



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

Audience Atlas Aotearoa 2020

March 2022

▶ **morris**
▶ **hargreaves**
▶ **mcintyre**

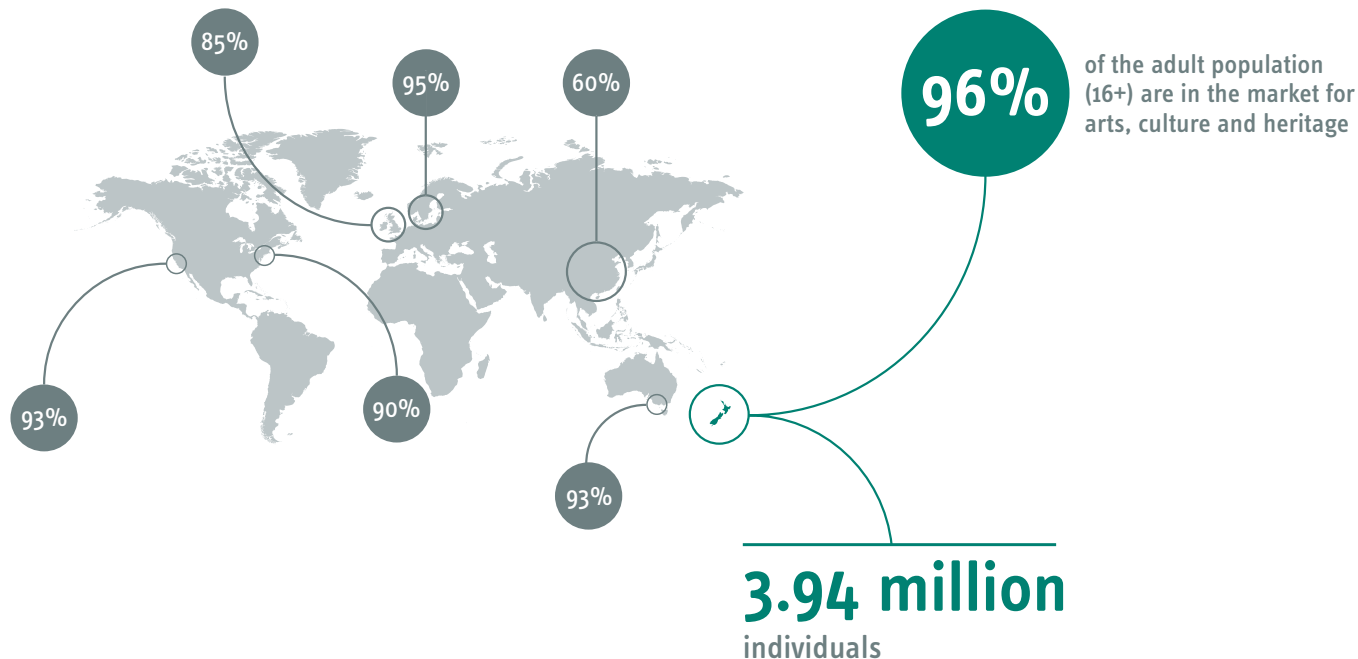


The impact of the Covid pandemic

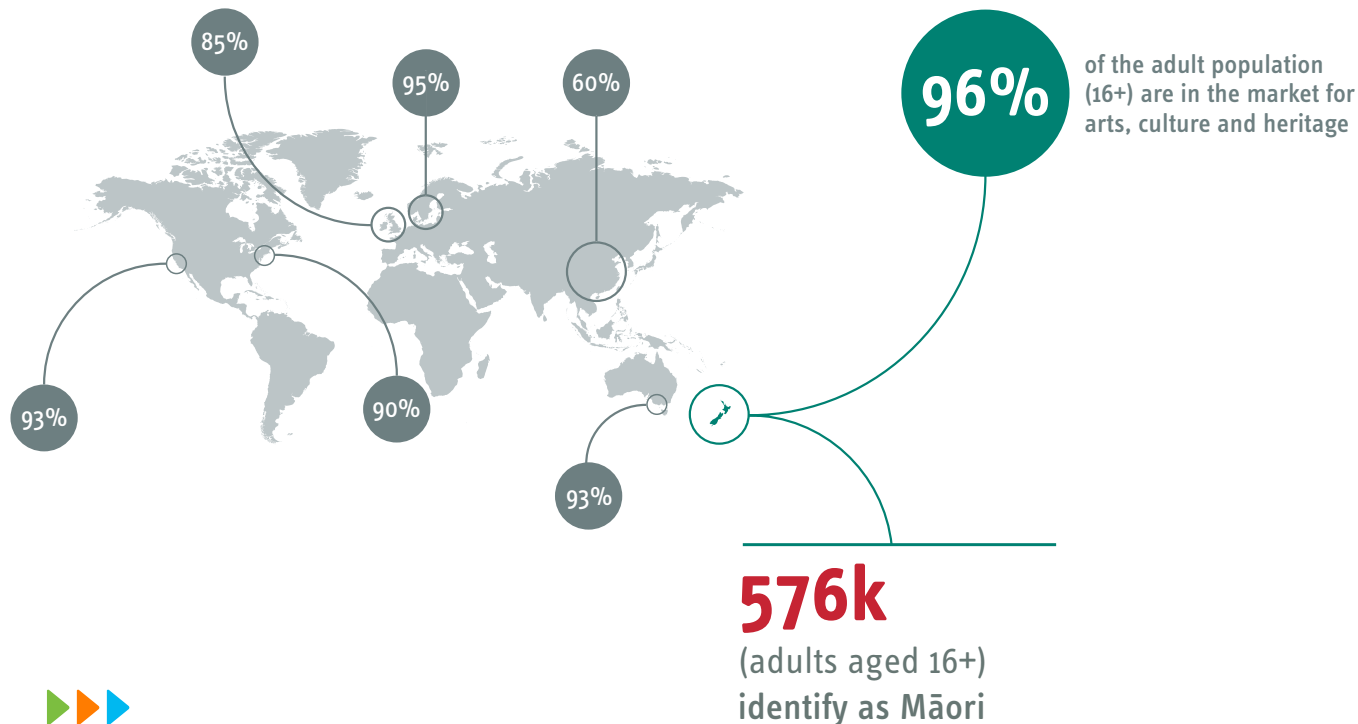
- Impact on organisations and individual practitioners
- The role of government, funders and philanthropists
- Organisations with deep audience roots
- Impact on audiences



Aotearoa New Zealand market for arts and culture



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What makes Audience Atlas unique?

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



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Across 12 core artforms



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Across 12 core artforms

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



Segment yourself



mhminstght.com/segmentme



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14%: pursuit of
self-actualisation



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22%: 'people
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Māori audiences

Māori audiences more likely to be Essence than average

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

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

Social

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

Intellectual

- Expanding their knowledge and
- Collecting new experiences



Māori audiences are more likely to be seeking identity development

Spiritual

- Stimulation for their imagination
- Get food for the soul
- To develop their tamariki's interests

Emotional

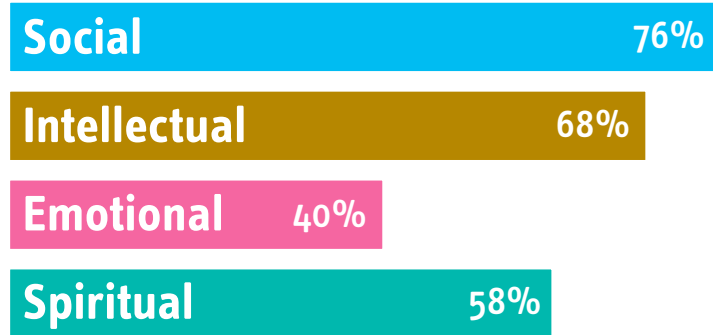
- Better define their cultural or personal identity



Social motivations are the gateway to a deeper reward

All motivations to engage with arts and culture

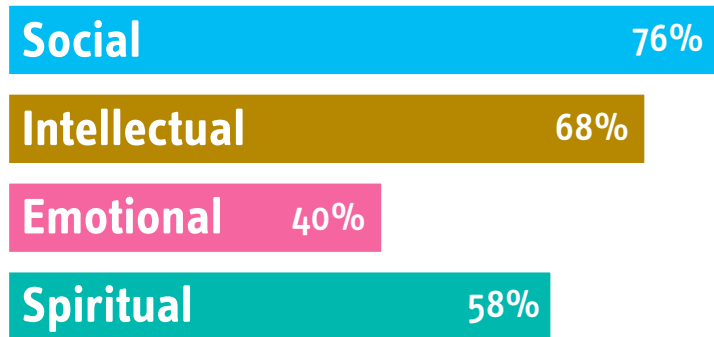
Māori in the culture market



Social motivations are the gateway to a deeper reward

All motivations to engage with arts and culture

Māori in the culture market



Main motivations to engage with arts and culture

Māori in the culture market

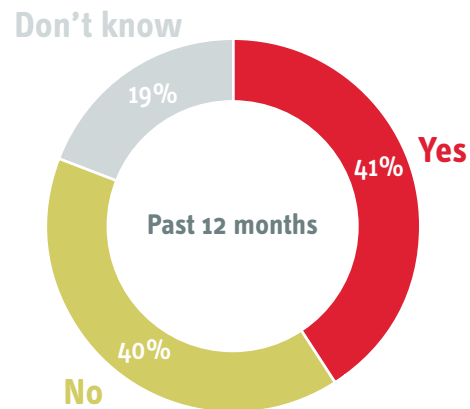


Culture market average



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

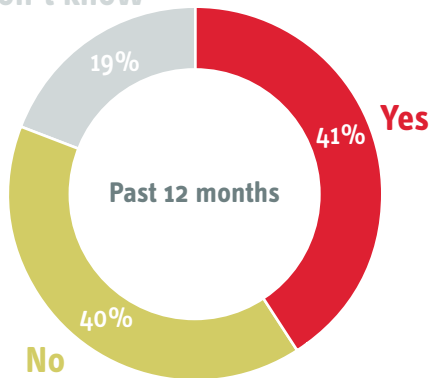
Was there an occasion you wanted to attend an arts, cultural or heritage organisation or event, and something prevented you from doing so?



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

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

Don't know

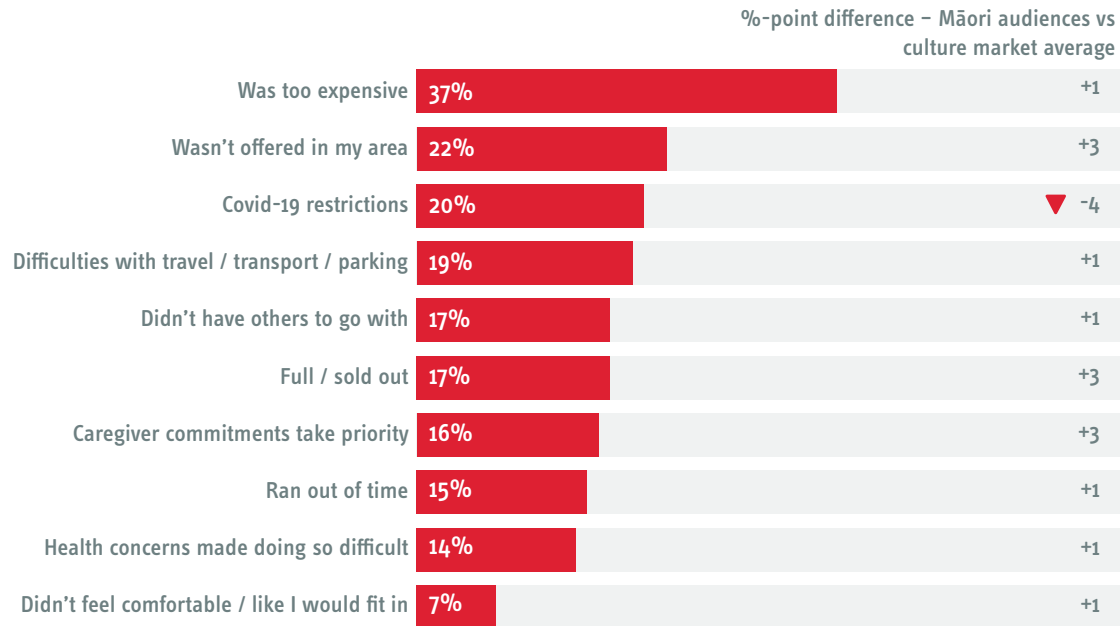


41% / 236k

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



Expense is a universal barrier to arts engagement



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

Māori audiences...

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

Don't know	Resistant	Potential	Recent
18% / 105k	23% / 134k	35% / 203k	23% / 133k



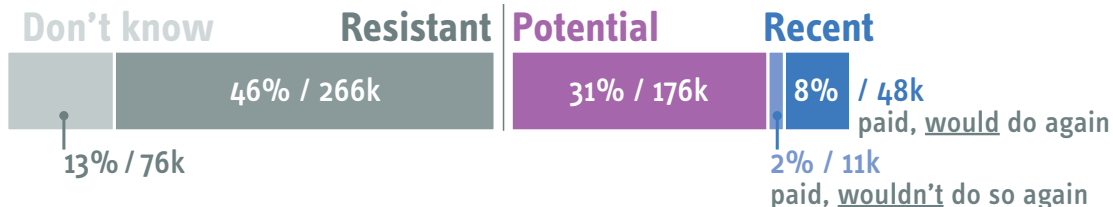
Māori audiences are more likely to consider paying for online arts content

Māori audiences...

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

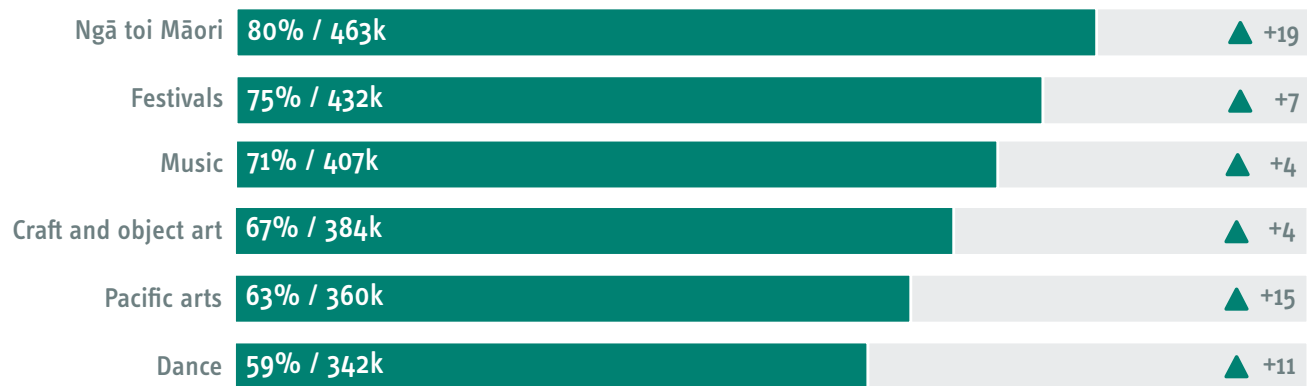


Paid or donated money to access arts & cultural content online in past 12 months



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

Current artform markets – % and real figure estimates



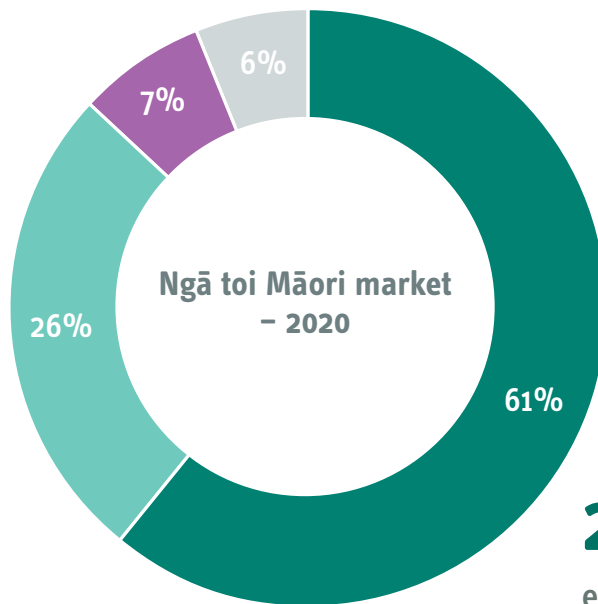
Top artforms Māori audiences have engaged with in past three years

Current artform markets – % and real figure estimates



The culture market's engagement with ngā toi Māori

3.7 million New Zealanders are open to ngā toi Māori

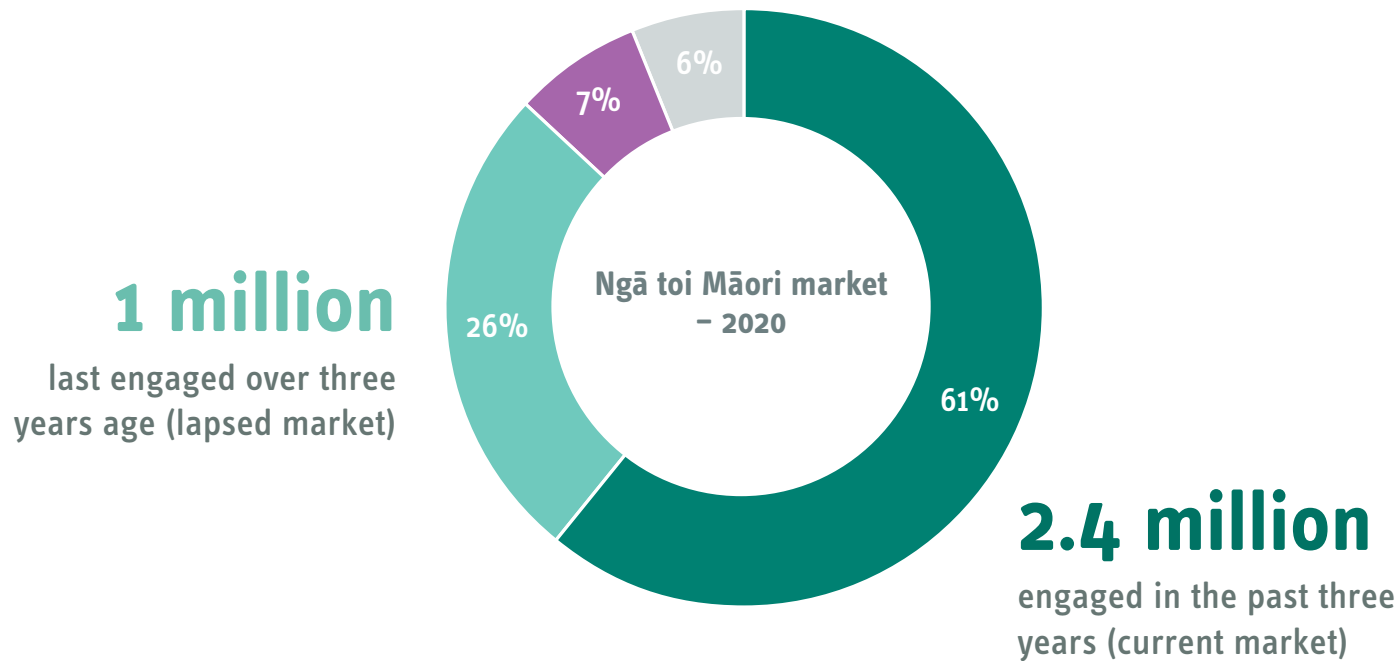


2.4 million

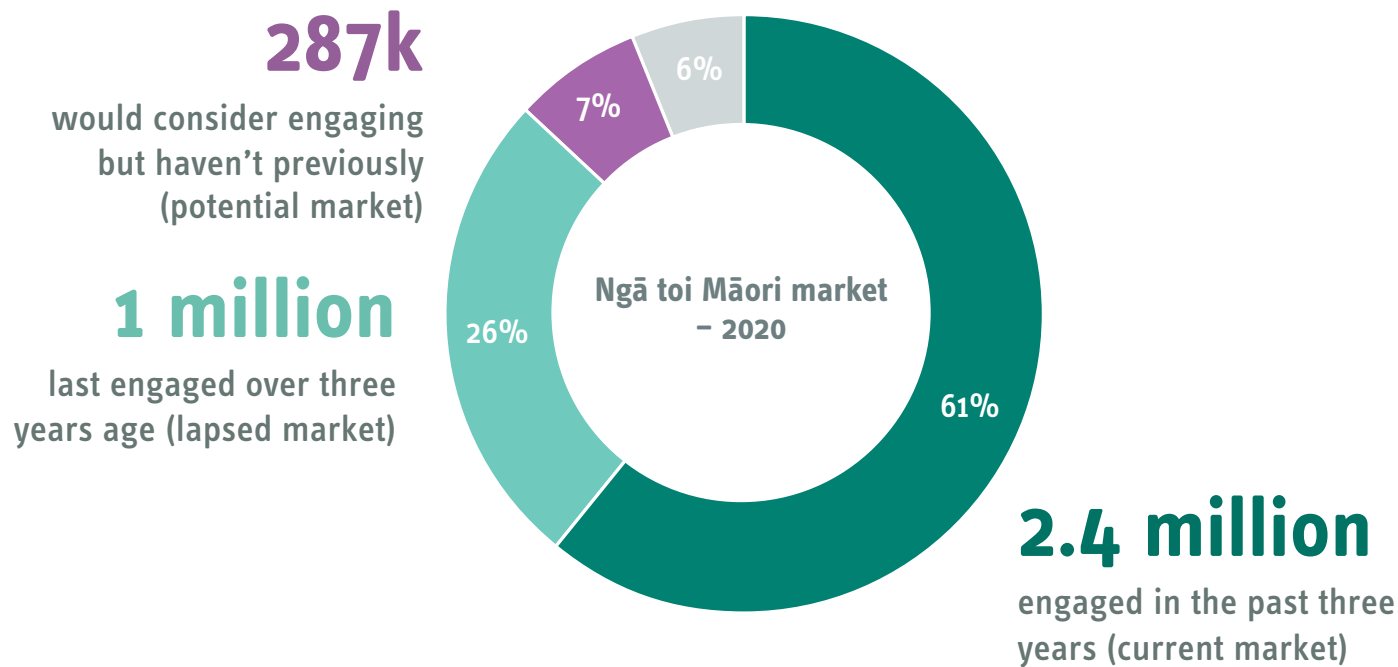
engaged in the past three
years (current market)



3.7 million New Zealanders are open to ngā toi Māori



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

61% or an estimated 2.4 million adults

The market is younger than average

36% aged under 35



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

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It's more diverse than average

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

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



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

26% or an estimated 1 million adults

The market is older than average

4 in 10 aged 55+



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

26% or an estimated 1 million adults

The market is older than average

4 in 10 aged 55+

It's less diverse than average

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

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



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

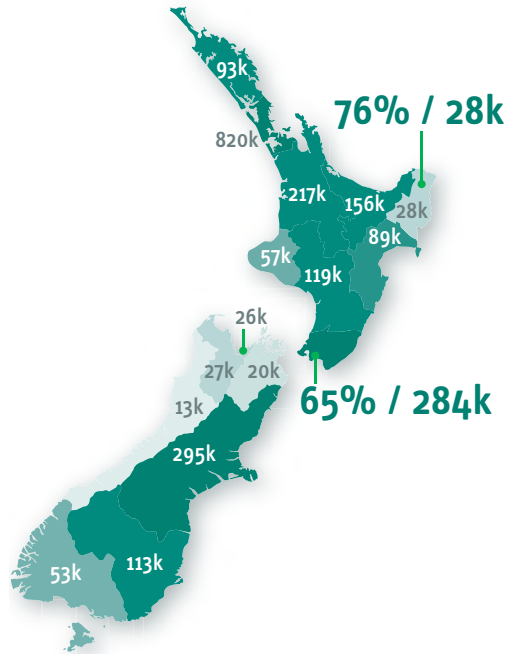
7% or an estimated 287k adults

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

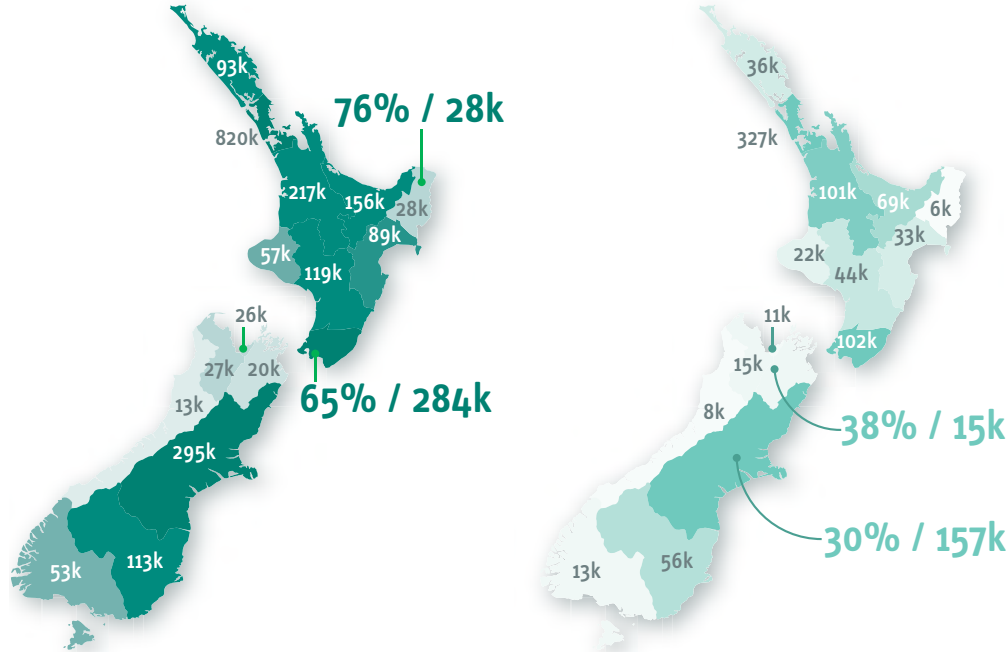
- Those identifying as male are over-represented
- As are those who identify as Asian



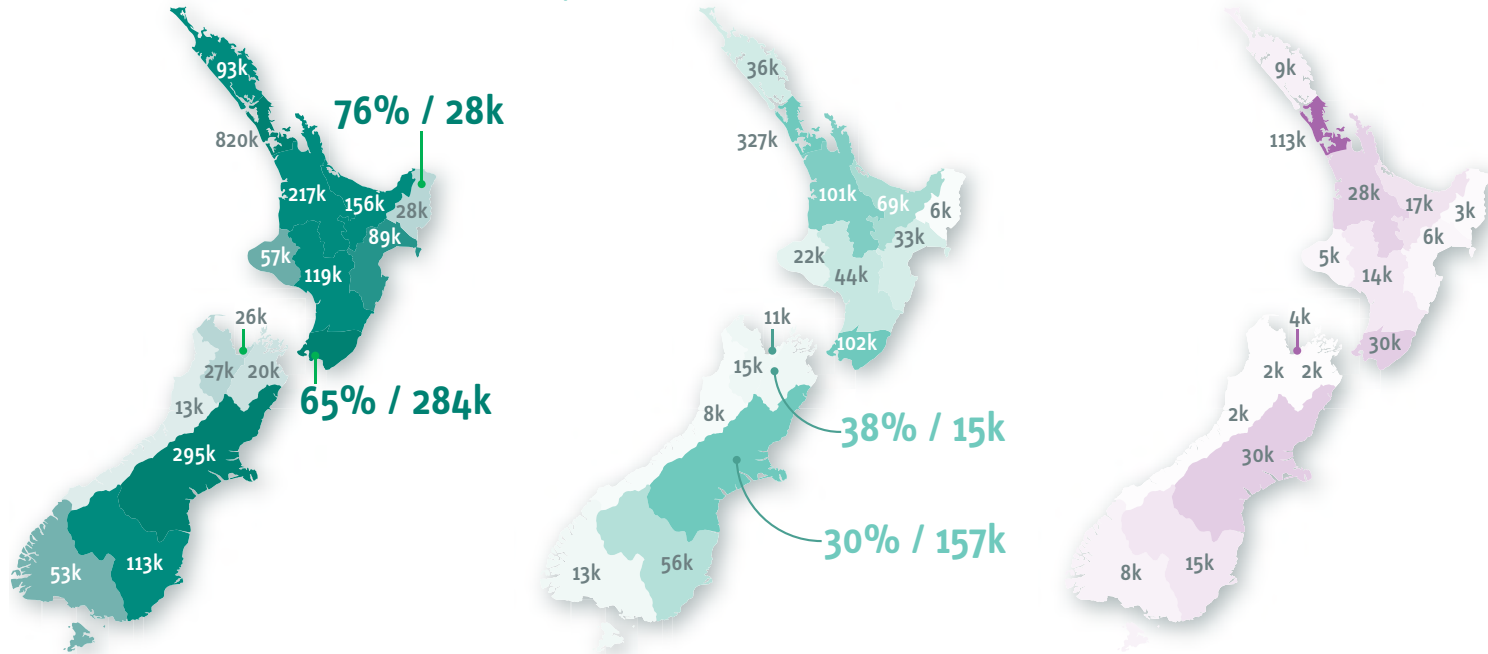
Larger proportion of Gisborne and Wellington residents are in the current market for ngā toi Māori



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

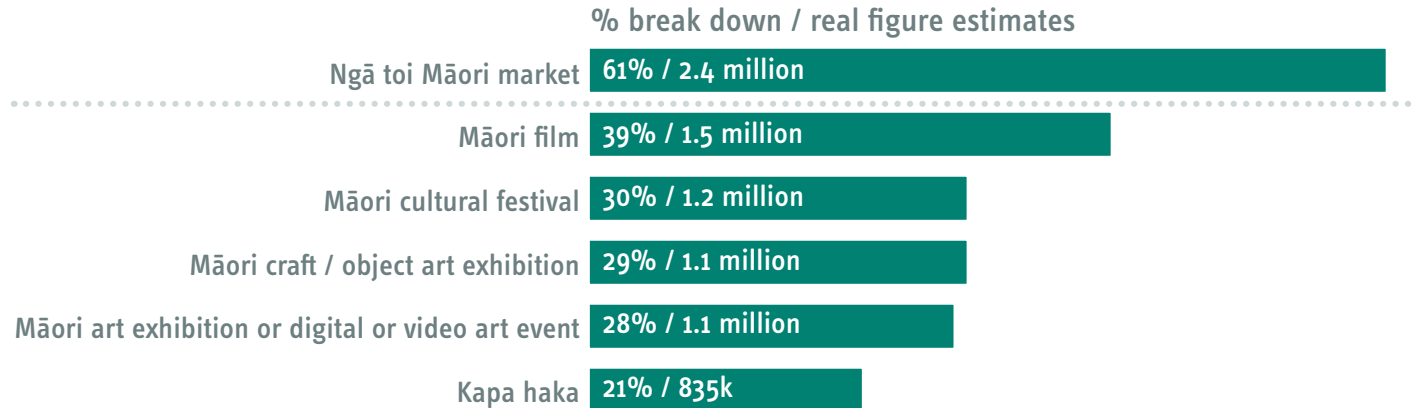


Due to high market penetration, potential market is relatively modest at a regional level



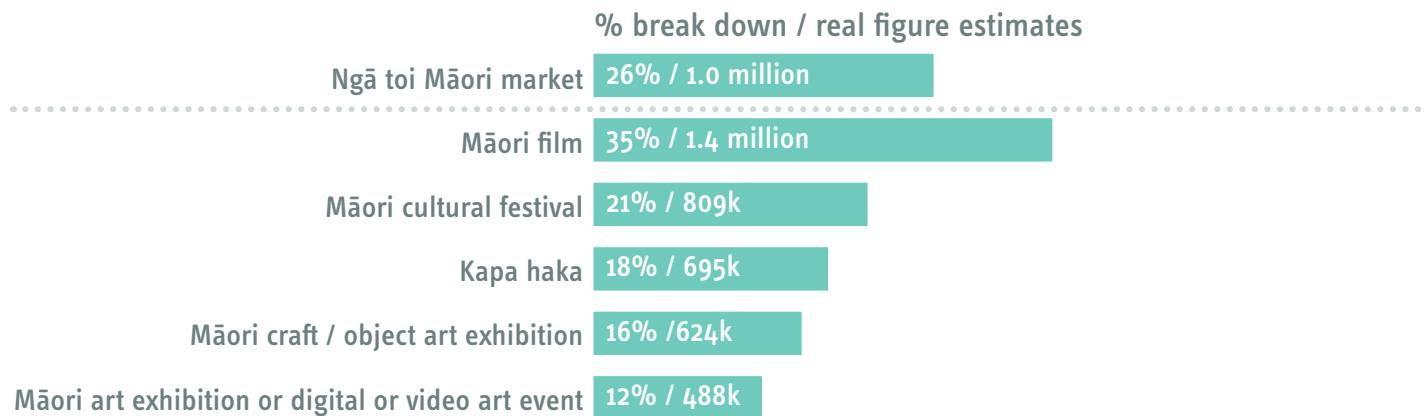
An estimated 1.2 million have engaged with a Māori cultural festival in past three years

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



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

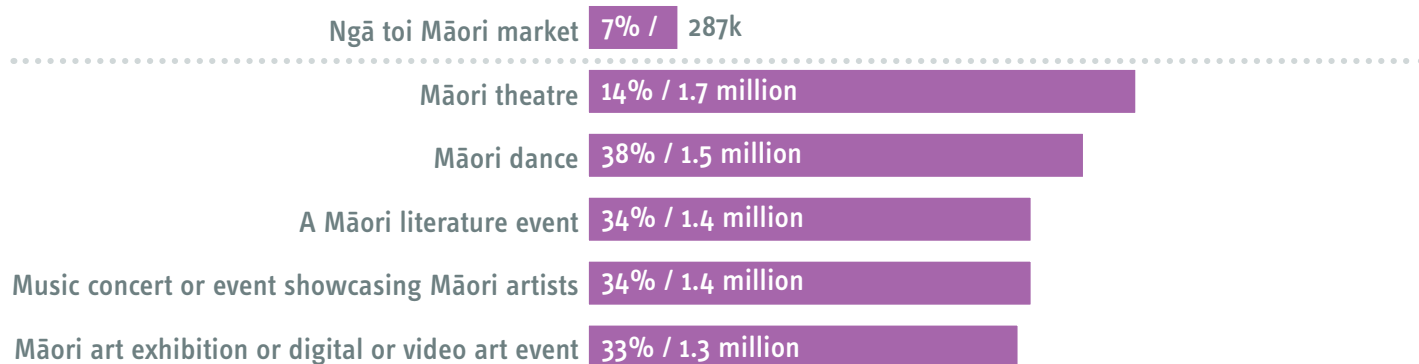
Ngā toi Māori **lapsed** market – including top five artforms within ngā toi Māori



Healthy potential amongst most artforms within ngā toi Māori

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

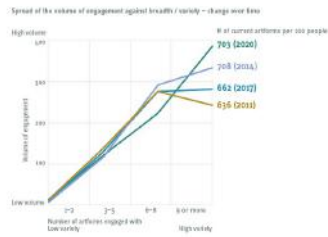
% break down / real figure estimates



Changing landscape

More people engaging more widely
In addition to growth in the size of the culture market engaged on page 8, there is a growing pool of people attending a wider range of arts and culture events in the previous studies. The adjusted chart compares the four studies by volume (estimated number of engagements) compared to the breadth (variety of activities engaged with). Broadly, we can see both the volume and the breadth has grown.

Skewing towards more variety
In 2020, the number of activities engaged with in a three year period (current market) is an estimated 70 per 100 people or 10 per person. This compares to 6.6 in 2010. 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 activities. So, while the overall volume of activity has grown only slightly in the past three years, engagement with a broader range of activities increased.



Note: In order to make a fair comparison the 2010 data has been adjusted to be the same as the 2020 data. The 2010 data has been adjusted to be the same as the 2020 data.

Ngā toi Māori

Most people are interested in Ngā toi Māori: 3.7 million people in total terms.
2.4 million are in the current market having engaged in the past three years. There is a stable engaged market, therefore, market development efforts should focus on excitation. As a sub-segment level focus, around one-third of the market would consider engaging, but haven't previously, suggesting raising awareness is needed.



Setting the high to Māori market
The high to Māori market is defined as anyone in the Māori market who has not engaged with Māori arts or culture in the past three years. This includes anyone who has not engaged with Māori arts or culture in the past three years.

Engaging the high to Māori market
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The current market for Ngā toi Māori is highly diverse
The current market for Ngā toi Māori is highly diverse, with a wide range of activities and interests. The market is growing, with more people engaging with Māori arts and culture. The market is also becoming more diverse, with more people engaging with Māori arts and culture from different backgrounds and ages.

Positive word-of-mouth remains a key source

A previous recommendation remains an important one for the market to have about what arts and cultural events are on, second only to Facebook. Being able to share a recommendation as a way to find out about events (94%), and for 94% the most influential source.

Commonly newspapers a key source for South Island residents...
After Facebook and personal recommendations, a commonly newspaper was the next most common source of information for arts and cultural events, cited by over one-quarter of the market.

...and the over 65s
But of the three aged 65+ cited a commonly newspaper as being their influential source, it was the most common source of information for arts and cultural events, cited by over one-quarter of the market. This is the most influential source. On the other hand, the over 65s are the one group for whom Facebook was the most influential source (21%, compared to 10% overall).

Consulted a commonly newspaper to find out about arts, cultural or heritage events in the past 12 months



Online listings are influential
Just over 1% is considered an online listing site (10%), which is one of the most influential sources (2%). Online listings are more commonly used in Auckland and Wellington than in other regions, and are a key information source for those in Auckland and Wellington. This is the most influential source (21%, compared to 10% overall).

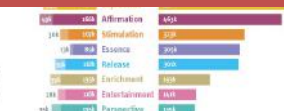
<https://www.creativenz.govt.nz/audience-atlas-2020>

-6%
decrease in estimated total spent by the market in 2020 compared to 2017

Spends are spending less across more activities
The number of people spending has increased and those who do spend are spending less and spreading it across a wider range of activities (on page 28). The lower average spend per person in 2020 means that, after adjusting for inflation, total spend is 6% down from three years ago.

Less active segments are likely to have lagged
Meanwhile, the proportion of children, teenagers and young adults who have lagged in their engagement, is significantly larger than average. These less active segments may be harder to attract and a better strategy might be to target larger segments (e.g., Affluents, 34%, 56% and 10% and over 65s 19%).

While the market is primarily seeking Social reward and gain from their engagement with the arts, it is also seeking intellectual, emotional or spiritual return on investment for their time and money – an extension on a purely social encounter.



The Gisborne (21%) and Wellington (15%) regions have the highest proportion of residents in the current market for Māori – significantly above the market average (10%).

Proportionally, Marlborough (38%) and Canterbury (30%) regions are most likely to have lagged in engagement with Ngā toi Māori, significantly higher than average (16%).

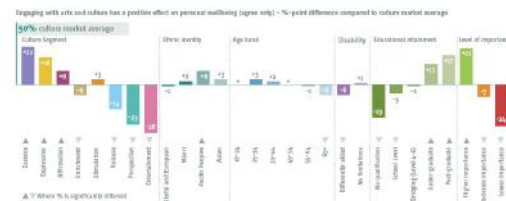
The proportion of residents who would consider engaging with Ngā toi Māori but haven't previously (historical market) is relatively low across all regions. Proportionally, the size of the potential market, in all regions, is broadly comparable to the culture market norm (2%).

Social the gateway to deeper reward

While the market is primarily seeking Social reward and gain from their engagement with the arts, it is 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 'hanging things' being distinct from one another – acting as a catalyst for connection between people and an entry point for deeper engagement.



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

The chart above looks at the two who agree that 'engaging with arts and culture has a positive effect on wellbeing' and have this effect in the culture market across age by age group.

disagree that agree with the wellbeing statement but were less likely than average to agree

The 'higher importance' group
The 'higher importance' group of people who agree that 'engaging with arts and culture has a positive effect on wellbeing' has a greater effect on wellbeing.

Those with the least experience of disability were significantly less likely to agree

There is a strong correlation between where someone feels their social, intellectual and emotional needs are met and their level of agreement.

Factors such as age or ethnicity and household income (not shown above) has a more muted impact

Those who agree with the wellbeing statement but were less likely than average to agree
The 'higher importance' group of people who agree that 'engaging with arts and culture has a positive effect on wellbeing' has a greater effect on wellbeing.

Physical barriers twice as common as cognitive
Living more closely at those conditions on having a lived experience of disability, physical barriers (18% of the culture market) are twice as common as those identifying cognitive barriers (10%). Proportionally, 1% have at least one impairment in both categories.

Some correlation with age

The Stan2 Disability Survey 2021 revealed that the number of people with a lived experience of disability that lived consumed by previous studies. This finding was due, in part, to an aging population. People in older age groups are more likely to be impacted compared to younger adults and children, and as societal attitudes shift, people are more willing to report limitations.

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Questions about today's Zui?

Contact: research@creativenz.govt.nz

Upcoming Audience Atlas Aotearoa events:

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



Thank you

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