



# Audience Atlas Aotearoa 2020 – Asian audiences and the market for Asian arts

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# Audience Atlas Aotearoa 2020 – summary of Asian audiences and the market for Asian arts

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## Research method

This is the fourth edition of Audience Atlas Aotearoa. The first edition took place in 2011 followed by 2014 and 2017.

*Audience Atlas Aotearoa 2020* is based on 6,743 responses collected between 11 December 2020 and 21 January 2021, from people aged 16 years and over. The survey sample was provided by the online panel provider Consumer Link (a Colmar Brunton company), Panelbase, Pureprofile and Prime research.

Please note that figures may not always total 100% due to rounding. In several places throughout the report we use population estimates to convert percentages into real figure estimates.

Please refer to the research parameters at the end of this report for more detailed information on sampling, methodology and confidence intervals.

Audience Atlas and Culture Segments are © Morris Hargreaves McIntyre, 2022.

Cover image: Opening night of Auckland Theatre Company's *Single Asian Female* by Michelle Law, directed by Cassandra Tse at ASB Waterfront Theatre 2021. Image: Jinki Cambronero.





# Robust methodology

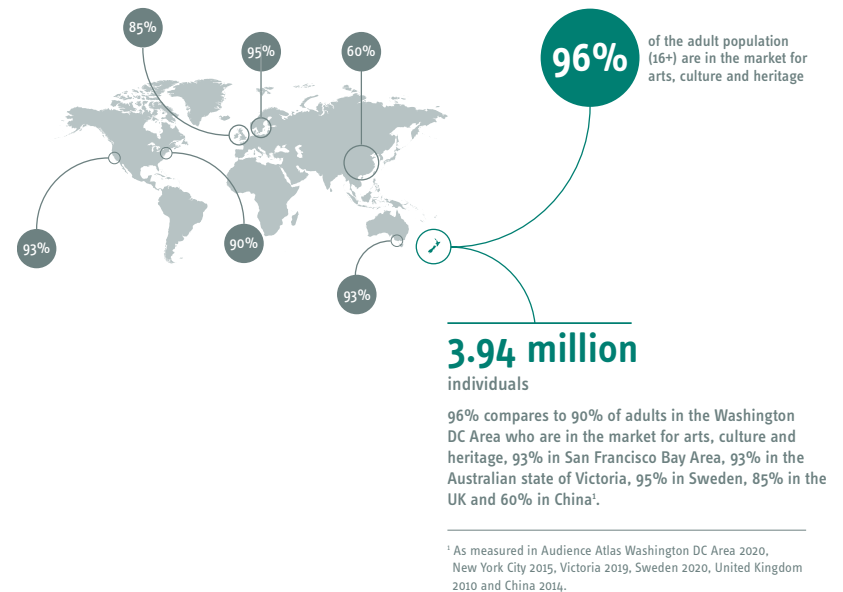
## The fourth Audience Atlas study for Aotearoa

Audience Atlas is a unique way of understanding the market for arts and culture. While Audience Atlas studies have taken place across the globe, New Zealand is the first country to invest in a regular series of studies, with *Audience Atlas Aotearoa 2020*, being the fourth iteration.

The full Audience Atlas 2020 study represents responses from a sample of 6,743 people nationally, representative of the population's demographics of people aged 16 years and over. The study includes a sample of 1,127 people nationally who identified as Asian. The increased number of Asian responses ensures we can report on results with confidence.

Any results reported as real numbers are estimates based on the weighted proportions applied to population estimates from Census data.

Please refer to the research parameters at the end of this summary report for more detailed information on sampling, methodology and confidence intervals. The full [Audience Atlas Aotearoa 2020](#) report is available via Creative New Zealand's website.





# Understanding the culture market



# 577k adults in the Aotearoa arts and culture market identify as Asian

## 3.9 million

adults in Aotearoa New Zealand are in the market for arts and culture

## 577k

identify as Asian

Culture market: defined as adults aged 16 or over who've engaged with at least one arts, cultural or heritage activity within the past three years. The overall definition is inclusive; from attending dance to going to a movie.



Photograph: David St George. Courtesy of Auckland Art Gallery Toi o Tāmaki.

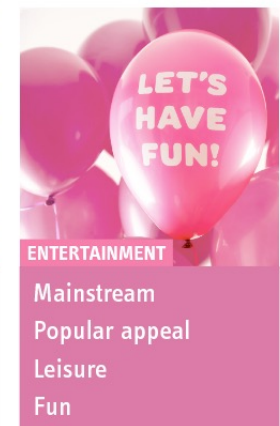
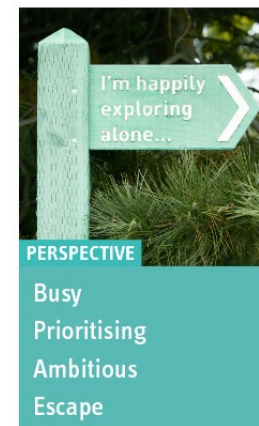
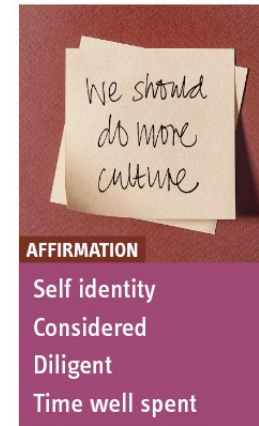
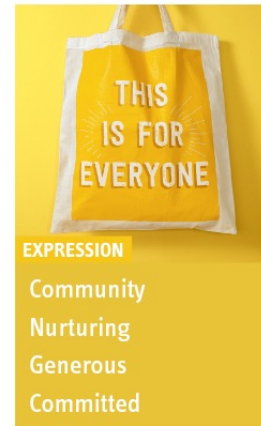
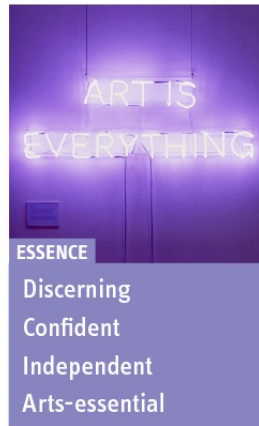


# Culture Segments your tool for retention and growth



Culture Segments is a psychographic segmentation system clustering people based on their deep-seated values towards arts and culture. These values frame a person's attitudes, lifestyle choices and ultimately, cultural consumption. Culture Segments gives you real insight into what motivates your audience and the tools to not only predict but influence future behaviour; perhaps to visit for the first time, attend more frequently, or even donate to your cause. Through Culture Segments, you can grow audiences, encourage repeat attendance, and develop long-lasting, mutually beneficial relationships.

There are eight Culture Segment clusters (represented to the right), each centring around a set of shared values. The segments are named to reflect the kind of experiences they value from culture.





# The Culture Segment profile of Asian audiences in Aotearoa

## Culture Segment profile

		Culture market	Asian audiences
Essence	'in pursuit of self-actualisation'	10%	▼ 7%
Expression	'people people'	20%	▲ 25%
Affirmation	'do the right thing'	18%	▲ 22%
Enrichment	'through the lens of the past'	10%	9%
Stimulation	'all about the big idea'	12%	11%
Release	'say they're too busy'	12%	▲ 15%
Perspective	'happy in their own bubble'	9%	▼ 5%
Entertainment	'looking for fun'	9%	▼ 6%

Base

[6743]

[1127]

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

The mindsets behind Culture Segments are universal, based on deep-seated human values. That being said, other factors can have an influence within different demographic cohorts, and the manifestation of this is some subtle variance in the Culture Segment profile for Asian audiences within the culture market.

Proportionally, there are significantly higher levels of Expression (25%), Affirmation (22%) and Release (15%) among the Asian audiences cohort compared to the culture market average (20%, 18% and 12%, respectively). Conversely, Essence (7%), Perspective (5%) and Entertainment (6%) are all less common.

Discover your segment here:

<https://mhminsight.com/segmentme>

Culture Segment pen portraits: for a deeper dive into Culture Segments, see Appendix 1 in the full [Audience Atlas Aotearoa 2020](#) report where there's a comprehensive summary of each of the eight segments, including how to reach them through marketing communications.



# The Culture Segment profile of Asian audiences in Aotearoa

## One quarter of Asian audiences in the culture market are Expression – the ‘people people’

Expression is the largest segment among Asian audiences (25%) and nationally (20%). The Expression segment is defined by its close connection to community. It is likely that higher levels of Expression amongst Asian audiences correlate to collectivist social structures and the migrant experience, where having a community identity and living in inter-generational households with family at the heart is likely to be more commonplace.

Expression is one of the segments most likely to regularly engage with arts and culture. They are also likely to join in and share their experiences with others, making them great advocates.

## Over one-fifth of the culture market’s Asian cohort are Affirmation

Similar to Expression, Affirmation are over-represented among Asian audiences (22%) compared to the wider market (18%). Affirmation are a segment committed to personal growth. They recognise the opportunity for self-improvement as well as quality time with others and like to build memories of these special experiences. Broadly, this might suggest this

cohort is exploring and expanding their cultural repertoire by trying things out in a new environment.

While Affirmation focuses on self-improvement, this may be seen as a way to add standing and honour to one’s family in Asian cultures, which are centred on family ties rather than individual needs.

## Busy Release are prominent among Asian audiences

Compared to the culture market average, Asian audiences are significantly more likely to be Release (12% and 15%, respectively). Although not defined by it, the Release segment can be aligned with life stage, and a number of lifestyle factors, for example, busy work, study and children, can compete for time.

Like the over-representation of Expression, the prominence of Release may be correlated with social structures and migrant experiences. In the case of Release, arts and cultural consumption may be seen as something difficult to fit into everyday life. Release are the segment most likely to say ‘they’re too busy’ to engage with arts and culture. This segment are often people who feel unable to prioritise the arts as much as they’d like. For some Asian audiences, attending mainstream arts and cultural activities may be seen as entertainment or leisure, which may not be a priority in cultures that value hard work and conscientiousness.





# The Culture Segment profile of Asian audiences in Aotearoa

## Adventure-loving Stimulation as common among Asian audiences in the wider market

Two key traits characterise Stimulation; their desire for something new and unique (and to discover this themselves) as well as being exposed to 'big ideas' in their arts and cultural consumption. Stimulation are often more concentrated in culturally vibrant urban areas. However, they are equally common among Asian audiences as they are in the wider market (11% and 12%, respectively).

## 7% of Asian audiences are Essence, the core cultural attenders

While not as large as some other segments, Essence are core cultural attenders, typically engaging in higher frequency than others. Essence seek peak experiences from their cultural consumption and are looking for deep, emotional connections. Essence is an important segment to the culture market. However, among Asian audiences, this segment is significantly under-represented compared to the market average (7% and 10%, respectively).

## Enrichment, Perspective and Entertainment round out the market

The remaining 20% of Asians in the culture market are made up of Enrichment (9%), Perspective (5%) and Entertainment (6%).

- Enrichment tends to be cautious with established tastes and less motivated by being up-to-date. Enrichment knows what they will enjoy and veer towards things they believe in having stood the test of time.
- Perspective is a more narrowly focused and introverted Essence. However, they lack the ardent appetite for the arts and are typically focused on their own personal areas of interest.
- Arts and culture are on the periphery of Entertainment's lives. They are looking for mainstream events or days out that will be fun.

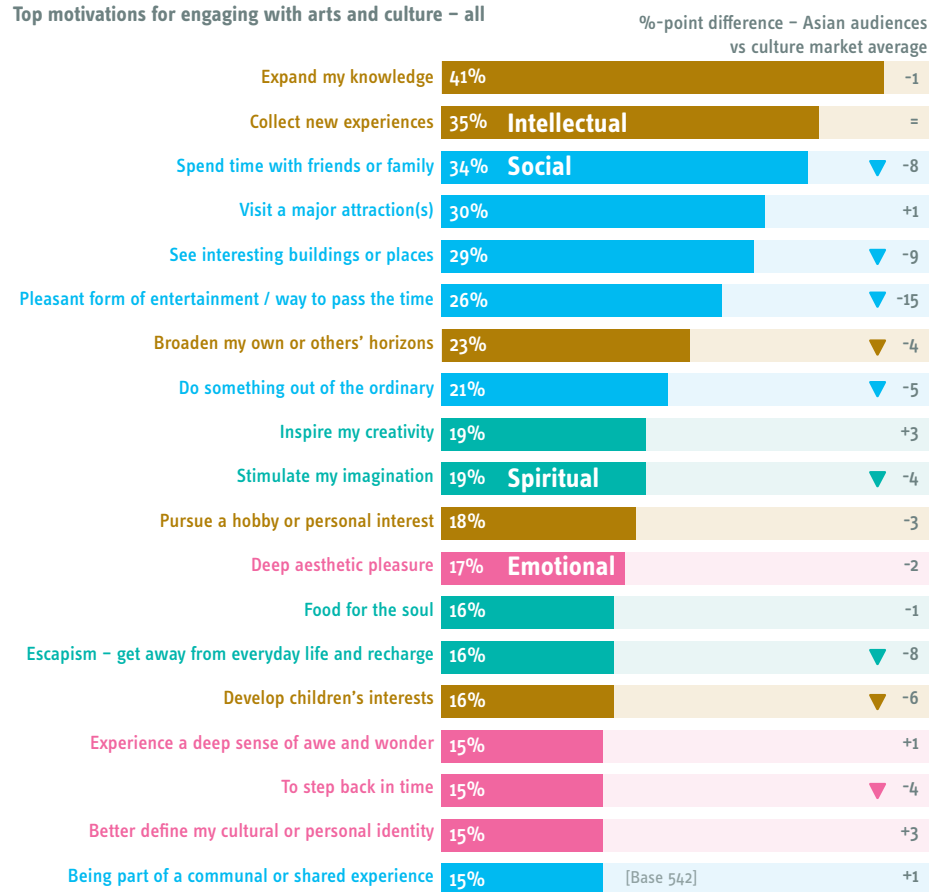




# **Motivations and barriers to arts engagement for Asian audiences**



# Asian audiences have a narrower range of motivations to engage



The culture market has a range of motivations for engaging with the arts and these are likely to vary for individuals, across different artforms and within different contexts. Broadly however, motivations for engagement can be clustered into four broad human needs – Social, Intellectual, Emotional and Spiritual. These drivers dictate the benefits people are seeking and ultimately, the expectations and needs they have once through the door.

Broadly, what motivates Asian audiences is similar to the wider market, with a mix of Intellectual and Social drivers being most common and two Spiritual motivations rounding out the top 10. However, on average, Asian audiences have fewer motivations and cite a number of specific drivers at a significantly lower level than average.

The two most common reasons Asian audiences engage are Intellectual: 'expanding knowledge' (41%) and 'collecting new experiences' (35%). Meanwhile, 'spending time with others' (34%) and as a 'form of entertainment or to pass the time' (25%) are the two most common drivers among the wider market (43% and 41%, respectively), but these two Social drivers are cited at a significantly lower level among Asian audiences.

Motivations for Asian Audiences are somewhat reflective of the Culture Segment profile. Affirmation – the 'self-improvers', prominent among Asian audiences – are among the most likely to be driven to 'expand their knowledge' and 'collect new experiences'. Conversely, busy Release – also more prominent among Asian audiences – is the segment least likely to engage with the arts to simply 'pass the time'.



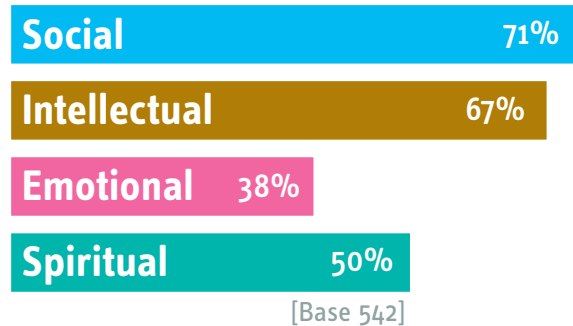
▼▲ % for Asian audiences is significantly different from the culture market average



# Social motivations as a gateway to deeper reward

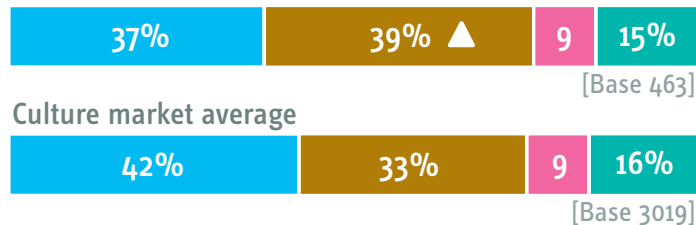
## All motivations to engage with arts and culture

Asian audiences in the culture market



## Main motivation to engage with arts and culture

Asian audiences in the culture market



Overall, 71% of Asian audiences have at least one Social motivation for engaging with arts and culture, while 67% have Intellectual, 38% Emotional and half at least one Spiritual reason for engaging.

Looking at the **main** drivers to engage (lower chart), a larger proportion of Asian audiences are seeking an extension on a purely social encounter through an Intellectual, Emotional or Spiritual reason (63%) compared to the culture market average (58%).<sup>1</sup> This is due to the significantly larger proportion who are mainly Intellectually driven (39%, compared to 33% overall). Asian audiences skew towards a main Intellectual driver comes at the expense of Social motivations (37%, compared to 42% overall).

To successfully deliver what is being sought by Asian audiences and the market more broadly, the sector needs to ensure that the artistic or cultural offer is at the centre of the social experience, acting as a catalyst for connection and an entry point for deeper engagement, particularly opportunities to learn.

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

<sup>1</sup>On the cusp of a statistically significant difference





# Asian audiences are less likely to have been prevented from cultural engagement

## 32% / 187k

of Asian 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.

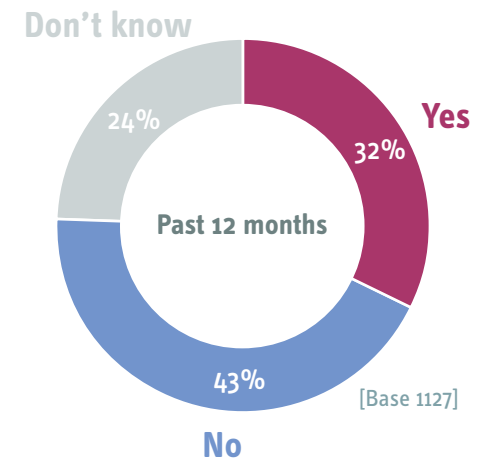
Compared to the wider culture market, Asian audiences are significantly less likely to have been prevented from arts engagement in the 12 months prior to the study (32%, compared to 36%). This equates to a minimum estimated 187k missed opportunities for Asian cultural engagement.<sup>1</sup>

### Barriers exist where lack of motivation exists

It is a common assumption that cost and time are key barriers to cultural engagement and when asked, the market commonly cite these reasons (see following page). However, it is how much someone values the arts which can be the determining factor. For example, the more culturally active segments, Essence, Expression, Affirmation and Stimulation, are more likely to recall being prevented from cultural engagement. Conversely, the less active segments are less likely to have been prevented from doing so and are likely to simply favour other activities.

On average, Asian audiences are less likely to have been prevented from cultural engagement than the wider market, but they are also less motivated to engage generally (explored on page 11).

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

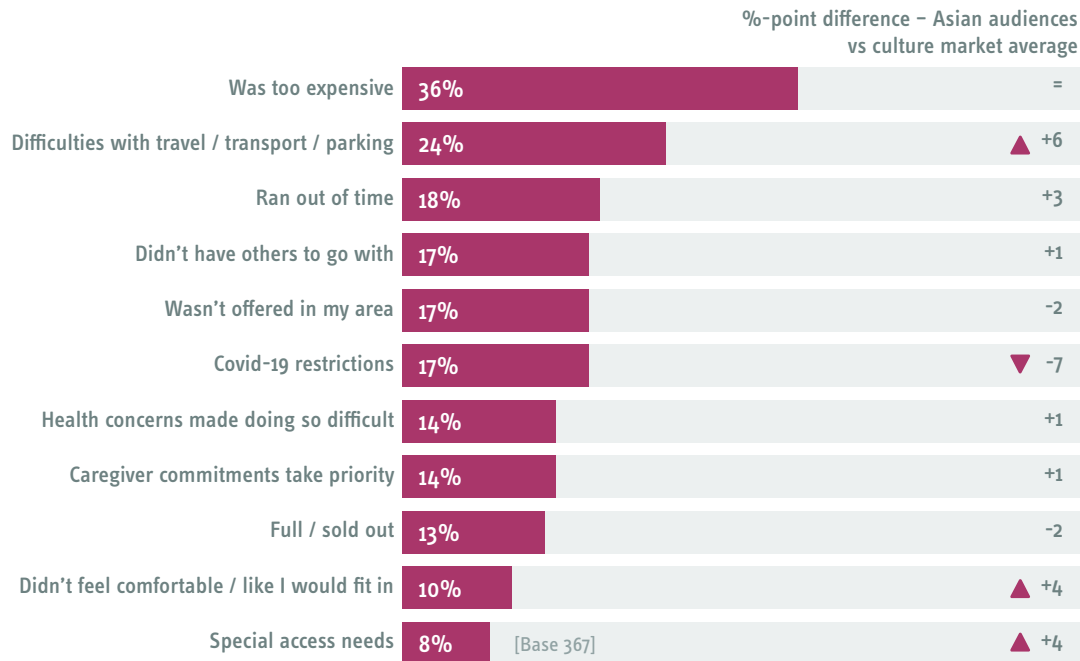


<sup>1</sup> Assuming that there was only one occurrence and does not account for groups, so the number is likely to be higher.



# Expense is a universal barrier to arts engagement

## Top reasons preventing attendance at a specific arts organisation or event in past 12 months



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

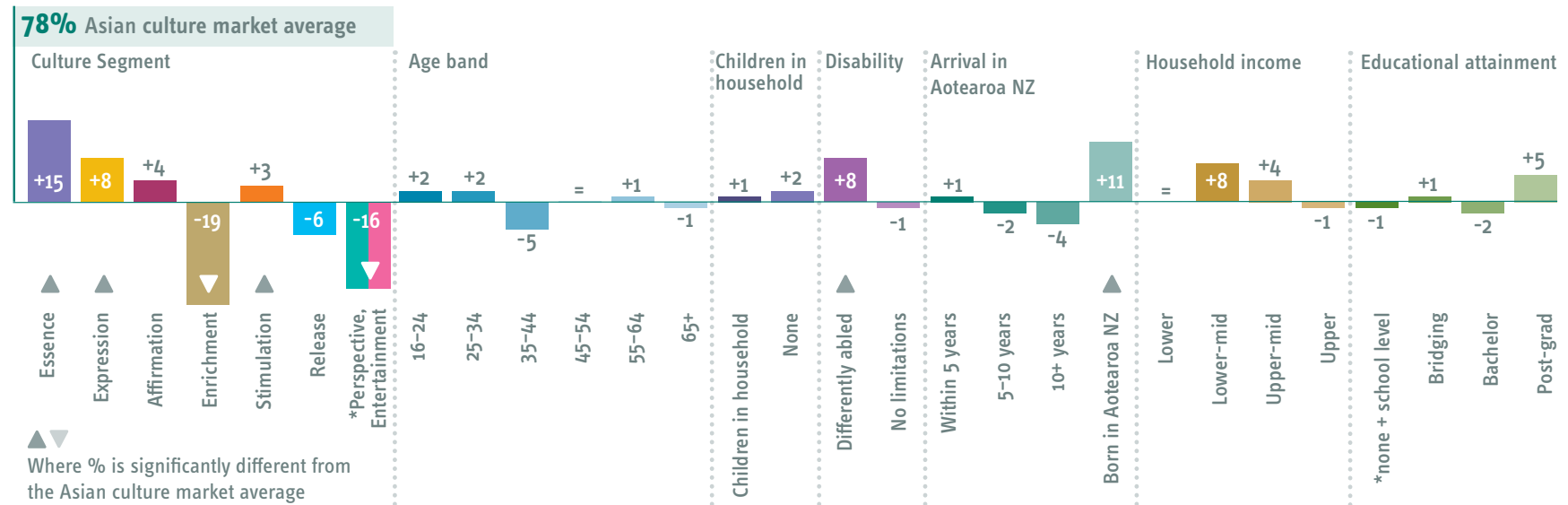
Among those who could recall being prevented from arts engagement in the last 12 months, expense was the most commonly cited reason. Expense is a universal barrier, and results for Asian audiences mirror the wider culture market (36% for both groups).

- Around one-quarter cited difficulties with travel in preventing engagement, a significantly higher level than seen in the market overall (18%). This is likely correlated to the concentration of Asian audiences in the Auckland and Wellington regions.
- While impacting a relatively small proportion (10%), Asian audiences are significantly more likely to feel some social discomfort which prevented attendance. This was more pronounced for Asian audiences in the younger age bands (14% aged 16–34), compared to older groups (7% aged 35+). Social comfort was not impacted by how long someone had resided in Aotearoa New Zealand. Asian audiences who'd arrived less than 10 years ago, 10+, or born locally were all as likely to cite 'comfort' as preventing engagement as average.



# Culturally engaged segments more likely to recall occasions of prevention

Asian audiences prevented from attending an arts, cultural or heritage organisation or event – %-point difference compared to Asian culture market average



Within the Asian audiences cohort, those with the lived experience of disability or who were born in Aotearoa New Zealand, were more likely to recall an occasion of being prevented from arts engagement than average. Otherwise, there are no other statistically significant differences on a demographic level.

The importance placed on the arts plays a role as the more culturally active and motivated segments, Essence, Expression and Stimulation, are more likely than average to recall an occasion of prevention. Conversely, Asian audiences in the less culturally active segments (Enrichment, Perspective and Entertainment) are significantly less likely to have done so.

\*Due to size limitations of sample at a sub-group level for Asian audiences, the less culturally active segments Perspective and Entertainment have been grouped, as have those with no qualification and school level only.





# Online arts engagement among Asian audiences



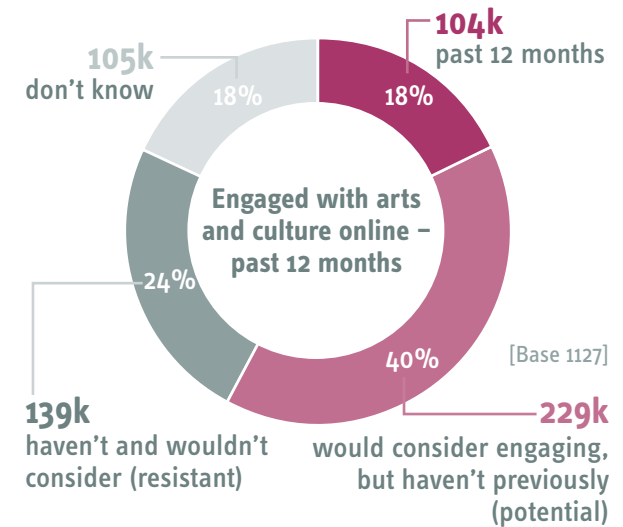
# Asian audiences are more open to engaging with the arts online

## Online engagement remains niche...

Among Asian audiences, close to 1 in 5 had engaged with arts and culture online in the 12 months prior to the study, matching the wider market (18% for both groups).<sup>1</sup>

## ... but Asian audiences are less resistant to online engagement than the market overall

While 18%, or an estimated 104k, had engaged with cultural content online in the 12 months prior to the study, more than twice that number (an estimated 229k) are in the potential market. Compared to the market average, Asian audiences are significantly more open to giving this form of engagement a try (40% compared to 35% overall) and less resistant (24%, compared to 30%). Therefore, while Asian audiences are as likely as average to have engaged with cultural content online before, they are more receptive to this form of engagement in the future.



<sup>1</sup> Audiences Atlas Aotearoa 2020 survey was in field in December 2020. Therefore, 'the 12 months prior' broadly refers to the 2020 calendar year.



# Nearly 1 in 5 had paid to access online cultural content

## 18% / 106k

Have paid or donated to access arts and cultural content online

Among Asian audiences, half expect to pay for online arts content (50%). This is significantly below average (53%) as a larger proportion expect to access this type of content for free (28%, compared to 21% overall). Even so, Asian audiences are more likely to have paid for this form of engagement than average (18% and 9%, respectively).

It is worth noting, that an estimated 34k of those who had recently paid or donated to access cultural content online wouldn't do so again.

Meanwhile, more are open to paying for online access than have done so recently. Among Asian audiences, 3 in 10 – or an estimated 172k – haven't, but would consider paying to engage with online cultural content in the future, broadly comparable to average (28%).

In the past 12 months have you paid or donated money to access arts and cultural content online?

	Culture market	Asian audiences	
	%	%	Estimate #
Yes, would pay again	8%	▲ 13%	73k
Yes, wouldn't do again	2%	▲ 6%	34k
Haven't but would consider (potential)	28%	30%	172k
Haven't and wouldn't consider (resistant)	51%	▼ 37%	216k
Don't know	11%	▲ 14%	83k

Base

[6743]

[1127]

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

<sup>1</sup> *Audiences Atlas Aotearoa 2020* survey was in field in December 2020. Therefore, 'the 12 months prior' broadly refers to the 2020 calendar year.



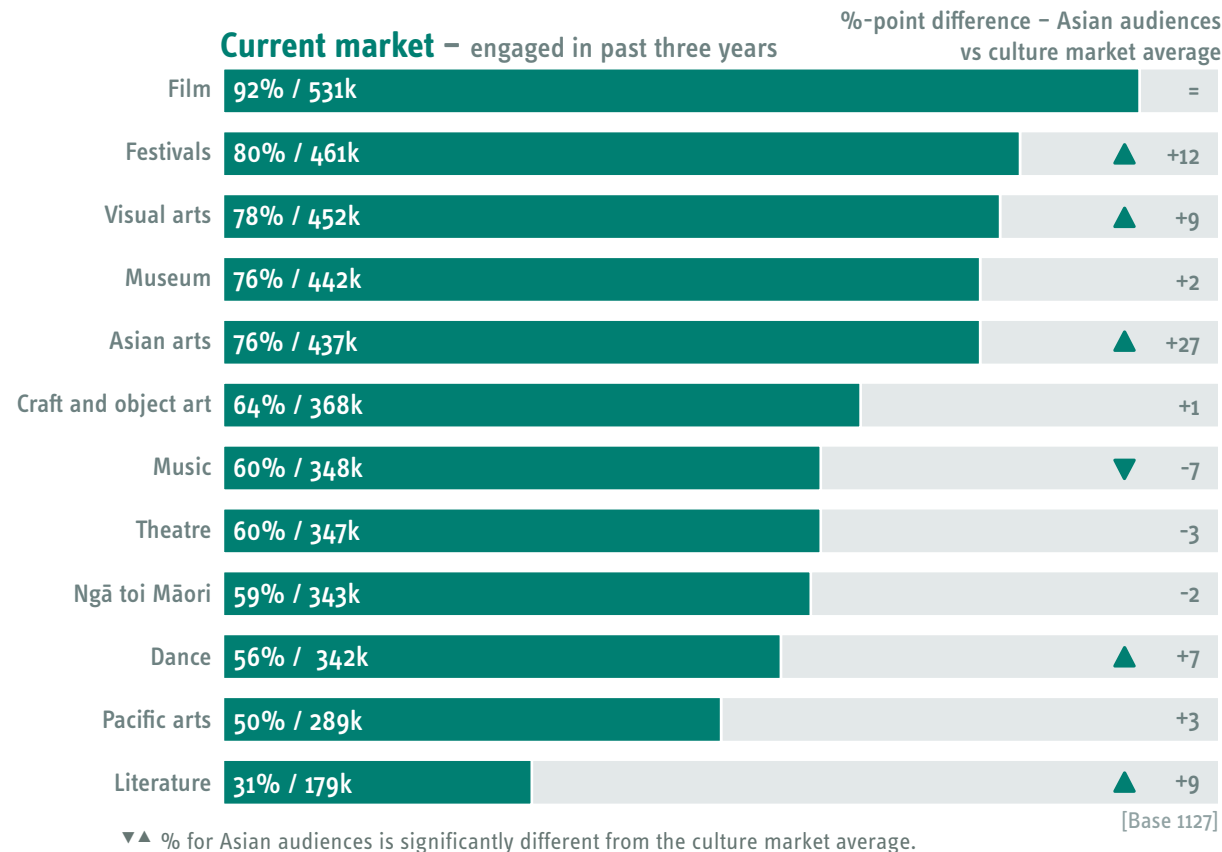


# Engagement with individual artforms among Asian audiences



# Asian audiences are more active across 5 of the 12 core artforms

**Current** artform markets – % and real figure estimates for Asian audiences



Asian audiences are significantly more likely than the market overall to have engaged with 5 of the 12 core artforms in the past three years (current market).

Engagement with film (at a cinema or another venue, including film festival venues) is near-universal and has the largest current market of the core 12 artforms.

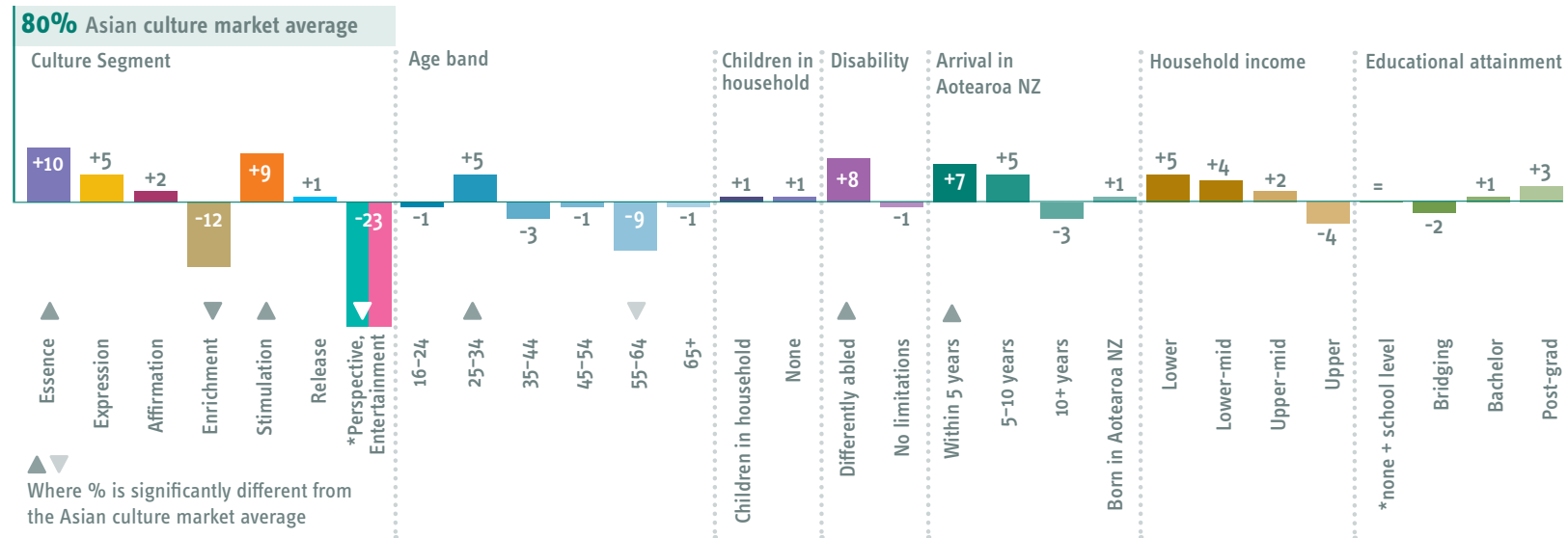
- Behind film, Asian audiences are most likely to have engaged with festivals (80%) and / or visual arts (78%) in the past three years both significantly higher than average.
- In addition, Asian audiences are also significantly more likely than average to be in the current market for Asian arts, dance and literature.

Conversely, Asian audience engagement with music (60%) is significantly lower than average (67%). It is slightly lower for theatre and ngā toi Māori, but not statistically significantly so.



# Recent arrivals helps drive engagement for festivals

Asian audiences in the current market for **festivals** – %-point difference compared to Asian culture market average



Compared to the market overall, Asian audiences are significantly more likely to be in the current market for festivals, visual arts, Asian arts, dance and literature. Looking at Asian audiences' engagement with these five artforms, reveals the more culturally active segments, recent arrivals, and those with the lived experience of disability are helping drive engagement in some cases.

Asian audiences who arrived in Aotearoa New Zealand within five years of the study, were more likely to be in the current market for festivals, visual arts and dance. However, this group's engagement with other artforms was not statistically different from average.

Those with a lived experience of disability are significantly more likely to be in the current market for the five artforms where Asian audience engagement is higher. However, this group represents 9% (or an estimated 52k) of Asian audiences.

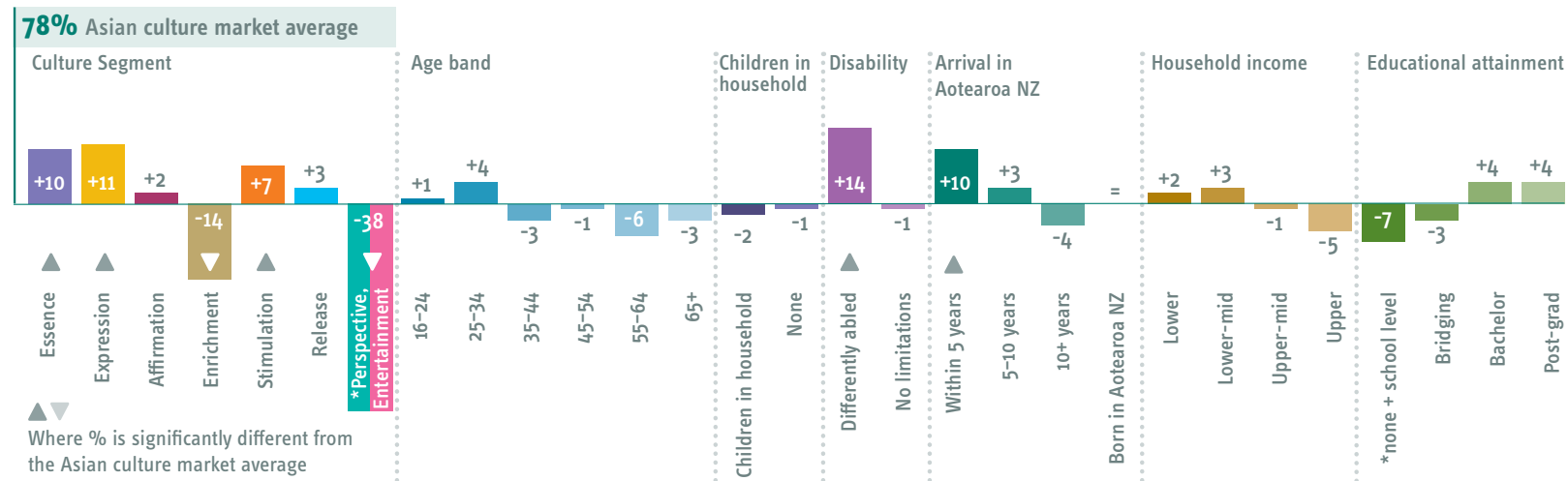
While there is a pattern of lower engagement for festivals as household income increases – which was true across the other artforms – this does not represent statistically a significant difference. Similarly, there was no difference by educational attainment (not represented above).

The model above looks at Asian audiences in the current market for festivals, as an example. The pattern is broadly similar for visual arts, Asian arts, dance and literature (visual arts is illustrated on the following page).



# Recent arrivals helps drive engagement for visual arts

Asian audiences in the current market for **visual arts** – %-point difference compared to Asian culture market average



Asian audiences who have engaged with visual arts in the past three years (current market) are significantly more likely than average to be Essence, Expression or Stimulation. Similar to the Asian audiences' engagement with festivals, it is more recent arrivals to Aotearoa and those identifying with the lived experience of disability, who are driving engagement.

Other demographic factors, such as, age, household income, educational attainment or children in the household, are not factors.

The model above looks at Asian audiences in the current market for visual arts, as an example. The pattern is broadly similar for festivals, Asian arts, dance and literature (festivals was illustrated on the preceding page).

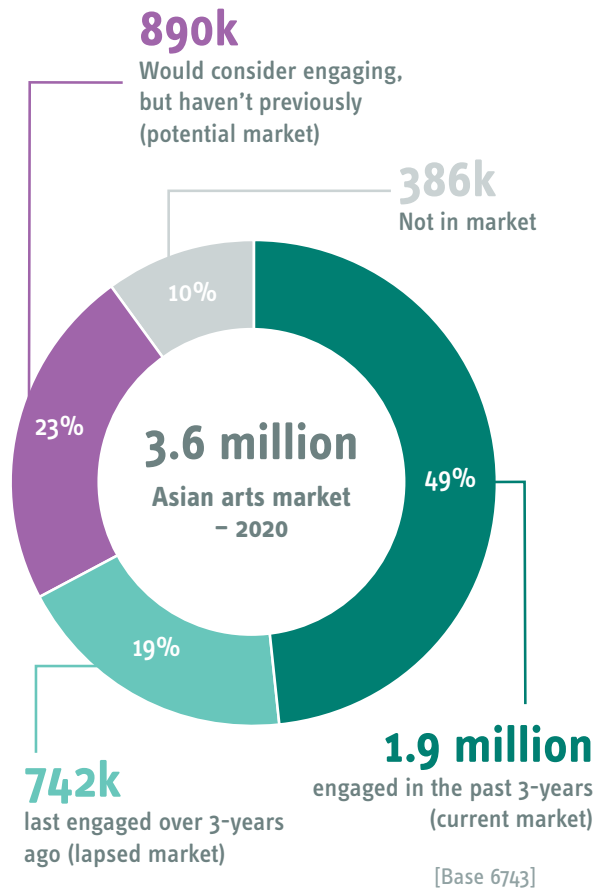
\*Due to size limitations of sample at a sub-group level for Asian audiences, the less culturally active segments Perspective and Entertainment have been grouped, as have those with no qualification and school level only.



# The culture market's engagement with Asian arts



# 3.6 million adults in Aotearoa are interested in Asian arts



This section explores the whole culture market in Aotearoa, as opposed to those identifying as Asian, seen in the earlier part of the report.

The culture market is defined as adults aged 16 or over who've engaged with at least one arts, cultural or heritage activity within the past three years. The overall definition is inclusive; from attending Asian dance to going to a movie.

Most in the culture market are interested in Asian arts.

90% or an estimated 3.6 million adults have either engaged with this artform in the past, or would consider doing so in the future.

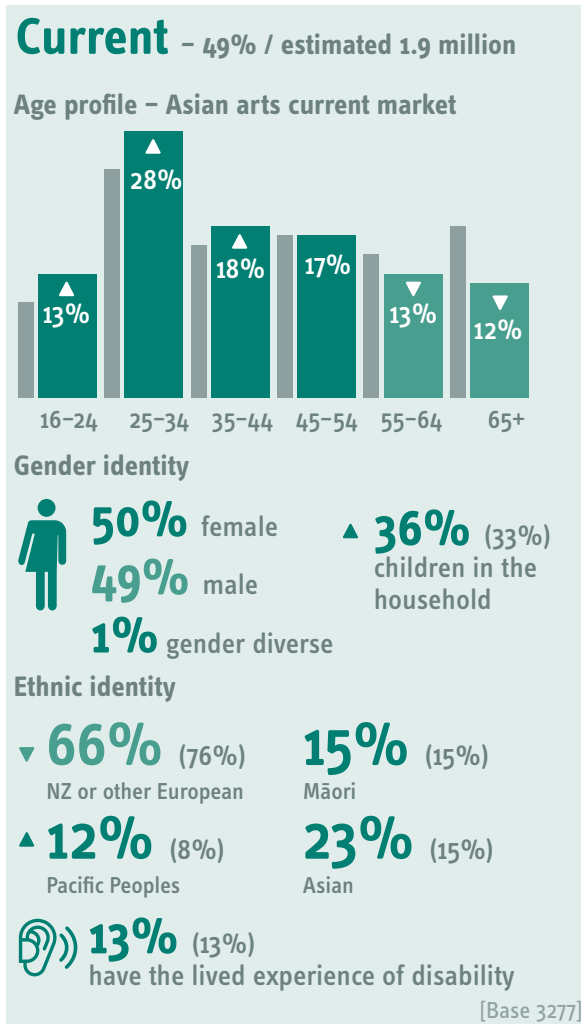
Taking a more granular look at the market, there is a healthy current market with an estimated 1.9 million having engaged in the past three years,

Meanwhile, the lapsed market, defined as those who last engaged over three years ago, is also sizeable, at an estimated 742k adults.

A further 890k would consider engaging but haven't previously.

The Asian arts market is defined as anyone in the culture market who has ever engaged with Asian arts or would consider engaging but haven't previously, including: an Asian film, Asian theatre, Asian craft / object art exhibition, Asian art exhibition or digital or video art event, Asian dance, music concert or event showcasing Asian artists, an Asian literature event, Asian cultural festival, or another Asian art, cultural event, or celebration.





## Current market for Asian arts

The current market for Asian arts – those who've engaged in the past three years – are younger and more diverse than the culture market average.

- 41% of those in the Asian arts current market are aged under 35, a significantly higher level than average (34%). Around one-quarter are aged 55+, significantly below the culture market average (33%).
- More ethnically diverse, with a significantly larger proportion identifying as Pasifika (12%, compared to 8%) or Asian (23%, compared to 15%). Conversely, there are significantly fewer in the current market for Asian arts identifying as New Zealand or other European (66%, compared to 76% overall).
- Significantly more likely to have children in the household (36%, compared to 33% overall).
- Significantly more likely to have completed higher education (36%, compared to 28% overall).
- Significantly more likely to be working full-time (51%, compared to 46%) or be in full-time study (6%, compared to 4%).
- Essence (13%), Expression (23%), Affirmation (20%) and Stimulation (14%) are over-represented compared to culture market average (10%, 20%, 18% and 12% respectively).

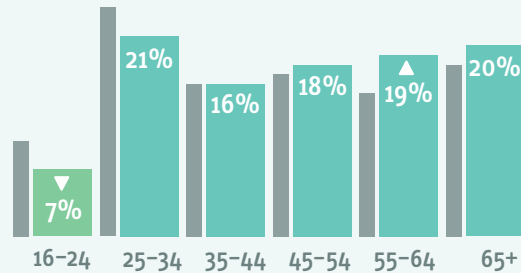
▲ ▼ where % is significantly different from the culture market average.

The culture market average is represented as either a grey bar or a % in brackets.

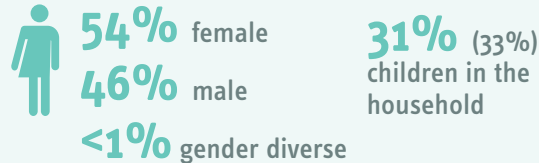


## Lapsed – 19% / estimated 742k

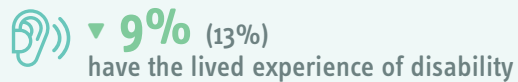
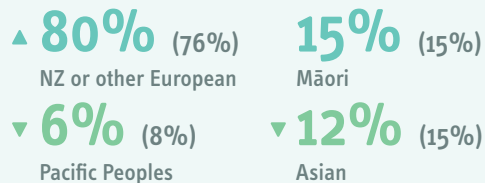
### Age profile – Asian arts lapsed market



### Gender identity



### Ethnic identity



[Base 1261]

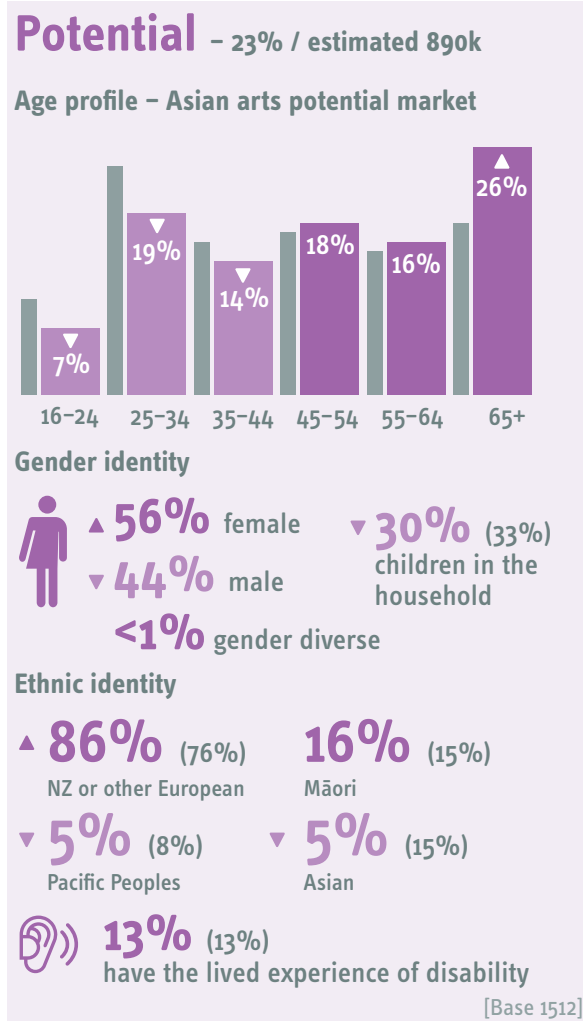
## Lapsed market for Asian arts

The lapsed market for Asian arts – those who last engaged over three years ago – are typically older and less diverse than average.

- 56% are aged 45+, a significantly higher level than average (50%). Conversely, younger adults (16-24s) are significantly under-represented (7%, compared to 10% overall).
- Less ethnically diverse, with a significantly larger proportion identifying as New Zealand or other European (80%, compared to 76% overall). Conversely, the proportion identifying as Pacific Peoples (6%) or Asian (12%) are significantly below average.
- Significantly less likely to have the lived experience of disability (9%, compared to 13% overall).
- Expression (17%) is under-represented compared to the wider market (20%, respectively). Conversely, the less culturally active segment of Enrichment (12%) is over-represented compared to the wider market (10%). Meaning Enrichment is more likely to have lapsed in their engagement with Asian arts.

▲▼ where % is significantly different from the culture market average.  
The culture market average is represented as either a grey bar or a % in brackets.





## Potential market for Asian arts

The potential market for Asian arts – those who would consider engaging but haven't previously – are more likely to be older or identify as New Zealand or other European than the culture market average.

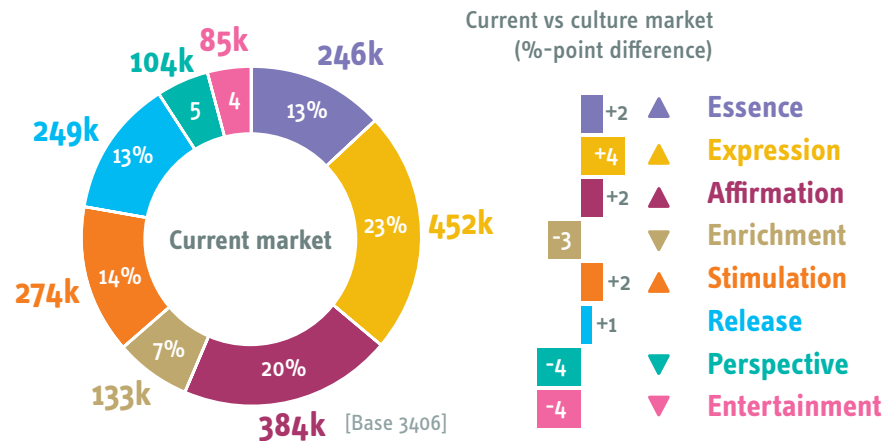
- 26% of those in the Asian arts potential market are aged 65+, a significantly higher level than average (18%). Meanwhile, 40% are aged under 45, significantly below the culture market average (50%).
- More likely to be retired (25%, compared to 16% overall).
- More likely to identify as European (86%, compared to 76% overall). Conversely, they are less likely to identify as Pacific Peoples (5%) or Asian (5%) than average.
- Less likely to have children in the household (30%, compared to 33% overall).
- The less culturally active segment of Enrichment (13%) are significantly over-represented compared to the wider culture market. However, the shift in balance is due to the absence of the more active Expression and Stimulation segments rather than larger numbers of the less active segments. See real figure estimates explored on the following pages.

▲▼ where % is significantly different from the culture market average.  
The culture market average is represented as either a grey bar or a % in brackets.



# The four most culturally active segments are over-represented in the current market for Asian arts

Culture Segment profile and real figure estimates – Asian arts



Essence, Expression and Stimulation are the segments most likely to have engaged with Asian arts in the past three years, and along with Affirmation, are over-represented compared to the culture market average. The less active segments of Enrichment, Perspective and Entertainment are less likely to be in the current market.

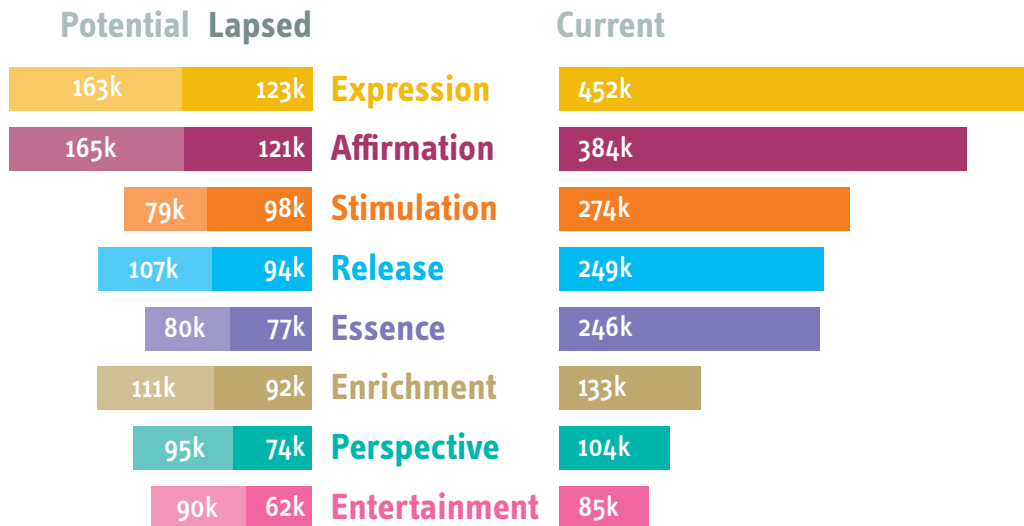
Expression is an important segment to the culture market generally and for Asian arts. This is not just because they are the most numerous (23%), but also the value they bring. Expression enjoy shared experiences and inclusive activities. They want others to join in with them, making them great advocates.

Affirmation closely follow Expression in size, representing around 1 in 5 of the current market. Affirmation are a self-conscious segment. They seek security and self-esteem through personal development and getting a sense of their place in the world.



# Expression and Affirmation are key to engagement and growth

Culture Segment profile and real figure estimates for the different Asian arts market groups



Expression and Affirmation are most numerous in all three market groups, highlighting their importance for engagement and growth for Asian arts. Stimulation represent an estimated 274k in the current market. This is a segment whose appetite for excitement drives their cultural engagement. With discovery at their heart, they love new, out of the ordinary experiences.

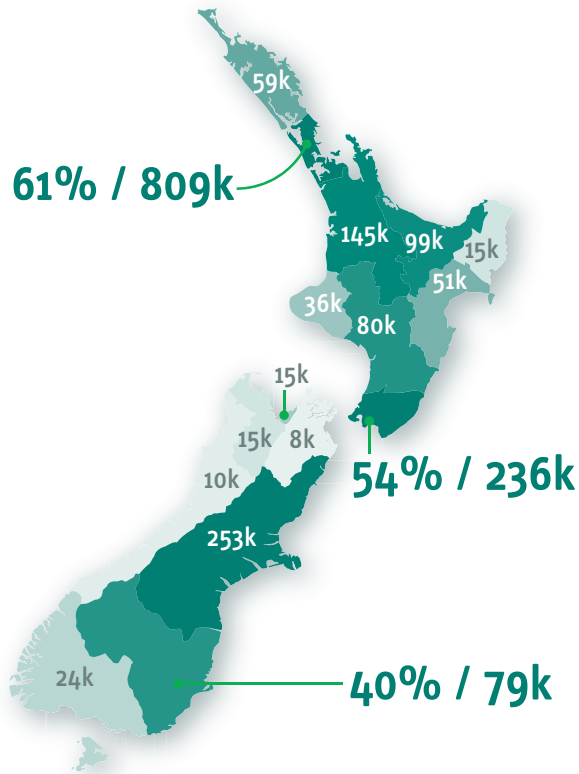
While Essence are not as numerous as some other segments they are an important group, being high-frequency attenders. Culturally confident Essence value quality experiences and substance.

Enrichment, is the segment most likely to have lapsed and nearly 3 in 10 people in this segment would consider engaging, but haven't previously. Enrichment tend to be cautious and price sensitive and favour traditional views. Their resistance to Asian dance, theatre and literature events is relatively high compared to Asian cultural festivals and film.



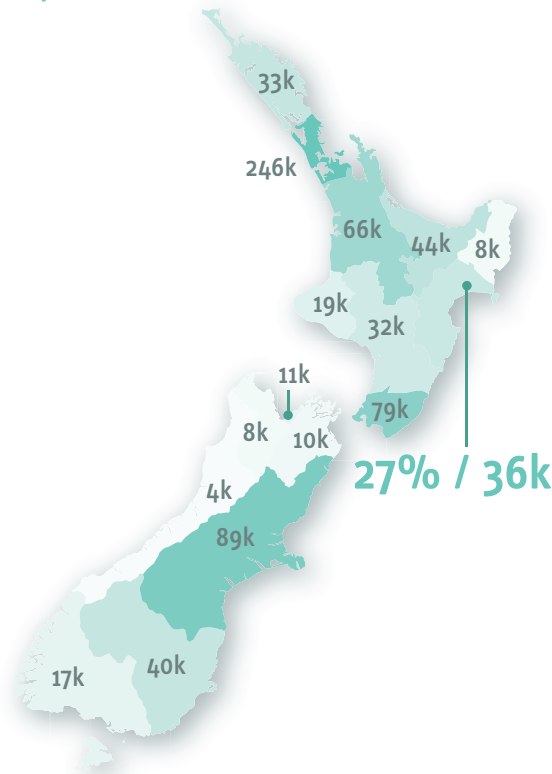
## Size of the current, lapsed and potential markets for Asian arts across Aotearoa New Zealand – real figure estimates

Current



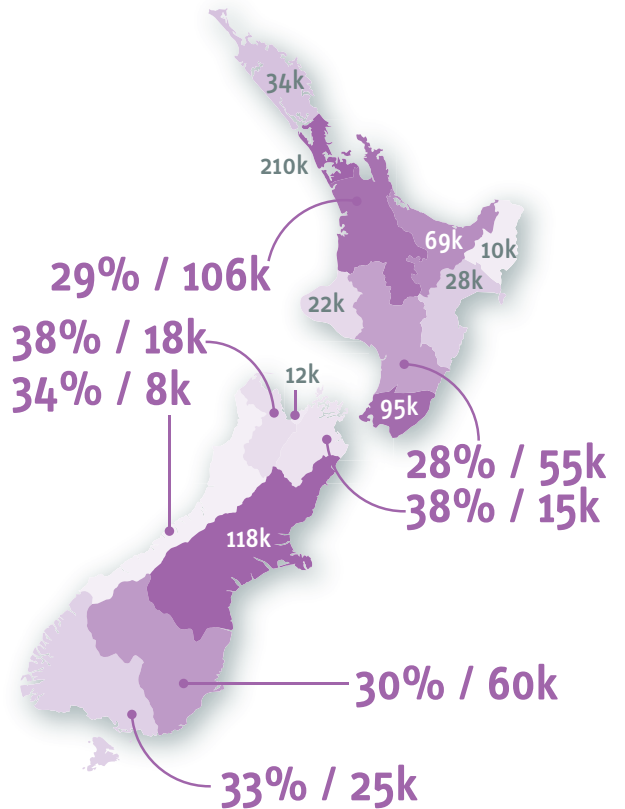
The Auckland (61%) and Wellington regions (54%) have a significantly larger proportion of residents, than average (49%) who have engaged with Asian arts in the past three years. Meanwhile, residents in the Otago region are less likely than average, to be in the current market for Asian arts.

Lapsed



The Hawke's Bay (27%) has a significantly larger proportion who have lapsed in their engagement with Asian arts compared to the average (19%).

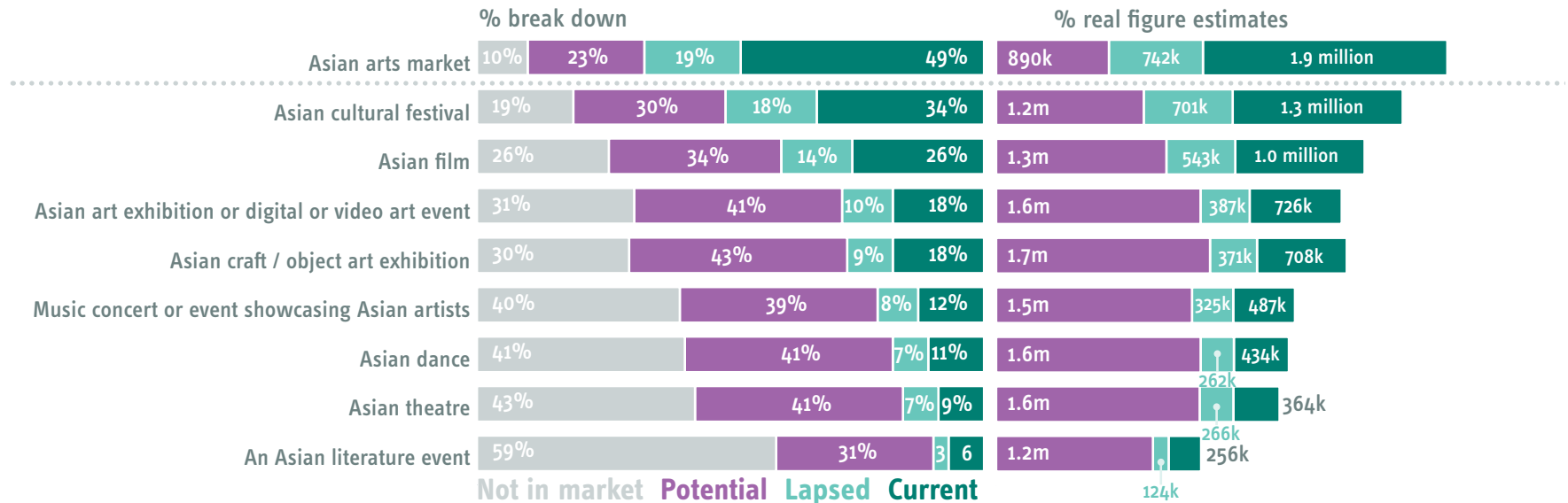
Potential



There is potential to introduce new audiences to Asian arts. A number of regions have a significantly larger proportion of people in the potential market compared to the market average (23%).



## Asian arts market penetration – including artforms within Asian arts



### 1.7 million in the potential market for Asian craft and object art exhibitions

All sub-artforms within the Asian arts market demonstrate sizeable untapped potential. An Asian cultural festival market has the largest current market (an estimated 1.3 million people having engaged within the past three years), and there is a similar potential market waiting to engage (1.2 million).

Meanwhile, the Asian craft and object art exhibition market has one of the smaller current markets (an estimated 708k), but it also has the largest potential for growth, an estimated 1.7 million people would consider engaging but haven't previously.

### A strong, shared market

Amongst those in the current Asian craft and object art exhibition market, 86% have engaged with an Asian art exhibition, digital or video art event in the past three years, while 83% of the current Asian art exhibition, digital or video art event market have engaged with an Asian craft and object art exhibition.





# Research parameters and methods

This study was carried out for Creative New Zealand Toi Aotearoa by Morris Hargreaves McIntyre. It was commissioned in October 2020.

**Target group for the research** The culture market in Aotearoa New Zealand.

**Date of fieldwork:** 11 December 2020 to 21 January 2021.

**Data collection method** Respondents were recruited by Consumer Link, Pureprofile, Prime Research and Panelbase. In order to qualify, respondents had to be aged 16 or over and live in Aotearoa New Zealand. Responses were collected online.

**Weighting procedures** Responses were weighted to be representative of the population; based on Census data. Data was weighted according to age band, gender, ethnicity, educational attainment and location.

**Sample size** 6,743 (nationally). Initial regional sampling was based on the 2018 Census. Some organisations opted to boost the sample in certain regions; there were additional national boosts for Māori, Pacific Peoples and Asian. Any imbalance was corrected post-collection, with weighting methods applied to match the demographic breakdown of the population.

**Population estimates:** For all four editions of Audience Atlas data cited in this report, real figure estimates have been generated using population estimates released by Stats NZ. The source for this data can be found here: <http://nzdotstat.stats.govt.nz/wbos/Index.aspx>. Please note that we deduct children, those not in the culture market and those in areas 'outside regions' before applying these estimates.

**Reliability of findings** Only a sample of the total 'population' was interviewed so we cannot be certain that the figures obtained are exactly those we would have found had every person been interviewed. However, for any percentage given, we can estimate confidence intervals within which the true values are likely to fall.

The data for the **national culture market** has a confidence interval (margin of error) of **+/-1.19%** at 50% (i.e., where the result is 50%, the actual result may fall between 47.81% and 51.19%).

The sample for **Māori** is 996 and has a confidence interval (margin of error) of **+/-3.10%** at 50% (ie, where the result is 50%, the actual result may fall between 46.90% and 53.10%).

The sample for **Pacific Peoples** is 432 and has a confidence interval (margin of error) of **+/-4.71%** at 50% (ie, where the result is 50%, the actual result may fall between 45.29% and 54.71%).

The sample for **Asian** is 1,127 and has a confidence interval (margin of error) of **+/-2.92%** at 50% (ie, where the result is 50%, the actual result may fall between 47.08% and 52.92%).

The data for those with the **lived experience of disability** has a confidence interval (margin of error) of **+/-3.48%** at 50% (ie, where the result is 50%, the actual result may fall between 46.52% and 53.48%)<sup>1</sup>.

<sup>1</sup> Confidence interval for lived experience is an approximate only and based on available data from StatsNZ. The definition of 'disability' is not directly comparable to *Audience Atlas Aotearoa 2020*.  
[www.stats.govt.nz/information-releases/disability-survey-2013](http://www.stats.govt.nz/information-releases/disability-survey-2013)





Morris Hargreaves McIntyre is an international consultancy. We work with charities, heritage and cultural organisations of all sizes.

We're fascinated by what makes people and organisations tick. Our strategic thinking, insight and creativity transform how our clients see their world.

Our clients use our work to connect more people, more deeply, with their causes, fuelling their success.

