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

Audience Atlas Aotearoa 2020

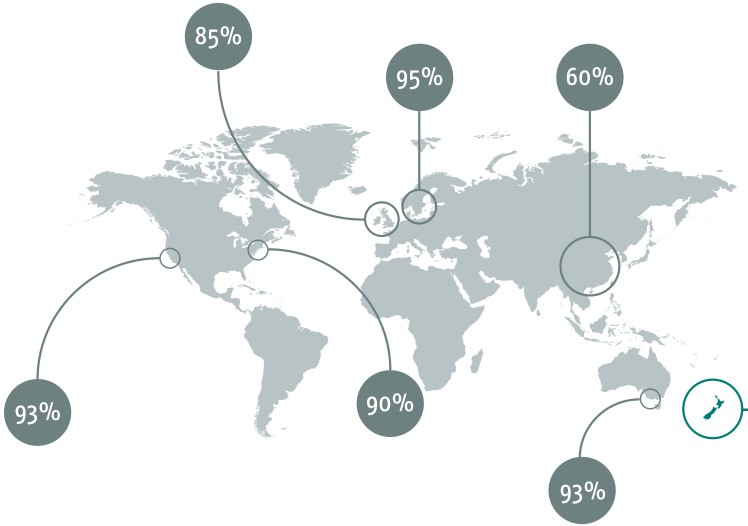
March 2022

morris hargreaves mcintyre

Audience Atlas

creative nz
ARTS COUNCIL OF NEW ZEALAND TOI AOTEAROA

Aotearoa New Zealand market for arts and culture



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

3.94 million individuals

Audience Atlas

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Arts Council of New Zealand Toi Aotearoa

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

Culture Segments

Segment yourself → mhminsight.com/segmentme

10%: pursuit of self-actualisation

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9%: happy in their own bubble

12%: say they're too busy

9%: looking for fun

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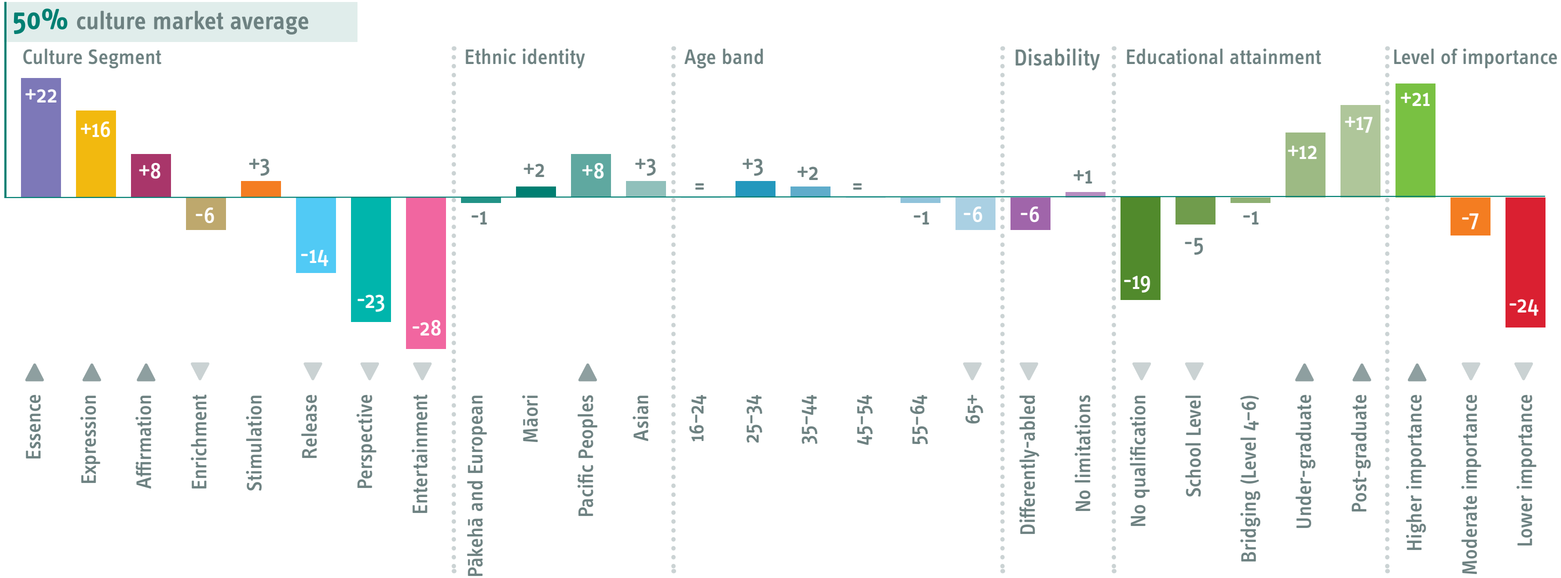
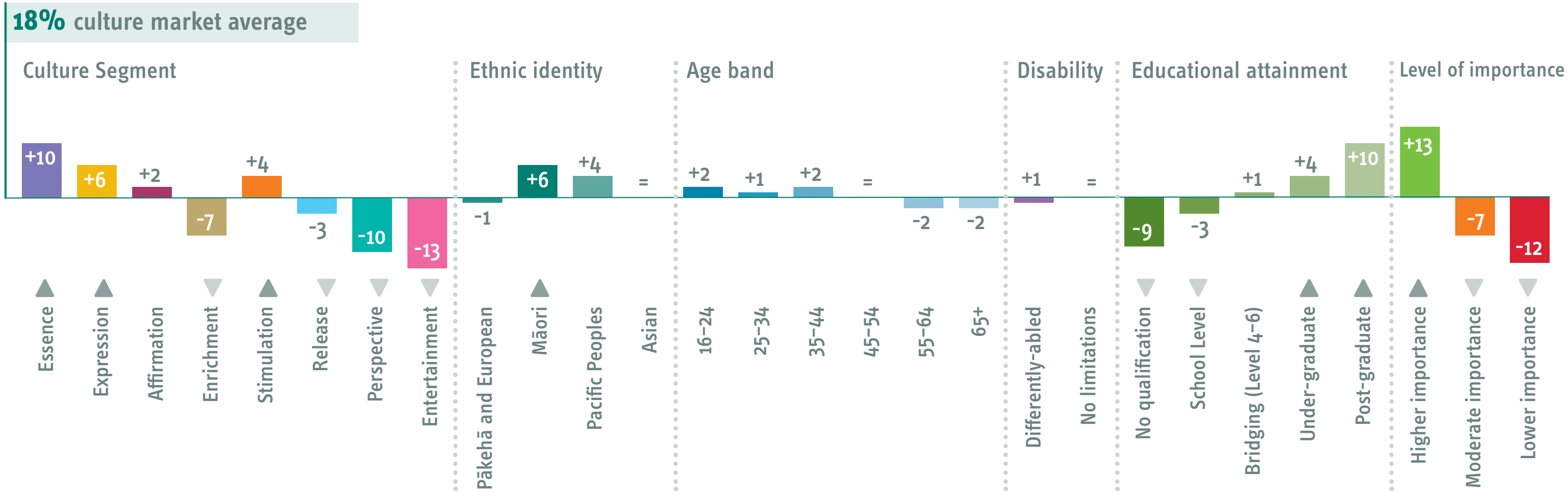
Culture Segments goes deeper than demographics

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



Culture Segments goes deeper than demographics

Engaged with arts and culture online in past 12-months – percentage-point difference compared to culture market average



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

Pandemic has had a slight impact on importance people place on arts

Importance of engaging with arts and culture

	Not at all	Not that	Neither	Somewhat	Very		
	<1%	1%	3%	6%	4%	More	14%
	10%	13%	27%	21%	6%	Unchanged	77%
	1%	1%	1%	4%	2%	Less	9%

Change in importance

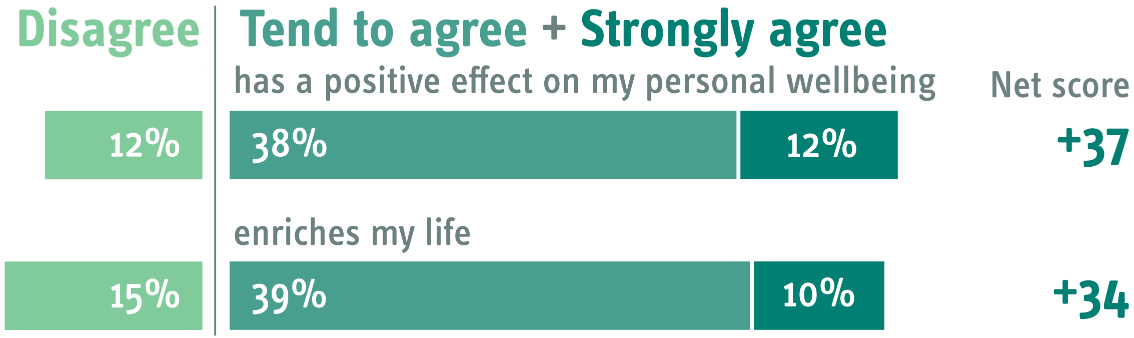
How important is engaging with art and culture to you now, compared to before Covid-19?

Importance of arts and culture pre-Covid

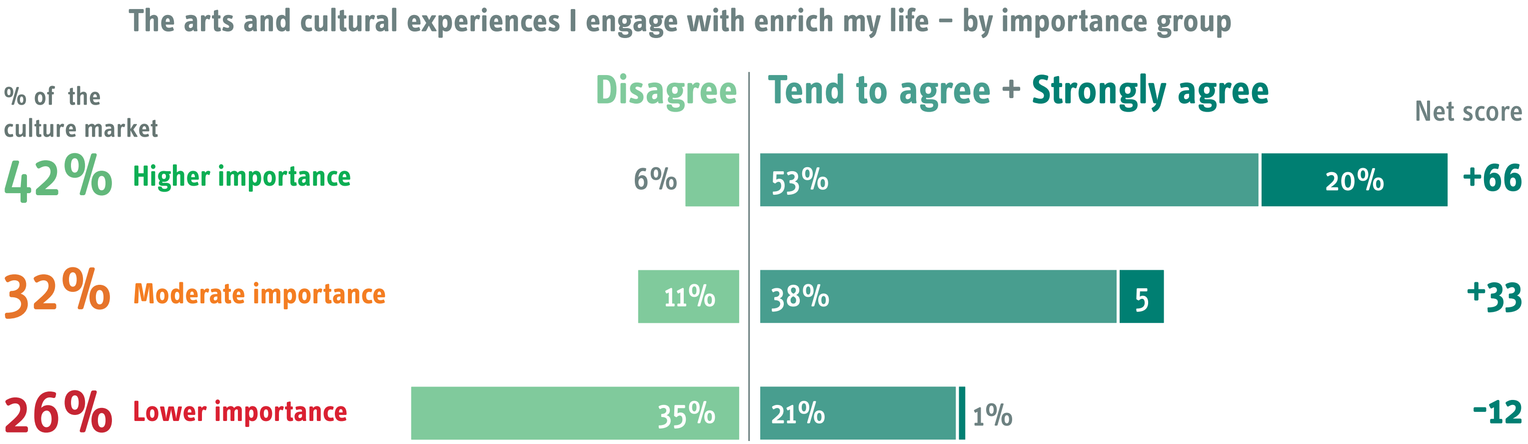
Before the Covid-19 lockdown restrictions, how important was engaging with art and culture to you?

Engaging with the arts positively impacts wellbeing...

Engaging with arts and culture...

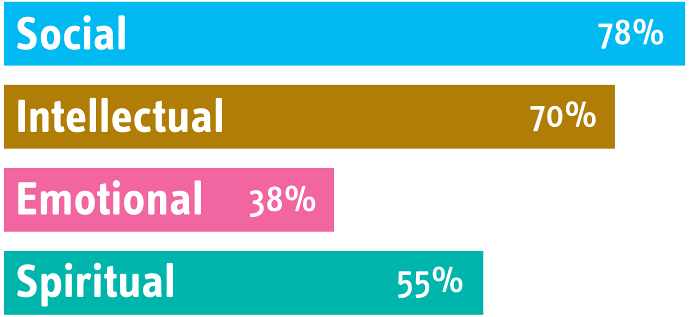


… but those who value it less are less likely to recognise benefits



Social experiences the gateway to deeper reward

Motivations to engage with art and culture – all



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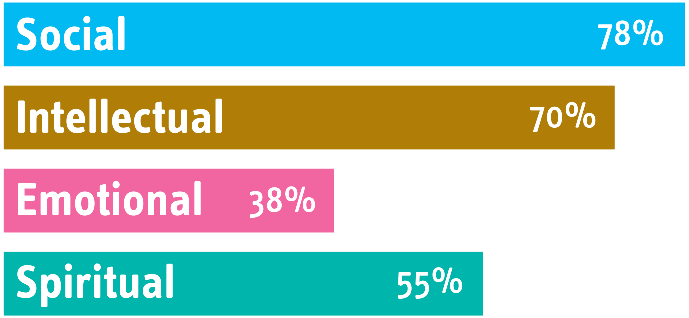
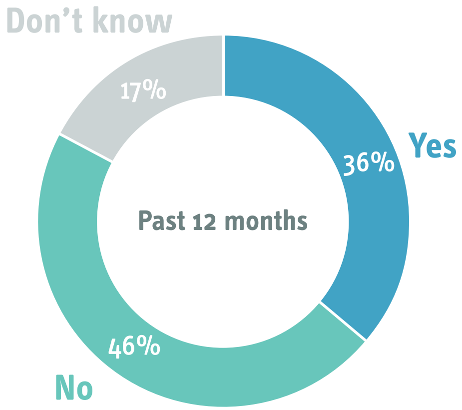


Motivations to engage with art and culture – main

Culture market average

Access pricing models needed to bridge gap

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



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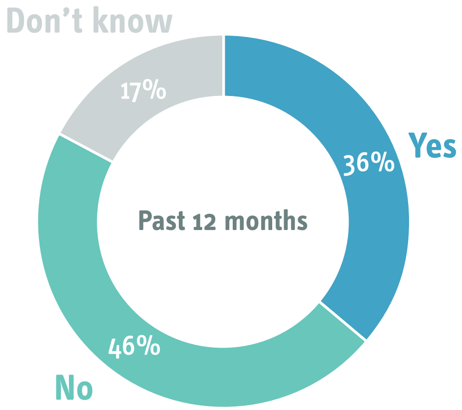
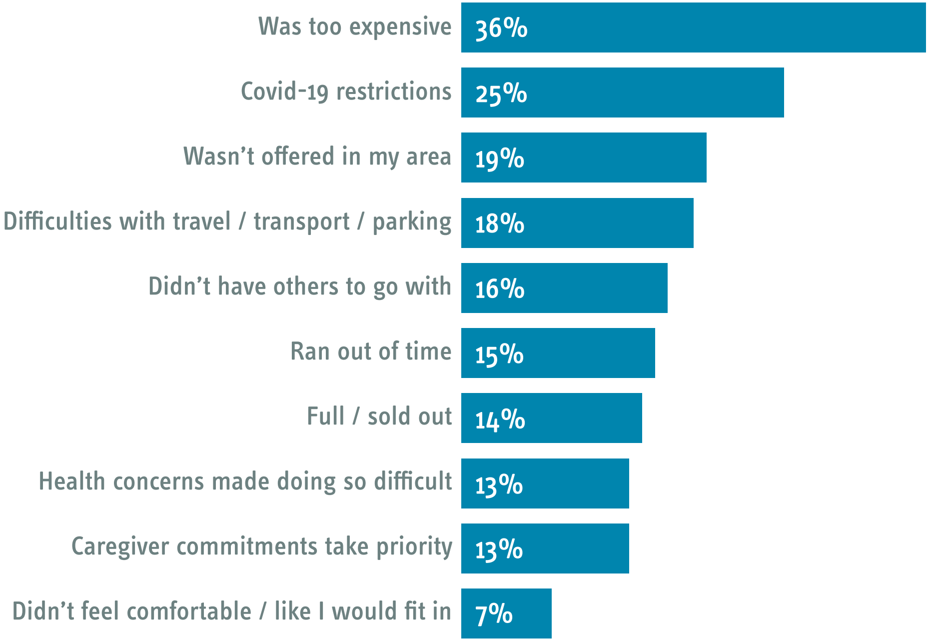
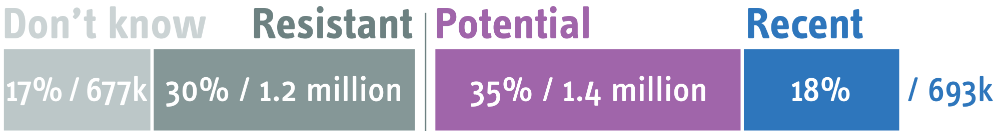




Fewer than 1 in 5 engaging with the arts online

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



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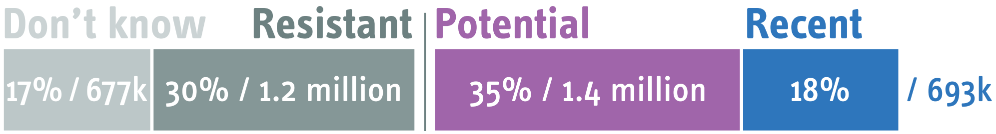
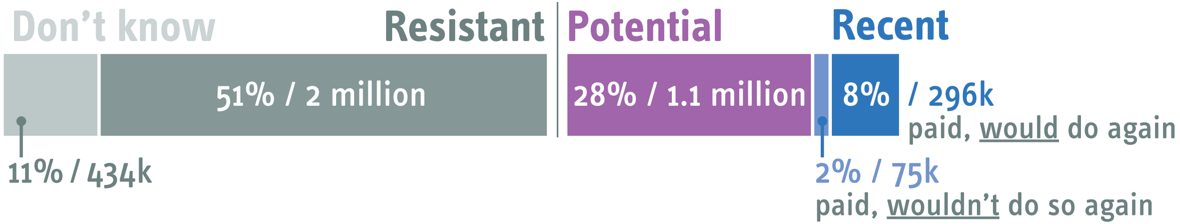


Paid or donated money to access arts & cultural content online in past 12 months – % and real figure estimates

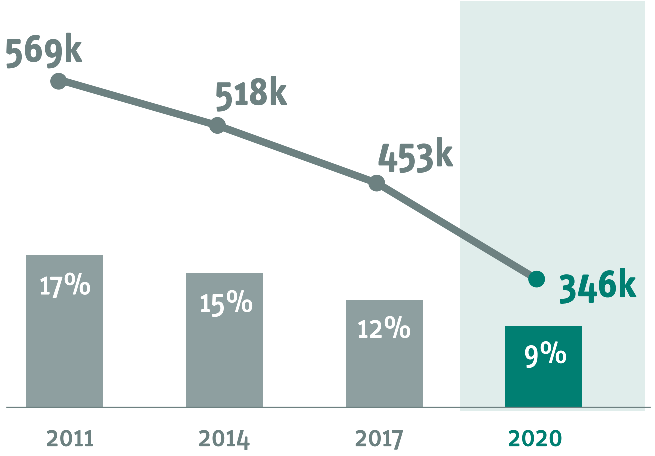


Digital engagement begs for digital strategy

Essence	Online engagement will only ever be an extra: a wrap-around enhancement.
Expression	Hold them closer. Curating this online community would build huge brand equity.
Affirmation	Being able to try before they hazard a visit could become a key part of their visit decisions.
Enrichment	The convenience of home viewing is very appealing but difficult to monetise in this price-conscious segment.
Stimulation	They've discovered new sources to feed their habit.
Release	Remote consumption suits them, as long as it's from trusted sources.
Perspective	Understanding their often minority specialisms is the key to engagement.
Entertainment	Seeking highlights – will only connect if our content gets on the populist radar.

Rates if membership and subscription continue to dip...

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



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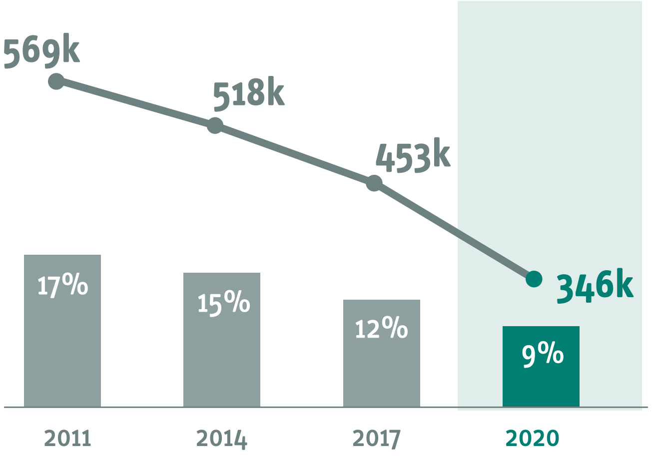


70% / an estimated 244k
are active member / subscribers and open to supporting in this way again

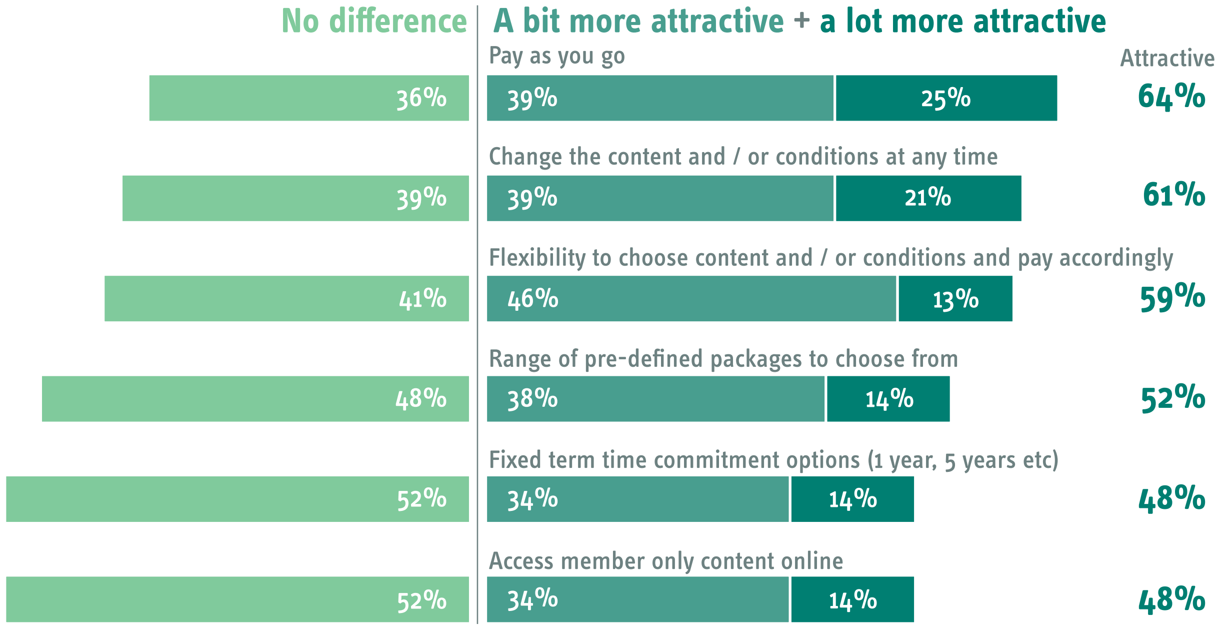
71% / an estimated 371k
are a lapsed member / subscriber and open to supporting in this way again

25% / an estimated 782k
have never-been-member / subscribers and are open to becoming one in the future

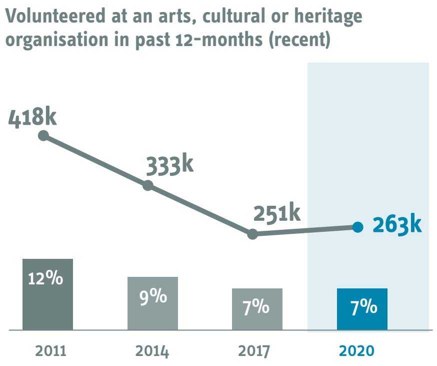
...although, still holds potential

New models of support are needed

Attractiveness of broad types of membership / subscriptions



Opportunity to develop and diversify volunteering



Number of people open to volunteering

1.4 million

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

Estimated capacity in the market

8.3 hours / month

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

Potential value to the sector

1.5 million

potential 8 hour working days on offer

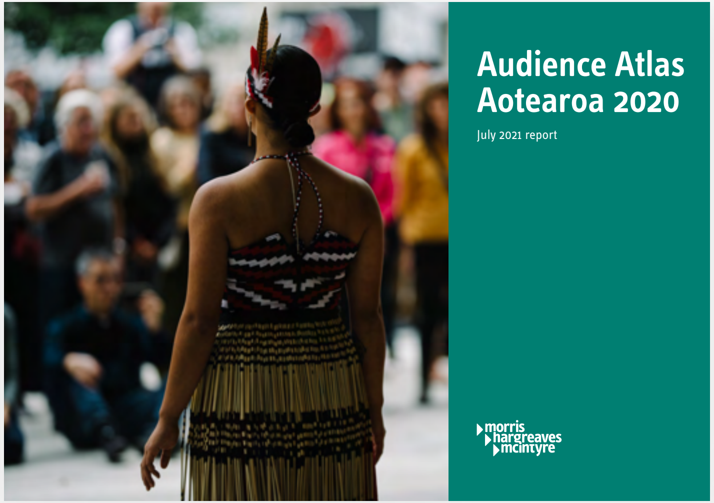
7k

full-time equivalent positions

$244 million

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

How organisations might use Audience Atlas data



Understanding your place in the market

For example a boutique theatre in Wellington

- Size of the current market as a real figure estimates

Understanding your place in the market

For example a boutique theatre in Wellington

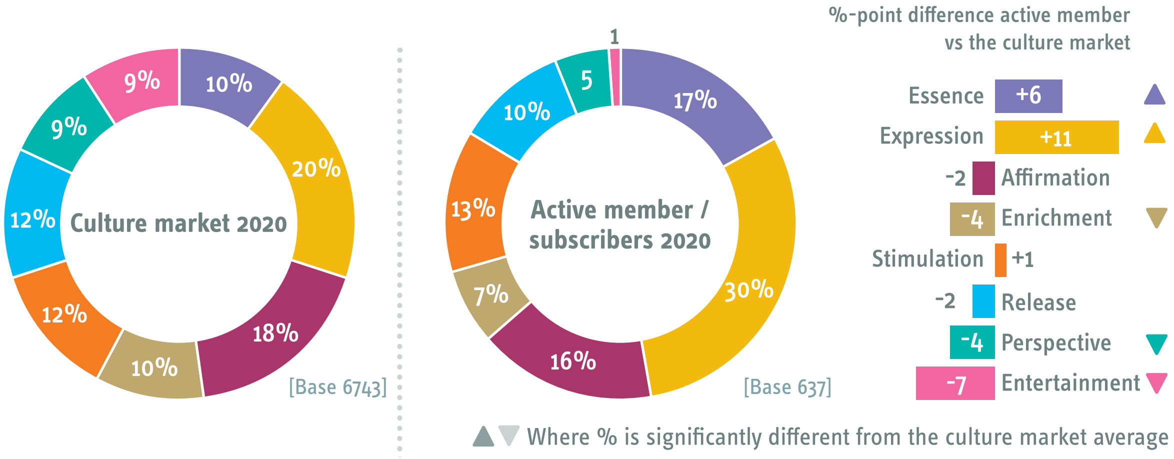
- Size of the current market as a real figure estimates
    - **2.5 million** nationally
    - **288k** regionally
    - **208k** current regional play and drama market
    - **35k** organisation's current market

Understanding your place in the market

For example a boutique theatre in Wellington

- Size of the current market as a real figure estimates
  - **2.5 million** nationally
  - **288k** regionally
  - **208k** current regional play and drama market
  - **35k** organisation’s current market
- How the Culture Segment profile for theatre, or play and drama might differ from the wider market

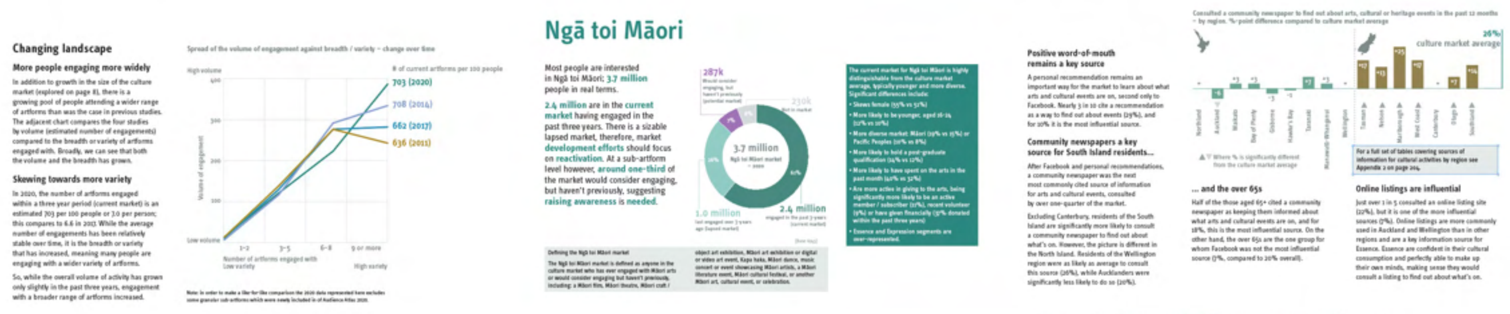
Refreshing membership and donations



Transactional vs common cause – membership

Shaping your offer

RED
LEAP
THEATRE



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

Upcoming Audience Atlas Aotearoa events:

Māori audiences focused Zui – Tuesday 15 March @9:30am NZST

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

Thank you

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