



Culture Segments

New Zealand



ARTS COUNCIL OF NEW ZEALAND TOI AOTEAROA

2011 report

Culture Segments New Zealand 2011 report prepared for Creative New Zealand by Morris Hargreaves McIntyre.

June 2012

Morris Hargreaves McIntyre is an international strategic research consultancy working within the culture, heritage, leisure, media and charities sectors. Our specialism is in helping organisations develop enhanced consumer focus.

Our company was born out of a desire to help cultural organisations become more creative in the way in which they are managed, more audience focused, more engaging, able to deliver greater impact and, as a result, more successful and sustainable. This founding ethos remains at the core of all our activity today.

Research is a means to an end in our world. We believe that knowledge and insight are the key to sustainable change and a successful sector. However, what we find is that most research is tactical not strategic, leaving many fundamental questions on the market for the arts unanswered.

Clients keep asking us the same questions – how can we better understand and reach our potential market? To address these directly, we have developed two new sector specific products. Audience Atlas and Culture Segments.

IF YOU WOULD LIKE TO FIND OUT MORE

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Audience Atlas

Audience Atlas New Zealand Report 2011 is the most detailed survey of cultural audiences ever undertaken in New Zealand.

It is robust and representative. *Audience Atlas New Zealand Report 2011* samples 3,900 adult respondents (aged over 15) who are in the market for art, culture and heritage activities and events. They are drawn from across the New Zealand regions and carefully weighted to be representative of the whole market.

It's rich and relevant. *Audience Atlas New Zealand* goes beyond the usual profiling. It measures lapsed and potential, not just recent engagement. It maps the market's motivations, not just its behaviour. *Audience Atlas* covers 60 artforms and leisure activities and almost 650 individual arts and heritage venues across New Zealand.

It's powerful and practical. *Audience Atlas New Zealand* defines your market. Then it cross analyses your lapsed, current and potential future market to provide detailed insight into your audiences. It supports realistic target setting, identification of potential markets and partner organisations. It provides powerful data for funders.

It puts your finger on the market's pulse. *Audience Atlas New Zealand* is right up to date. It is regularly updated to reflect and map trends over time.

If you want to know the size and characteristics of your current and potential market – you need Audience Atlas.



Culture Segments

Culture Segments is a new, international, sector-specific segmentation system for arts, culture and heritage organisations. The system is powered by data from *Audience Atlas New Zealand*, and draws upon a decade's leading-edge practice helping organisations to truly 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, with a view to targeting them more accurately, engaging them more deeply and building lasting relationships.

Culture Segments is designed to be more subtle, granular and sophisticated than existing segmentation systems. This is because it is based on people's cultural values and motivations. These cultural values define the person and frame their attitudes, lifestyle choices and behaviour.

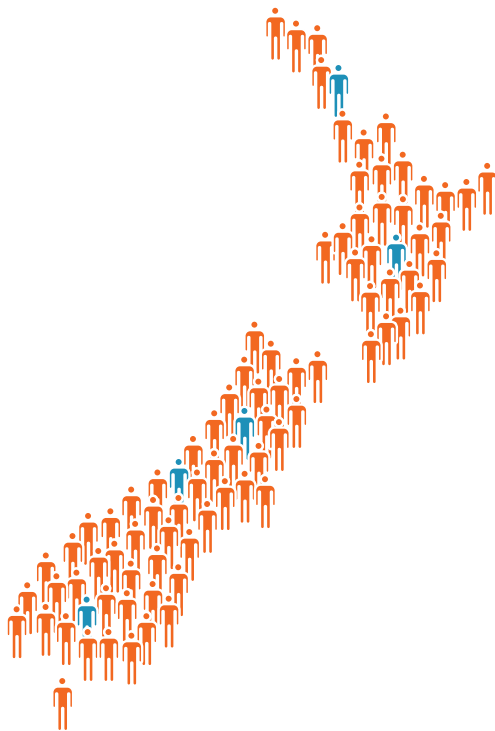
The segments are distinguished from one another by deeply-held beliefs about the role that art and culture play in their lives, enabling you to get to the heart of what motivates them and develop strategies to engage them more deeply.

Culture Segments has highly practical applications. The system is Consumer & Media View ready, which means you can use it with your media planning agency to increase effectiveness. It uses a small set of Golden Questions, which can easily be included in audience surveys and databases to evaluate the success of campaigns and better understand your existing audiences. The system can also be used to recruit focus group respondents and build online panels to explore your brand, test your marketing campaigns and inform product development.

If you want to reach new audiences and meet their needs more effectively – you need Culture Segments.



The market



95%

of New Zealand's (15+) population are in the market for arts, culture and heritage (**3,347,000 individuals**)

Tickets

Food & drink

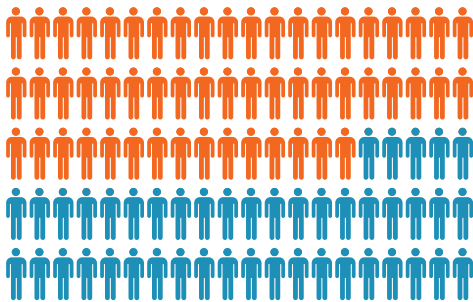
Souvenirs



Between them they spent a total of

\$2.31 billion

on arts/culture/heritage in the last 12 months



55%

state their spending on arts/culture/heritage will stay the same or increase in the next 12 months

The segments

We have identified eight segments within the market for arts, culture and heritage:



ENRICHMENT

mature
traditional
heritage
nostalgia



ENTERTAINMENT

consumers
popularist
leisure
mainstream



EXPRESSION

receptive
confident
community
expressive



PERSPECTIVE

settled
self-sufficient
focused
contented



STIMULATION

active
experimental
discovery
contemporary



AFFIRMATION

self-identity
aspirational
quality time
improvement



RELEASE

busy
ambitious
prioritising
wistful



ESSENCE

discerning
spontaneous
independent
sophisticated

Each segment has different levels of spending and consumption

% who have spent on culture in the past month

Average annual frequency of arts attendance



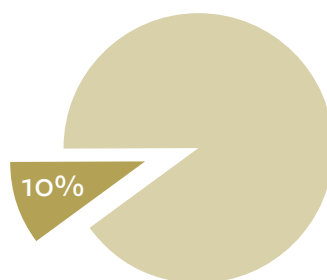
ENRICHMENT



Mature
Traditional
Heritage
Nostalgia

320,600 adults

10%



ENRICHMENT

Who are they?

The Enrichment segment are 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.

Attitudes and life priorities

NATURE, GARDENING, THE OUTDOORS

TRADITIONAL ARTFORMS

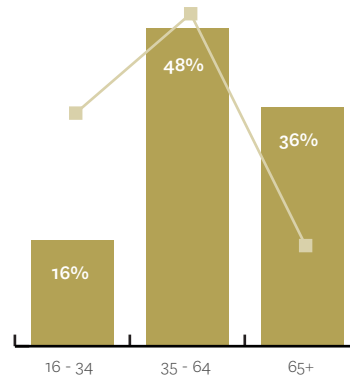
HOME LIFE

THE PAST

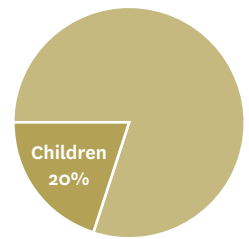
FAITH

ARTS AND CRAFTS

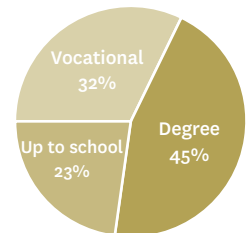
Age profile



Children at home



Highest education level reached



What needs are they looking to fulfil?

The Enrichment segment tends to be in the later stages of life and are unlikely to have children at home. They are a risk averse segment with established tastes. They know what they like and their visits to cultural organisations are very much driven by their own interests and not those of others, nor what is considered to be new or fashionable.

The arts and culture fits with their interests in heritage, gardening and nature. It is these interests, along with the desire to experience nostalgia, awe and wonder, which motivates them to engage with culture. Rather than the opportunity to seek out new experiences, the arts provides this segment with a form of warm escapism, offering a means to reach even greater fulfilment within their lives.

What do they do?

Artform interest index:

-10

Annual artform frequency index:

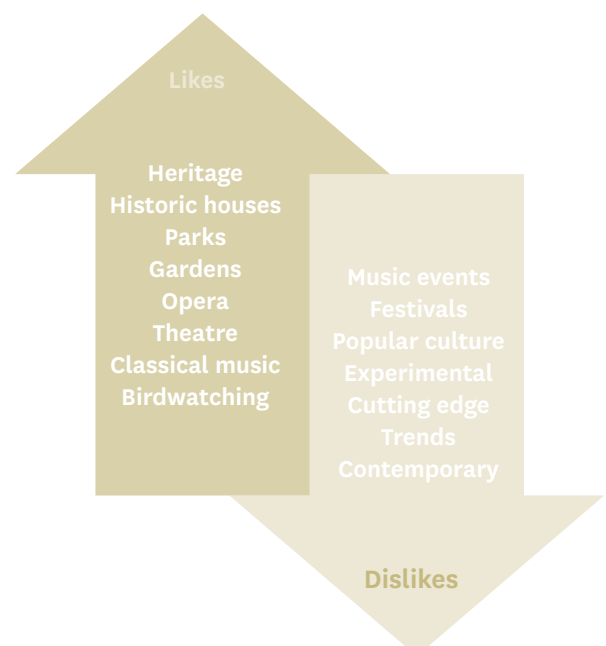
-39

Annual artform frequency:

10

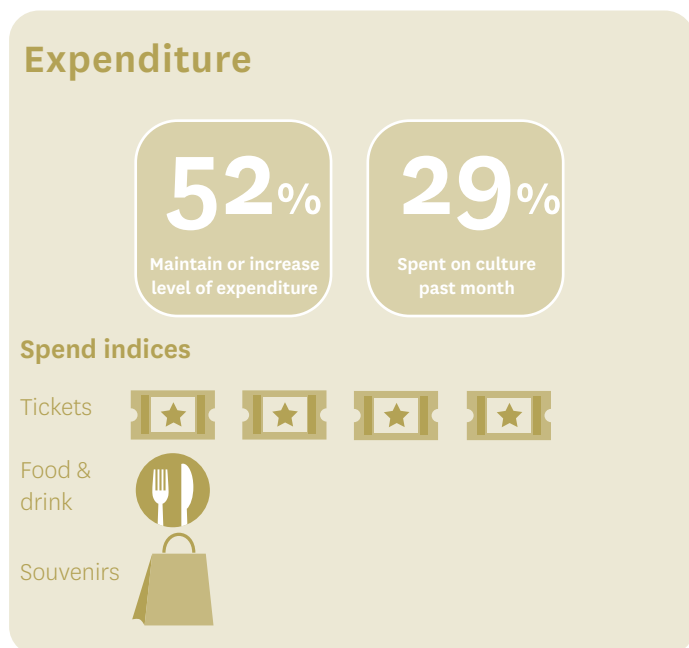
The arts sit in the middle of this segment's leisure priorities, below their garden, home life and the outdoors. Consumption is moderately high and tends to focus on traditional artforms and heritage days out, such as historic properties, parks and formal gardens.

Likes and dislikes

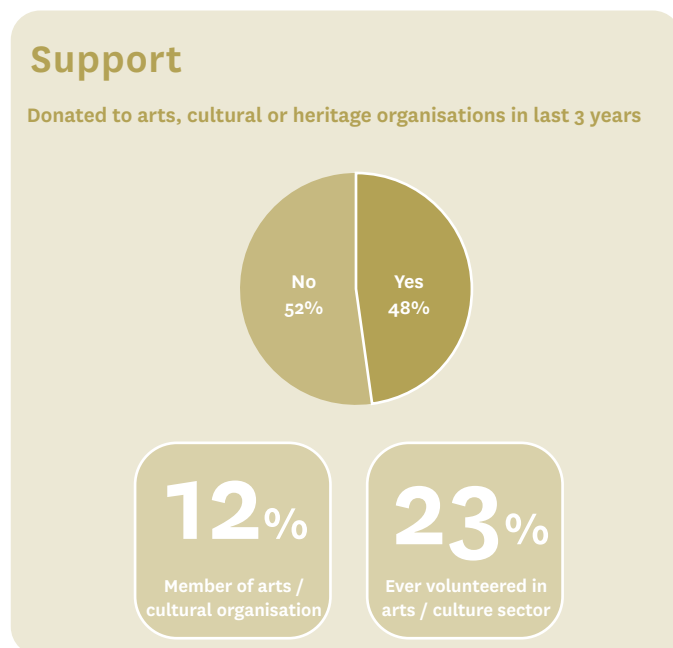


ENRICHMENT

What is their value?



Despite slightly above average levels of attendance, with a high incidence of retirement and relatively low income levels, this segment tends to restrict secondary spend when visiting cultural venues. Value for money is very important to this segment; they are more likely to take a packed lunch than spend unnecessarily on on-site catering.



Whilst secondary spend is generally low, this segment likes to invest in the core experience, spending more on tickets than other segments. They have established tastes and will remain loyal to a small number of organisations that can cater well for their needs – for this reason they have development potential for the right venues.

How to reach this segment



The key to engaging the Enrichment segment is to focus on their interests in heritage, gardening, nature, nostalgia, beauty and the past. They are risk averse and mature individuals who are not looking to broaden their horizons or to be taken outside their cultural comfort zone. They have a core set of venues, destinations and organisations that they will support and rarely explore further. Developing this segment will then require encouraging them to try something new that fits with their established tastes and appeals to their hobbyist interests.

Key marketing proposition

'Focus on their established tastes and desire to experience nostalgia, awe and wonder'

They have moderate media consumption, with above average readership of regional and local free press. They regularly watch TV1, TV2, TV3, C4 or Prime and listen to Radio New Zealand and Radio New Zealand Concert. They show below average Internet use. As they do not actively seek out information, the way to reach this segment is via their specific hobbies and social groups; and through their preferred, established media brands.

ENTERTAINMENT



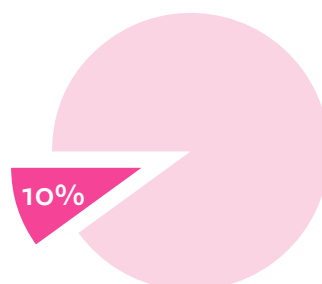
Consumers

Popularist

Leisure

Mainstream

337,400 adults



ENTERTAINMENT

Who are they?

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.

Attitudes and life priorities

HOME AND PUB

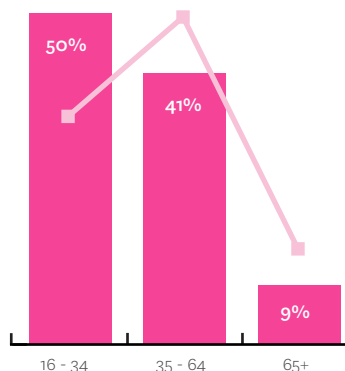
TV, CELEBRITY, SPORTS

THRILL

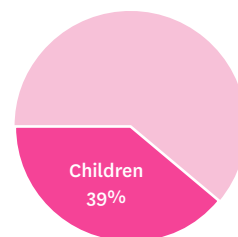
ESCAPISM

PRIORITIES ARE VERY CLOSE TO HOME

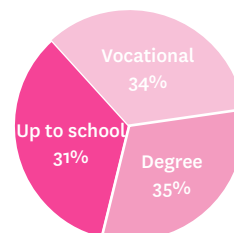
Age profile



Children at home



Highest education level reached



What needs are they looking to fulfil?

This segment looks for escapism and thrill in leisure activities. Leisure time is for fun, not for learning or applying oneself intellectually – this is something they are looking to escape from through their leisure pursuits. They are largely socially motivated to attend, looking to pass time in an enjoyable and fun way with friends and family. For the most part they cannot envisage that they will meet these needs through engaging with arts and culture.

The Entertainment segment prefers to stick to the tried and tested when it comes to leisure pursuits and is not looking to be challenged or to take risks in discovering something new. They worry about what other people think about them and therefore do not want to be seen to go against the grain or to try things that do not have established, popular currency.

What do they do?

Artform interest index:

-37

Annual artform frequency index:

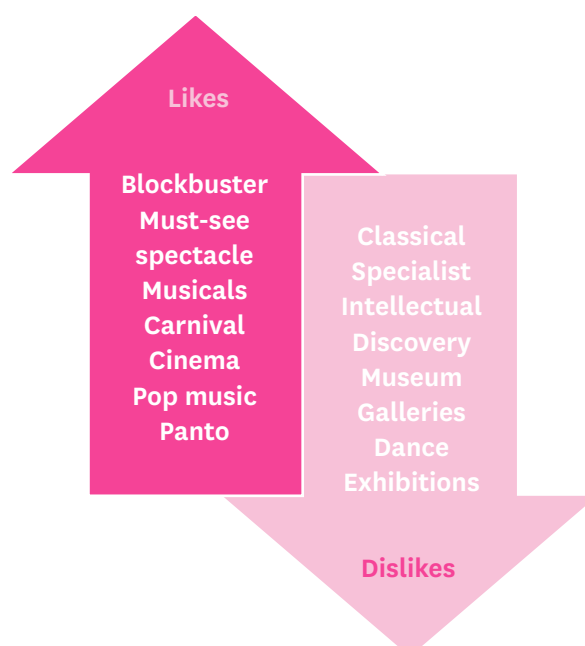
-49

Annual artform frequency:

8

The Entertainment segment has a very sporadic relationship with the arts and culture, attending popular, blockbuster events that have received widespread positive reviews and that they know they are guaranteed to enjoy. They enjoy popular cultural events and activities that are exciting and spectacular such as carnival, panto, popular music and blockbuster films.

Likes and dislikes



ENTERTAINMENT

What is their value?

Expenditure

41%

Maintain or increase level of expenditure

13%

Spent on culture past month

Spend indices

Tickets



Food & drink

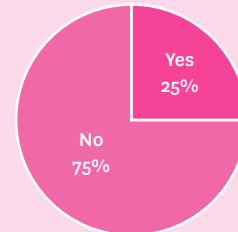


Souvenirs



Support

Donated to arts, cultural or heritage organisations in last 3 years



3%

Member of arts / cultural organisation

9%

Ever volunteered in arts / culture sector

The arts and culture are only one of many leisure choices for the Entertainment segment. They prefer to enjoy theme parks, sports, the beach, package holidays and a night in the pub. When they do engage in the arts they tend to be consumers rather than creators or participators, and stick to mainstream cultural activities. They will pay a premium for something that they are keen to see, but it will need to be spectacular and must-see when it comes to culture.

They do not believe that the arts contribute to people's lives or society at large, and therefore tend not to support public subsidy of the arts. They spend little time worrying about issues such as faith, the environment or consumerism, but are concerned with issues closer to home, such as the cost of living and local issues. They have limited development potential as either supporters or volunteers.

How to reach this segment

Link into mainstream through TV, sports and celebrity

Emphasis on one off, must-see events and shows

Promote escapism and excitement

The Entertainment segment is only willing to spend on leisure and recreation if they believe it will meet all of their needs. While they may not see a value in the arts and culture per se, the right type of event has the potential to provide exactly what they want – primarily escapism and thrill.

Advertising via mainstream media heavily influences them. Their children also influence their behaviour so pester power would work on this segment. As they are not looking for anything overtly cultural; 'culture' needs to be downplayed in the marketing, with messaging emphasising the 'must-see', 'not to be missed', 'thrill' and 'blockbuster' elements of the offer.

Key marketing proposition

'Highlight the thrilling and must-see elements, position as a blockbuster event'

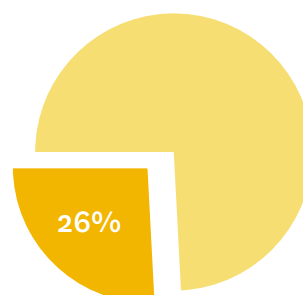
They have below average readership of newspapers instead preferring to use the Internet for their news consumption. They tend to watch Sky TV or other digital TV channels and are frequent consumers of commercial radio stations and sports magazines.

EXPRESSION



Receptive
Confident
Community
Expressive

861,900 adults



EXPRESSION

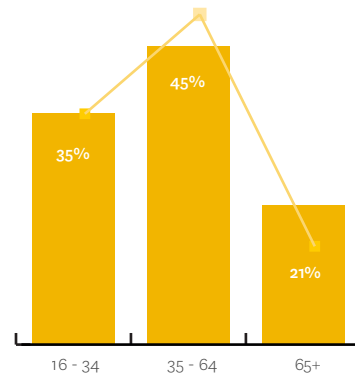
Who are they?

The Expression segment is in-tune with their creative and spiritual side. They are confident, fun-loving, self-aware people who accommodate a wide range of interests, from culture and learning, to community and nature.

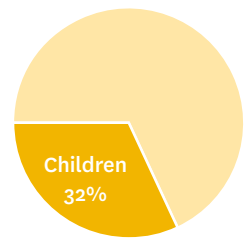
Attitudes and life priorities

LIVING LIFE TO THE FULL
COMMUNITY AND FAMILY
ARTS AND CULTURE
FAITH AND SPIRITUALITY
NATURE

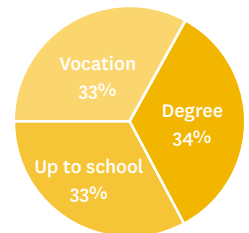
Age profile



Children at home



Highest education level reached



What needs are they looking to fulfil?

This segment actively pursues life. Their free time is highly valued and they try to cram in as much as possible to make the most of it. Open and receptive to new ideas, they pursue challenge, entertainment and intellectual stimulation through their cultural engagement.

They enjoy being part of a crowd and seek communal experiences that broaden horizons. Arts and culture is a key element of their lifestyle, it is a means of self-expression and connecting with other like-minded individuals who share their deeply-held values about the world around them.

What do they do?

Artform interest index:

+3

Annual artform frequency index:

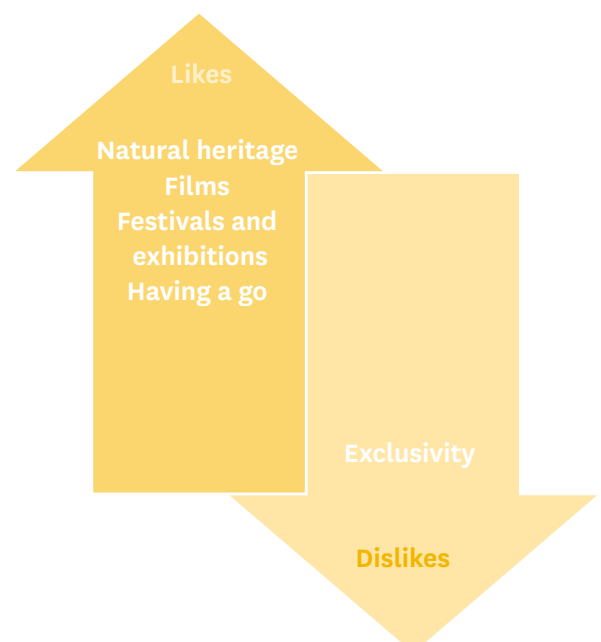
+43

Annual artform frequency:

23

The Expression segment is highly culturally active and open to a broad spectrum of artforms. They enjoy the arts and culture frequently in an active rather than passive manner, seeking inspiration and opportunities for self-expression through their engagement. They like hands-on involvement and active debate.

Likes and dislikes



EXPRESSION

What is their value?

Expenditure

64%

Maintain or increase level of expenditure

52%

Spent on culture past month

Spend indices

Tickets



Food & drink

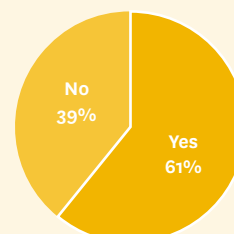


Souvenirs



Support

Donated to arts, cultural or heritage organisations in last 3 years



22%

Member library/arts/cultural organisation

36%

Ever volunteered in arts/culture sector

Their activity levels result in above-average expenditure in the arts. However, value for money and emotional engagement is important to this segment and they may avoid financial risks unless they are sure of the benefits to them. They tend to be loyal supporters of arts brands who mirror their own values and lifestyle choices.

The Expression segment strongly believes in the benefits of the arts and is supportive of public subsidy. They have above-average membership of arts, heritage and cultural organisations and their strong sense of community means that they are willing to volunteer their time for the greater good. They are ripe for campaigning relationships.

How to reach this segment

Debate and discuss

Build networks that appeal to their community spirit

Highlight the opportunities for participation

Whilst obscure and little-known names are appealing to this segment, so too are more mainstream artforms, as they don't hold disdain for popular culture. They believe that expressing an opinion is more important than following carefully developed taste; culture is for sharing and discussing with others.

Key marketing proposition

'Tap into their desire to be part of something bigger'

Although they like adventure, innovation and discovery, the Expression segment also like to know what they're letting themselves in for. Their receptiveness to the views of others and happiness to lead from within, rather than be at the forefront of cutting-edge arts and culture, means they are open to reviews and recommendations. Rather than reject marketing communications they see them as a useful tool for being more discerning.

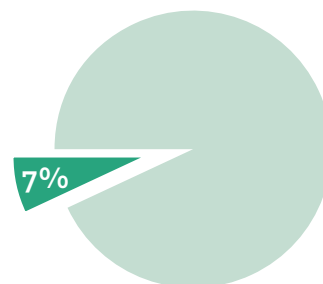
Keeping up to date with current affairs both home and abroad is important. They are avid consumers of print media – in particular the *New Zealand Herald*, *Dominion Post*, *The Press* and a variety of other major newspapers and magazines, as well as regional press. They also listen to major radio stations such as The Breeze, Classic Hits and Coast FM.

PERSPECTIVE



Settled
Self-sufficient
Focused
Contented

244,900 adults



PERSPECTIVE

Who are they?

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

Attitudes and life priorities

OPTIMISTIC

THEIR OWN NEEDS ARE IMPORTANT

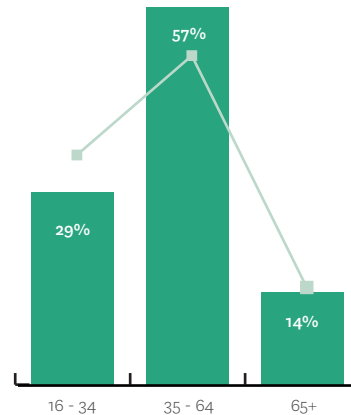
INNER DIRECTED

READING

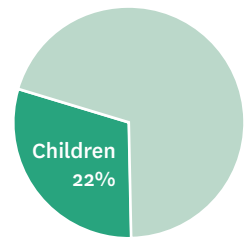
LEARNING

THE OUTDOORS

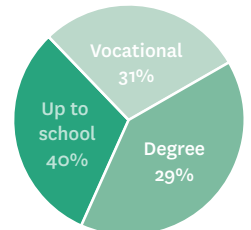
Age profile



Children at home



Highest education level reached



What needs are they looking to fulfil?

The Perspective segment has an optimistic outlook, they are inner-directed and prioritise their own needs above others. Whilst this means they are highly contented, their horizons have become somewhat narrowed. They tend to gravitate to a limited 'days out' focus in their leisure time, based around a small number of interests that have become habitual over time.

The Perspective segment doesn't see the arts as essential; culture for them is not part of their identity. Nevertheless they do see some forms of culture as providing the opportunity to pursue an interest or broaden their horizons, and it is this area which offers the greatest potential to increase the scope of their cultural consumption – by offering them a new perspective on life and the things that they are already interested in.

What do they do?

Artform interest index:

-24

Annual artform frequency index:

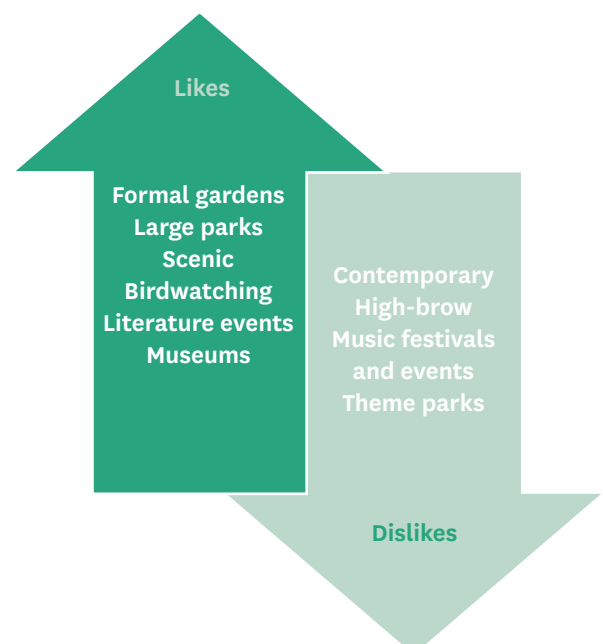
-54

Annual artform frequency:

7

The range of artforms that the Perspective segment engage with, or show an interest in engaging with, is relatively small and largely limited to the outdoors and nature activities. Their tastes tend to lean towards the traditional over the contemporary, topics such as literature, history and the natural world have the potential to spark their interest. They show an interest in libraries, museums and other cultural venues that focus on learning, as a means of further developing their specific interests and broadening their horizons.

Likes and dislikes



PERSPECTIVE

What is their value?

Expenditure

51%

Maintain or increase level of expenditure

27%

Spent on culture past month

Spend indices

Tickets



Food & drink

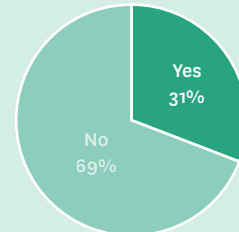


Souvenirs



Support

Donated to arts, cultural or heritage organisations in last 3 years



9%

Member of arts/cultural organisation

13%

Ever volunteered in arts/culture sector

The low priority that they give the arts and culture in their lives translates into comparatively low spend in this area. Instead nature resonates strongly with the Perspective segment, and is something that they can access for free.

As with their personal expenditure, the Perspective segment may feel that taxpayers' money should be spent on things other than the arts and culture.

In keeping with these values the segment offers little potential in terms of memberships, volunteering and donations.

How to reach this segment

Offer taster sessions

Tap into and build on existing interests

Respect their individuality and subtly encourage them to explore

The Perspective segment's interest in culture seems to have dissipated, and they need to be tempted from their homes and gardens and convinced that the arts and culture do have something to offer them.

They are not proactive when it comes to seeking out cultural activities and events, thus push rather than pull marketing will be key to reaching them. Their inner-directed and independent nature, however, means that forming effective marketing messages can be a challenge; they will see through explicit marketing and publicity.

Key marketing proposition

'Allow them to feel they are making their own discoveries'

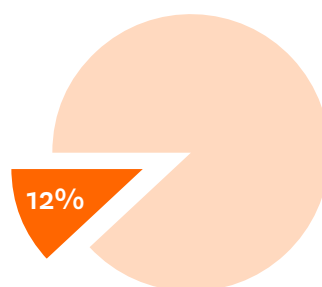
Instead they need to feel that they are making their own discoveries and acting on their own terms. They are not avid readers of national newspapers and major magazines, but are keener to consume the regional or local paid-for newspapers than many of the other segments.

STIMULATION



Active
Experimental
Discovery
Contemporary

389,900 adults



STIMULATION

Who are they?

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.

Attitudes and life priorities

ENJOYING LIFE

GOING OUT

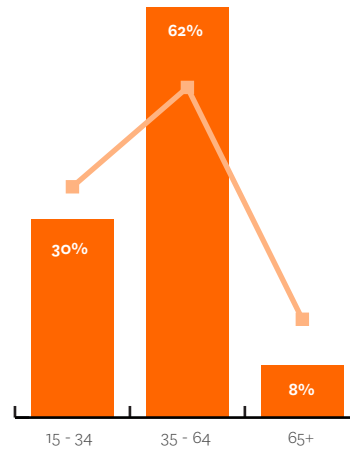
TAKING RISKS

LIVE MUSIC

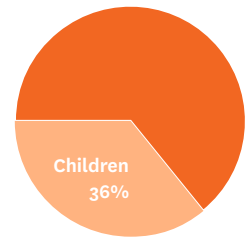
FOOD AND DRINK

CONTEMPORARY EVENTS

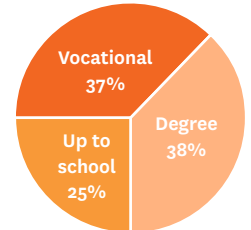
Age profile



Children at home



Highest education level reached



What needs are they looking to fulfil?

This segment wants to live a varied, entertaining life of novelty and challenge – hence the varied array of artforms they partake in and the level of risk they are willing to take. Their main reasons for attending arts events and activities tend to be for the social and emotional experience and to ensure they remain the ones in the know amongst their peer group.

As innovators and early adopters, they are not guided by the opinions of others. Rather they are keen to break away from the mainstream, and are at the head of the pack in terms of finding out about new events and activities. Their keen sense of adventure and a desire to stand out from the crowd constantly encourages them to try new things, even if it means going out on their own.

What do they do?

Artform interest index:

+7

Annual artform frequency index:

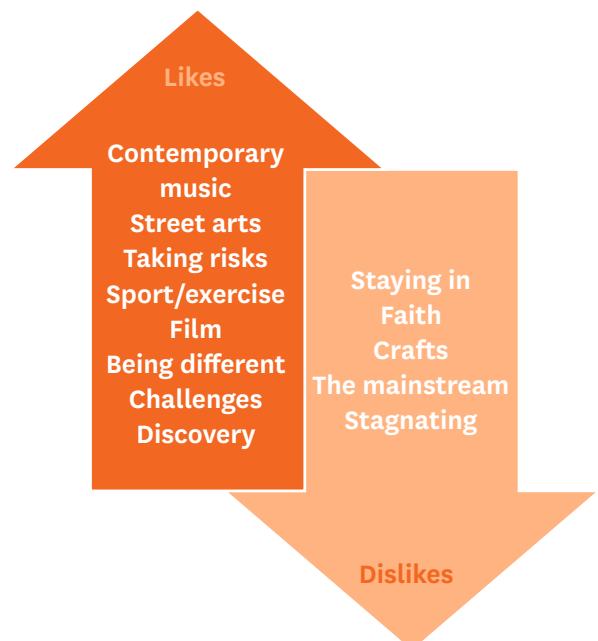
+7

Annual artform frequency:

17

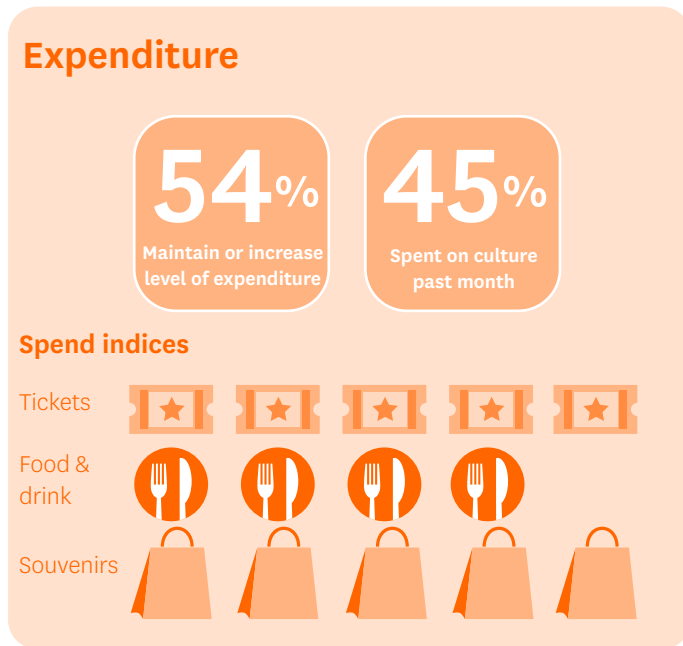
The Stimulation segment has an interest in a wide range of artforms, and although they are happy to attend more traditional events, they often prefer to seek out more contemporary artforms such as music festivals, electronic live music and street art.

Likes and dislikes



STIMULATION

What is their value?



They like to keep themselves occupied in their spare time and are keen arts attenders, across a varied range of artforms. They are willing to spend money on the whole experience – secondary spend on drinks, programmes and other souvenirs is part of this.



Their hectic lifestyle and constant search for something new and exciting means they tend not to commit to one particular activity or venue for any length of time. As soon as an event becomes mainstream they look for something different. Their desire for the new and unusual means they are prepared to join organisations in order to stay 'in the know'.

How to reach this segment



Key marketing proposition

'Support their desire to be the first to try something new'

This segment can be relatively straightforward to engage as they are already proactively looking out for new and interesting ways to spend their spare time. Alerting them to potentially interesting arts events at a sufficiently early juncture and focussing on the new, experimental, quirky and one-off will encourage their attendance.

There is little point in targeting the Stimulation segment with mainstream or blockbuster events – they will already know about them – but letting them know about less well-known, riskier events is a good way to generate interest. Their early adopter nature and desire to share their knowledge with others make them ideal to cultivate as brand ambassadors.

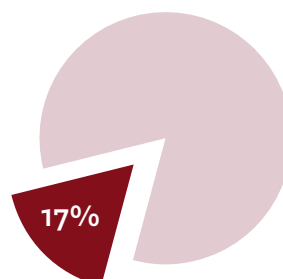
The Stimulation segment likes to watch Sky TV and are keen consumers of newspapers online, as well as major press such as the *New Zealand Herald* and *Dominion Post*. They also have a keen interest in reading celebrity, film and music magazines.

AFFIRMATION



Self-identity
Aspirational
Quality time
Improvement

554,600 adults



AFFIRMATION

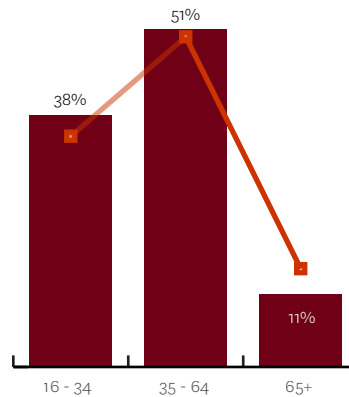
Who are they?

The core of the Affirmation segment comprises young adults, for whom the arts is one of many leisure choices. They are adventurous when it comes to their arts and cultural consumption, viewing it as a means of developing themselves as individuals.

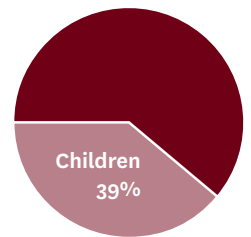
Attitudes and life priorities

FAMILY NEEDS
PERSONAL DEVELOPMENT
QUALITY TIME WITH OTHERS
WHOLESOME LEISURE ACTIVITIES
ENJOYABLE EXPERIENCES

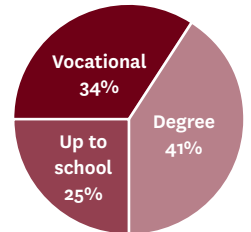
Age profile



Children at home



Highest education level reached



What needs are they looking to fulfil?

The Affirmation segment welcomes cultural consumption as a way of enjoying quality time with friends and family, as well as developing their children's knowledge and improving themselves as individuals. This segment will continue to attend large, mainstream events and activities as they offer a low-risk means of satisfying these varied needs.

The arts and culture also provide a means for this segment to validate 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 popular entertainment.

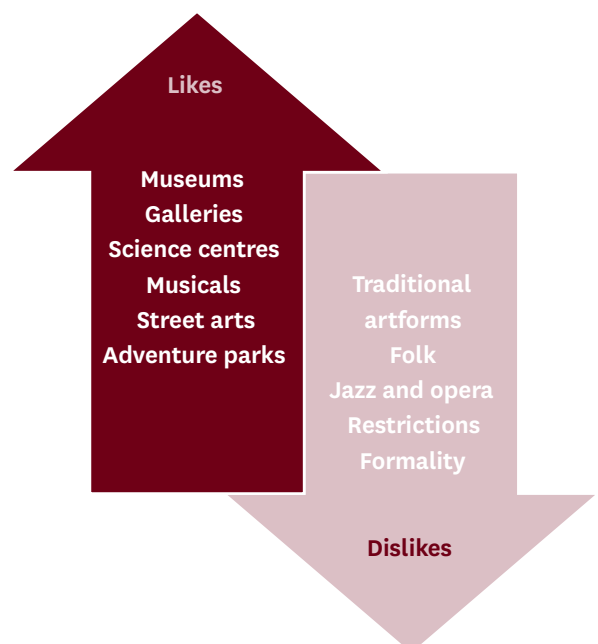
What do they do?

Artform interest index: Annual artform frequency index: Annual artform frequency:



The Affirmation segment expresses an interest in less traditional artforms such as contemporary dance and music festivals, but when it actually comes to attending they tend to gravitate towards established names, well-known films and more popular music events.

Likes and dislikes



AFFIRMATION

What is their value?

Expenditure

53%

Maintain or increase level of expenditure

46%

Spent on culture past month

Spend indices

Tickets



Food & drink



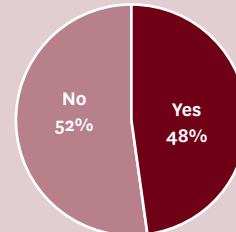
Souvenirs



This segment spends its free time engaging in a wide range of leisure activities, from learning experiences through historic houses, to entertaining days out at theme parks. Whilst they are relatively high spenders, the arts and culture is one element within this wider mix, and as a result has to compete for their leisure spend.

Support

Donated to arts, cultural or heritage organisations in the last 3 years



14%

Member of arts/cultural organisation

23%

Ever volunteered in arts/culture sector

They view arts and cultural organisations as a resource providing them with enjoyment and education, offering an environment for spending quality time with others. They have the propensity to be regular visitors to a small number of cultural organisations; ones they know from experience can meet their needs. Family discounts are likely to appeal.

How to reach this segment

Let them know early about forthcoming events – let them feel like they're 'in the know'

Promote benefits as being both entertaining and educational

Offer loyalty schemes, discount cards and 'clubs'

They recognise the value in engaging with arts and culture, but need to be provided with clear reasons for selecting a cultural activity over a wider leisure activity. Emphasising the entertainment as well as learning value of engaging with a particular artform or venue would encourage take up by the Affirmation segment.

They wear their cultural consumption as a badge and want to be viewed by others as consumers of the arts, more so than they are in reality – give them advance notice of suitable events and provide them with the recognition they desire when they do engage.

Key marketing proposition

'Endorse their view that culture is a more valuable way of spending time with others'

Marketing for cultural venues, events and activities will be competing with other leisure activities, so needs to stand out from the crowd and grab their attention, as well as clearly demonstrating the benefits they will get from engaging. They welcome recommendations as to which cultural venues, activities and events they ought to be engaging with.

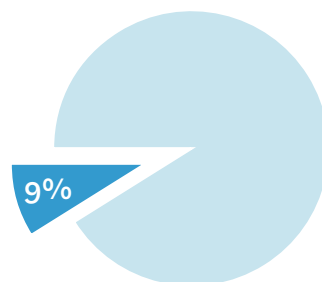
The Affirmation segment tends to favour mainstream and popular broadcast and media channels. They read regional and local paid for newspapers, and enjoy reading fashion, lifestyle, home and gardening magazines. Alongside advertising through these and other broadcast channels, encouraging them to sign up to well endorsed and relevant marketing lists and sending regular, targeted marketing communications would ensure that they felt in the know and give them confidence in making their leisure choices.

RELEASE



Busy
Ambitious
Prioritising
Wistful

297,400 adults



RELEASE

Who are they?

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. Consequently they feel they have limited time and resources to enjoy the arts and culture, although they would like to do more.

Attitudes and life priorities

WORK & FAMILY

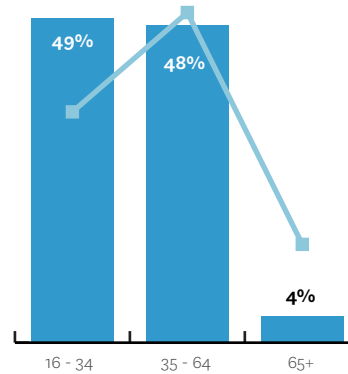
SOCIALISING OUTSIDE THE HOME

RELAXATION

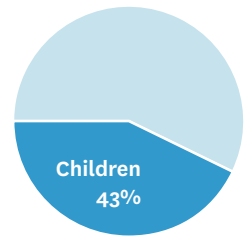
ENTERTAINMENT

PRIORITIES ARE CLOSE TO HOME

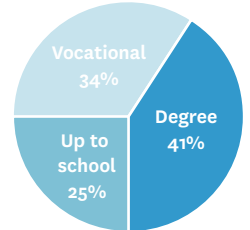
Age profile



Children at home



Highest education level reached



What needs are they looking to fulfil?

The Release segment is preoccupied with meeting life's demands and seeks opportunities for relaxation, entertainment and socialising in their leisure time. They need to be encouraged to view the arts as a social activity and another means of taking time out from their stressful and busy lives; currently they do not perceive they can get this from engaging with arts and culture and therefore look elsewhere.

Because they are so busy with their day-to-day lives they currently feel 'out of the loop'. The arts and culture can then also offer them a means of staying connected to things that are current and contemporary.

Although they are one of the segments most likely to have children, they tend not to engage with arts and culture as a family, and need convincing that the arts can also be enjoyable for children.

What do they do?

Artform interest index:

+10

Annual artform frequency index:

-20

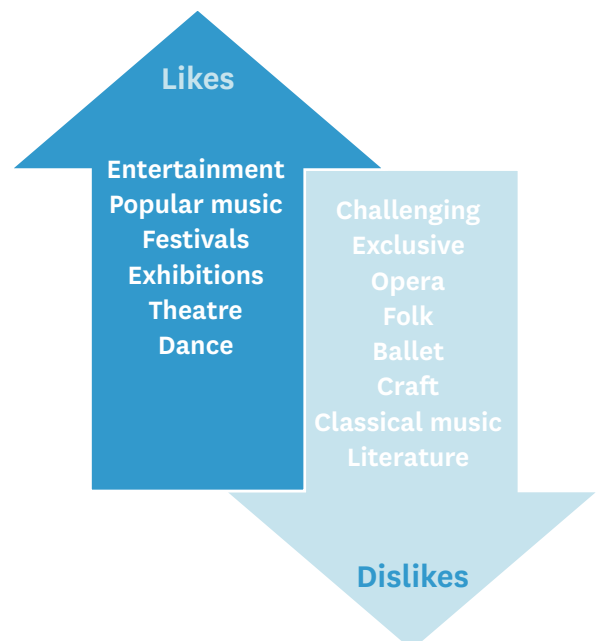
Annual artform frequency:

13

Whilst their current consumption of the arts and culture is relatively low, the Release segment used to do far more in the past and would like to do more now. They express a certain wistfulness; a sense that they are missing out on something they once enjoyed.

They currently opt for relatively low-risk activities that they know will meet their needs, choosing the mainstream over the more challenging.

Likes and dislikes



RELEASE

What is their value?

Expenditure

43%

Maintain or increase level of expenditure

28%

Spent on culture past month

Spend indices

Tickets



Food & drink

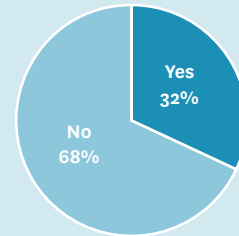


Souvenirs



Support

Donated to arts, cultural or heritage organisations in the last 3 years



9%

Member of arts/cultural organisation

13%

Ever volunteered in arts/culture sector

With average levels of education and working full time, the Release segment tends to be reasonably well off, but they do not currently spend a large proportion of their income on the arts. They need to be reassured that the arts can meet their leisure needs before they will adapt their spending habits.

The Release segment is not forthcoming in its support for arts and culture, certainly in relation to their propensity to donate to such organisations. Due to their busy lives they are unlikely to make the most of the cost-saving benefits of membership, and have little free time for volunteering. Engagement with the arts for this segment is likely to be based on transactional relationships.

How to reach this segment

Special offers and discount voucher codes

Package up experiences – on a plate, easy to consume

Endorsements through known brands

Key marketing proposition

‘Demonstrate that the arts offers the opportunity for a great time together with friends’

The Release segment is not adverse to consuming arts and culture, but needs to be reactivated. Remind these lost cultural consumers of what they are missing out on and reinforce the idea that time spent enjoying the arts and culture is time well spent.

They tend to stick to what they know when it comes to arts and culture. Risk reduction is therefore key for this segment; they are looking for assurances of a guaranteed good time. They are externally referenced so will respond to things that are well recommended and endorsed. They are also highly price sensitive; special offers and vouchers will attract them.

Affiliate marketing, list purchase and endorsements through known brands, individuals and organisations that the Release segment is already engaged with will be key to reaching them. They are unlikely to be actively looking for cultural activities, so push marketing that is eye-catching, contemporary and fun will be most effective.

They tend to be relatively low consumers of printed media, in particular they dislike magazines. They are below average Internet users, but a small majority do use it for informational purposes.

ESSENCE



Discerning
Spontaneous
Independent
Sophisticated

340,300 adults



ESSENCE

Who are they?

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

Attitudes and life priorities

EXPLORING

ART & CULTURE

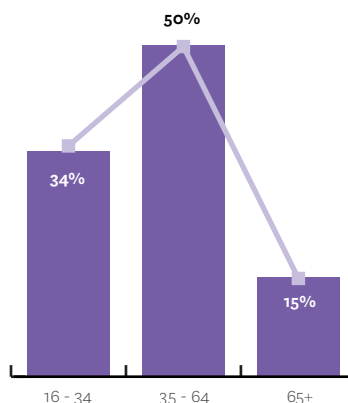
SELF DEVELOPMENT

LIFELONG LEARNERS

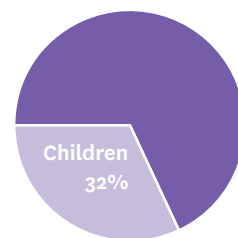
EXPERIENCE OVER MATERIAL GOODS

ADVENTURES

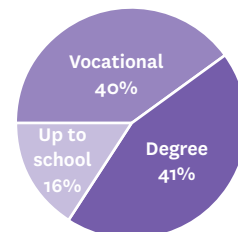
Age profile



Children at home



Highest education level reached



What needs are they looking to fulfil?

Whilst they live full and active lives, they will make time for cultural activities. Arts and culture are an integral, even essential, part of their life. Culture is something they can experience with or without others, 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. They actively avoid the mainstream, what other people think is of little importance to them. They are fiercely independent and will pride themselves in being the first to discover little-known names.

What do they do?

Artform interest index:

+15

Annual artform frequency index:

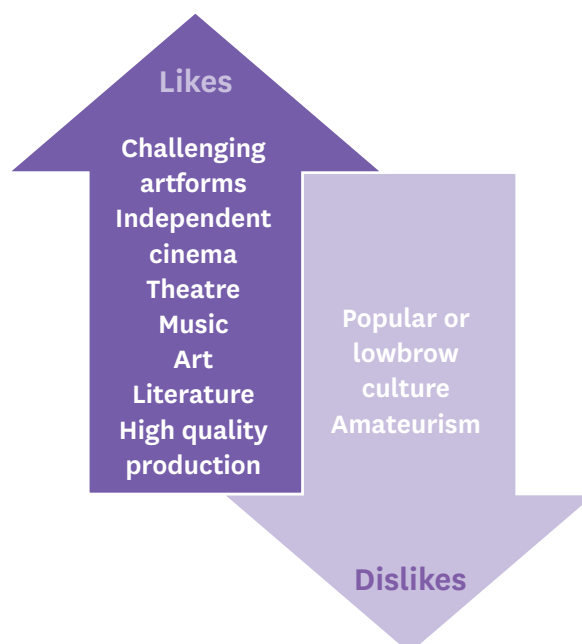
+27

Annual artform frequency:

20

The Essence segment demonstrates a high level of cultural consumption and participation across a broad expanse of cultural activities. They are adventurous and discerning in their tastes, engaging and creating often, with the arts and culture taking a prominent role in their life.

Likes and dislikes



ESSENCE

What is their value?

Expenditure

62%

Maintain or increase level of expenditure

47%

Spent on culture past month

Spend indices

Tickets



Food & drink

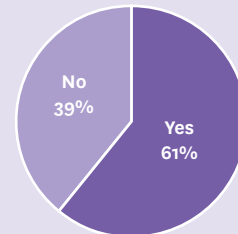


Souvenirs



Support

Donated to arts, cultural or heritage organisations in the last 3 years



33%

Member of arts/cultural organisation

46%

Ever volunteered in arts/culture sector

This segment has the means to indulge and will follow their cultural interests at a cost – for them the arts and culture are worth paying for and supporting. That said, their keen support for the arts means that many are members of arts, heritage and cultural organisations, and they will make the most of reduced entry costs this brings.

They are active in their support; they are one of the segments most likely to donate money to arts, cultural or heritage organisations and the most likely to have carried out voluntary work. They strongly believe in state subsidy for the arts and recognise the benefits that the arts and culture bring to society. They are arts advocates.

How to reach this segment

Highlight quality and sophistication aspects

Acknowledge their discerning knowledge and interests

Present opportunities for taste development and challenge

Engaging them is not difficult, rather it's a case of competing for their time and building their valuable loyalty and advocacy. Targeting them may be difficult, and unnecessary; they have eclectic tastes, are highly proactive when it comes to finding out what's on and are independently minded. They can be wary and cynical of marketing speak and value discovery over recommendation. Pull marketing is most effective for this segment, they will come on their own terms.

Key marketing proposition

'Flatter their independence and sophisticated tastes'

They need no convincing as to the benefits of engaging with arts and culture. They already have a voracious appetite for culture and diverse and eclectic interests.

They consume a broad range of media that reflects their wide range of interests and the importance they place on keeping up-to-date with current affairs. Their Internet usage is high and crosses a broad spectrum of uses. They tend to favour traditional and broadsheet media over mainstream or popular output. Newspapers such as the *New Zealand Herald* and the *Dominion Post*, public radio like Radio New Zealand and special interest news and affairs or home and gardening magazines are channels for reaching them.

How to read this data

The data

All data quoted is taken from Morris Hargreaves McIntyre's *Audience Atlas New Zealand*, a nationally representative population survey of adults (aged 15 and over) who are in the market for arts, culture and leisure activities and events. The data was collected in November and December 2011 using an online survey methodology. Quotas were put in place to ensure the response is representative of the New Zealand population. The weighted dataset is based on a sample of 3,890 respondents.

The market

New Zealand residents aged 15 and over who have been culturally active in the past 3 years – 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). This accounts for 95% of the New Zealand population aged 15 and over; that is 3,347,000 individuals. Population figures are taken from New Zealand's 2006 census. All percentages and figures are based on the total market for culture, unless stated otherwise.

Culture Segments pen portraits

Artform interest index: Gauges the number of artforms, from a list of 39 possible artforms, the proportion the segment has been to ever, or is interested in going to; negative numbers are lower than the market norm of 100, positive numbers are higher.

Annual artform frequency index: Gauges the number of visits per year the segment makes to all 23 artforms tested; negative numbers are lower than the market norm of 100, positive numbers are higher.

Annual artform frequency: The mean average number of visits the segment makes per year across all 23 artforms tested. Spend indices: Gauges spend on admissions/tickets, food and drink and souvenirs/programmes at cultural events or places in the last month. An index of 5 represents high spending, and index of 1 represents low spending, when compared to other segments. This is illustrated by the use of 1-5 icons.

This report can be found online at:
www.creativenz.govt.nz/culturesegments

www.creativenz.govt.nz

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