creative nz
ARTS COUNCIL OF NEW ZEALAND TOI AOTEAROA

Audience Atlas New Zealand

2011 report

ARTS COUNCIL OF NEW ZEALAND TOI AOTEAROA

Widening audiences, deepening support

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Audience Atlas New Zealand 2011 report prepared for Creative New Zealand.

June 2012

Morris Hargreaves McIntyre is an international strategic research consultancy working within the culture, heritage, leisure, media and charities sectors.

The company was established to help cultural organisations to enhance their consumer focus and use their marketing to engage more effectively with their audiences so ultimately they become more successful and sustainable.

Morris Hargreaves McIntyre has developed two sector specific research products – Audience Atlas and Culture Segments – to help their clients better understand their current market and to reach potential new markets.

Audience Atlas New Zealand

Culture Segments

Contents

The research

Audience Atlas New Zealand report 2011

Audience Atlas New Zealand 2011 is a detailed survey of cultural audiences in New Zealand.

The survey covers 39 artforms and leisure activities and 640 individual arts, culture and heritage venues throughout the country. It measures lapsed, current and potential markets to provide detailed insight into New Zealand audiences.

THE DATA

All data quoted is taken from a nationally-representative population survey of adults (aged 15 or more) who are in the market for arts, culture and leisure activities and events. Quotas were put in place to ensure that responses are representative of the New Zealand population. The weighted dataset is based on a sample of 3,900 respondents. The data was collected by Colmar Brunton in November – December 2011, using an online survey.

THE MARKET

The market is New Zealand residents, aged 15 or more, who have been culturally active in the past three years, that is, having made at least one visit to a cultural event or place within that period (this includes cinema, live music, comedy, museums, galleries, theatre and dance). Population figures are taken from Statistics New Zealand. All percentages and figures are based on the total market for culture, unless stated otherwise.

Glossary of terms

Current market: Attended in the past 36 months.

Potential market: Would consider attending in the future, but hasn't attended in the last 36 months.

Lapsed market: Last attended more than 36 months ago.

Not in market: Not attended and not interested in attending.

Total market: New Zealanders who have attended in the past 36 months or would consider attending in the future.

The market for arts and culture

Market size

The market for arts and culture in New Zealand is large, with 95% of adults stating that they have been to at least one cultural event or place within the past three years.

NATIONAL CULTURE MARKET

95%

of the New Zealand (15+) population are in the market for arts, culture and heritage

3,347,000 individuals

This figure compares favourably with 87% of Australian adults who are in the market for arts, culture and heritage and 85% of adults in the United Kingdom in the market.

REGIONAL CULTURE MARKET

Region	Percent in cultural market	Number in cultural market	Percent of total cultural market
New Zealand	**95%**	**3,347.0k**	**100%**
Auckland Region	96%	1,084.9k	32%
Canterbury Region	91%	426.5k	13%
Wellington Region	98%	388.8k	12%
Waikato Region	93%	305.5k	9%
Bay of Plenty Region	96%	212.8k	6%
Manawatū-Wanganui Region	95%	183.4k	4%
Otago Region	97%	172.7k	5%
Northland Region	95%	120.5k	4%
Hawke's Bay Region	94%	119.2k	5%
Taranaki Region	94%	85.5k	3%
Southland Region	94%	74.9k	2%
Nelson Region	98%	37.8k	1%
Tasman Region	97%	37.8k	1%
Gisborne Region	97%	35.3k	1%
Marlborough Region	90%	34.7k	1%
West Coast Region	93%	25.9k	1%

Regional market size ranges from a high of 98% of the adult population in Wellington and Nelson, who have taken part in at least one cultural activity within the past three years, to 90% of the adult population in Marlborough and 91% in Canterbury[1].

The four most populous regions of the country: Auckland, Canterbury, Wellington and Waikato together account for more than 2 million adults in the cultural market; making up two-thirds of New Zealand's overall arts and culture market.

While the four most populous regions hold the top spots for market size and a greater share of arts provision, they do not hold the top four spots in terms of cultural consumption.

1 Please note, the 2010 and 2011 earthquakes impacted upon cultural attendance in the Canterbury region.

Market value

In any four-week period, an average of 40% of New Zealanders in the total market for culture[2] spent money on going to cultural events or places. Each of them spent an average of $132.50 doing so.

This means that each New Zealander in the total market spent an average of $53 per person every four weeks. This breaks down as $35 on admissions or tickets, $14 on food and drink at cultural events or places and $5 on souvenirs/programmes[3] per adult.

The level of expenditure varies considerably by region, with cultural consumers in the three biggest cultural markets of Wellington, Auckland and Canterbury spending above the national average.

FOUR-WEEKLY CULTURAL SPEND BY REGION

Region	Four-weekly cultural spend per person
New Zealand	**$53**
Wellington Region	$66
Auckland Region	$63
Canterbury Region	$58
Tasman Region	$56
Nelson Region	$54
Northland Region	$54
Gisborne Region	$51
Bay of Plenty Region	$46
Marlborough Region	$44
Southland Region	$43
Taranaki Region	$42
Hawke's Bay Region	$41
Waikato Region	$38
Otago Region	$36
West Coast Region	$31
Manawatū-Wanganui Region	$26

2 New Zealanders who have attended in the past 36 months or would consider attending in the future.

3 Figures do not add due to rounding.

Extending the four-weekly average spend across the whole population gives a calculated total of $2.31 billion spent on consuming culture in New Zealand in the last 12 months.

Between them they spent a total of **$2.31** billion on arts/culture/heritage in the last 12 months

ANNUAL CULTURAL SPEND BY REGION

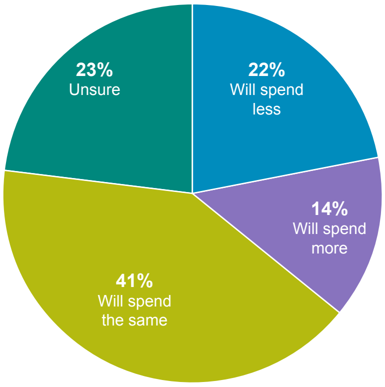
Region	Four-weekly cultural spend per person	% of total cultural spend
New Zealand	**$2.3 billion**	**100%**
Auckland Region	$885.7 million	38%
Wellington Region	$333.3 million	14%
Canterbury Region	$322.3 million	14%
Waikato Region	$150.2 million	7%
Bay of Plenty Region	$128.6 million	6%
Northland Region	$83.9 million	4%
Otago Region	$81.4 million	4%
Hawke's Bay Region	$63.4 million	3%
Manawatū-Wanganui Region	$62.9 million	3%
Taranaki Region	$46.7 million	2%
Southland Region	$41.4 million	2%
Tasman Region	$27.4 million	1%
Nelson Region	$26.6 million	1%
Gisborne Region	$23.4 million	1%
Marlborough Region	$20.0 million	1%
West Coast Region	$10.3 million	0%

The four largest cultural markets of Auckland, Wellington, Canterbury and Waikato, which together account for 66% of the market, make up 73% of New Zealand's annual cultural spend.

Future culture spending

Overall spend on culture in the coming year is expected to drop a little, with 22% of New Zealanders anticipating that they will spend less on arts and culture, against only 14% anticipating they will spend more.

FUTURE CULTURE SPEND:



FUTURE SPEND BY REGION

Those in Canterbury are significantly more likely to say that they intend to spend more on culture in the coming 12 months, perhaps in light of reduced cultural opportunities in the preceding 12 months following the earthquakes.

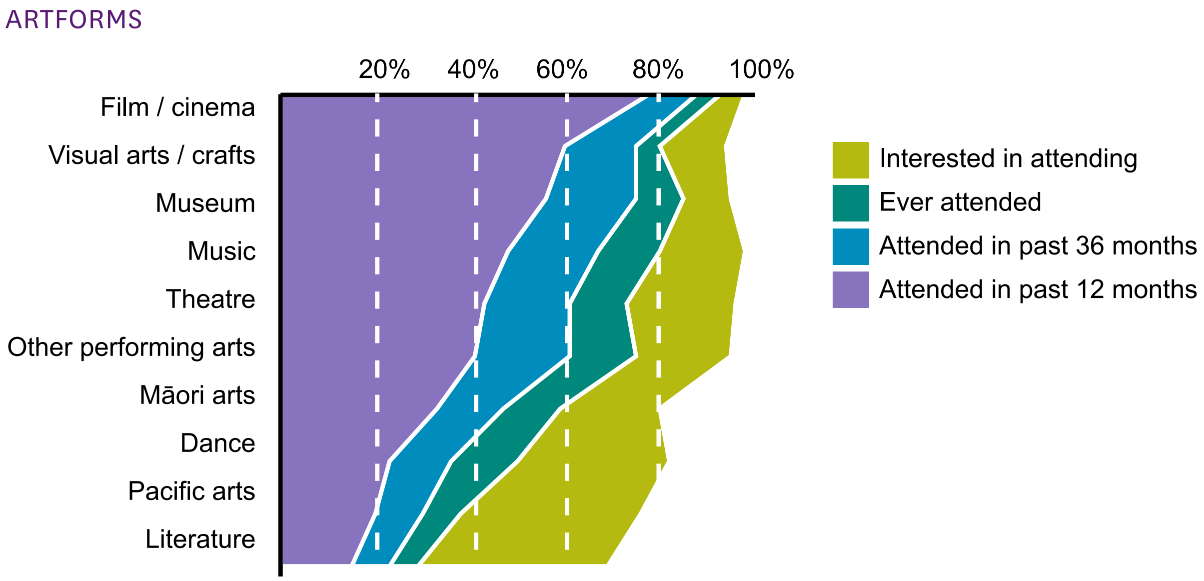
Expenditure is closely related to levels of cultural consumption. Those who consume more arts are planning to at least maintain their current levels of expenditure in the coming 12 months, while the biggest consumers of the arts are most likely to be planning to increase their spending.

Region	Spend more	Spend the same	Spend less	Unsure
New Zealand	**14%**	**41%**	**22%**	**23%**
Canterbury Region	22%	32%	20%	26%
Wellington Region	17%	48%	16%	18%
Waikato Region	16%	37%	28%	19%
Nelson Region	15%	47%	18%	20%
Bay of Plenty Region	15%	35%	27%	24%
Tasman Region	14%	48%	17%	21%
Manawatū-Wanganui Region	13%	43%	21%	23%
Otago Region	12%	47%	20%	21%
Northland Region	12%	44%	20%	24%
Taranaki Region	12%	45%	25%	17%
Gisborne Region	12%	46%	18%	25%
Auckland Region	12%	39%	22%	28%
Southland Region	12%	48%	21%	20%
Marlborough Region	10%	55%	21%	15%
Hawke's Bay Region	9%	45%	28%	17%
West Coast Region	9%	41%	22%	27%

Artform attendance and demand

The shape of the market

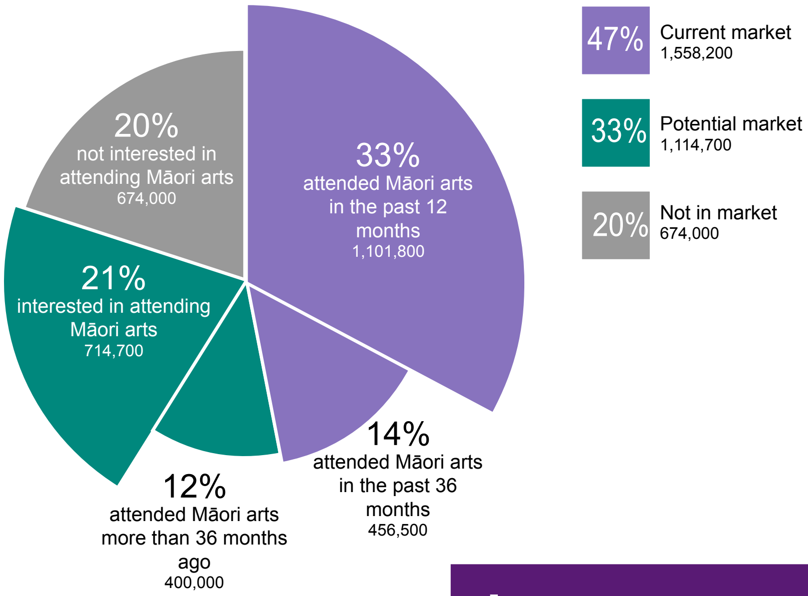
The chart below shows the level of current and potential engagement for 10 different artforms.



The data shows that not only is the current market for each artform larger than we might expect if we take a three-year, rather than a narrow 12-month view of the market, but that there is also significant potential for further development amongst lapsed and potential attenders.

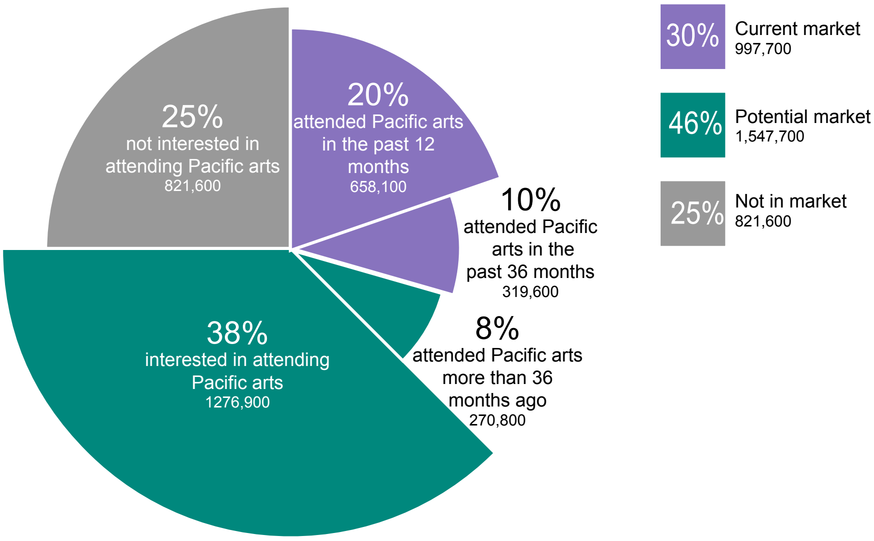
The series of charts and tables on the following pages break down the current and potential market for each of the 10 artforms, to show the extent of the potential audience.

Māori arts



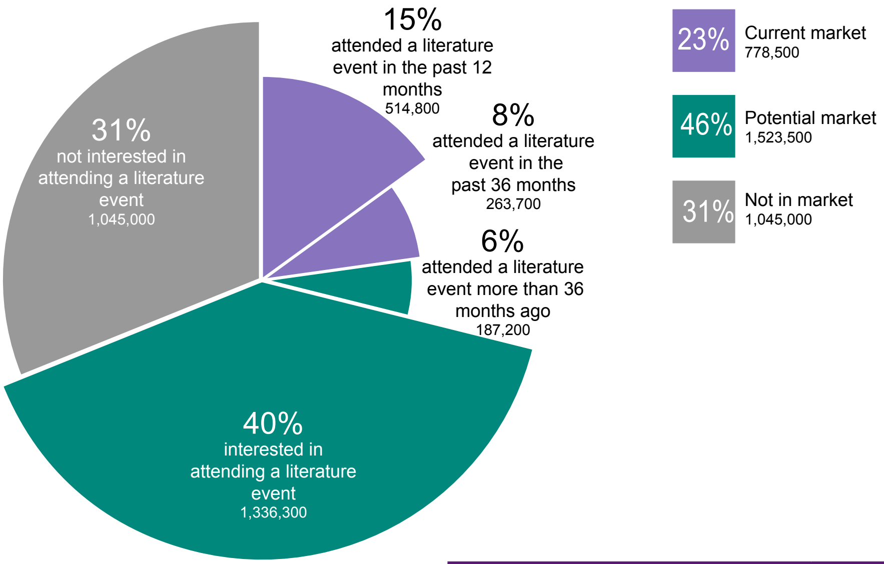
MĀORI ARTS	Current market	Potential market	Total market
New Zealand	**1558.2k**	**1114.7k**	**2673.0k**
Auckland Region	502.4k	376.5k	878.9k
Canterbury Region	176.7k	160.1k	336.8k
Wellington Region	210.7k	107.5k	318.3k
Waikato Region	138.8k	98.9k	237.7k
Bay of Plenty Region	103.1k	60.3k	163.4k
Manawatū-Wanganui Region	81.0k	72.0k	152.9k
Otago Region	73.5k	61.7k	135.2k
Northland Region	69.9k	30.7k	100.6k
Hawke's Bay Region	57.0k	36.5k	93.5k
Taranaki Region	39.1k	27.2k	66.2k
Southland Region	27.9k	28.0k	55.9k
Tasman Region	16.2k	13.3k	29.5k
Gisborne Region	21.7k	6.7k	28.4k
Nelson Region	15.2k	12.2k	27.4k
Marlborough Region	15.5k	11.6k	27.1k
West Coast Region	9.3k	11.5k	20.8k

Pacific arts



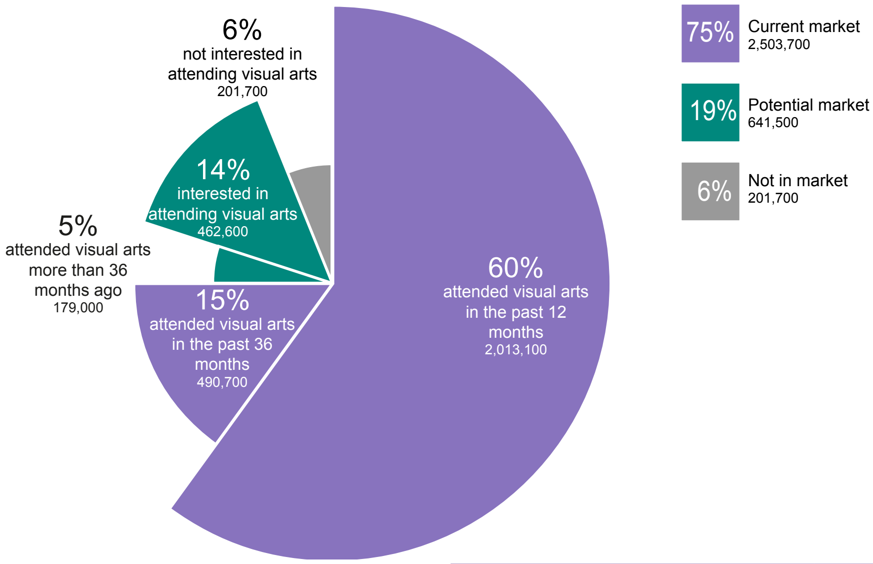
PACIFIC ARTS	Current market	Potential market	Total market
New Zealand	**977.7k**	**1547.7k**	**2525.4k**
Auckland Region	442.2k	471.6k	913.9k
Canterbury Region	78.0k	228.0k	306.0k
Wellington Region	139.2k	150.8k	290.0k
Waikato Region	80.3k	133.5k	213.8k
Bay of Plenty Region	44.6k	96.0k	140.6k
Manawatū-Wanganui Region	36.8k	96.3k	133.1k
Otago Region	34.7k	86.5k	121.3k
Northland Region	31.9k	57.9k	89.9k
Hawke's Bay Region	25.6k	58.5k	84.1k
Taranaki Region	20.7k	38.8k	59.5k
Southland Region	14.6k	36.7k	51.4k
Tasman Region	6.2k	19.7k	26.0k
Nelson Region	6.0k	19.9k	25.8k
Gisborne Region	7.4k	18.2k	25.6k
Marlborough Region	5.5k	19.7k	25.2k
West Coast Region	3.6k	15.3k	18.9k

Literature



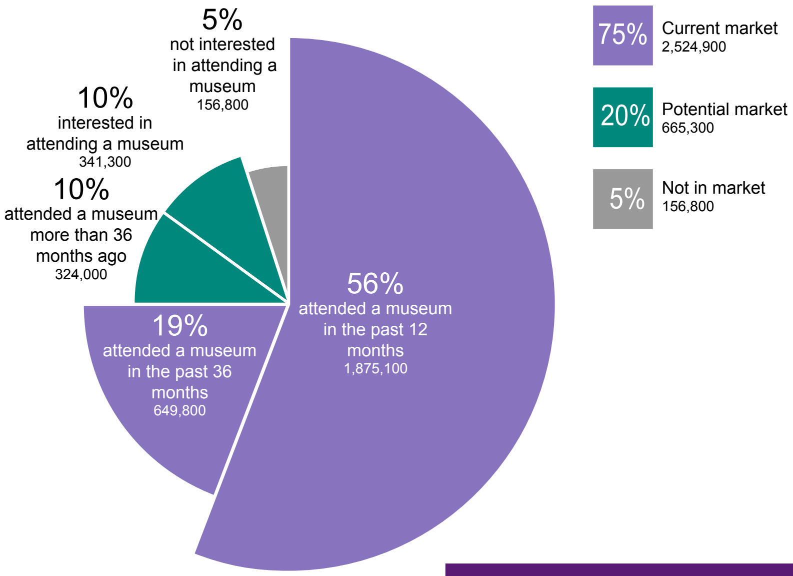
LITERATURE	Current market	Potential market	Total market
New Zealand	**778.5k**	**1523.5k**	**2302.0k**
Auckland Region	232.4k	500.7k	733.2k
Canterbury Region	100.3k	201.9k	302.2k
Wellington Region	103.3k	165.9k	269.2k
Waikato Region	71.0k	140.1k	211.1k
Bay of Plenty Region	40.0k	105.8k	145.8k
Manawatū-Wanganui Region	37.3k	87.5k	124.7k
Otago Region	46.6k	76.5k	123.1k
Northland Region	29.5k	54.2k	83.7k
Hawke's Bay Region	25.8k	56.0k	81.7k
Taranaki Region	30.7k	25.6k	56.3k
Southland Region	18.3k	31.3k	49.6k
Nelson Region	11.3k	15.6k	27.0k
Tasman Region	10.8k	16.1k	26.9k
Marlborough Region	6.4k	18.0k	24.5k
Gisborne Region	8.4k	15.4k	23.8k
West Coast Region	6.4k	12.5k	18.9k

Visual arts/crafts



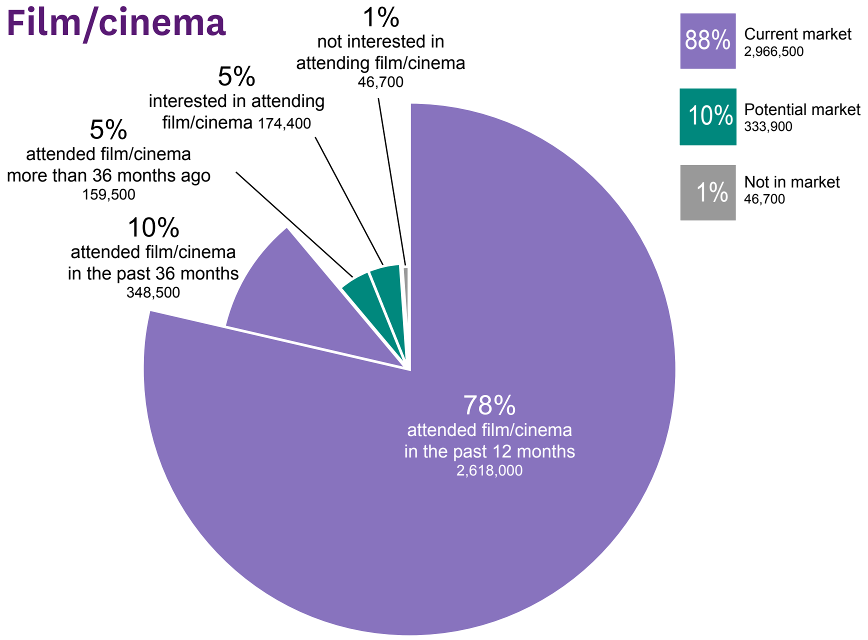
VISUAL ARTS/CRAFTS	Current market	Potential market	Total market
New Zealand	**2503.7k**	**641.5k**	**3145.3k**
Auckland Region	720.9k	270.2k	991.1k
Canterbury Region	341.1k	76.7k	417.8k
Wellington Region	319.4k	51.7k	371.1k
Waikato Region	229.8k	62.8k	292.5k
Bay of Plenty Region	169.1k	29.1k	198.3k
Manawatū-Wanganui Region	138.4k	29.8k	168.2k
Otago Region	134.5k	28.7k	163.1k
Northland Region	98.8k	14.4k	113.2k
Hawke's Bay Region	84.6k	28.1k	112.7k
Taranaki Region	69.0k	12.5k	81.5k
Southland Region	64.0k	9.4k	73.5k
Tasman Region	29.6k	6.3k	35.9k
Nelson Region	29.7k	5.9k	35.6k
Gisborne Region	25.2k	7.4k	32.6k
Marlborough Region	27.9k	4.2k	32.1k
West Coast Region	21.4k	4.2k	25.6k

Museums



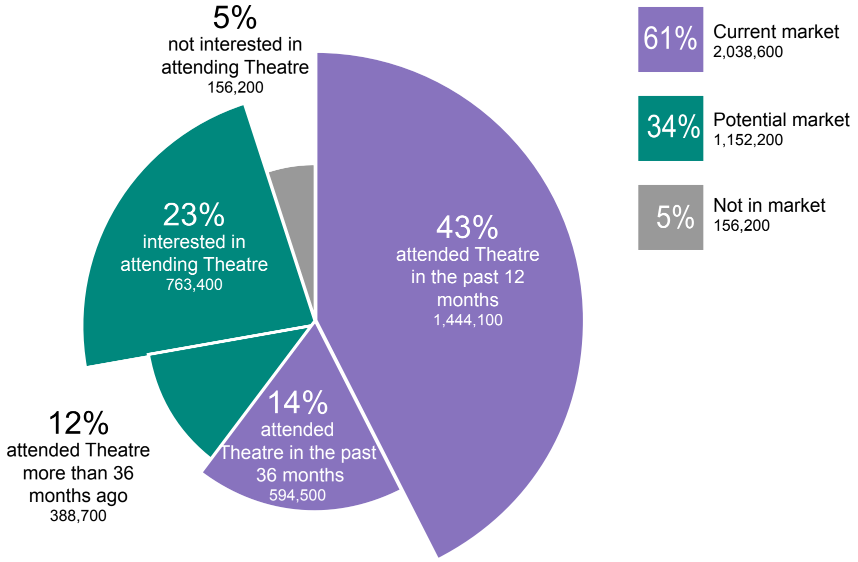
MUSEUMS	Current market	Potential market	Total market
New Zealand	**2524.9k**	**665.3k**	**3190.2k**
Auckland Region	795.9k	230.0k	1025.9k
Canterbury Region	306.1k	103.0k	409.1k
Wellington Region	336.2k	38.5k	374.7k
Waikato Region	223.7k	70.4k	294.1k
Bay of Plenty Region	149.8k	54.0k	203.8k
Manawatū-Wanganui Region	130.9k	40.4k	171.3k
Otago Region	146.9k	20.9k	167.8k
Northland Region	90.9k	25.6k	116.5k
Hawke's Bay Region	81.3k	30.4k	111.7k
Taranaki Region	72.4k	7.5k	79.9k
Southland Region	64.0k	8.8k	72.8k
Nelson Region	26.5k	9.3k	35.8k
Tasman Region	28.1k	7.3k	35.4k
Marlborough Region	26.8k	6.7k	33.5k
Gisborne Region	24.6k	7.6k	32.2k
West Coast Region	20.3k	4.8k	25.1k

Film/cinema



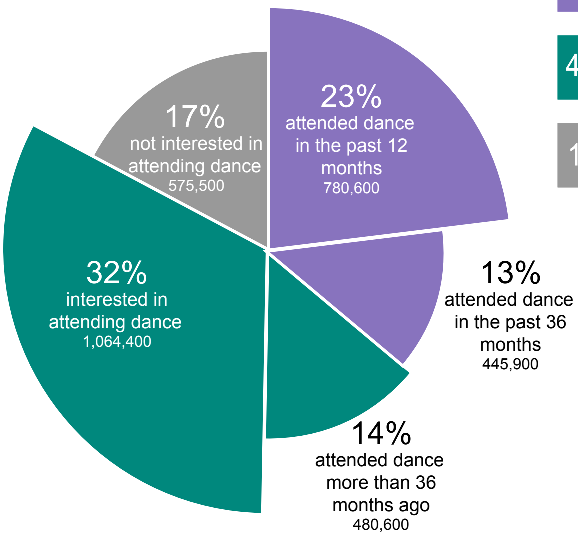
FILM/CINEMA	Current market	Potential market	Total market
New Zealand	**2966.5k**	**333.9k**	**3300.3k**
Auckland Region	957.2k	107.0k	1064.2k
Canterbury Region	381.1k	42.5k	423.5k
Wellington Region	357.1k	29.7k	386.8k
Waikato Region	270.3k	32.1k	302.4k
Bay of Plenty Region	193.4k	17.0k	210.5k
Manawatū-Wanganui Region	159.2k	20.5k	179.7k
Otago Region	148.3k	23.0k	171.4k
Hawke's Bay Region	107.9k	11.0k	118.9k
Northland Region	104.0k	14.7k	118.7k
Taranaki Region	74.8k	9.0k	83.8k
Southland Region	64.1k	9.1k	73.2k
Nelson Region	34.8k	2.5k	37.4k
Tasman Region	33.4k	3.5k	36.9k
Gisborne Region	29.4k	4.5k	33.9k
Marlborough Region	30.8k	3.1k	33.9k
West Coast Region	20.2k	4.6k	24.8k

Theatre



THEATRE	Current market	Potential market	Total market
New Zealand	**2038.6k**	**1152.2k**	**3190.8k**
Auckland Region	625.9k	404.0k	1029.9k
Canterbury Region	252.1k	146.0k	398.2k
Wellington Region	267.5k	104.5k	372.0k
Waikato Region	173.3k	117.6k	290.9k
Bay of Plenty Region	138.9k	69.4k	208.3k
Manawatū-Wanganui Region	116.1k	62.4k	178.5k
Otago Region	111.5k	51.2k	162.8k
Northland Region	69.2k	46.9k	116.1k
Hawke's Bay Region	73.5k	41.7k	115.2k
Taranaki Region	61.4k	21.4k	82.8k
Southland Region	48.7k	23.6k	72.3k
Nelson Region	23.2k	13.2k	36.4k
Tasman Region	20.8k	14.5k	35.4k
Gisborne Region	16.8k	16.5k	33.3k
Marlborough Region	25.7k	7.6k	33.3k
West Coast Region	13.6k	11.3k	24.8k

Dance



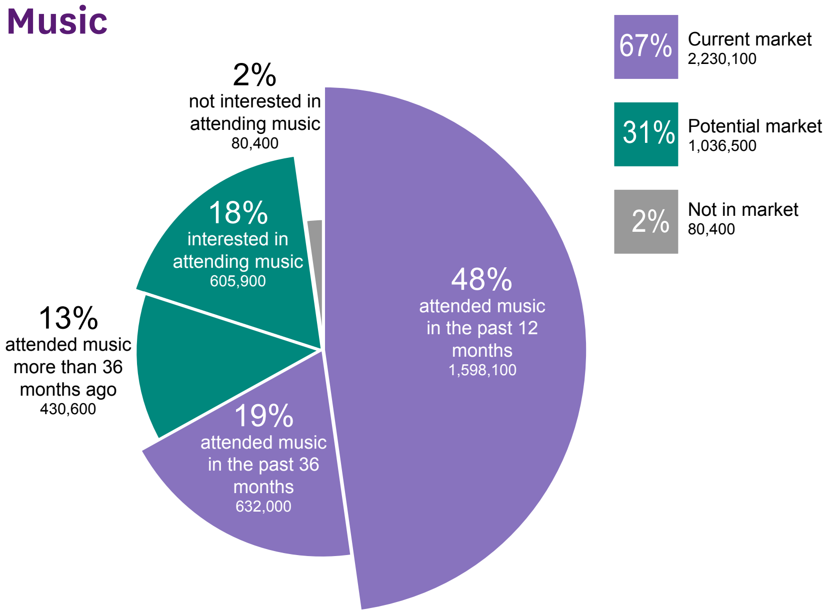
37% Current market 1,226,600

46% Potential market 1,545,000

17% Not in market 575,700

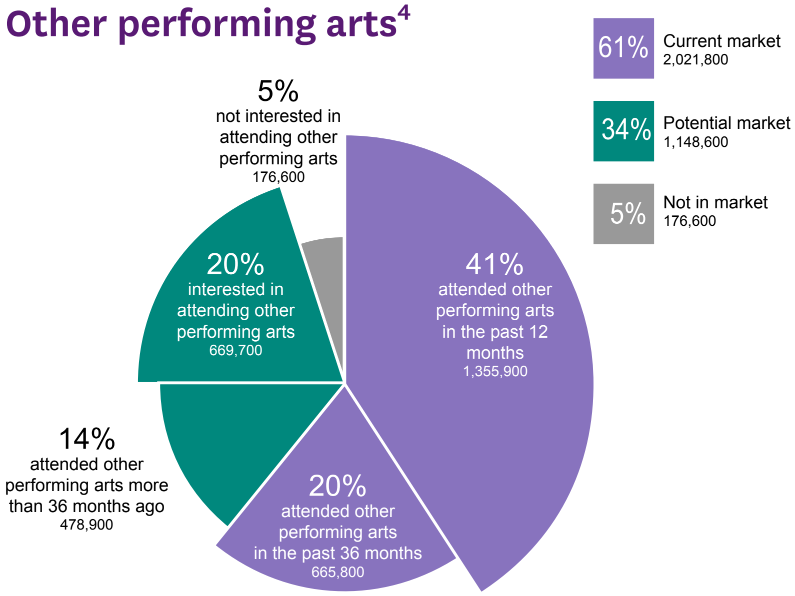
DANCE	Current market	Potential market	Total market
New Zealand	**1226.6k**	**1545.0k**	**2771.5k**
Auckland Region	408.5k	513.8k	922.3k
Canterbury Region	144.7k	213.8k	358.5k
Wellington Region	183.3k	144.4k	327.7k
Waikato Region	100.6k	144.2k	244.9k
Bay of Plenty Region	73.6k	92.9k	166.5k
Manawatū-Wanganui Region	50.8k	99.7k	150.5k
Otago Region	56.6k	83.8k	140.4k
Hawke's Bay Region	46.6k	51.4k	98.0k
Northland Region	44.9k	52.6k	97.5k
Taranaki Region	30.4k	37.1k	67.5k
Southland Region	28.5k	34.2k	62.6k
Tasman Region	10.4k	19.3k	29.7k
Marlborough Region	13.8k	15.3k	29.2k
Nelson Region	12.8k	15.7k	28.6k
Gisborne Region	12.5k	14.5k	27.0k
West Coast Region	8.6k	11.7k	20.3k

Music



MUSIC	Current market	Potential market	Total market
New Zealand	2230.1k	1036.5k	3266.6k
Auckland Region	680.0k	370.7k	1050.6k
Canterbury Region	283.3k	132.1k	415.4k
Wellington Region	280.0k	104.0k	384.0k
Waikato Region	211.6k	84.0k	295.6k
Bay of Plenty Region	153.4k	57.6k	211.0k
Manawatū-Wanganui Region	112.6k	65.5k	178.1k
Otago Region	122.8k	47.6k	170.4k
Northland Region	79.8k	39.4k	119.2k
Hawke's Bay Region	86.4k	30.6k	117.0k
Taranaki Region	60.7k	22.5k	83.2k
Southland Region	49.2k	24.8k	74.0k
Tasman Region	24.0k	13.4k	37.4k
Nelson Region	24.8k	11.9k	36.7k
Gisborne Region	23.2k	10.9k	34.1k
Marlborough Region	22.5k	11.3k	33.8k
West Coast Region	15.5k	10.1k	25.6k

Other performing arts[4]



OTHER PERFORMING ARTS	Current market	Potential market	Total market
New Zealand	**2021.8k**	**1148.6k**	**3170.4k**
Auckland Region	688.3k	349.3k	1037.6k
Canterbury Region	252.6k	145.6k	398.2k
Wellington Region	236.3k	127.8k	364.1k
Waikato Region	160.5k	130.0k	290.6k
Bay of Plenty Region	134.1k	70.2k	204.2k
Manawatū-Wanganui Region	91.6k	79.6k	171.2k
Otago Region	110.4k	54.9k	165.3k
Northland Region	80.1k	32.6k	112.7k
Hawke's Bay Region	63.3k	47.9k	111.2k
Taranaki Region	46.6k	34.4k	81.0k
Southland Region	47.7k	24.4k	72.1k
Nelson Region	26.6k	9.9k	36.5k
Tasman Region	25.1k	10.5k	35.6k
Marlborough Region	19.9k	12.6k	32.5k
Gisborne Region	24.9k	7.5k	32.4k
West Coast Region	13.4k	11.3k	24.7k

4 Comprises circus and street performance.

While the size of the current market is impressive, there is clearly still significant potential for greater engagement across each of the artforms listed.

Almost half of the cultural market is open to attending each of Pacific arts, literature and dance performances and events, and around a third are interested in attending theatre, Māori arts, music and other performing arts performances and events. These people either attended more than three years ago, or have never attended but would be interested in doing so.

Around two-thirds of the market potential comes from the four most culturally active regions of Auckland, Canterbury, Wellington and Waikato, with a further third from the remaining 12 regions. However, the figures show that there is unmet demand across each of the 16 regions and that the level of this demand as a proportion of the population is broadly consistent across each region.

Support for the arts

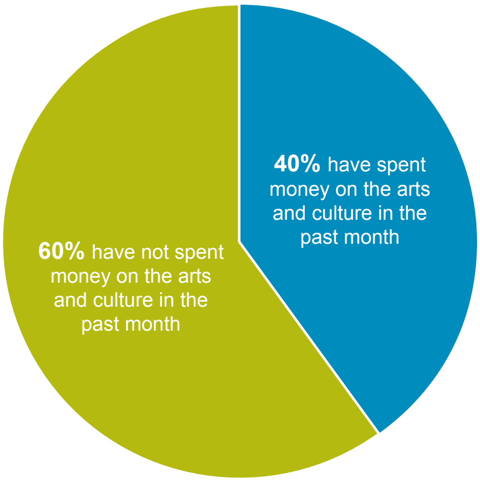
Market support for the arts takes a number of forms. Support ranges from purely transactional expenditure and membership, through to the giving of money and time.

The following set of charts and tables outlines the proportions of the cultural market that support the arts in each way at a national and regional level.

Taken together the charts demonstrate that support for the arts is significant across the cultural market at a national level, and that there are some interesting differences in support for the arts at a regional level.

Perhaps the most interesting finding is that, while Auckland, Canterbury, Wellington and Waikato have the largest market for the arts, and correspondingly the highest level of provision, this does not correlate with higher levels of support for the arts.

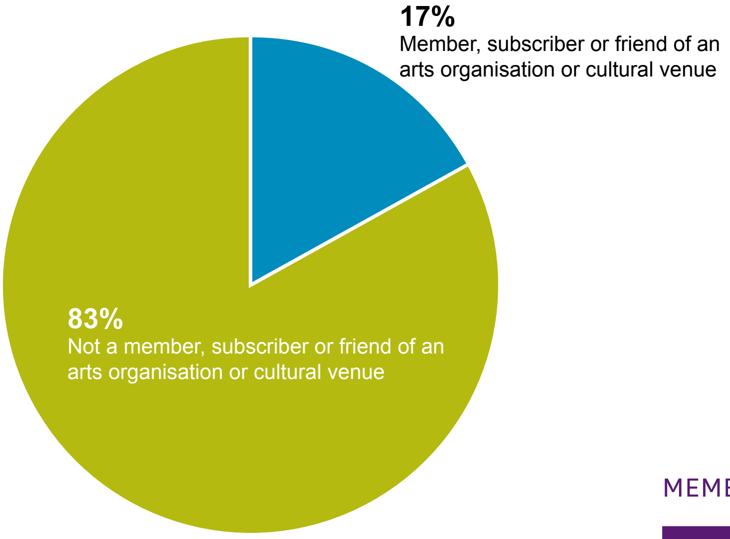
Expenditure



EXPENDITURE BY REGION

Region	Expenditure
New Zealand	**60%**
West Coast Region	68%
Hawke's Bay Region	67%
Manawatū-Wanganui Region	66%
Otago Region	66%
Tasman Region	65%
Waikato Region	65%
Southland Region	63%
Taranaki Region	63%
Gisborne Region	63%
Northland Region	60%
Marlborough Region	60%
Auckland Region	60%
Bay of Plenty Region	60%
Canterbury Region	58%
Nelson Region	56%
Wellington Region	50%

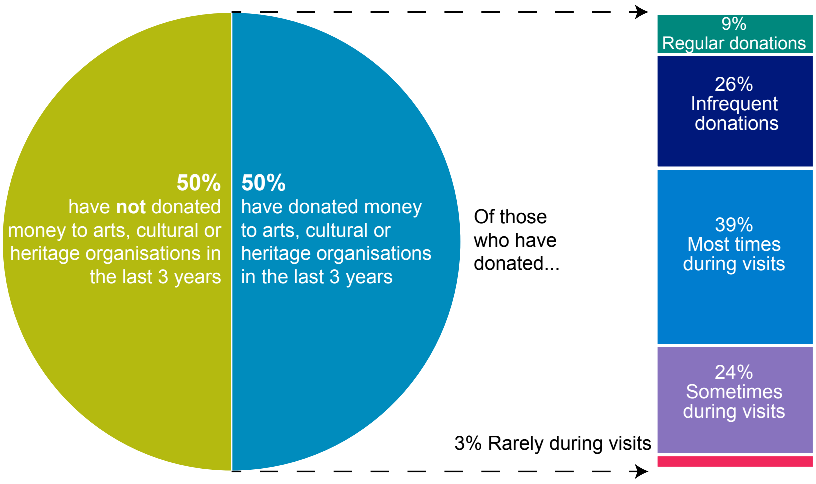
Membership



MEMBERSHIP BY REGION

Region	Membership
New Zealand	**17%**
Marlborough Region	24%
Northland Region	21%
Canterbury Region	20%
Waikato Region	18%
Hawke's Bay Region	17%
Taranaki Region	17%
Gisborne Region	17%
Auckland Region	17%
Bay of Plenty Region	16%
Otago Region	16%
Wellington Region	16%
Manawatū-Wanganui Region	14%
Tasman Region	14%
Nelson Region	14%
Southland Region	14%
West Coast Region	13%

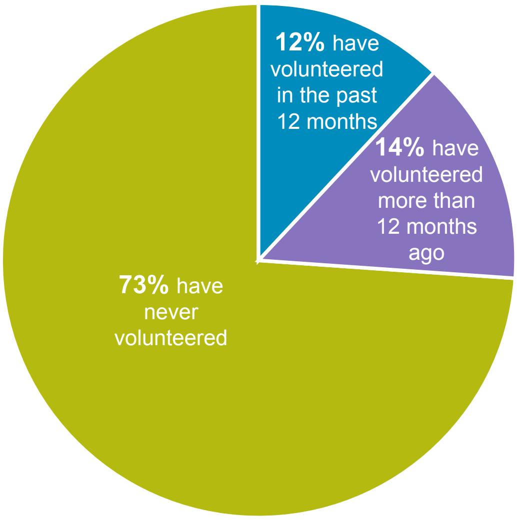
Donation



DONATION BY REGION

Region	Donation
New Zealand	**50%**
West Coast Region	59%
Canterbury Region	54%
Wellington Region	54%
Otago Region	53%
Northland Region	53%
Marlborough Region	53%
Nelson Region	52%
Gisborne Region	51%
Bay of Plenty Region	50%
Manawatū-Wanganui Region	49%
Tasman Region	49%
Hawke's Bay Region	48%
Auckland Region	48%
Southland Region	47%
Waikato Region	45%
Taranaki Region	43%

Volunteering



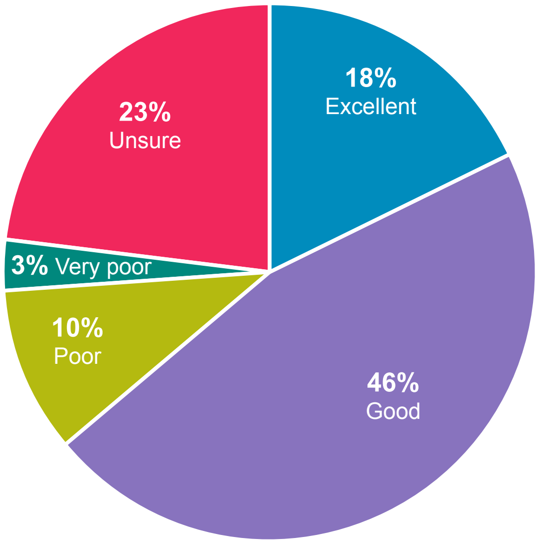
VOLUNTEERING BY REGION

Region	Volunteering
New Zealand	**27%**
Northland Region	36%
Marlborough Region	35%
Tasman Region	34%
Nelson Region	32%
Waikato Region	31%
West Coast Region	31%
Taranaki Region	31%
Southland Region	30%
Bay of Plenty Region	30%
Gisborne Region	28%
Canterbury Region	28%
Manawatū-Wanganui Region	28%
Otago Region	26%
Wellington Region	25%
Auckland Region	23%
Hawke's Bay Region	22%

Perceived value for money delivered by arts funding

'In 2010 Creative New Zealand spent around $43 million on opportunities for New Zealanders to experience the arts, including funding for artists and arts organisations.

With just over 3.5 million adults in New Zealand, this represents an estimated $12 per person per year. To what extent do you think this is value for money?'



Region	Arts are good value for money
New Zealand	**64%**
Northland Region	72%
Canterbury Region	70%
Manawatū-Wanganui Region	68%
Marlborough Region	67%
Southland Region	66%
Otago Region	65%
West Coast Region	65%
Taranaki Region	65%
Wellington Region	63%
Auckland Region	62%
Bay of Plenty Region	60%
Nelson Region	60%
Waikato Region	60%
Hawke's Bay Region	59%
Tasman Region	59%
Gisborne Region	57%

Widening the market

Culture Segments

Culture Segments is a new, international, sector-specific segmentation system developed for arts, culture and heritage organisations by Morris Hargreaves McIntyre. The system uses data from Audience Atlas New Zealand, and draws on a decade of experience in helping organisations to understand and meet the needs of audiences for arts, culture and heritage.

The principle objective of Culture Segments is to provide the sector with a shared, international language for understanding the audience, so marketing can be targeted more accurately, audiences engaged more deeply and lasting relationships built.

Culture Segments is based on people's cultural values and motivations. These cultural values define the person and frame their attitudes, lifestyle choices and behaviour.

The people in these segments are distinguished from one another by deeply-held beliefs about the role that art and culture play in their lives, enabling arts organisations to get to the heart of what motivates people in each segment and develop strategies to engage them more deeply.

By taking a psychographic approach[5] to segmenting the market for arts and culture, Culture Segments offers the sector a powerful framework for targeting new audiences and meeting their needs more effectively.

Culture Segments

Summaries of the eight Culture Segments follow.

Full portraits are free to download at:

www.creativenz.govt.nz/culturesegments

5 Booking data and demographics helps to describe your audiences and tells you a lot about their current behaviour, but – while it can show you WHO your audiences are and WHAT they are currently doing – it can't tell you anything about WHY they do these things and it can't help you influence their behaviour. A psychographic approach can give you an understanding of shared values, attitudes, needs and motivations so you can succeed in meeting your audiences' needs and changing their behaviour patterns. You need to understand what drives and motivates audiences – what different people are seeking to get out of the experiences you offer if you hope to present them with the right proposition in the most appropriate way.

Essence

DISCERNING
SPONTANEOUS
INDEPENDENT
SOPHISTICATED

The Essence segment tends to be well-educated professionals who are highly-active cultural consumers; they are leaders rather than followers. Confident and discerning in their own tastes, they will act spontaneously according to their mood and pay little attention to what others think.

The arts and culture are an integral, even essential part of their life. Rather than a social activity or form of entertainment, culture is a source of self-fulfilment and challenge, a means for experiencing life. They are inner-directed and self-sufficient, actively avoiding the mainstream.

Stimulation

ACTIVE
EXPERIMENTAL
DISCOVERY
CONTEMPORARY

The Stimulation segment is an active group who live their lives to the full, looking for new experiences and challenges to break away from the crowd. They are open to a wide range of experiences, from culture to sports and music, but they like to be at the cutting-edge in everything they do.

This segment wants to live a varied life of novelty and challenge – partaking in a wide variety of artforms and taking risks with their cultural consumption. As early adopters and innovators, they are keen to break away from the mainstream, to try new things and to ensure they remain the ones in the know amongst their peer group.

Release

BUSY
AMBITIOUS
PRIORITISING
WISTFUL

The Release segment tends to be younger adults with busy working and family lives who used to enjoy relatively popular arts and culture, but have become switched off as other things have taken priority in their lives. Consquently they feel they have limited time and resources to enjoy the arts and culture, although they would like to do more.

This segment is preoccupied with meeting life's demands and seeks opportunities for relaxation, entertainment and socialisation in their leisure time. They need to be encouraged to view culture as a social activity and an alternative means of taking time out from their busy lives. The arts and culture can offer them a means of staying connected to things that are current and contemporary – keeping them in the loop.

Enrichment

MATURE
TRADITIONAL
HERITAGE
NOSTALGIA

The Enrichment segment is characterised by older adults with time to spare who like spending their leisure time close to the home. They have established tastes and enjoy culture that links into their interests in nature, heritage and more traditional artforms.

They know what they like and their visits to cultural organisations are very much driven by their own interest and not those of others, or what is considered to be new or fashionable. Their cultural consumption fits with their interests in heritage, gardening and nature. These personal interests, along with the desire to experience nostalgia, awe and wonder, motivate them to engage with culture.

Expression

RECEPTIVE
CONFIDENT
COMMUNITY
EXPRESSIVE

The Expression segment is in tune with their creative and spiritual side. They are self-aware people who have a wide range of interests, from culture, to community to nature. They lead an eclectic lifestyle, trying to cram in as much as possible to make the most of their free time.

Open to new ideas, they pursue challenge, debate and intellectual stimulation through their cultural engagement. They enjoy being part of a crowd and seek communal experiences. The arts offers a means of self-expression and connection with like-minded individuals who share their deeply-held values about the world.

Affirmation

SELF-IDENTITY
ASPIRATION
QUALITY TIME
IMPROVEMENT

The core of the Affirmation segment comprises young adults, often studying or looking after family at home, for whom the arts is one of many leisure choices. They welcome cultural consumption as a way of improving themselves and developing their children's knowledge. They are looking for larger, non-specialist events and activities, as they offer a low risk means of satisfying their needs.

The arts and culture also provides this segment with a means of validating themselves with their peers. They care what others think about them and as a result want to be seen to be engaging with cultural activities, not just entertainment.

Perspective

SETTLED
SELF-SUFFICIENT
FOCUSED
CONTENTED

The Perspective segment is fulfilled and home-orientated. The arts and culture are low among their priorities, however their spontaneous nature, desire to learn and make their own discoveries provides a focus for engagement with them.

This segment is optimistic and prioritises their own needs above others. Whilst this means they are highly contented, their horizons have become somewhat narrow. Nevertheless, they do see some forms of culture as providing the opportunity to broaden their horizons.

Entertainment

CONSUMERS
POPULARIST
LEISURE
MAINSTREAM

The Entertainment segment tends to be conventional younger adults for whom the arts are on the periphery of their lives. Their occasional forays into culture are usually for spectacular, entertaining or must-see events, and compete against a wide range of other leisure interests.

This segment looks for escapism and thrill in leisure activities. They are largely socially motivated to attend, looking to pass the time in an enjoyable way with friends and family.

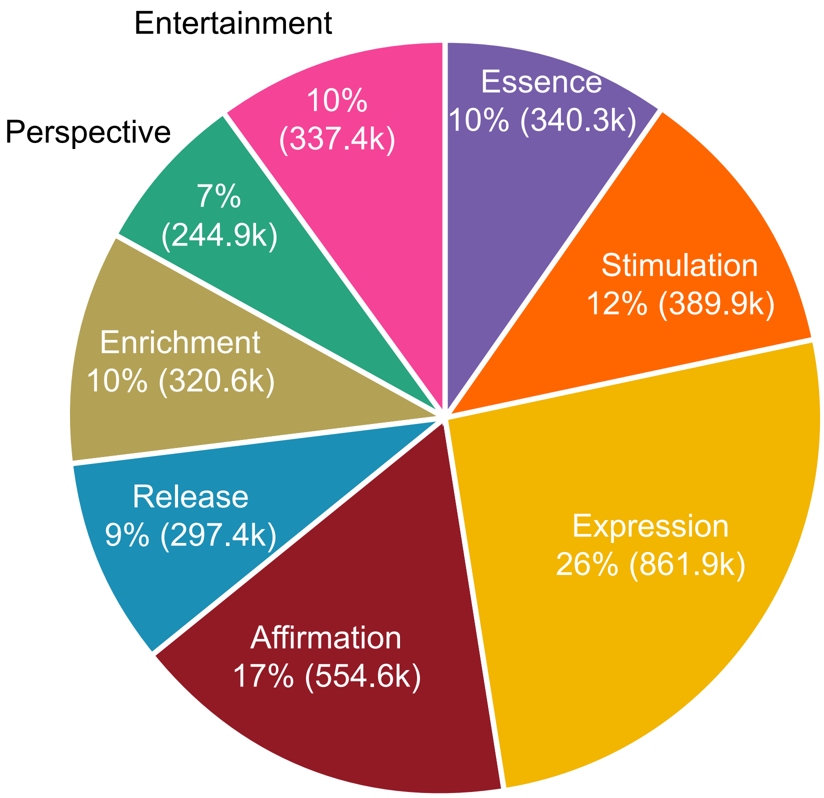
The Entertainment segment prefers to stick to the tried and tested and are not looking to be challenged or take risks in discovering something new. They do not want to try things that are not well established, strongly branded and with popular currency.

National profile

The Culture Segment profile of the New Zealand culture market is provided below.

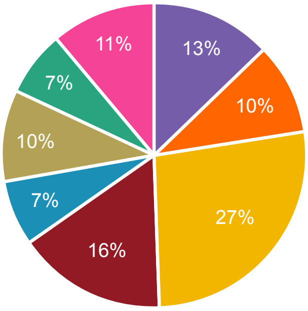
The three largest segments of Expression, Affirmation and Stimulation, account for 55% of the New Zealand culture market.

New Zealand Culture Segments market profile:

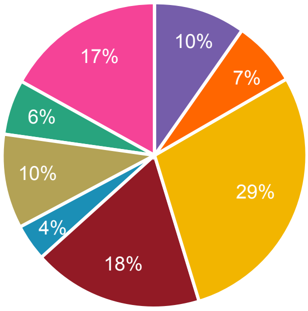


The charts on the following pages show the regional Culture Segment profiles, highlighting some interesting regional differences.

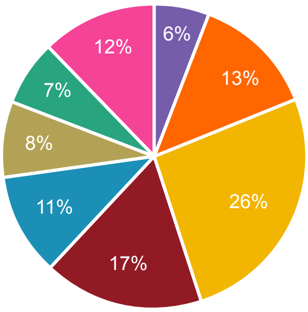
Northland



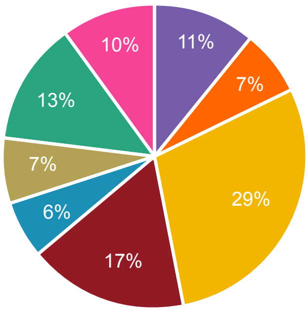
Gisborne



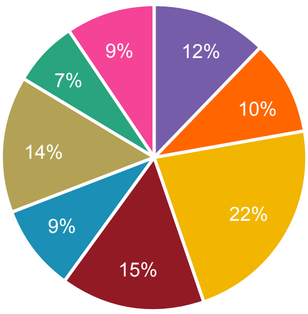
Auckland



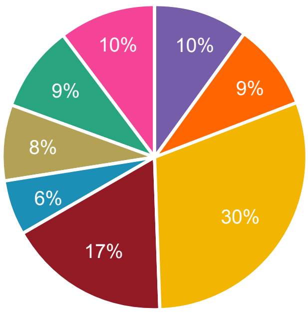
Hawke's Bay



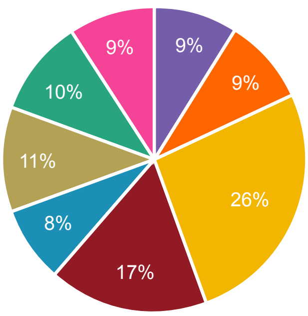
Waikato



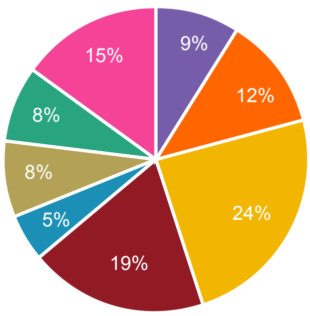
Taranaki

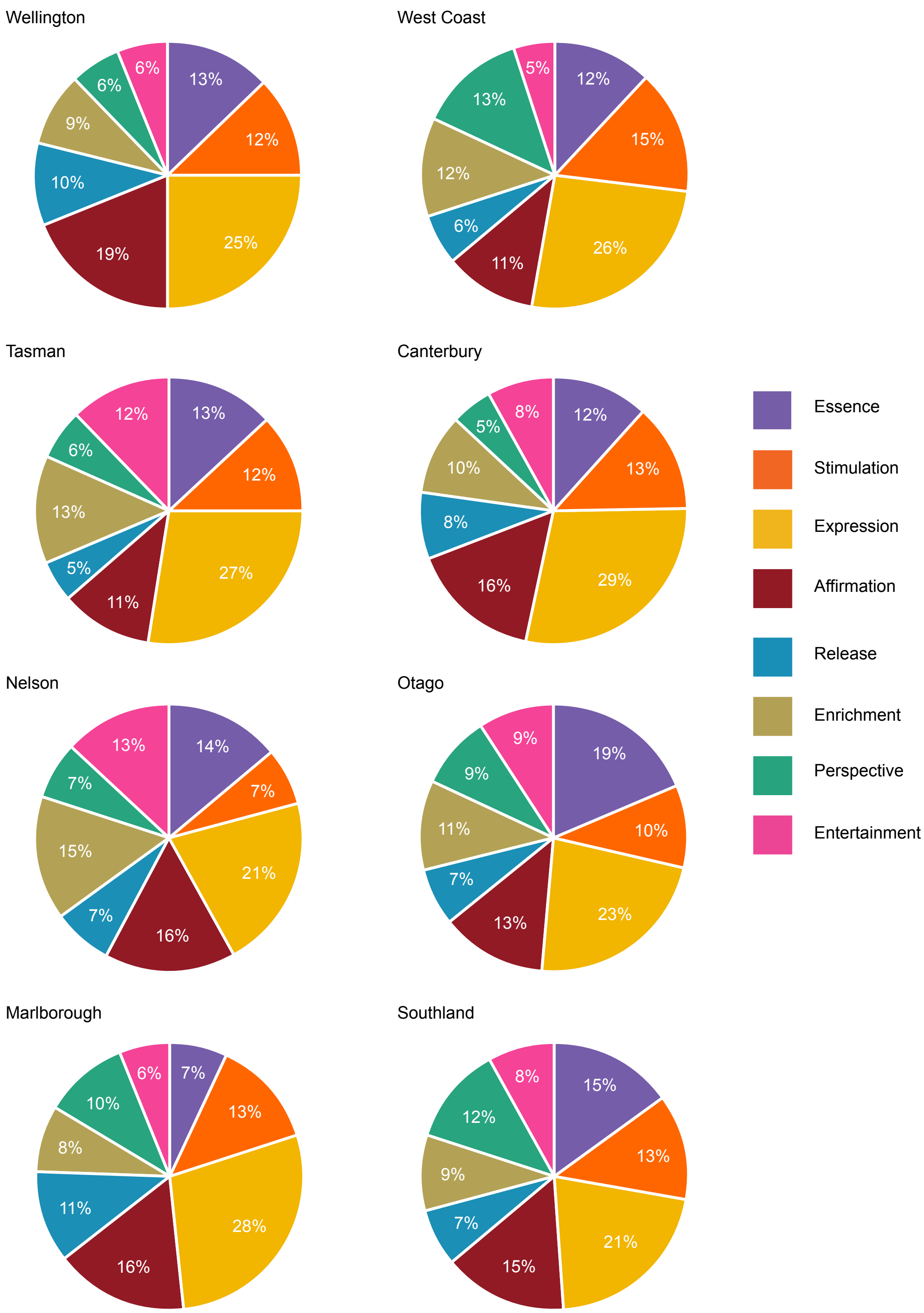


Bay of Plenty



Manawatū-Wanganui




Wellington
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Southland
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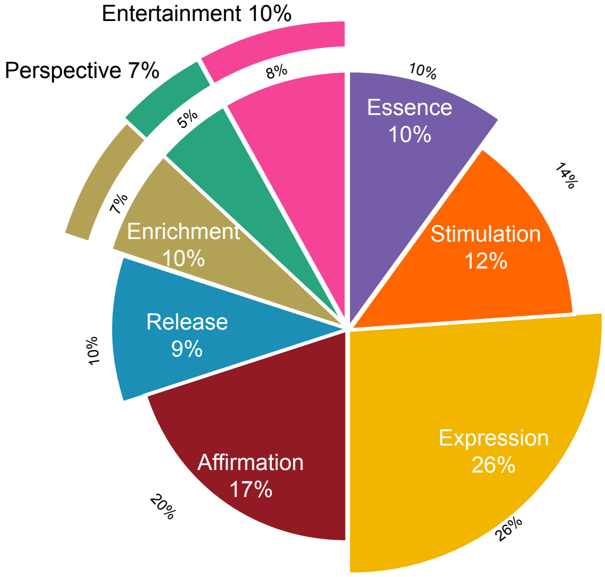
12%
8%
Essence
Stimulation
Expression
Affirmation
Release
Enrichment
Perspective
Entertainment

National comparators

The charts below compare New Zealand's Culture Segment profile with that of Australia and the United Kingdom.

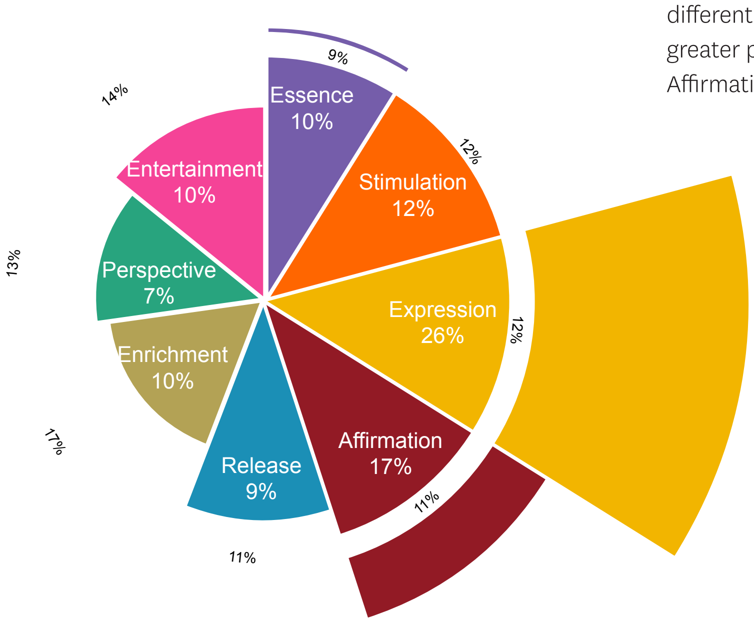
The segments of the circle represent the profile of the New Zealand market, while the percentages in the white band denote the profile of the other national market.

NEW ZEALAND v AUSTRALIA



New Zealand has a similar Culture Segment profile to that of the Australian market, although with slightly more of the less culturally-engaged segments of Enrichment, Perspective and Entertainment.

NEW ZEALAND v UNITED KINGDOM



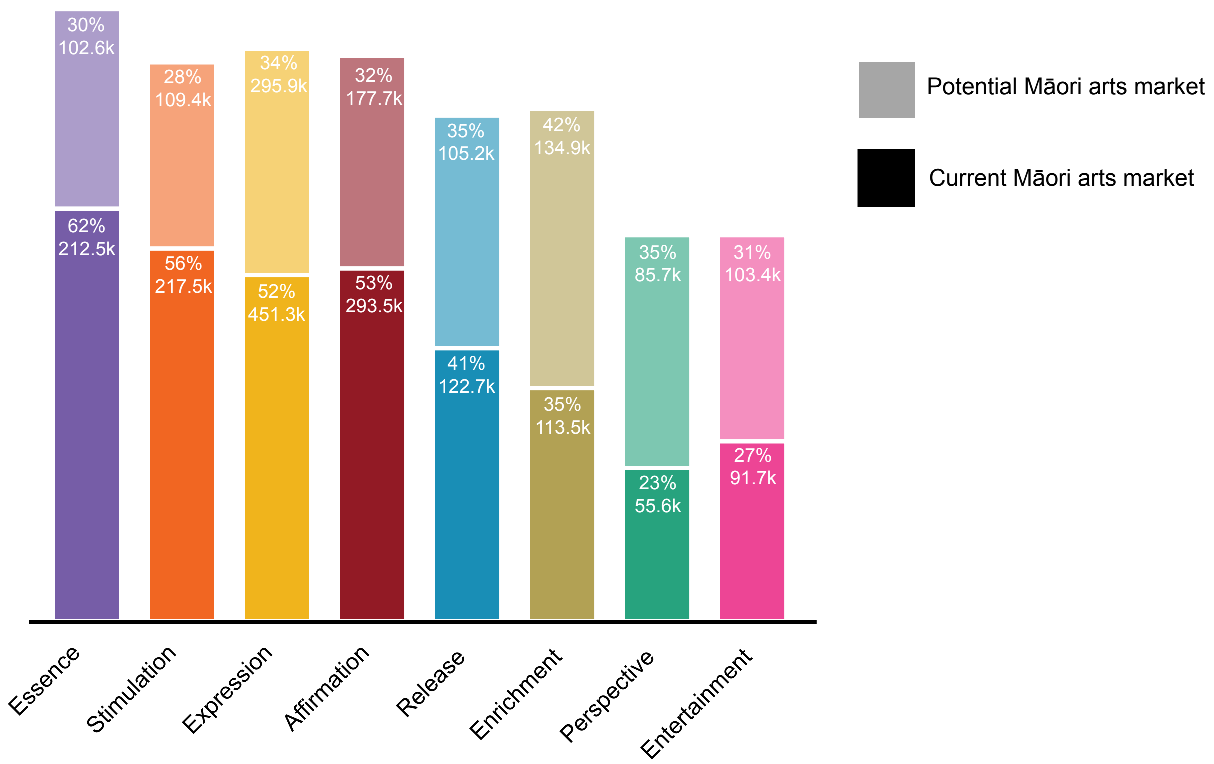
In contrast, the New Zealand culture market has a very different profile to the United Kingdom market, with a far greater proportion in the Expression segment and in the Affirmation segment.

Releasing the potential

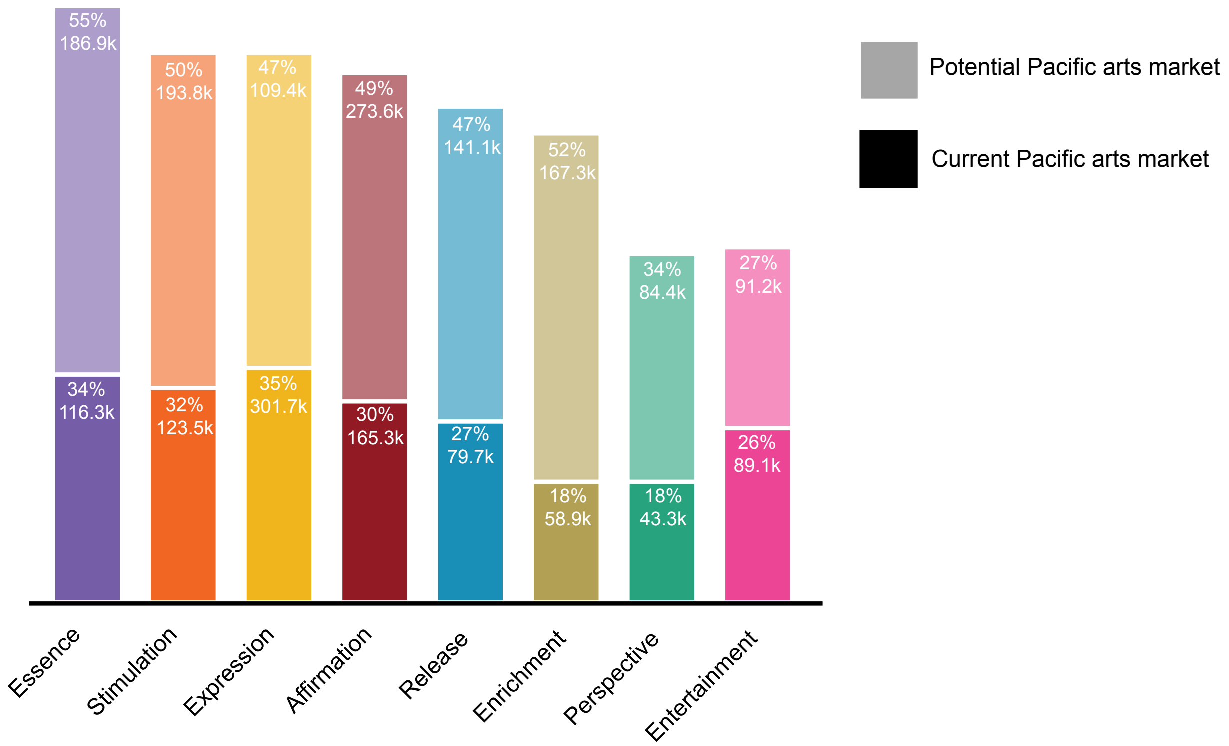
The following series of charts shows the proportion of each Culture Segment that is in the current market (attended in the past three years) and the potential market (attended more than three years ago, plus never attended but is interested in attending) for each of the 10 artforms, as well as the actual number of New Zealand adults they represent.

The research demonstrates that there is clear potential for attracting audiences for each artform from across each of the eight Culture Segments, but also that certain segments show greater levels of demand for certain artforms.

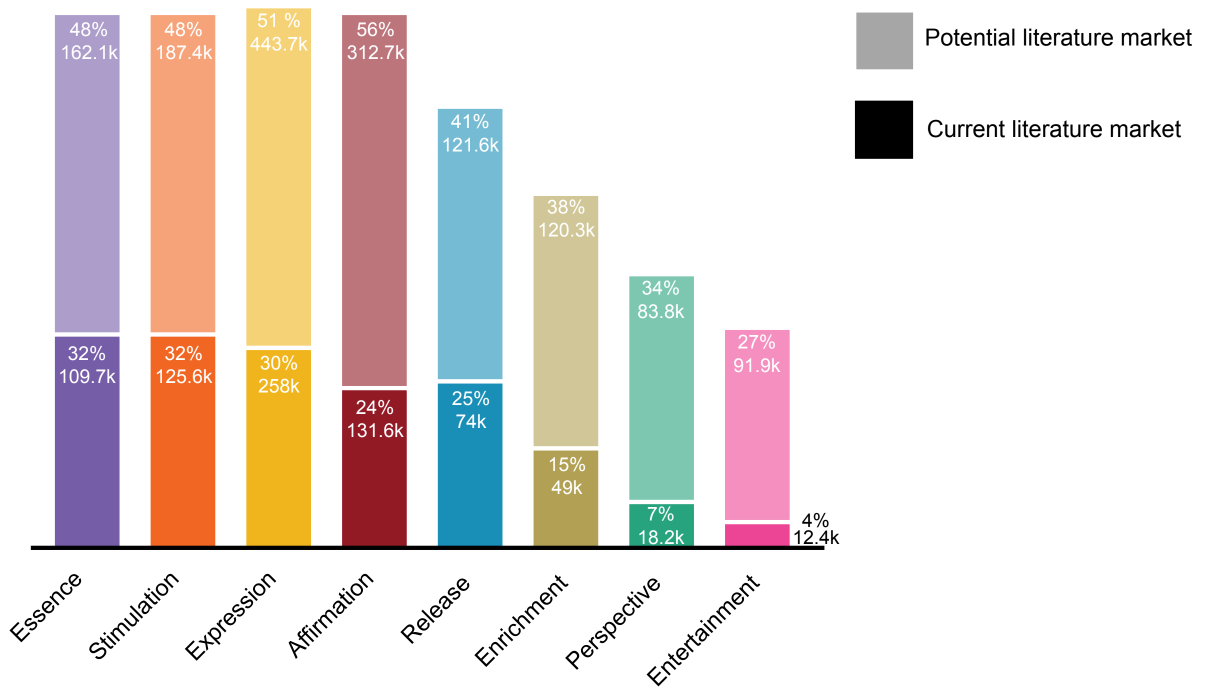
MĀORI ARTS



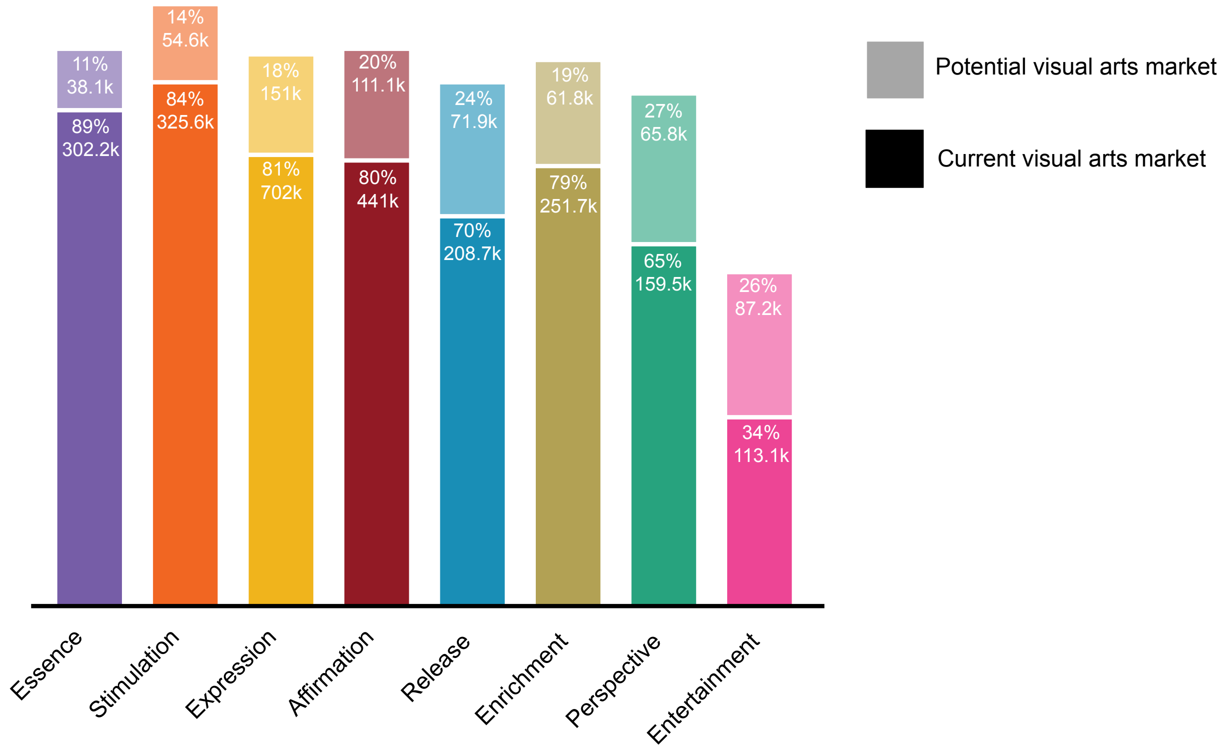
PACIFIC ARTS



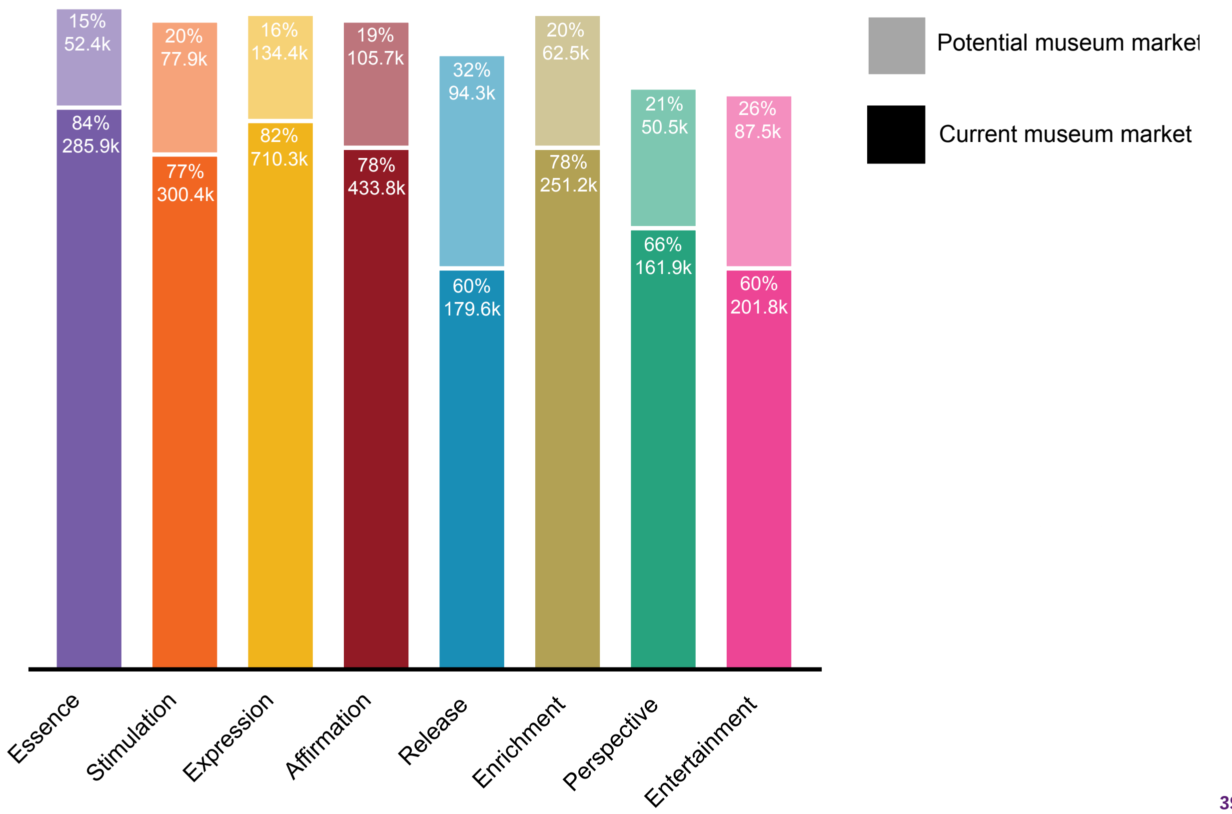
LITERATURE



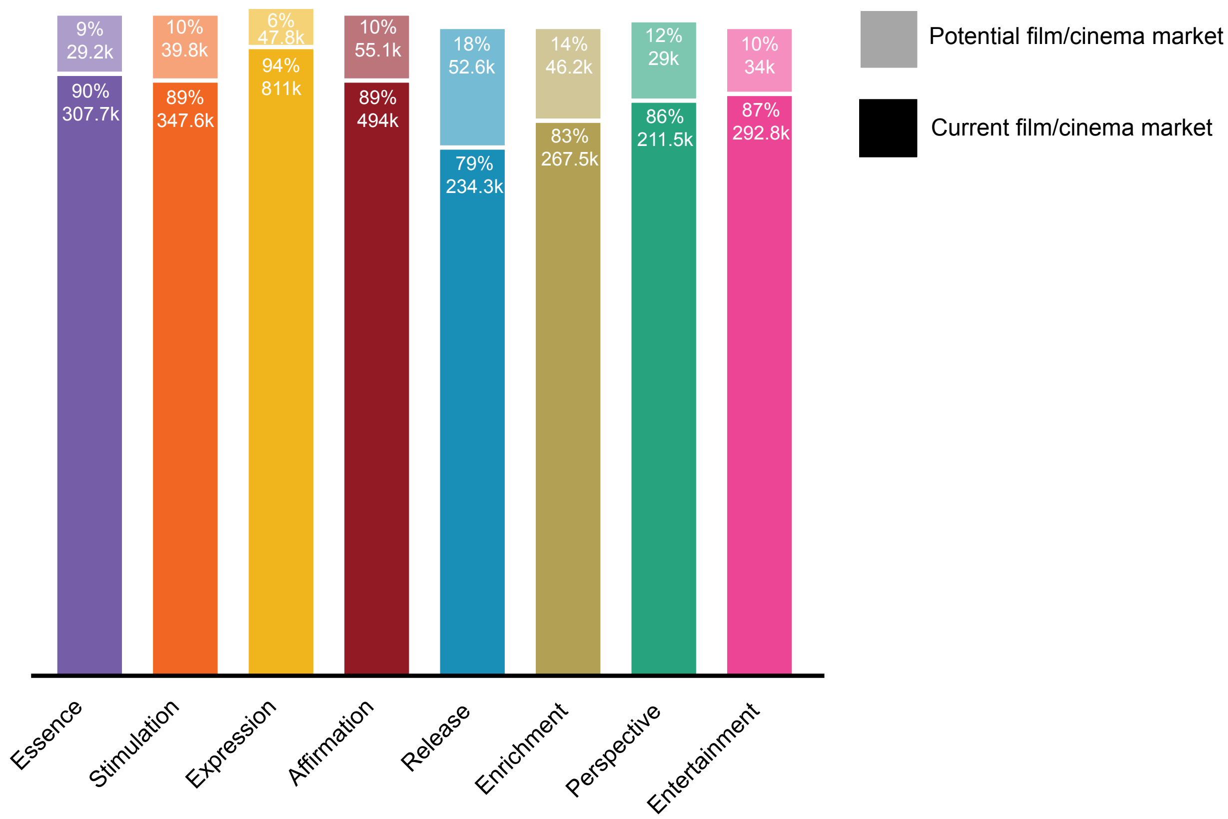
VISUAL ARTS



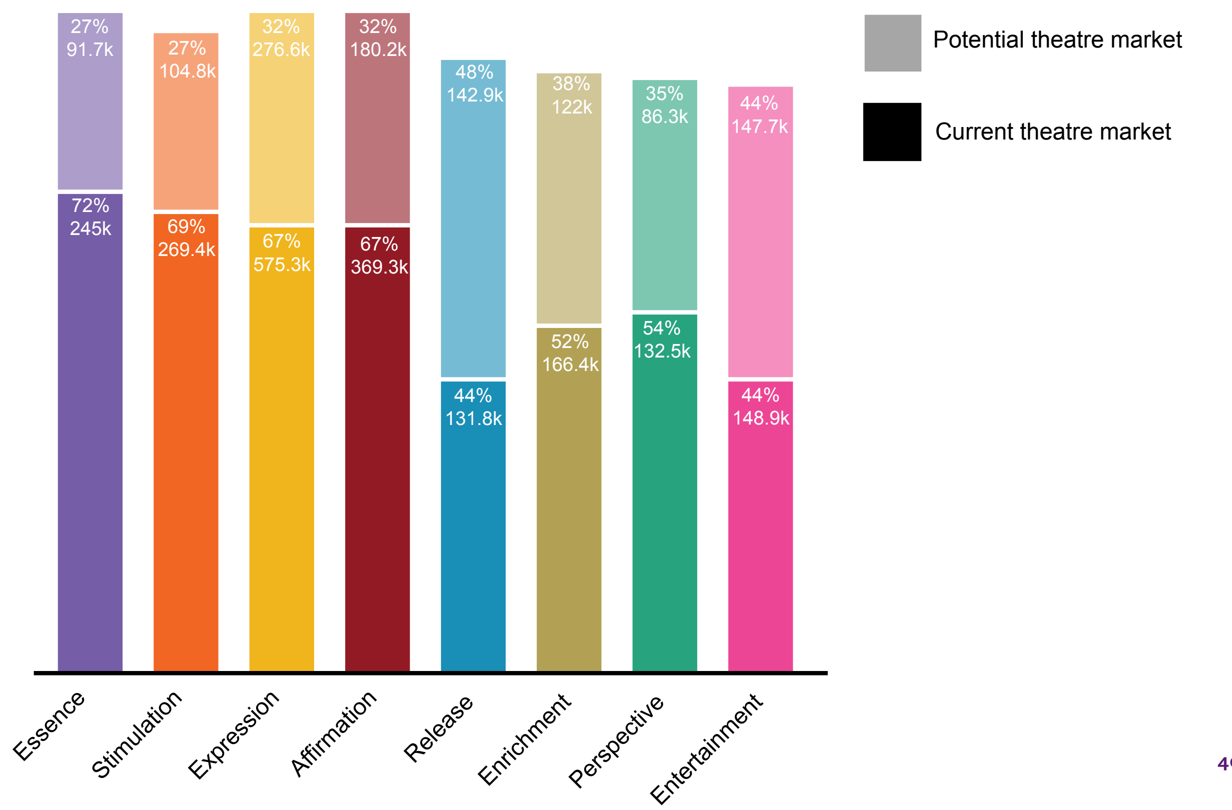
MUSEUMS



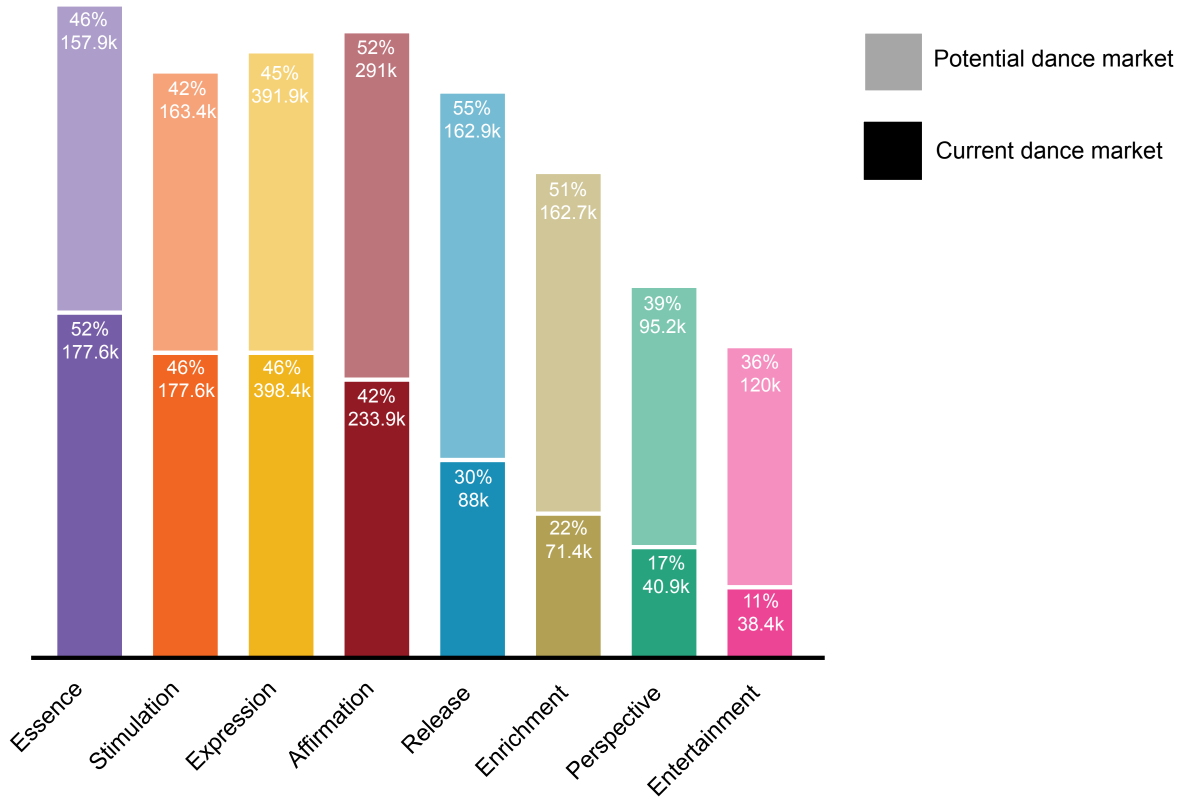
FILM/CINEMA



THEATRE



DANCE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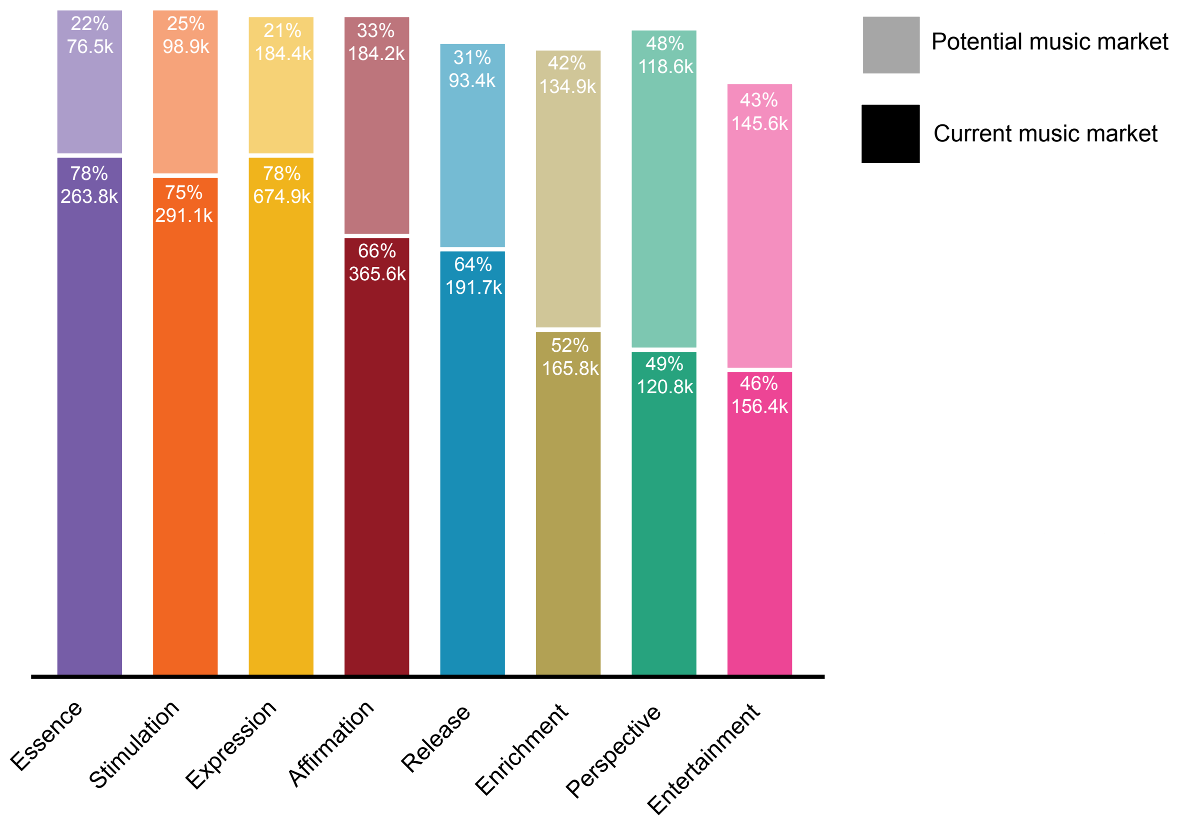
Potential dance market
Current dance market
Essence
Stimulation
Expression
Affirmation
Release
Enrichment
Perspective
Entertainment

MUSIC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93.4k
64%
191.7k
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43%
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46%
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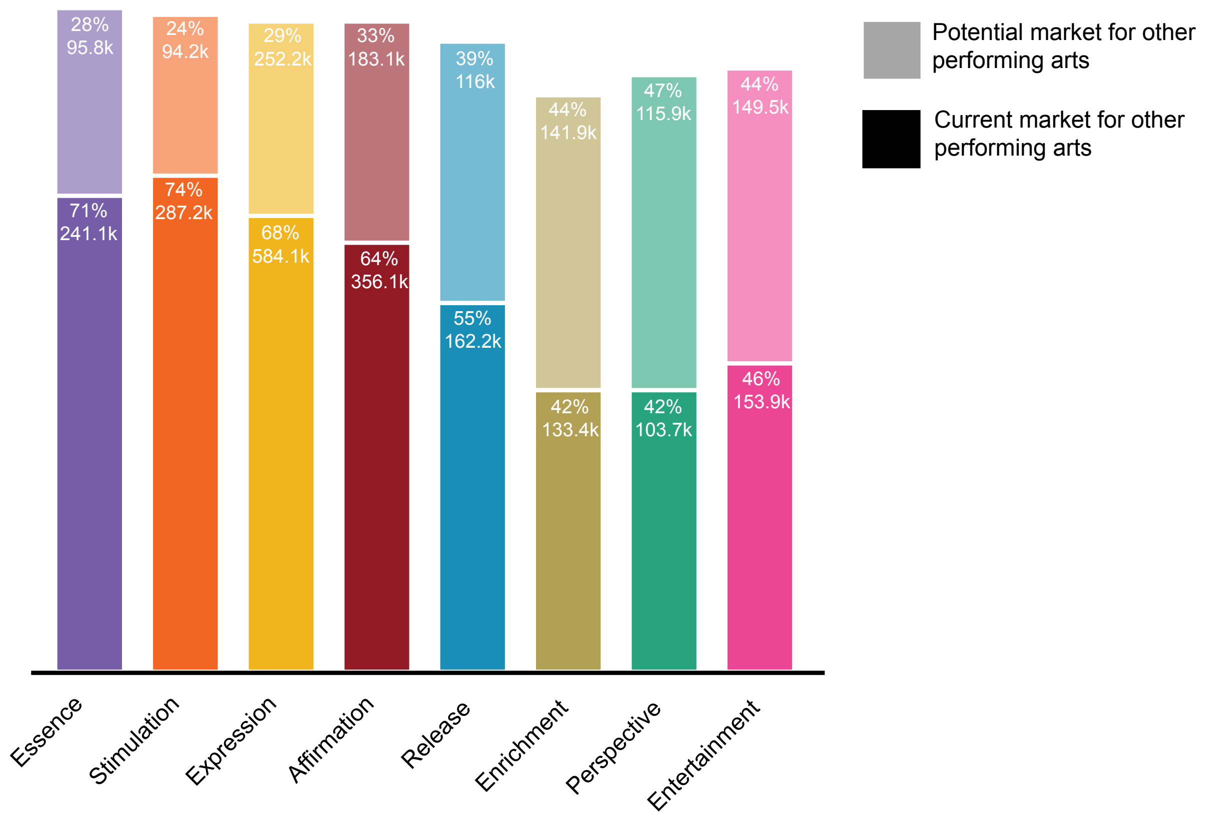
Potential music market
Current music market
Essence
Stimulation
Expression
Affirmation
Release
Enrichment
Perspective
Entertainment

OTHER PERFORMING ARTS



Deepening engagement

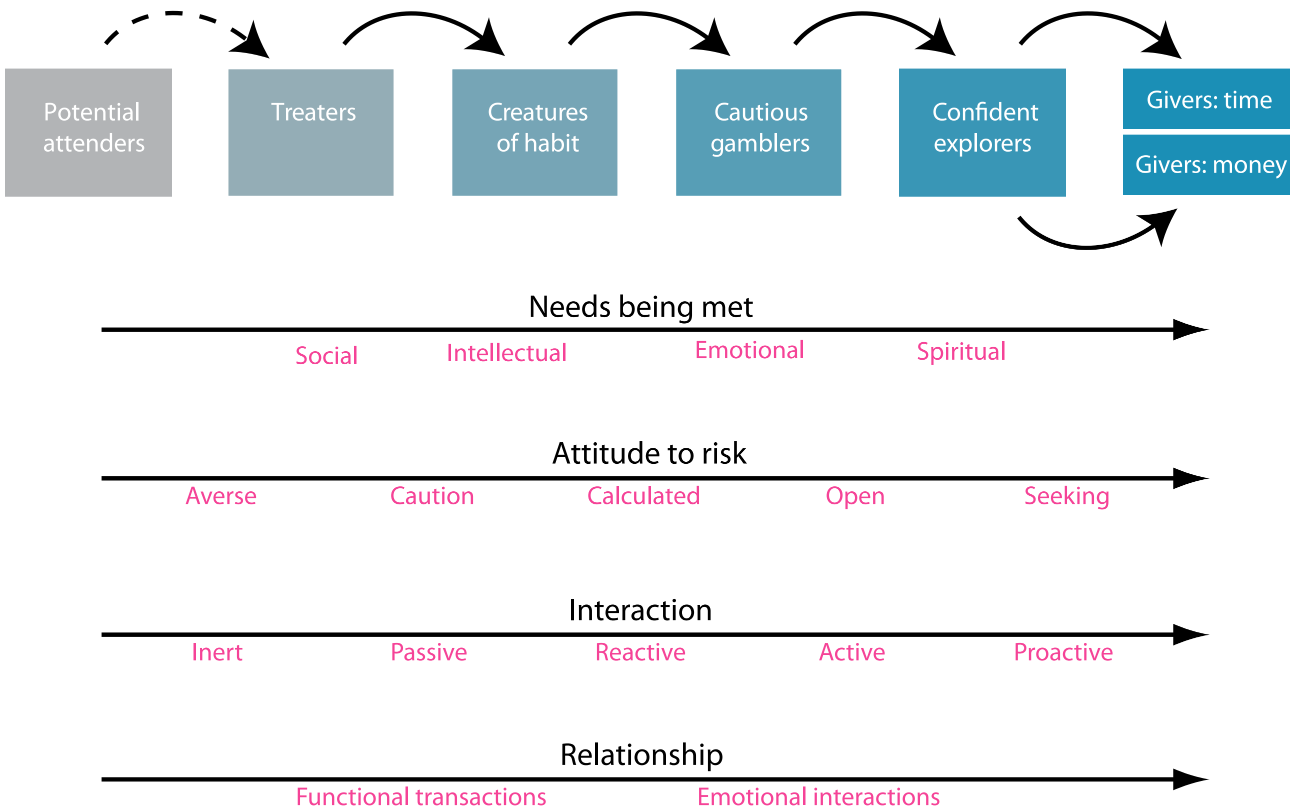
Levels of engagement

An individual's engagement level describes how deeply and how widely the person is engaging with culture at the moment. Levels of engagement are based on recent behaviour and attitudes to culture – and they change over the course of a person's life.

The six levels of engagement shown below describe a person's current relationship with culture and the reasons why they are not currently engaging more deeply.

Mapped out side-by-side, engagement levels represent an 'engagement journey', from unengaged, but interested potential attenders to those who are so familiar with the benefits of culture that they freely give time and money to the arts.

THE LEVELS OF ENGAGEMENT



The six levels of engagement

POTENTIAL ATTENDERS

These people have not been to any cultural events or places in the past three years, but would be interested in doing so. This group is excluded from Audience Atlas New Zealand research, which looks at the 95% of the population who are culturally active.

TREATERS

While these people have been to at least one cultural event or place in the past three years, they do not see culture as essential to their life and stick to safe options when choosing cultural experiences.

They are occasional visitors, particularly to museums, galleries and cinema, but are very cautious about trying anything new. They reject much of the cultural spectrum, seeing it as 'not for the likes of me'. They are only interested in trying further cultural activities that are very closely connected to things they already do, for example seeing a film at a film festival if they already see films at the cinema. From related qualitative work, we know that treaters tend not to have been hooked into culture as children.

However, these people are not 'couch potatoes': they lead full lives, but for them culture is just one of their leisure pastimes, mentioned in the same breath as going to a wildlife sanctuary or the beach.

Treaters are price sensitive and are the engagement level most likely to be reducing their spending on culture in the next 12 months.

They are the engagement level that are most looking for the social benefits of culture, focused on spending quality time with friends and family in an enjoyable way and focused on the needs of others (especially children).

CREATURES OF HABIT

Creatures of habit attend slightly more cultural events or places across a slightly broader spectrum than treaters. However, they are ambivalent about the benefits that culture can deliver to them and are risk averse.

They are most likely to make visits to 'safe' options like museums, art galleries and the cinema, with occasional (less than once a year) visits to mainstream comedy performances or plays and/or live rock music. They may have a few tried and trusted venues that they return to again and again.

They are the engagement level that are most interested in trying new artforms. But their aversion to risk keeps them stuck in their current patterns (which were often established early in life). They tend to be worriers, unsure what to think of potential new experiences and unsure of the benefits that unfamiliar arts and cultural venues could deliver to them.

CAUTIOUS GAMBLERS

Cautious gamblers see themselves as cultured people. They are aware of some of the emotional and spiritual benefits that cultural engagement can deliver and are open to taking controlled risks.

They engage in a fairly broad range of culture, and while they might have one or two artforms that they are passionate about, they have broad tastes and try to consume a balanced cultural diet. They also use culture for a variety of reasons: they are happy to go to musical theatre as a fun night out with family and friends, but will also visit contemporary art exhibitions looking for a deeply moving experience.

They like to think of themselves as relatively well informed and independent minded. However, when prompted they may admit 'I don't really go to the more obscure stuff'.

These people treasure stand-out cultural experiences and are looking out for opportunities to experience something a bit different. However, cautious gamblers find it difficult to identify new opportunities that might fulfill their needs, partly because they have broad tastes – across genres and venues.

And even when they do see things that appeal, they will often end up missing out because they forget to book or just don't quite get there in time.

CONFIDENT EXPLORERS

Confident explorers are actively searching for a very wide range of cultural experiences and visit as many venues and types of artform as often as they can, constrained only by budget and time.

Although they do have particularly treasured organisations or types of work, they are stimulated mainly by new experiences and delight in discovering new things. They can also be powerful advocates for culture, 'converting' friends and relatives.

This behaviour is driven by an awareness of (and near addiction to) the widest range of personal benefits from culture, including deep spiritual benefits. These people have transformative, self-actualising experiences and are renewed by engaging with culture.

Their fiercely-independent and inner-directed approach to culture means that they sometimes miss out on new experiences that they are not looking for.

GIVERS OF TIME AND/OR MONEY

Givers are people who are highly engaged with a wide range of culture. They are confident explorers who have gone one step further, having voluntarily given time and/or regularly given money (via a regular payment or donating on almost every visit) to one or more cultural organisations in the past 12 months.

This giving is driven by their appreciation of the deep benefits that culture can deliver to individuals and to society, through the lens of personal experience.

While these people may get a variety of benefits from giving, there is no direct transactional return on their investment (e.g. membership benefits: members can be found in every engagement level).

Why are engagement levels important?

Engagement levels help us understand patterns of attendance, and enable the development of strategies aimed at helping audiences in each engagement level to overcome barriers to deeper engagement.

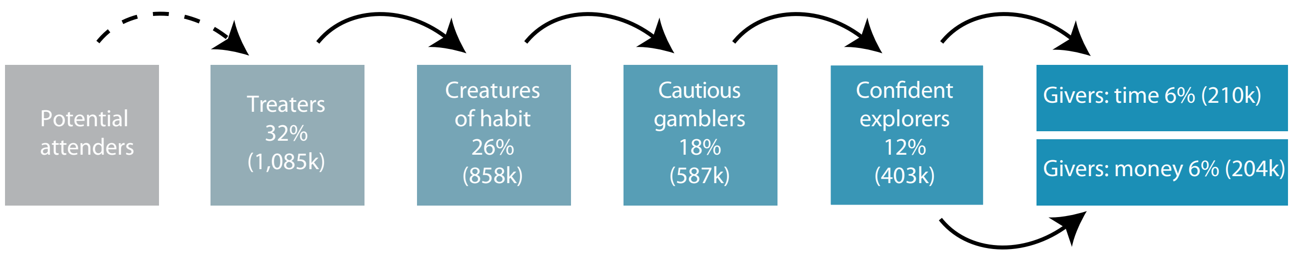
By encouraging people along the 'engagement journey' we can grow audiences, increase visitor numbers and sales, and ultimately help to grow the supporter base of volunteers and donors. Any potential attender can become a giver of time or money, given the right support.

Deep engagement with multiple cultural venues and artforms is a pre-requisite to cultural giving. If someone does not understand the benefits of culture to individuals and to society, and an organisation's role in delivering these benefits, they will not give. Getting more people to engage more deeply with culture is the route to getting more people to spend more on the arts, and to give time and money.

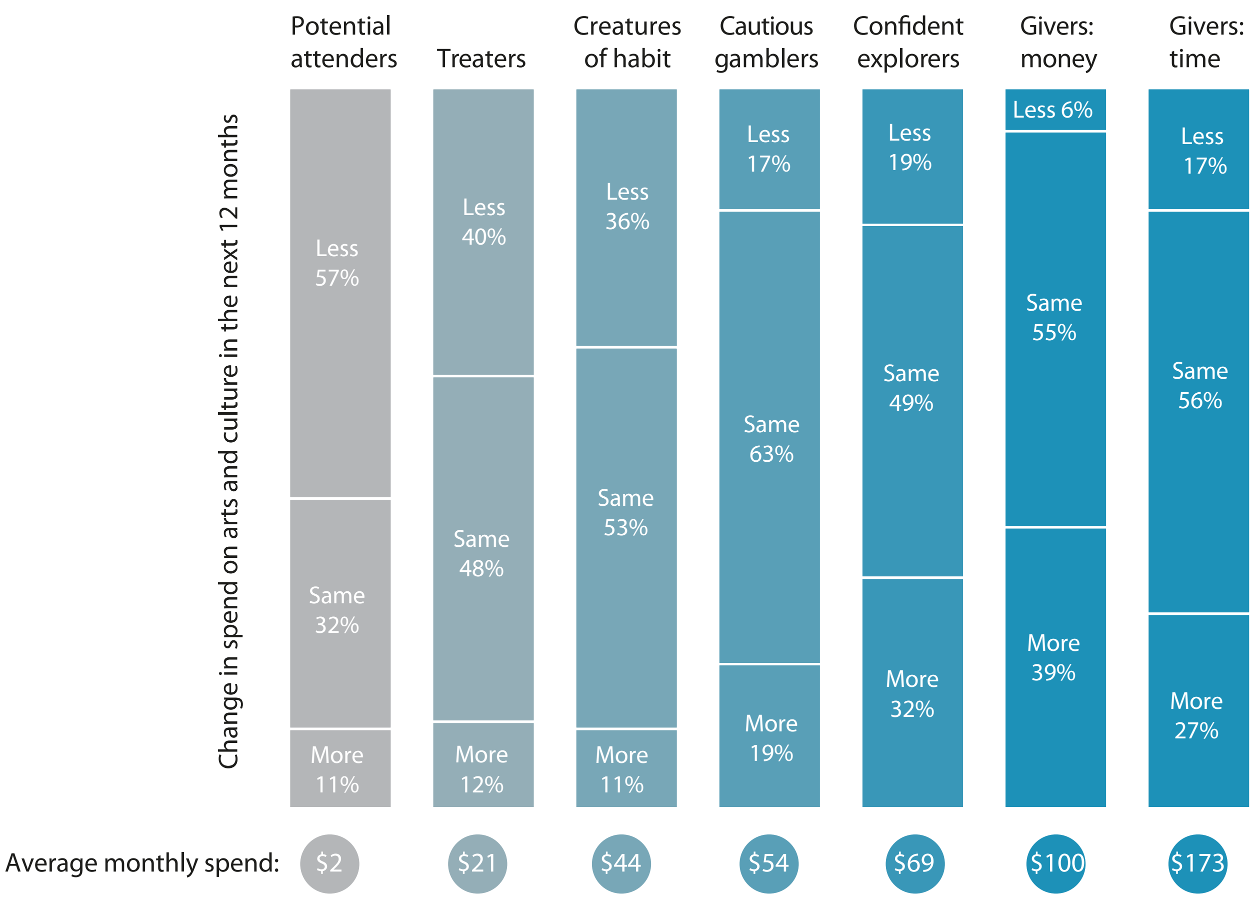
National engagement level profile

The engagement level profile of the New Zealand culture market, and the value of each engagement level breaks down as follows:

NEW ZEALAND ENGAGEMENT LEVEL PROFILE



ENGAGEMENT LEVEL CULTURE SPEND



The relationship between Culture Segments and the levels of engagement

Culture Segments are based on people's deep-seated beliefs, cultural values and motivations. They define and describe individuals' *orientation;* what benefits they fundamentally believe are to be gained by engaging with arts and culture.

Levels of engagement are not *segments*. Instead, they merely identify the individuals' current engagement *behaviour* with arts and culture. These levels are arranged in a hierarchy from currently unengaged to currently deeply engaged. While a person's Culture Segment might change slowly, if at all (as their beliefs change), they may be able to move more rapidly between the levels of engagement (up and down) as their behaviour changes.

There is obviously a correlation between the benefits you believe to be gained from engaging and your current engagement behaviour. Most of those believing the benefits to be profound are engaging deeply. But, for many reasons or lifestyle, life-stage and circumstance, people within any one Culture Segment are spread across a number of levels of engagement. The table below shows how each of the levels of engagement are populated by people from many Culture Segments.

By reading 'down' the columns for each level of engagement, you can find out what percentage of people currently at that level of engagement are from each Culture Segment. By reading 'across' each row you can compare the proportion in each engagement level to the first 'Total' column which shows the proportion of that Culture Segment in the New Zealand market. The figures marked '+' denote a higher than average representation, while those marked '-' denote a lower than average representation.

Looking at the table overall, it is clear that there is a very strong correlation between the higher levels of engagement (the left hand columns) and the Culture Segments, Essence, Expression and Affirmation. There is a similarly strong correlation between the lower levels of engagement (the right hand columns) and the Culture Segments, Enrichment, Release, Perspective and Entertainment.

So, levels of engagement is a useful tool to understand the overall behaviour and activity of our audiences. It also adds real subtlety to our understanding of each Culture Segment. For example, it's important to understand that Stimulation, a much sought-after segment for their enthusiastic word-of-mouth and willingness to attend early, is actually spread fairly evenly across many levels of engagement from the highest to the lowest. Even Essence, who value the arts most highly, can be found in reasonable numbers in the *Creatures of Habit* level of engagement.

		LEVELS OF ENGAGEMENT						
CULTURE SEGMENT	**Total**	**Giver (time)**	**Giver ($)**	**Confident explorer**	**Cautious gambler**	**Creature of habit**	**Treater**	**Potential attender**
Essence	10%	**31%** +	12%	**16%** +	**13%** +	8%	4% -	3% -
Expression	25%	**44%** +	**56%** +	**46%** +	**31%** +	21% -	10% -	12% -
Affirmation	16%	5% -	17%	**21%** +	17%	**23%** +	**12%** +	5% -
Enrichment	10%	4% -	5% -	2% -	9%	11%	**13%** +	**15%** +
Stimulation	12%	14%	9%	12%	**17%** +	11%	9% -	12%
Release	9%	0% -	0% -	2% -	5% -	**14%** +	**13%** +	**20%** +
Perspective	8%	1% -	0% -	0% -	3% -	6%	**16%** +	**13%** +
Entertainment	11%	-	0% -	1% -	5% -	6% -	**23%** +	**21%** +

The way forward

This research has quantified the high level of public engagement with, support for, and expenditure on the arts and culture within New Zealand.

The research shows a strong correlation between consumption of art and culture and support for the arts. Those who consume the arts are more likely to support the arts, either through spending, memberships, donating or volunteering. Increasing arts consumption then gives rise to wider benefits for the sector and the economy.

The research also sheds new light on the significant level of potential for even greater consumption across the full range of artforms supported by Creative New Zealand.

There is high demand from the population to consume even more art and culture.

However, perhaps more surprisingly, the research also shows that there is limited correlation between regional market size, level of arts provision and engagement with the arts.

Greater provision does not necessarily result in greater consumption.

THE CHALLENGE FOR THE SECTOR IS TO FIND WAYS OF UNLOCKING THE POTENTIAL AND INCREASING ENGAGEMENT WITH THE ARTS.

Culture Segments and levels of engagement provide the sector with the tools it requires for achieving this.

Together, Culture Segments and levels of engagement offer a way to release the potential within the market, by widening the audience and deepening engagement in the arts which, in turn, will result in increased support for the sector.

This will require a cultural shift within the funding system away from the provision of artforms for regions, and towards building engaged audiences for our visionary artists.

It will require a cultural shift within arts organisations away from functional transactions with the audience (selling tickets) to emotional interactions with the audience (making them *want* to buy tickets).

Morris Hargreaves McIntyre is a New Zealand and United Kingdom-based creative and intelligent arts management consultancy working in the interests of audience and organisational development.

The company combines thorough project planning with incisive, deep analysis, lateral thinking and detailed, intelligent strategic planning to produce relevant, helpful and high quality reports with practical recommendations.

Our services include:

- strategic analysis, planning and development
- product and service development
- Feasibility studies
- market appraisals
- marketing audits, strategies and plans
- audience development strategies and implementation
- access strategies
- in-service training
- training needs analysis
- training programmes
- organisational development
- change management.

Most of our projects are research-based.

We have a fully integrated market research service that undertakes:

- quantitative research
- qualitative research
- telephone marketing
- community consultation.

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