



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

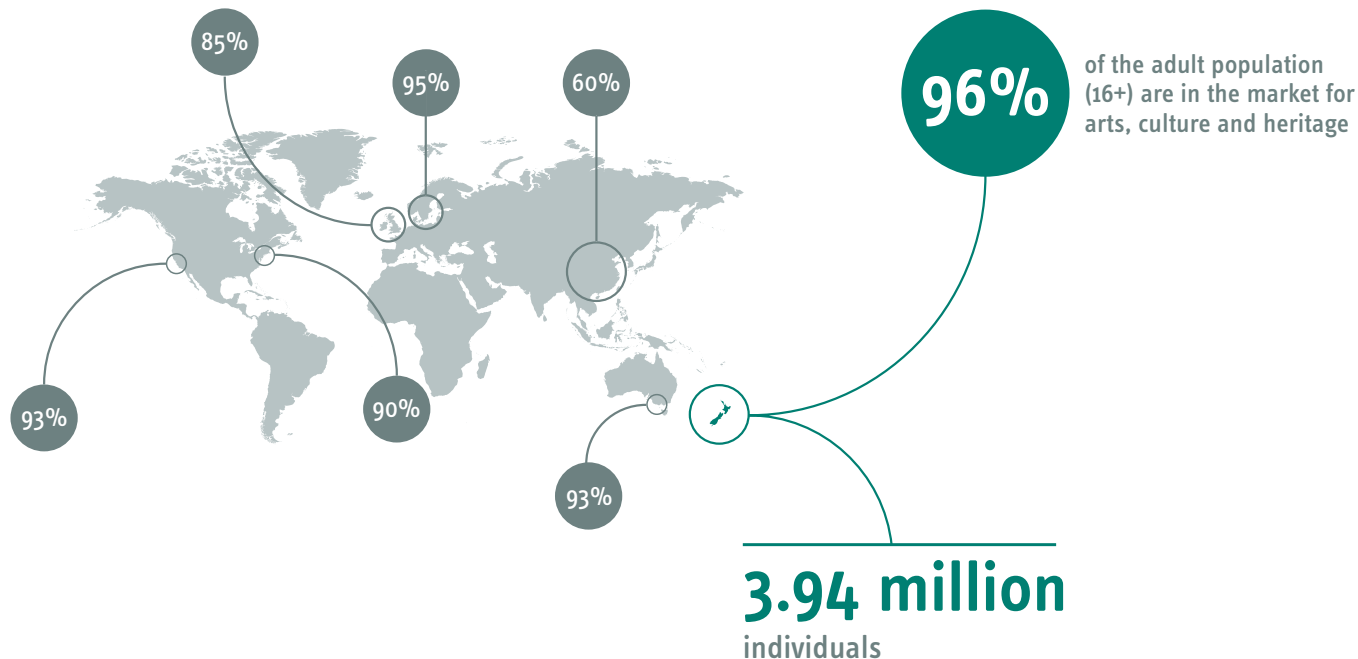
Audience Atlas Aotearoa 2020

March 2022

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



Aotearoa New Zealand market for arts and culture



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?

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Across 12 core artforms

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





Segment yourself



mhminsight.com/segmentme



10%: pursuit of
self-actualisation



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20%: 'people
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18%: do the right
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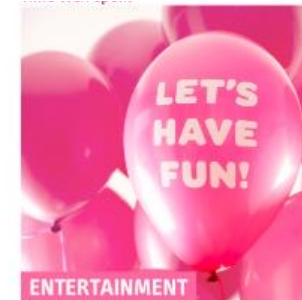
PERSPECTIVE

9%: happy in their own bubble



RELEASE

12%: say they're too busy



ENTERTAINMENT

9%: looking for fun

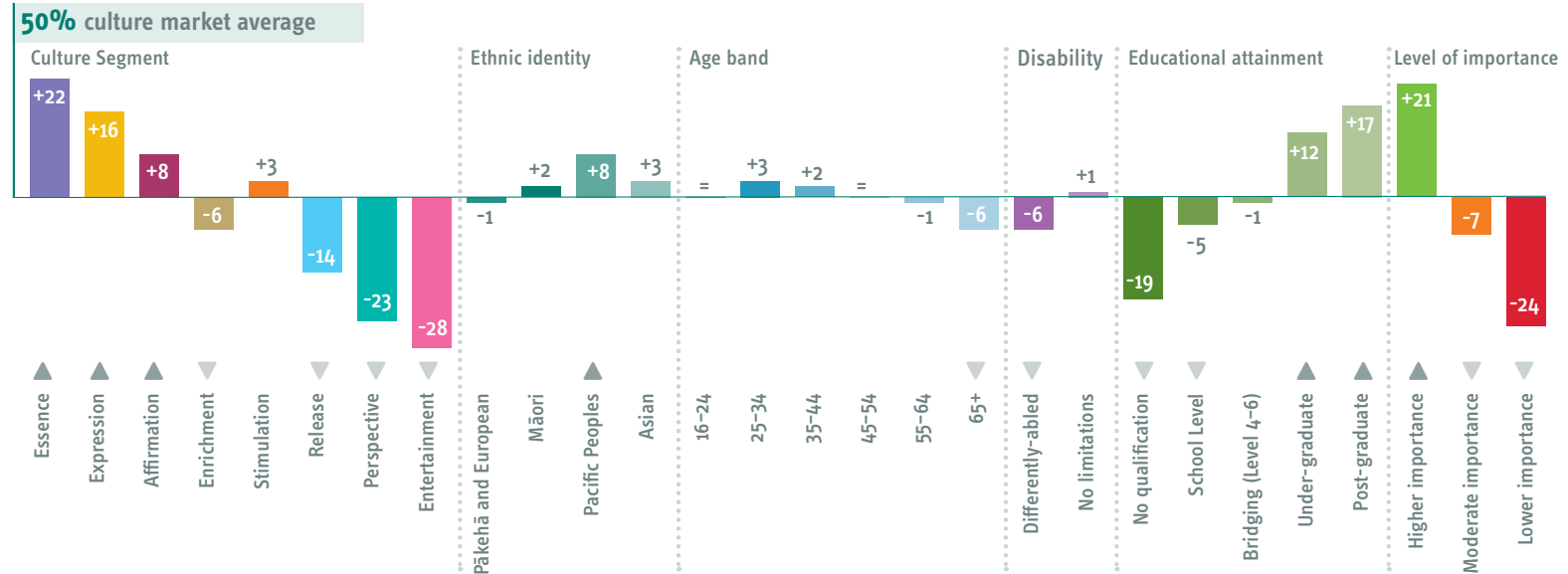
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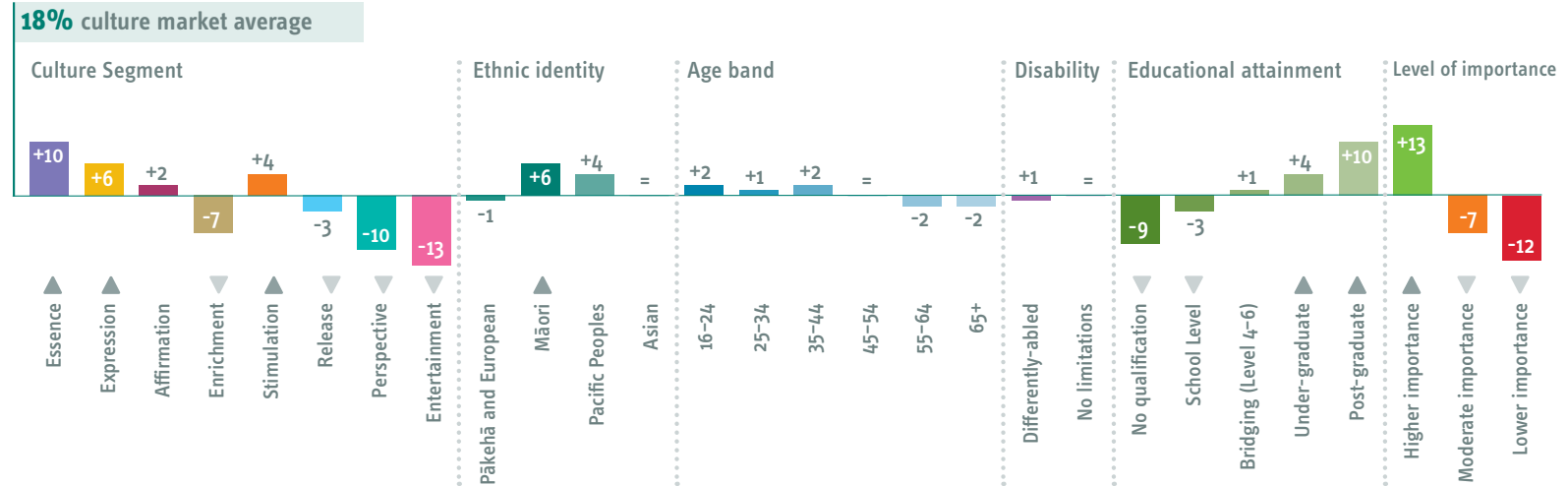
Culture Segments goes deeper than demographics

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





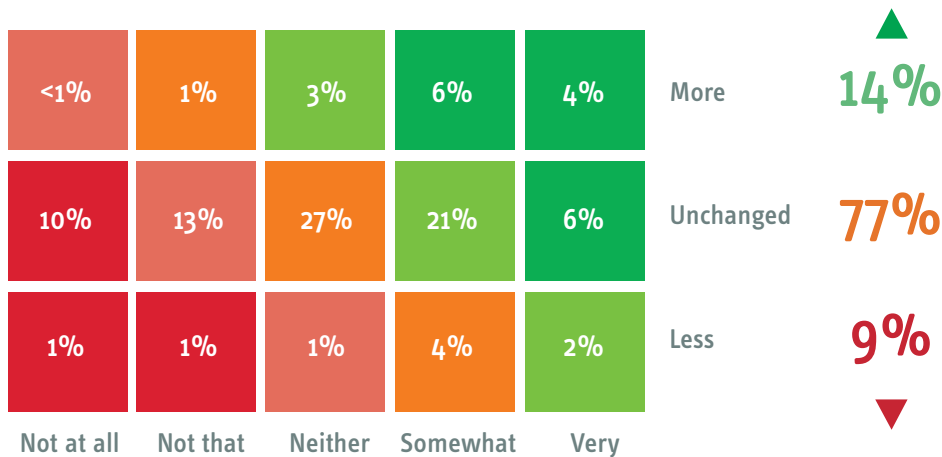
The impact of the Covid pandemic

- 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



Change in importance

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

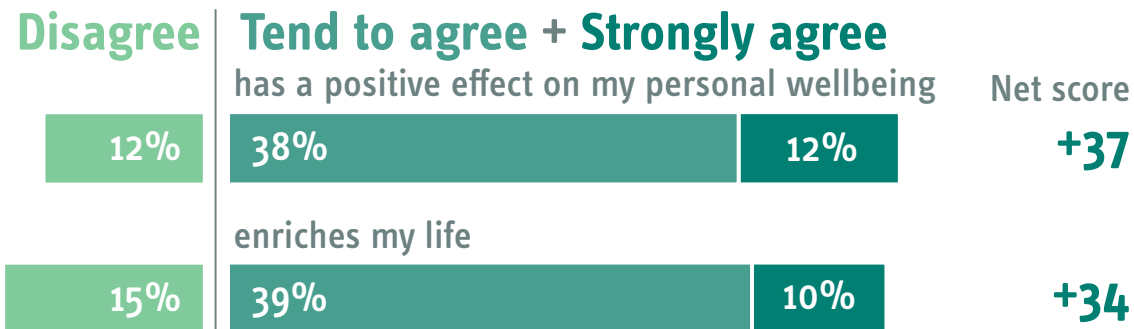
Importance of arts and culture pre-Covid

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

The arts and cultural experiences I engage with enrich my life – by importance group

% of the
culture market

42% Higher importance

Disagree

6%

Tend to agree + Strongly agree

53%

20%

Net score

+66

32% Moderate importance

11%

38%

5

+33

26% Lower importance

35%

21%

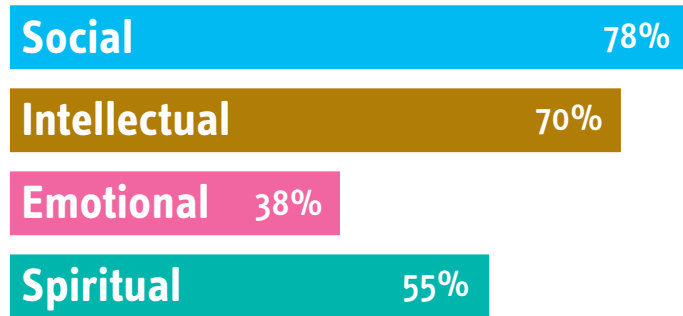
1%

-12



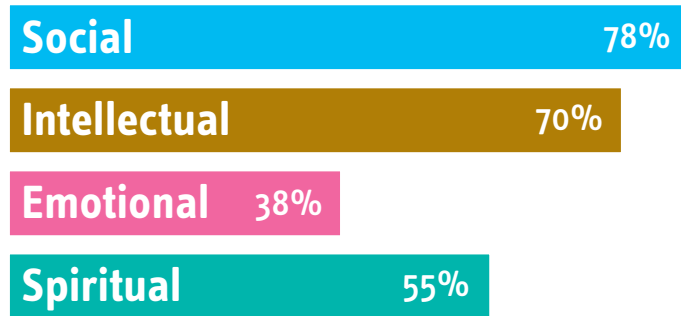
Social experiences the gateway to deeper reward

Motivations to engage with art and culture – all



Social experiences the gateway to deeper reward

Motivations to engage with art and culture – all



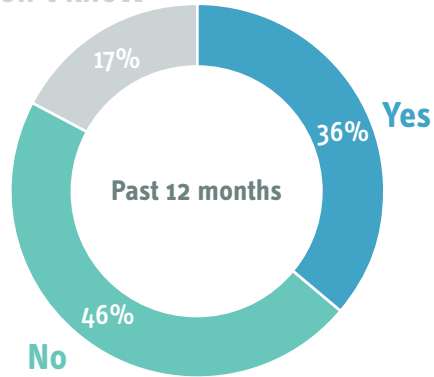
Motivations to engage with art and culture – main
Culture market average



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?

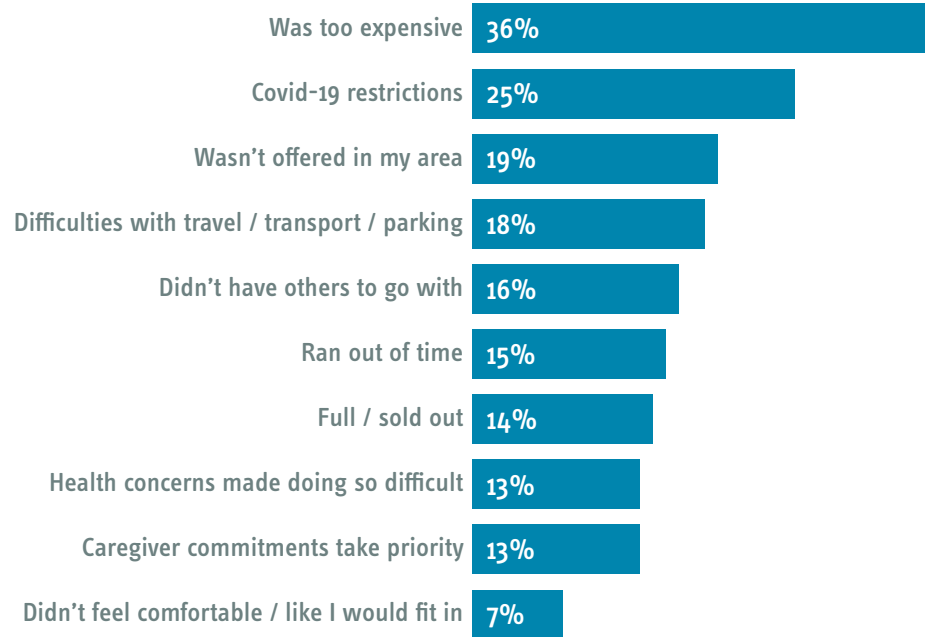
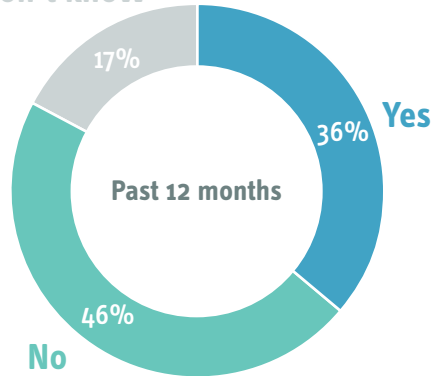
Don't know



Access pricing models needed to bridge gap

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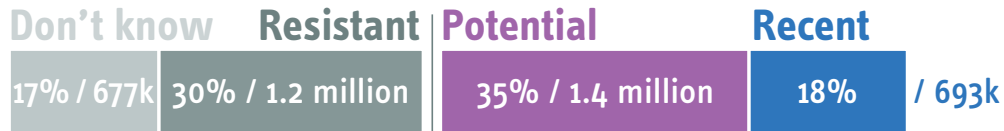
Don't know





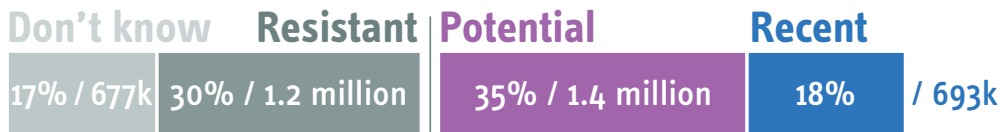
Fewer than 1 in 5 engaging with the arts online

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

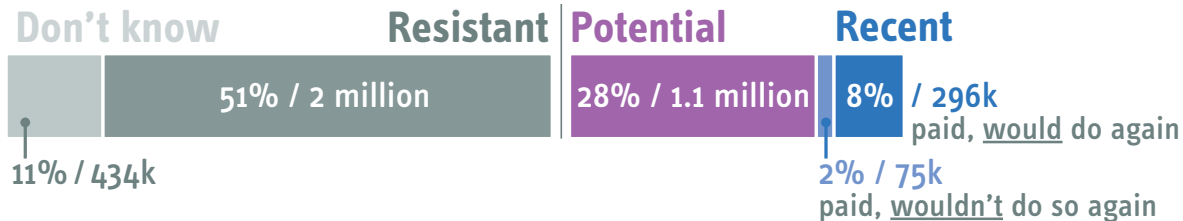


Fewer than 1 in 5 engaging with the arts online

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 – % and real figure estimates



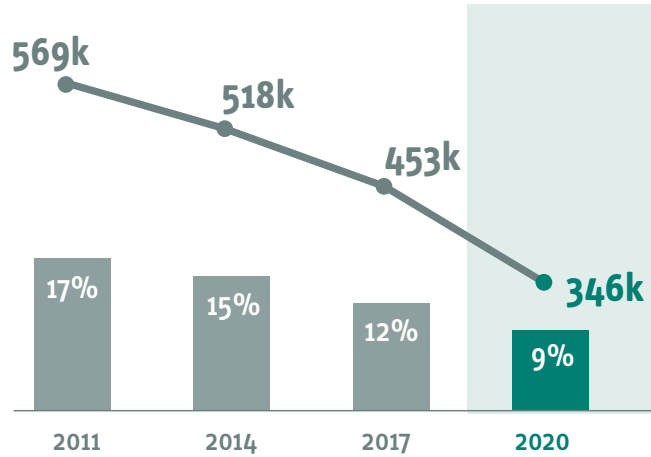
Digital engagement begs for digital strategy

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.



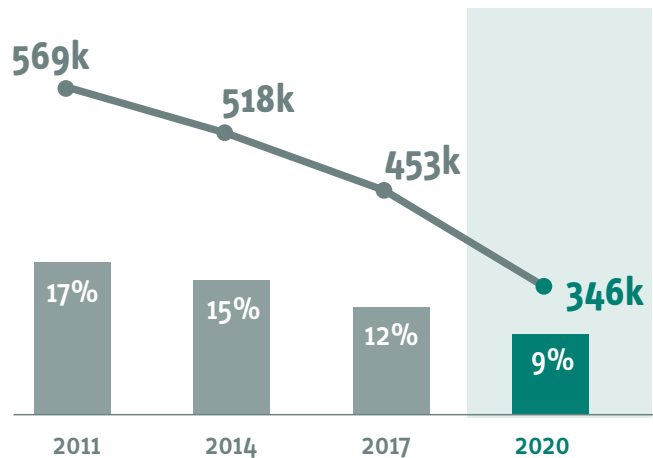
Rates if membership and subscription continue to dip...

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



Rates if membership and subscription continue to dip...

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



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

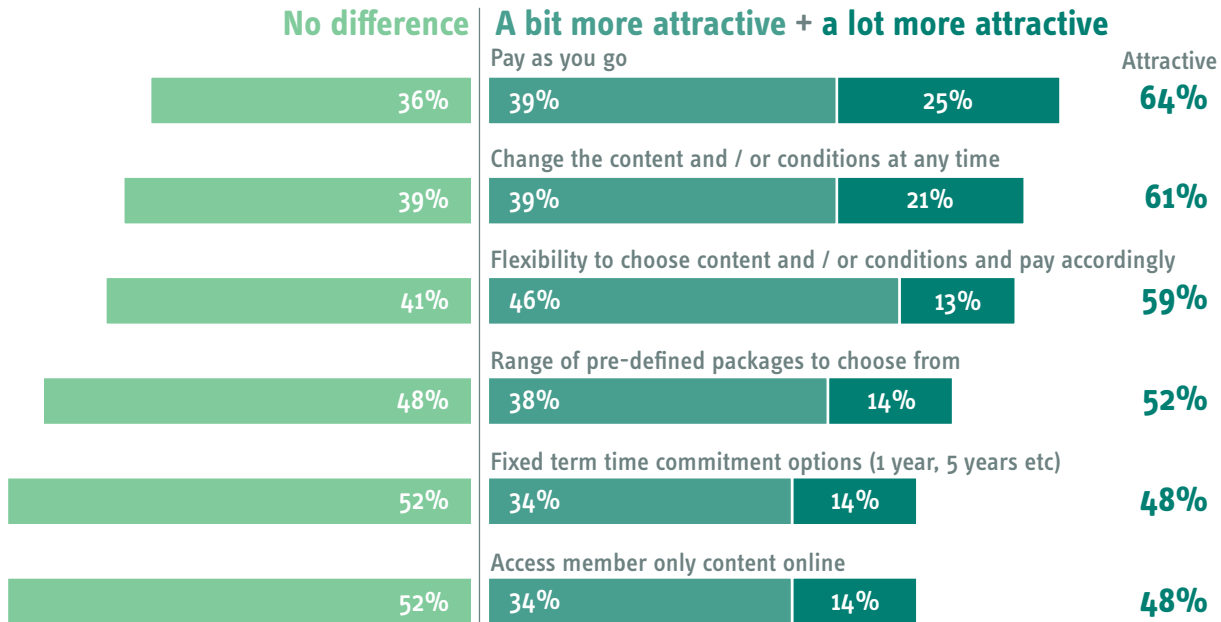
have never-been-member / subscribers and are open to becoming one in the future

...although, still holds potential



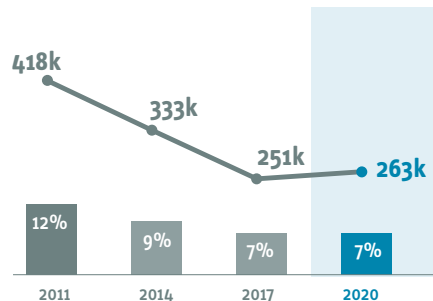
New models of support are needed

Attractiveness of broad types of membership / subscriptions



Opportunity to develop and diversify volunteering

Volunteered at an arts, cultural or heritage organisation in past 12-months (recent)



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

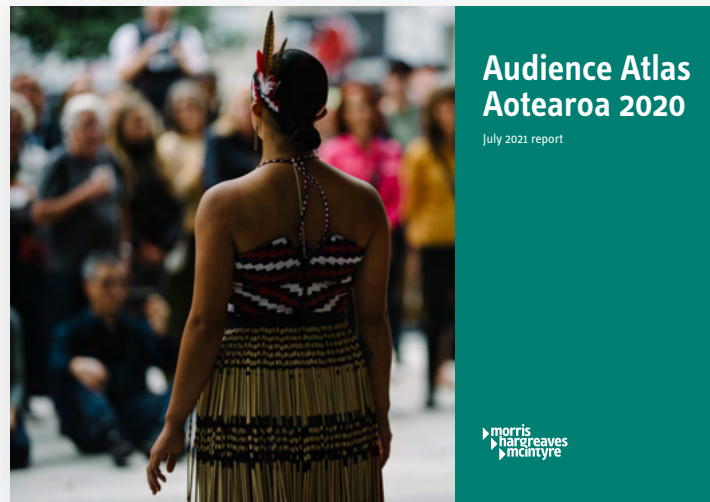
full-time equivalent positions

\$244 million

dollar value of 7k full-time equivalent volunteer positions¹



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

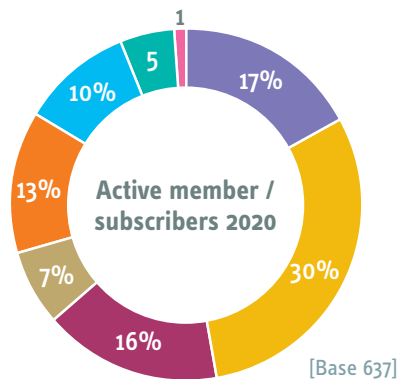
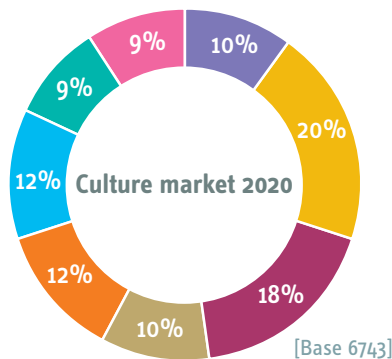
- Size of the current market as a real figure estimates
 - **2.5 million** nationally
 - **288k** regionally
 - **208k** current regional play and drama market
 - **35k** organisation's current market

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
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 - **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



%-point difference active member vs the culture market



▲ ▼ Where % is significantly different from the culture market average



Transactional vs common cause – membership



Shaping your offer

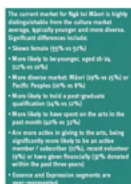


In 2020, the number of airforms engaged within a three year period (current market) is an estimated 703 per 100 people or 3.0 per person; this compares to 6.6 in 2013. While the average number of engagements has been relatively stable over time, it is the breadth or variety that has increased, meaning many people are engaging with a wider variety of airforms.

So, while the overall volume of activity has grown only slightly in the past three years, engagement with a broader range of airforms increased.



Defining the Ngāi Māori market
The Ngāi Māori market is defined as anyone in the culture market who has ever engaged with Māori arts or would consider engaging but hasn't previously, including a Māori film, Māori music, Māori craft /



just over 1 in 5 consulted an online listing site (22%), but it is one of the more influential sources (7%). Online listings are more commonly used in Auckland and Wellington than in other regions and are a key information source for Essence. Essence are confident in their cultural consumption and perfectly able to make up their own minds, making sense they would consult a *Yellow Pages* or *Black and White* as well.

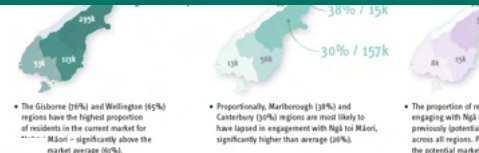
satisfactory for inflation.

The numbers of people spending has plateaued and those who do spend are spending less on the arts.

There was a step down in the dollar value spenders reported spending on in-person

period (\$50 on average). Therefore, there is a relatively similar number of people in the market spending compared to three years ago, but they are spending less and spreading it across a wider range of artworks (explored on page 96). The lower average amount spent in 2020 means that, after adjusting for inflation, total spend in it is 6% down on three years ago.

Meanwhile, the proportion of Enrichment, Perspective and Entertainment who have lapsed in their engagement, is significantly larger than average. These less culturally active segments may be harder to attract and a better strategy might be to target lapsing Expression (34%). Affluents



Key to success is ensuring that the artistic or cultural offer is at the centre of the social experience, rather than the two things being distinct from one another – acting as a catalyst for connection between people and an entry point for deeper engagement.



Those groups whose level of agreement is below the average were not necessarily more likely to

- The 'higher importance' group sits 20-percentage points above the average for agreement that 'engaging with culture has a positive effect on wellbeing'.
- This statement particularly aligns with *Essence* Expression and Affirmation; three of the more culturally active Culture Segments.

- Those with the lived experience of disability were significantly less likely to agree.
- There is a strong correlation between when someone finished formal education and levels of agreement.
- Factors such as age or ethnicity and household income (not shown above) have a more muted impact.

Some correlation with age

This finding is broadly mirrored within the 2020 culture market. Of those impaired in at least one physical activity (walking, seeing, hearing), 66% are aged 65+, which is significantly above the culture market norm (38%). Conversely, 18% of those impacted by a cognitive issue (remembering or concentrating and communicating, mixing with others or socialising) are younger adults (18% aged 18–29), significantly higher than average (9%).

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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