



Audience Atlas Aotearoa 2020 – Pasifika audiences and the market for Pacific arts

March 2022

▶ morris
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‘Tautai, Tā Ina o le Tatau, Photography by: Isoa Kavakimotu, courtesy of Tautai Contemporary Pacific Arts Trust’

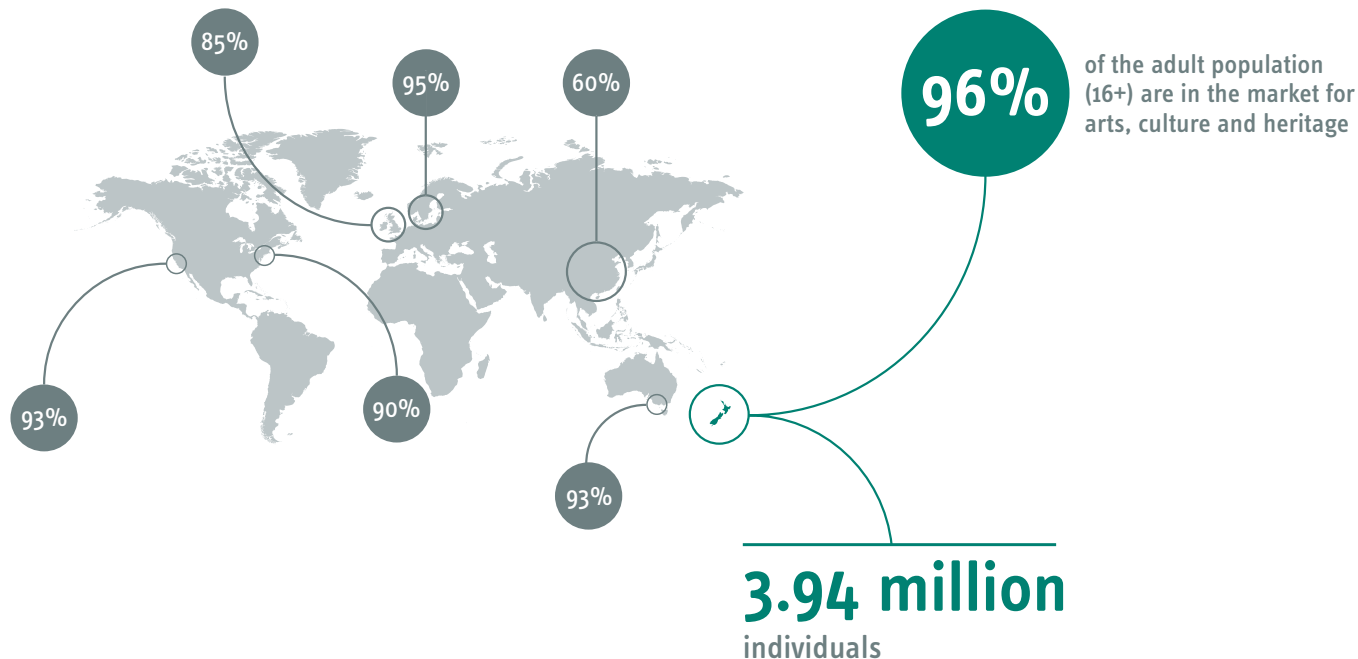


The impact of the Covid pandemic

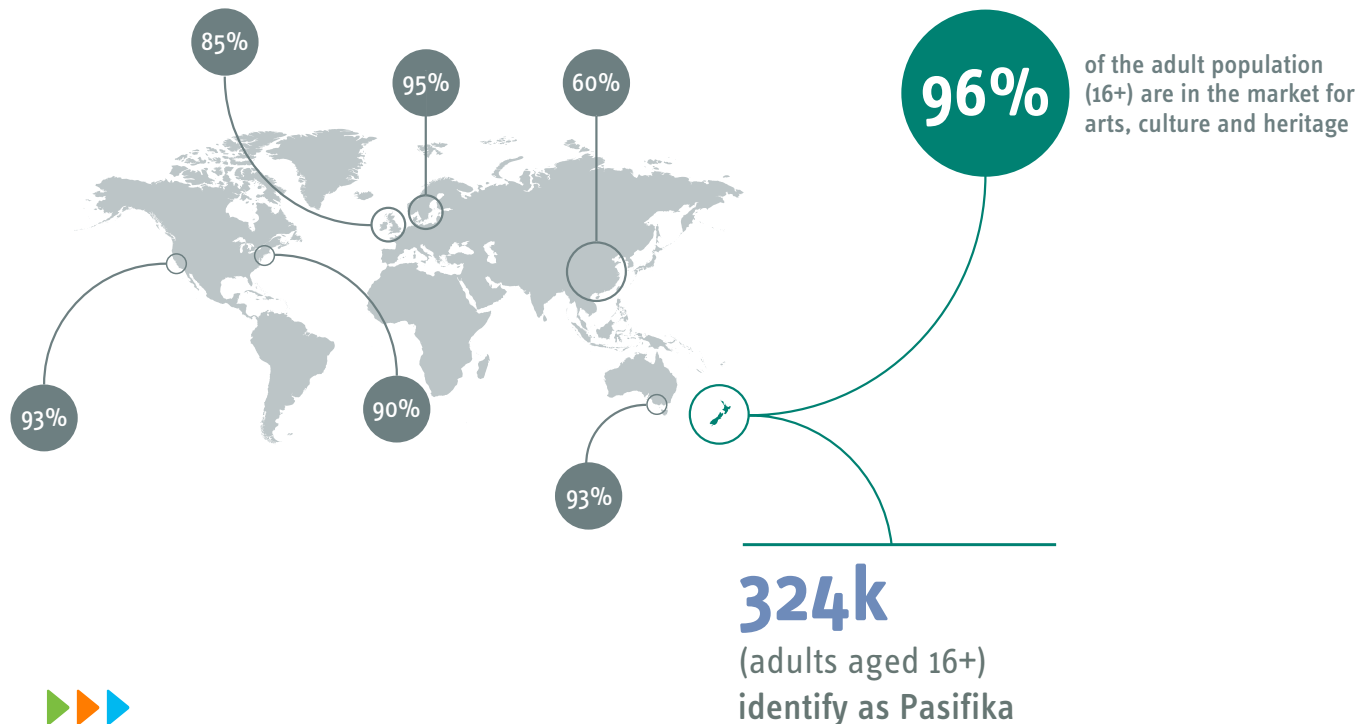
- Impact on organisations and individual practitioners
- The role of government, funders and philanthropists
- Organisations with deep audience roots
- Impact on audiences



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



What makes Audience Atlas unique?

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

Across 12 core artforms

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



Segment yourself →

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10%: pursuit of
self-actualisation



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20%: 'people
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12%: say they're too busy



9%: looking for fun

Pasifika audiences

3 in 10 Pasifika audiences are Expression

		Culture market	Pasifika
Essence	'in pursuit of self-actualisation'	10%	▼ 6%
Expression	'people people'	20%	▲ 30%
Affirmation	'do the right thing'	18%	16%
Enrichment	'through the lens of the past'	10%	▼ 7%
Stimulation	'all about the big idea'	12%	13%
Release	'say they're too busy'	12%	▲ 17%
Perspective	'happy in their own bubble'	9%	▼ 3%
Entertainment	'looking for fun'	9%	▼ 5%

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

Social

Top motivations

- Spending time with whānau and friends
- Expanding their knowledge and
- Collecting new experiences
- See new buildings or places
- Something out of the ordinary

Intellectual



Pasifika audiences are more likely to be seeking identity development

Where motivations differ significantly from average

Spiritual

- Stimulation for their imagination
- Better define their cultural or personal identity
- Get food for the soul

Emotional

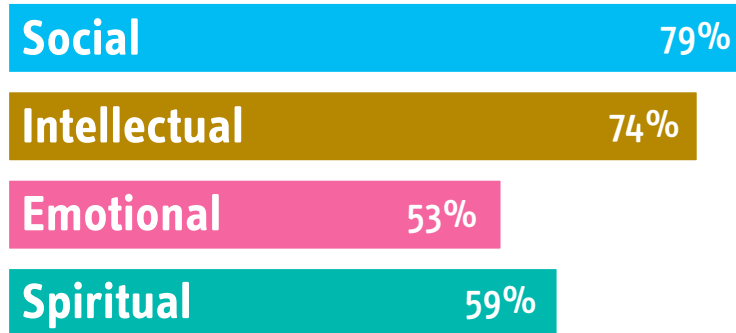
- Experience a deep sense of awe and wonder
- Be part of a communal shared experience
- Deep feeling of personal connection



Social motivations are the gateway to a deeper reward

All motivations to engage with arts and culture

Pasifika in the culture market



Main motivation to engage with arts and culture

Pasifika in the culture market



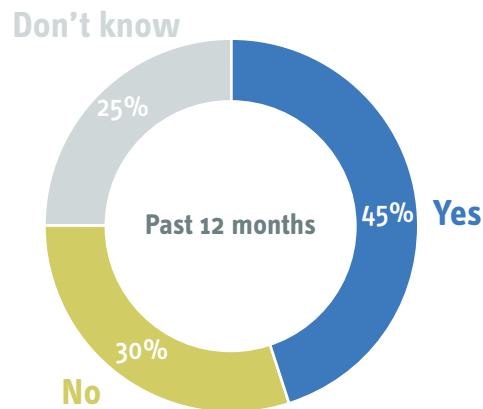
Culture market average



Barriers to arts engagement for Pasifika audiences

– 45% 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?

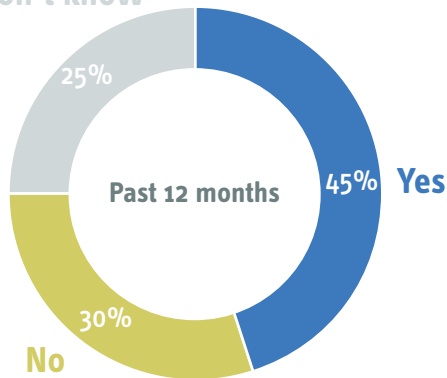


Barriers to arts engagement for Pasifika audiences

– 45% 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

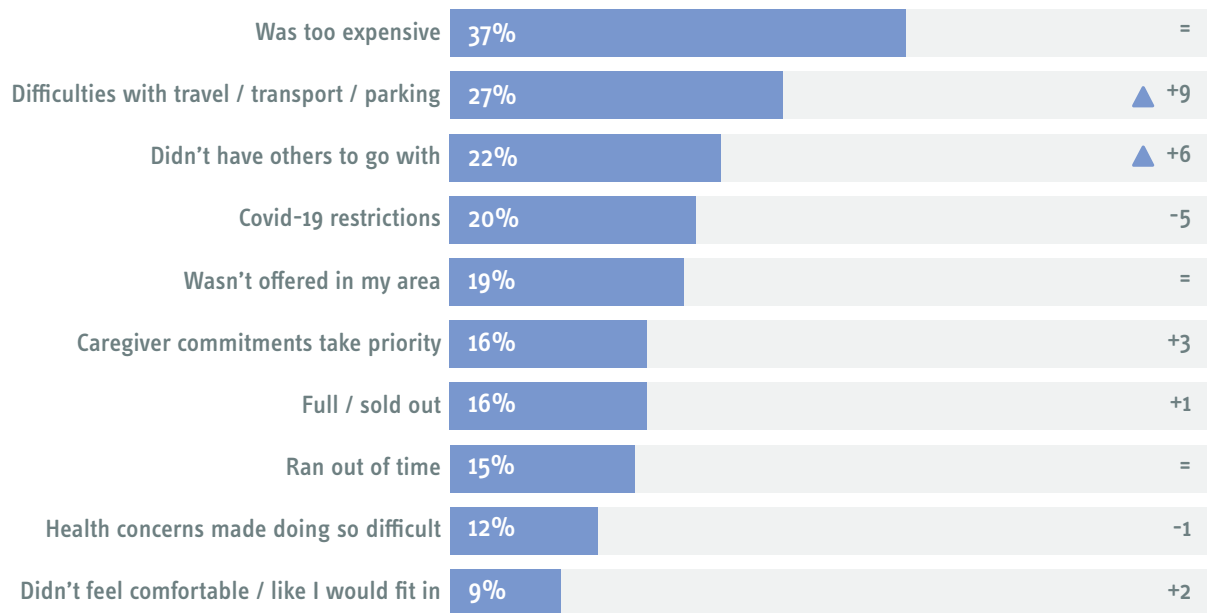


45% / 147k

of Pasifika 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

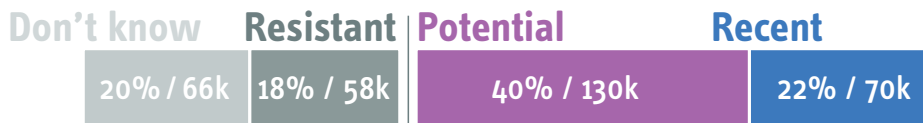


▼▲ % for Pasifika audiences is significantly different from the culture market average.

Sizable number of Pasifika audiences would consider engaging with online arts content in the future

Pasifika audiences...

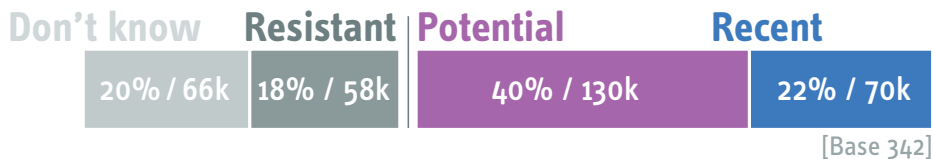
Engaged with arts and culture online in past 12 months – % and real figure estimates



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

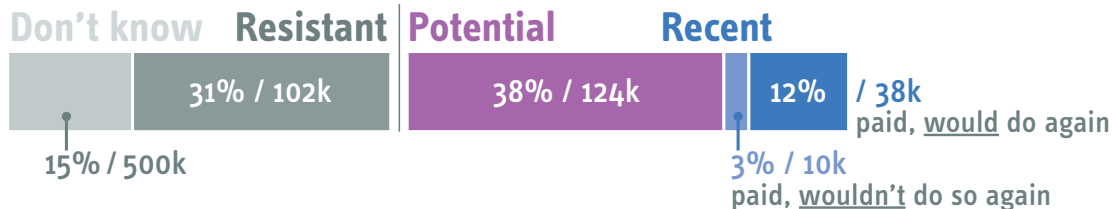
Pasifika audiences...

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



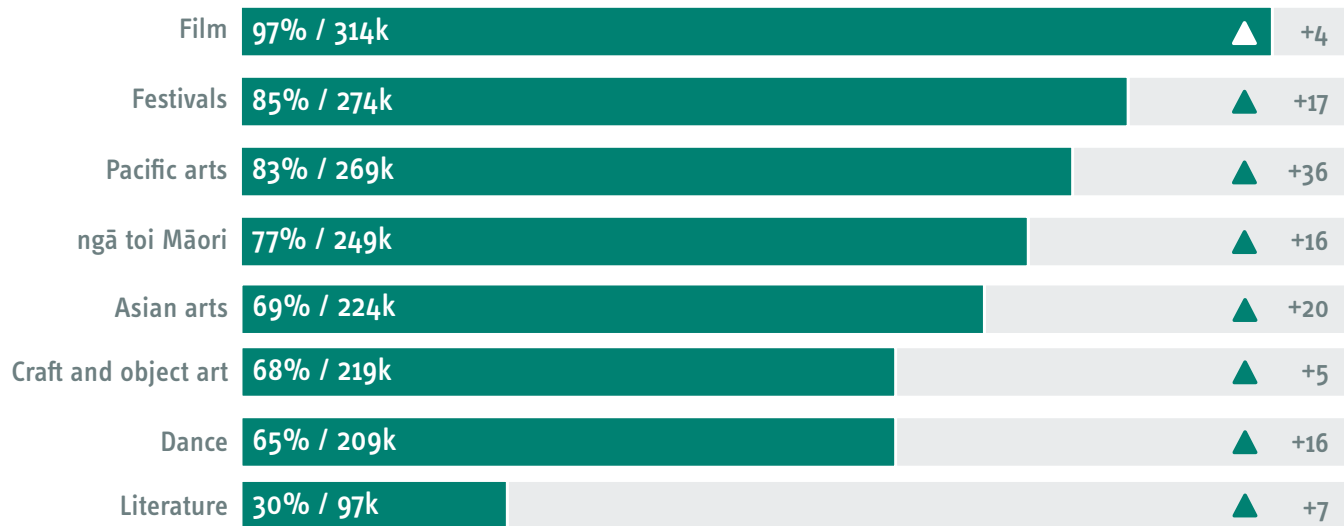
Paid or donated money to access arts & cultural content online in past 12 months

5



Pasifika audiences are more engaged in 8 of the 12 core artforms

Current artform markets – % and real figure estimates



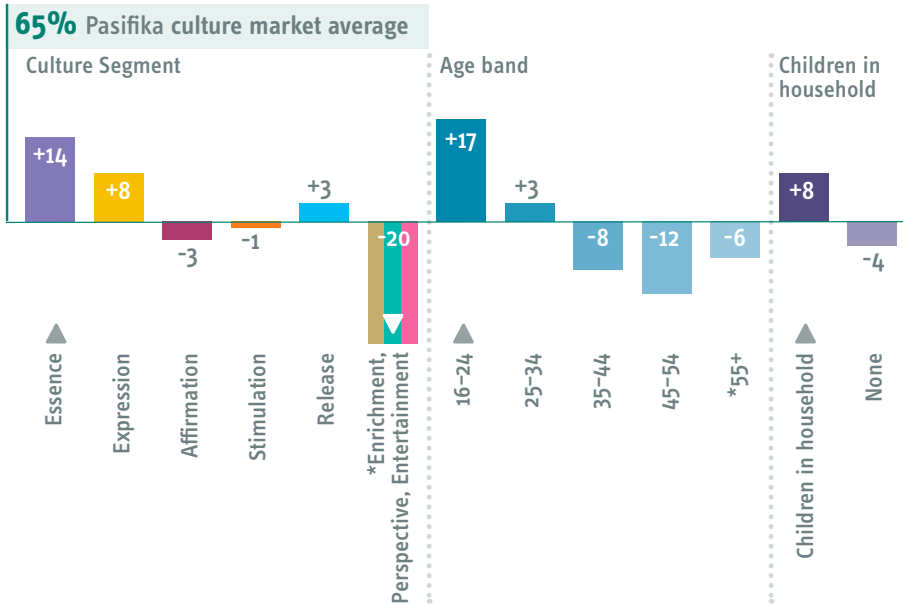
Top artforms Pasifika audiences have engaged with in the past three years

Current artform markets – % and real figure estimates



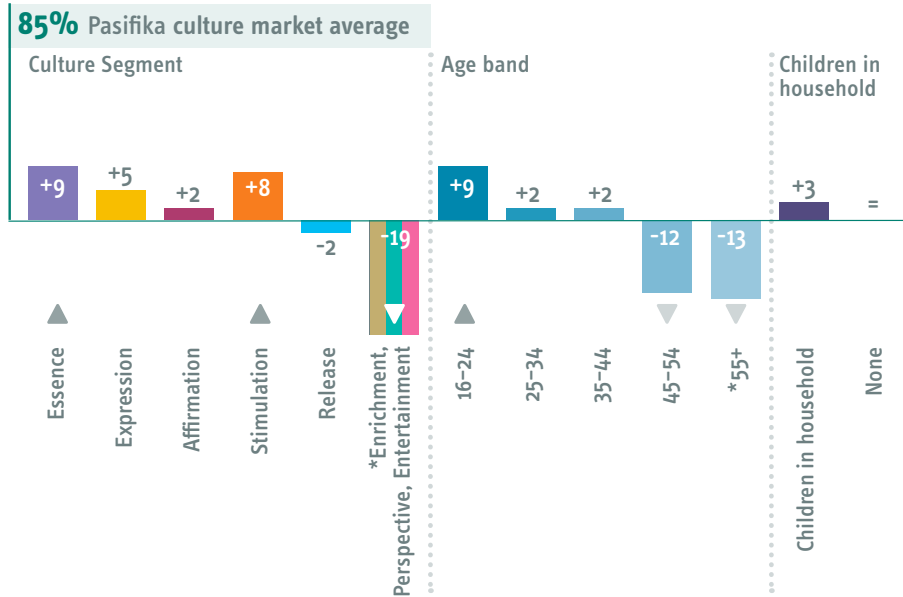
Younger Pasifika audiences driving higher engagement

Pasifika audiences in the **current** market for **dance**



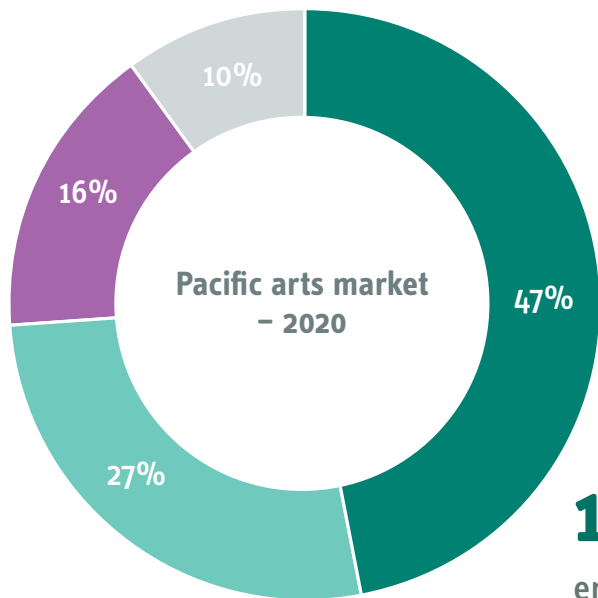
Younger Pasifika audiences driving higher engagement

...in the **current** market for **festivals**



The culture market's engagement with Pacific arts

3.6 million New Zealanders are open to Pacific arts

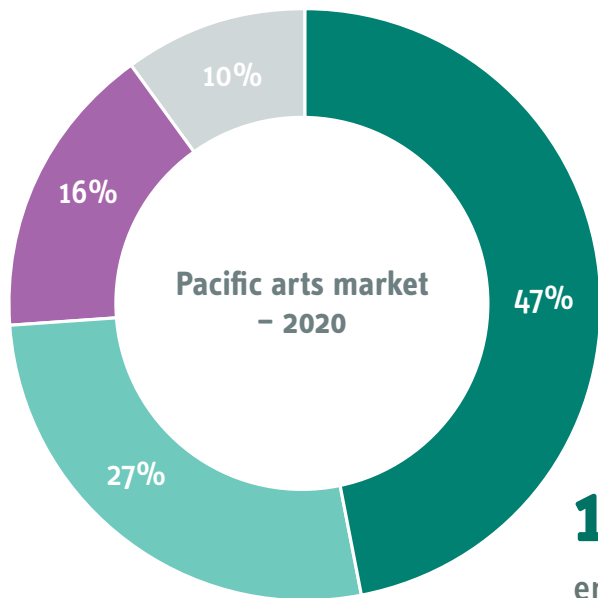


1.9 million

engaged in the past three
years (current market)



3.6 million New Zealanders are open to Pacific arts



1 million

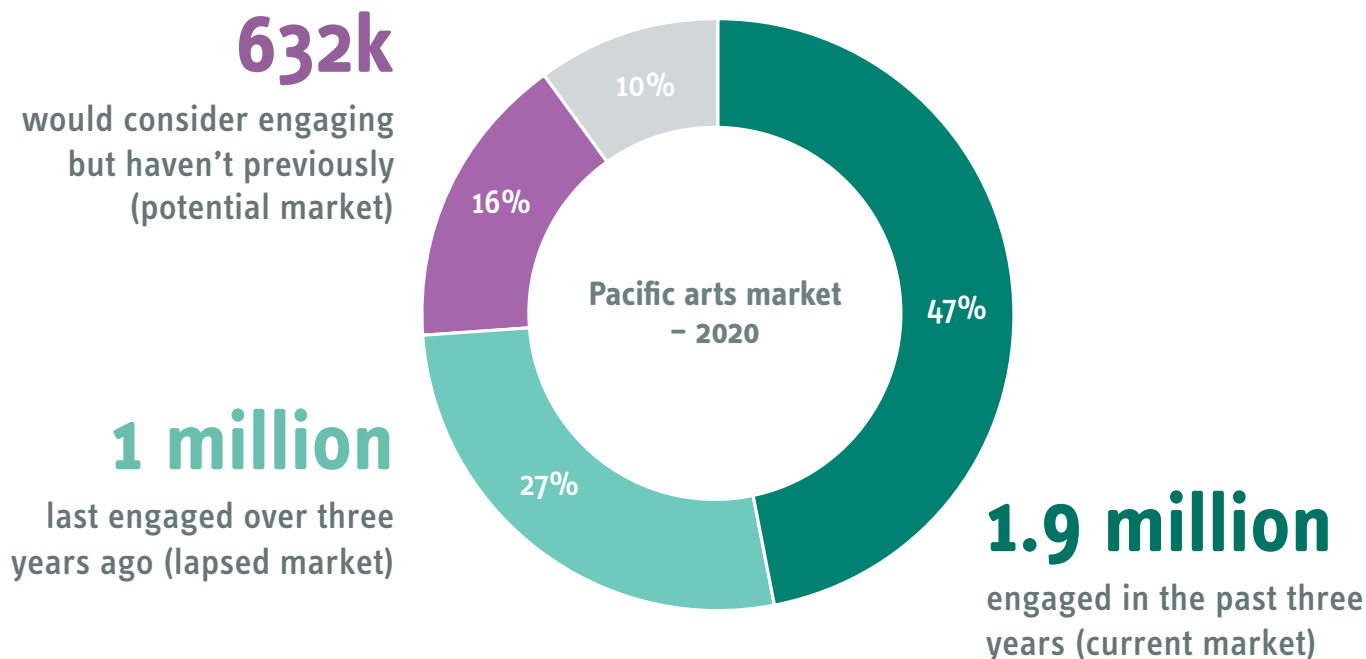
last engaged over three
years ago (lapsed market)

1.9 million

engaged in the past three
years (current market)



3.6 million New Zealanders are open to Pacific arts



Who's in the current market for Pacific arts?

47% or an estimated 1.9 million adults

The market is younger than average

40% aged under 35 (vs 35%)

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It's more diverse than average

69% identify as New Zealand European or another European group (vs 79%) a larger proportion of the market than average identifies as Māori (**19%** vs 15%) and Pasifika (**14%** vs 8%), Asian (**16%** vs 15%)

37% have tamariki (vs 33%) and **14%** the lived experience of disability (vs 13%)

Who's in the lapsed market for Pacific arts?

27% or an estimated 1 million adults

The market is older than average

55% aged 55+ (vs 32%)



Who's in the lapsed market for Pacific arts?

27% or an estimated 1 million adults

The market is older than average

55% aged 55+ (vs 32%)

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 Pacific arts?

16% or an estimated 632k adults

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

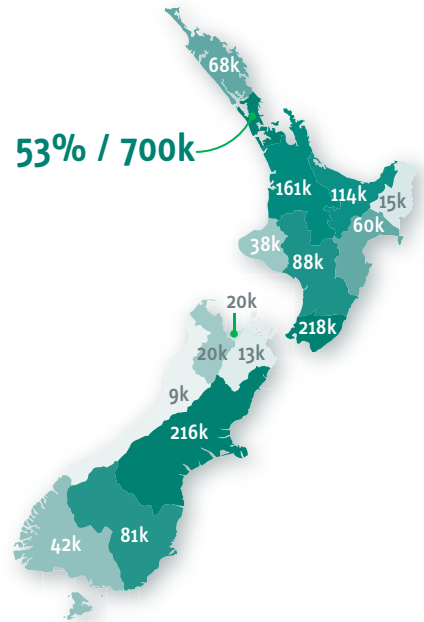
The potential market is older than average

27% aged under 65+ (vs 27%) and therefore, more likely to be retired

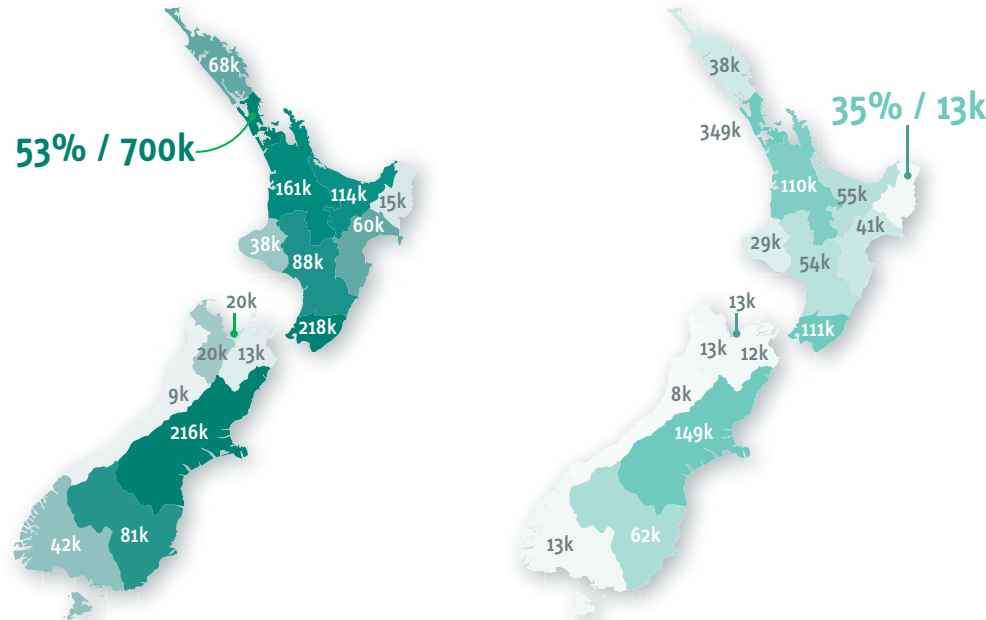
20% identify as Asian, significantly more prominent than average (15%)



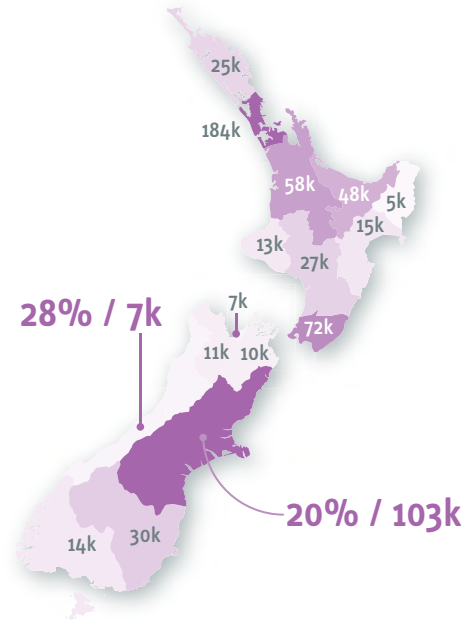
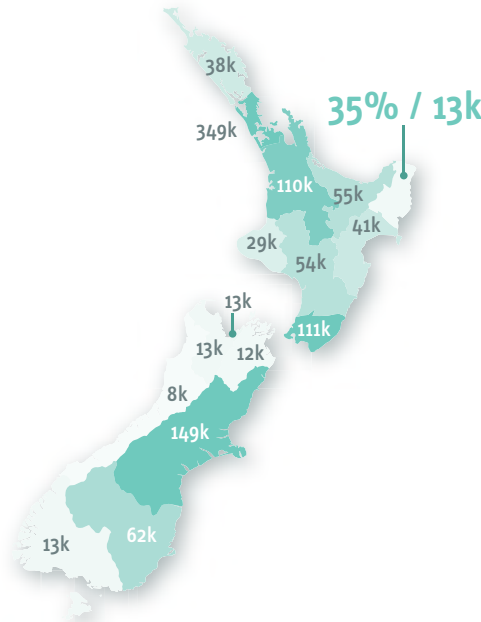
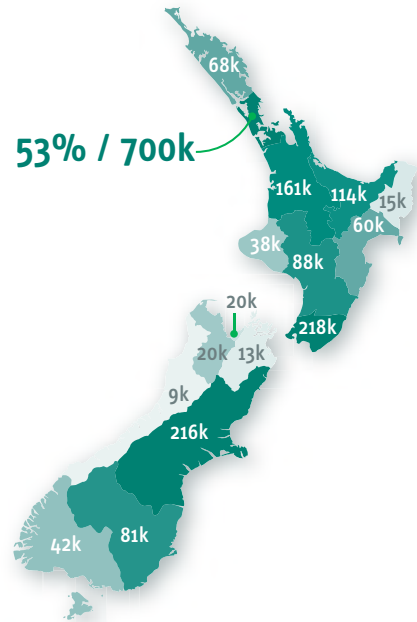
A larger proportion of Auckland residents have engaged with Pacific arts in past three years



Proportionally, size of the lapsed market is evenly spread across the country

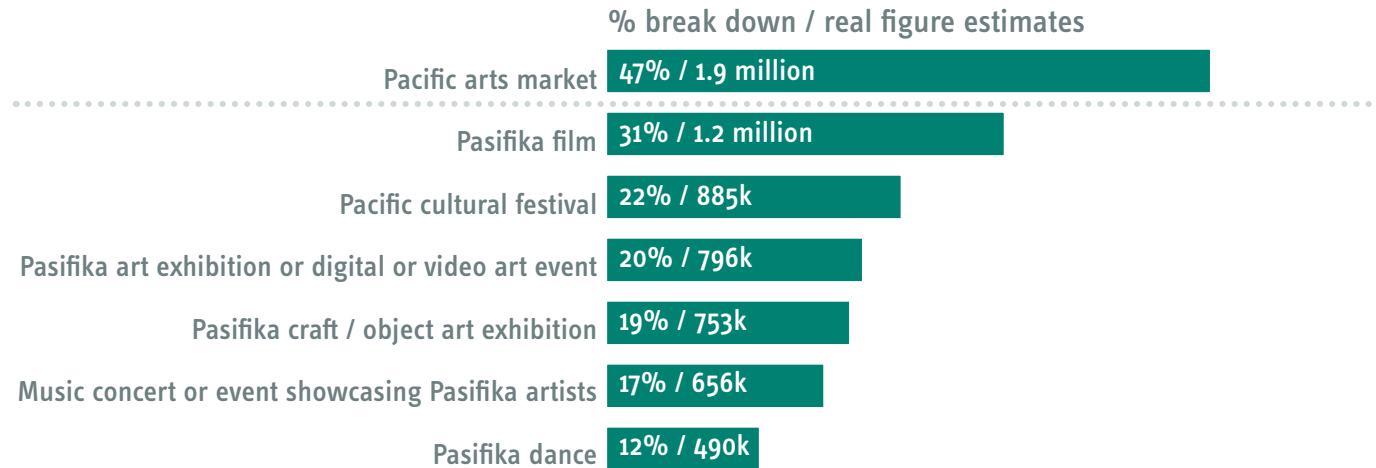


Proportionally, West Coast and Canterbury residents are more likely to be in the potential market



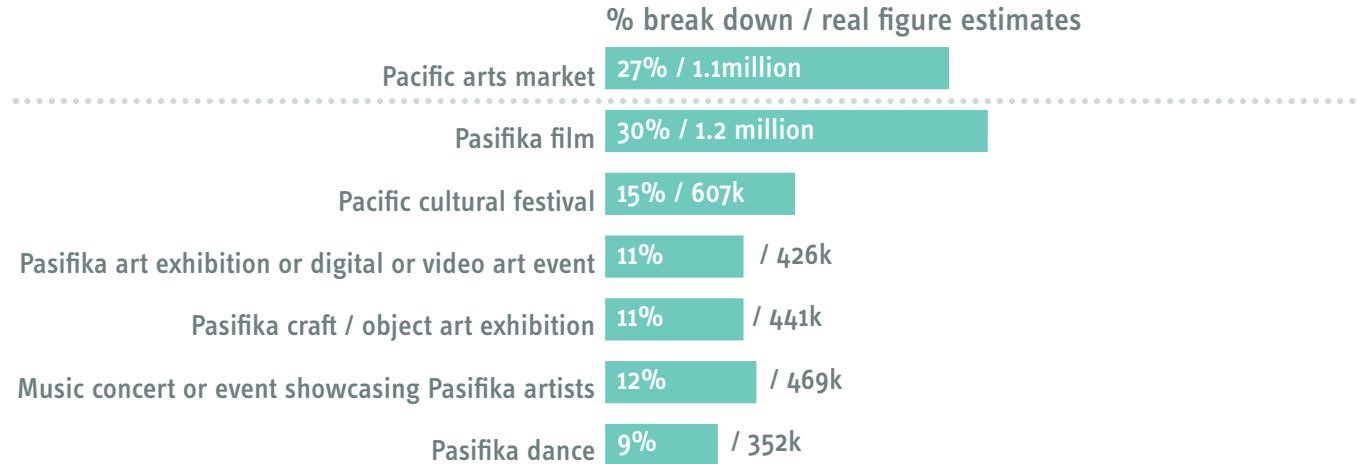
An estimated 885k have engaged with a Pacific cultural festival in the past three years

Pacific arts **current** market penetration – including artforms within Pacific arts



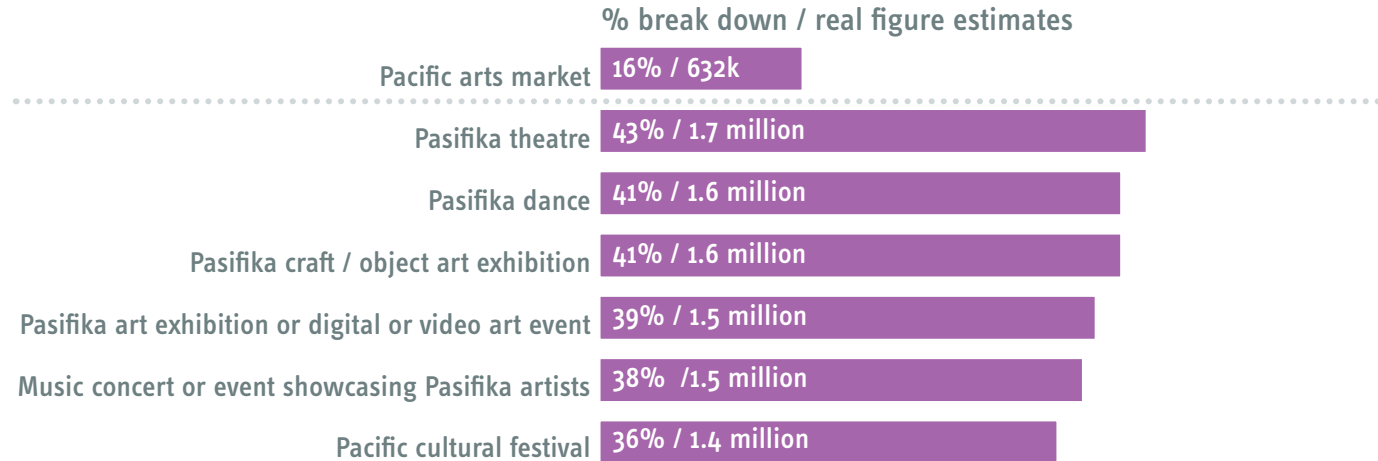
An estimated 607k last engaged with a Pacific cultural festival three or more years ago

Pacific arts **lapsed** market penetration – including top artforms within Pacific arts



Sizeable potential for artforms within Pacific arts

Pacific arts **potential** market penetration – including top artforms within Pacific arts



Questions about today's Zono?

Contact: research@creativenz.govt.nz

Reports are accessible here: www.creativenz.govt.nz/audience-atlas-2020



Changing landscape

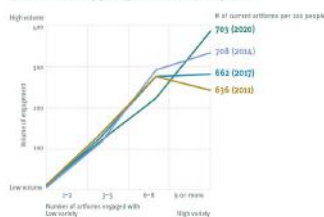
More people engaging more widely

In addition to growth in the size of the culture market engaged on page 16, there is a growing pool of people attending a wider range of activities than was the case in previous studies. The adjusted chart compares the four studies by volume (adjusted 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 (culture 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.

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

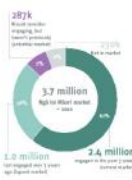


Note: In order to make a fair comparison the 2010 data has been adjusted to reflect the same population as the 2020 data.

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 re-engagement. As a sub-segment level focus, around one-third of the market would consider engaging, but haven't previously, suggesting raising awareness is needed.



This current market for Ngā toi Māori is highly diverse, people have the culture market every day. Typically, people are more diverse, engaged in the market.

Most likely to be engaged in the market are: Māori (38%), Pākehā (31%), Pasifika (18%), and Asian (13%). Most likely to be engaged in the market are: Māori (38%), Pākehā (31%), Pasifika (18%), and Asian (13%). Most likely to be engaged in the market are: Māori (38%), Pākehā (31%), Pasifika (18%), and Asian (13%).

Positive word-of-mouth remains a key source

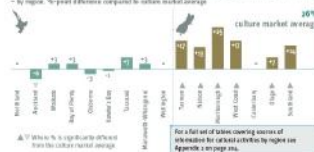
A personal recommendation remains an important way for the market to learn about what arts and cultural events are on, second only to Facebook. Being 10 to 20 years a recommendation as a way to find out about events (94%), and for 10% the most influential source.

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, consulted by over one-quarter of the market.

Including Canterbury residents of the South Island are significantly more likely to consult a commonly newspaper to find out about what's on. However, the pattern is different in the North Island. Residents of the Waikato region were as likely as anyone to consult this source (34%), compared to 28% overall.

Consulted a commonly newspaper to find out about arts, cultural or heritage events in the past 12 months - by region. % of total (Source compared to culture market average)



... and the over 65s

But it's those aged 65+ that a commonly newspaper is helping them informed about what arts and cultural events are on, and for 28% 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 (24%, compared to 18% overall).

Online listings are influential

Just over 1% is considered an online listing site (1%), but it is one of the most influential sources (24%). Online listings are more commonly used in Auckland and Wellington in other regions and are a key information source for those in Auckland who are the most influential source (24%, compared to 18% overall).

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

The culture gap between regions

-6% decrease in estimated total spent by the market in 2020 compared to 2010

(adjusted to reflect)

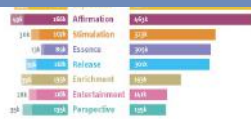
Spenders are spending less across more activities

The number of people spending has increased and those who do spend are spending less on the arts. This was a step down in the dollar value spenders spending on average engaged with arts and culture in their week.

period (per person on average). Therefore, there is a relative risk for number of people in the market spending compared to three years ago, but they are spending less and spending less across a wider range of activities (compared to page 24). The lower average amount spent in 2020 means that, after adjusting for inflation, total spent is 6% down from three years ago.

Less active segments are likely to have tapered

Meanwhile, the proportion of retirement, Pensioner and Retirement who have tapered 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 higher spenders in the Affluence (34%), Moderate (22%) and Over (18%) segments.

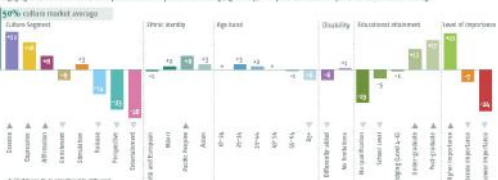


• The Gibeon (21%) and Wellington (15%) regions have the highest proportion of residents in the current market for Māori - significantly above the market average (10%).

• Proportionally, Marlborough (38%) and Canterbury (36%) regions are most likely to have tapered engagement with Ngā toi Māori, significantly higher than average (24%).

• 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%).

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



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

The chart shows beliefs of those who agree that 'engaging with arts and culture has a positive effect on wellbeing' and have this effect on the culture market norm across by subgroups.

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

• The 'higher importance' group of 10% (primarily people above the average) agree that 'engaging with culture has a positive effect on wellbeing'.

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

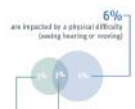
• There is a strong correlation between where someone (National) lived, education and levels of agreement.

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 'have things being distinct from one another' - acting as a catalyst for connection between people and an entry point for deeper engagement.



Physical barriers twice as common as cognitive

Living more closely at those conditions on having a lived experience of disability, physical difficulties (18% of those impacted by a cognitive issue (seeing, hearing or moving) and communicating, mixing with others or reaching) are more prevalent than cognitive difficulties (9%).

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 older adults, and as societal attitudes shift, people are more willing to report limitations.

Thank you

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