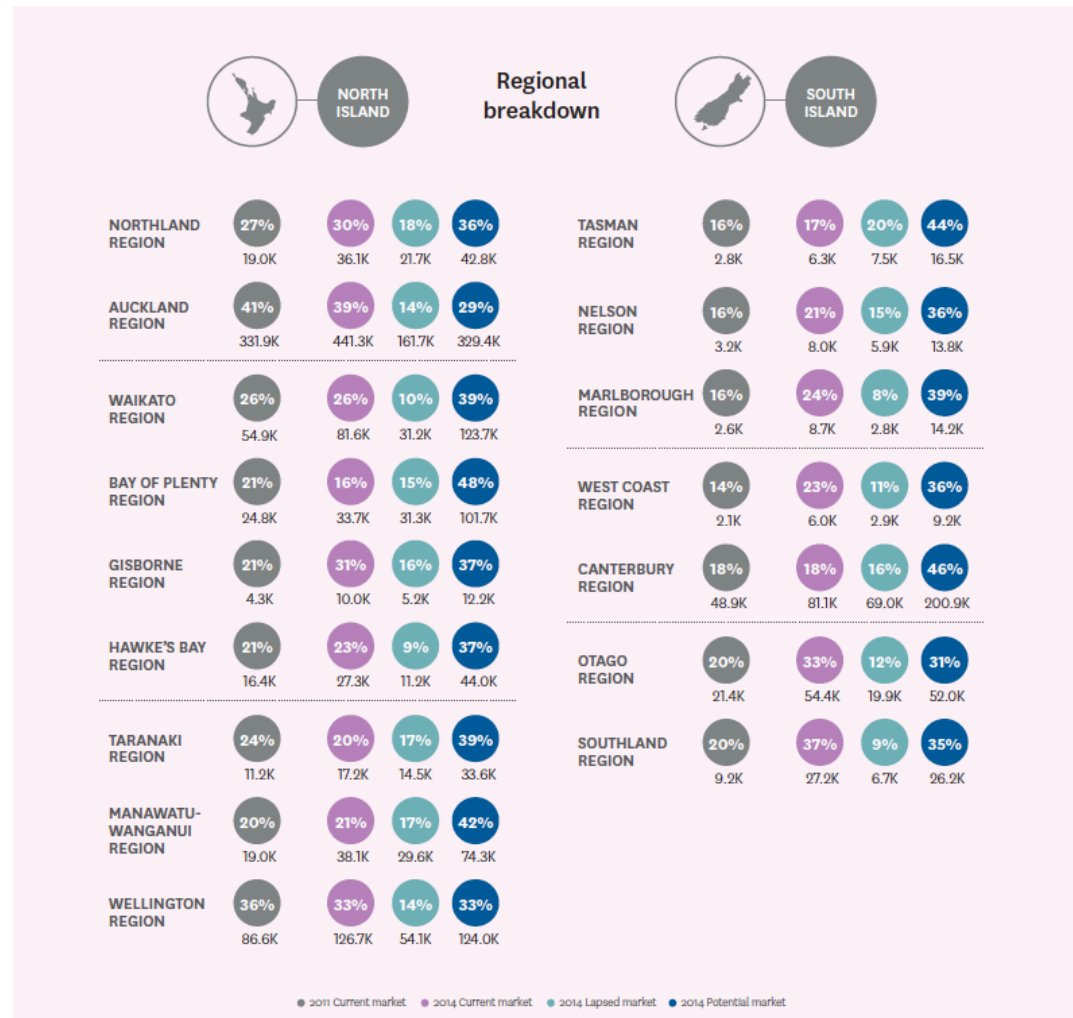
OTHER PACIFIC ARTS OR CULTURAL EVENT



Base: (4011).

Pacific Arts

- Auckland has the largest current market (39%) followed by Southland (37%)
- Largest potential market in Bay of Plenty (48%), Canterbury (46%) and Tasman (44%)



Pacific Performance

- Pacific Performance appeals most to Expression, with 40% attending one in the past year
- Between 39-41% of Essence, Affirmation, Enrichment, Stimulation and Perspective are interested in attending for the first time

PACIFIC PERFORMANCE:

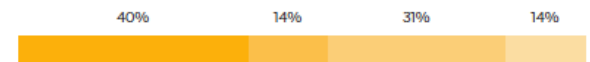
TOTAL MARKET



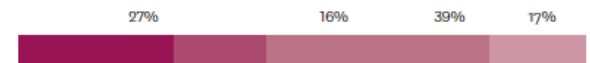
ESSENCE



EXPRESSION



AFFIRMATION



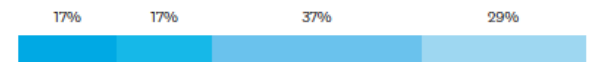
ENRICHMENT



STIMULATION



RELEASE



PERSPECTIVE



ENTERTAINMENT



Support for the Arts

- People are spending less on arts and cultural activities
 - \$41 every four weeks, compared to \$53 in 2011
- Fewer people are volunteering their time to help an arts, cultural or heritage organisation
 - 9% of the culture market volunteered in the last 12 months compared to 12% in 2011
- Fewer people are donating to an arts, cultural or heritage organisation or cultural venue
 - 23% donated in the last 12 months, compared to 50% in 2011

The Way Forward

- **We have to learn to love our infrequent attenders:** they're the cats of the arts world, but ultimately they are a serious chunk of the market
- **We need to reach them:** Orthodox communication strategies aren't working on the infrequent, non-committed market: we need to revisit how we're reaching these audiences
- **Focus on developing an online presence:** use it as a platform to showcase work in a way that's true to the art



WORKSHOP: UNLOCKING POTENTIAL

Unlocking Potential

- In groups of five, develop two different marketing strategies for the situation you're assigned
- You have 15 minutes to plan and 5 minutes to write-up and rehearse – and then 1 minute to present
- You need to assign people in your group to present each of your ideas

And your Challenges are...

1. Come up with 2 different ways to entice **Affirmation infrequents** to become a member of a theatre company.
2. Come up with 2 strategies to deepen engagement of **Expression infrequents** (one using digital and one without) for a classical music concert.
3. Come up with 2 strategies to encourage **Stimulation infrequents** (one using digital and one without) to attend a museum for the first time.

