

#### 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



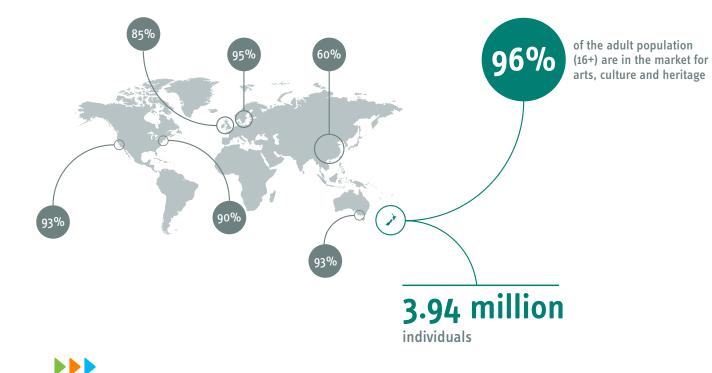


### **Aotearoa New Zealand market for arts and culture**



ARTS COUNCIL OF NEW ZEALAND TOI AOT

creative





### 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













mhminsight.com/segmentme



10%: pursuit of self-actualisation



Segment yourself



mhminsight.com/segmentme





mhminsight.com/segmentme











10%: pursuit of self-actualisation



10%: through the lens of the past

20%: 'people people'



12%: all about the big idea



18%: do the right thing

Segment yourself





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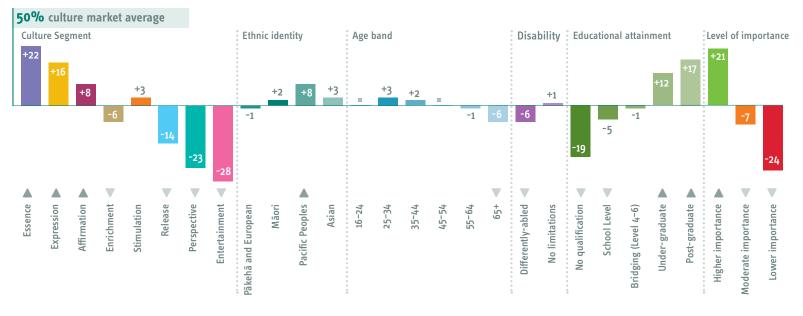
9%: looking for fun

Segment yourself



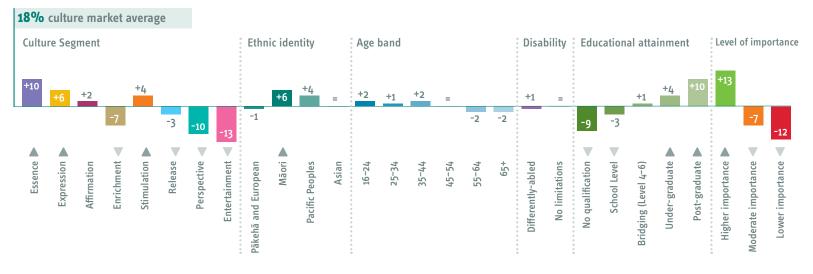
### **Culture Segments goes deeper than demographics**

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



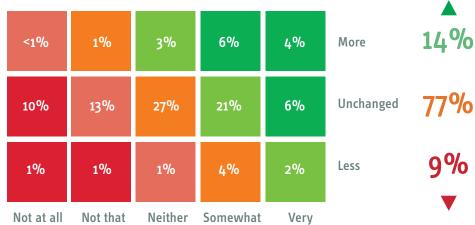


### The impact of the Covid pandemic

- 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



#### Importance of arts and culture pre-Covid

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



#### **Change in importance**

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



## **Engaging with the arts positively impacts wellbeing...**

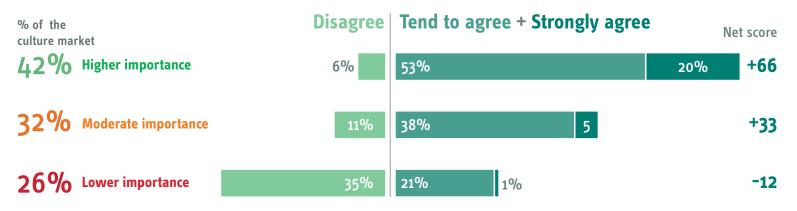
Engaging with arts and culture...

Disagre	has a positive effect on my person	Ig Net score	
12%	38%	12%	+37
	enriches my life		
15%	39%	10%	+34



# ... 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





### Social experiences the gateway to deeper reward

Motivations to engage with art and culture - all

Social		78%		
Intellectual			70%	
Emotional	38%			
Spiritual		55%		



### 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

Social			78	3%
Intellectual			70%	
Emotional	38%			
Spiritual		55%		

**42%** 33% 9 16%

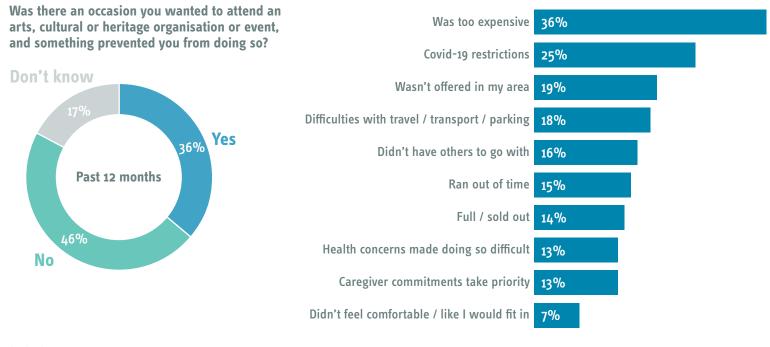


### Access pricing models needed to bridge gap

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



### Access pricing models needed to bridge gap





## Fewer than 1 in 5 engaging with the arts online

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

Don't know Resist	ant   Po	otential	Recent	
17% / 677k 30% / 1.2 mil	lion	35% / 1.4 million	18%	/ 693k



## Fewer than 1 in 5 engaging with the arts online

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

Don't know	Resistant	Potential	Recent	
17% / 677k 30%	/ 1.2 million	35% / 1.4 million	18%	/ 693k

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

Don't know	w Resistant	Potential	Recent
·	51% / 2 million	28% / 1.1 million	8% / 296k paid, <u>would</u> do again
 11% / 434k			2% / 75k paid, <u>wouldn't</u> do so again



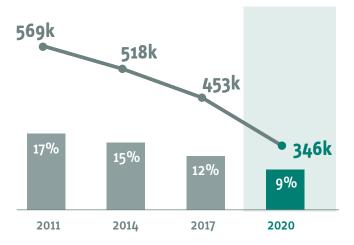
## **Digital engagement begs for digital strategy**

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...

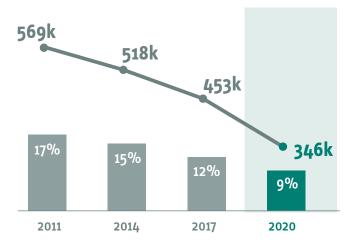
Active member, subscriber or friend of an arts, cultural or heritage organisation





### Rates if membership and subscription continue to dip...

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



# ...although, still holds potential

### 70% / an estimated 244k

are active member / subscribers and open to supporting in this way again

### **71%** / an estimated 371k

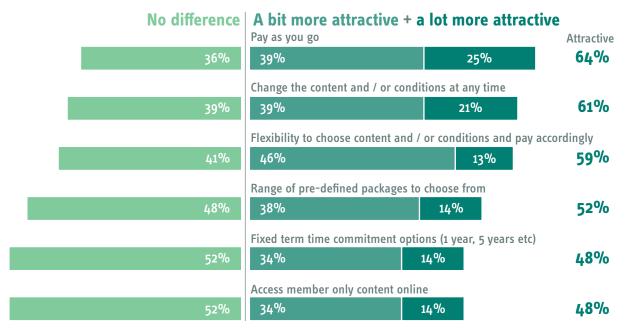
are a lapsed member / subscriber and open to supporting in this way again

### 25% / an estimated 782k

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

### New models of support are needed

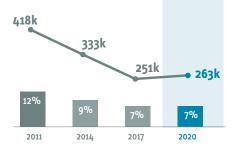
Attractiveness of broad types of membership / subscriptions





### **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 positions<sup>1</sup>



### 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

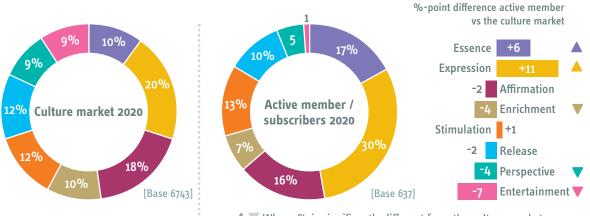
- Size of the current market as a real figure estimates
  - 2.5 million nationally
  - 288k regionally
  - 208k current regional play and drama market
  - **35k** organisation's current market

## **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**



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



### **Transactional vs common cause – membership**

### **Shaping your offer**





#### **Changing landscape**

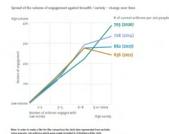
#### More people engaging more widely

In addition to growth in the size of the culture market (explored on page #), there is a growing pool of people attending a wider range of artforms than was the case in previous studies. The adjacent chart compares the four studies by volume (estimated number of engagements) compared to the breadth or variety of artforms engaged with. Broadly, we can see that both the volume and the breadth has grown.

#### Skewing towards more variety

In 2020, the number of artforms engaged within a three year period (current market) is an estimated 203 per 100 people or 10 per person: this compares to 6.6 in 2011 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 artforms.

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



#### Ngā toi Māori





Excluding Canterbury, residents of the South bland are significantly more likely to consult a community newspaper to find out about what's on. However, the picture is different in the North Island, Residents of the Wellington region were as likely as average to consult this source (26%), while Aucklanders were

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. Nearly t in 10 cite a recommendation

as a way to find out about events (29%), and

for 10%, it is the most influential source

Community newspapers a key

community newspaper was the next

for arts and cultural events, consulted

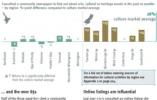
significantly less likely to do so (20%).

by over one-quarter of the market.

most commonly cited source of information

source for South Island residents.

After Facebook and personal recommendatio



newspaper as keeping them informed about what arts and cultural events are on, and for 18%, this is the most influential source. On the other hand, the over 65s are the one group for whom Facebook was not the most influential cource ()%, compared to 30% overall).

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 Aackland and Wellington than in other spices and are a key information source for Essence, Essence are confident in their cultural sumption and perfectly able to make uptheir cars minds, making sense they would consult a listing to find out about what's on.

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

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de,	cn	145		

Advantation in the Advantage

50% culture market average

timated total spend by the market in 2020 compared to 20131

plateaued and those who do spend are spending less on the arts.

Spenders are spending les

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

across more artforms spending compared to three years ago, but they The numbers of people spending has are spending less and spreading it across a wider range of artforms (explored on page \$6). The lower average amount spent in 2020 There was a step down in the dollar value means that, after adjusting for inflation, total spenders reported spending on in-person spend in is 6% down on three years ago. engagement with arts and culture in a four week

period (\$150 on average). Therefore, there is a Less active segments are relatively similar number of people in the marke

#### likely to have lapsed 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 (34/84), Affirmation (3694), Stimulation (32/94) and even Essence (8184).



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





. The Gisborne (76%) and Wellington (65%)

MJori - significantly above the

market average (61%).

regions have the highest proportion

of residents in the current market for

are impacted by both -3% are impacted by a cognitive difficulty (communicating socialising or remoni / concentrating)

31%

have some

difficult

57%

See Out



· Proportionally, Marlborough (38%) and

significantly higher than average (26%).

Canterbury (30%) regions are most likely to

have lapsed in engagement with Ngã toi Mãori.

Physical barriers twice as

Looking more closely at those classified

as having a lived experience of disability.

are twice as common are those identifying

at least one impairment in both categories

Some correlation with age

physical difficulties (6% of the culture market)

cognitive barriers (3%). Meanwhile, 3% have

The Stats/NZ Disability Survey 2013 revealed that

the number of people with a lived experience

studies. This finding was due, in part, to an aging

population. People in older age groups are more

likely to be impaired compared to younger adults

of disability had lifted compared to previous

and children and, as sociatial attitudes shift,

people are more willing to report limitations."

common as cognitive

. The proportion of residents who would consider engaging with Ngã toi Mãori but haven't previously (potential 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 (1%)

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 65x, which is significantly above the cultury market norm (18%). Conversely, 18% of those impacted by a cognitive issue (remembering or concentrating and communicating, mixing with others or socialising) are younger adults (18% aged 16-265, significantly higher than average 10%1

4 6 46

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

The chart above looks at those who agree that 'engaging with arts and culture has a positive effect on wellbeing' and how this differs to the culture market norm across key subgroups.

A T Where % is significantly different

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

but were less likely than average to agree · 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.

disagree than agree with the wellbeing statement

. Those with the lived experience of disability were significantly less likely to agree. · There is a strong correlation between when someone Enished formal aducation and leasts of annearant · Factors such as are or othericity and household income inot shown abovel has a more muted impact.

### **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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