ARTS COUNCIL OF NEW ZEALAND TOI AOTEAROA

Audience Atlas New Zealand 2014

Audience Atlas New Zealand 2014

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Designed by Samdog

Auckland Arts Festival, Groupe F, Skin of Fire with Red Leap performers (2015).
Gate Photography

Contents

Foreword

Creative New Zealand is pleased to publish the second *Audience Atlas New Zealand* survey.

This resource provides detailed insight into New Zealanders' relationship with arts and culture which our clients and other arts organisations can use to increase engagement with their audiences.

This is the largest survey of its kind in New Zealand. Following the inaugural *Audience Atlas* survey in 2011 we can now start to measure trends in how audiences engage with arts and cultural activities.

The research includes responses from over 4,000 people canvassing the following areas:

- How big is the market for arts and culture?
- What is the potential market for different artforms?
- How do we reach that potential market?
- And how are people engaging with arts and culture online?

For the first time we have detailed information on media consumption and the online behaviour of New Zealand arts audiences. Importantly, the research findings show that investment in digital communication increases the likelihood that people will seek out similar 'real' arts experiences.

While New Zealand is a culturally engaged nation the results indicate there is potential to increase engagement with a wider audience base. Creative New Zealand is already investing in collaborative working models such as the Auckland and Christchurch Audience Development Pilots to promote a smarter way of working by growing a shared market for the arts, rather than market share for individual organisations.

We hope that this information will inspire other organisations to develop effective strategies for programming, marketing and income generation that engage more people in more meaningful ways with New Zealand's arts and culture.

Stephen Wainwright
Chief Executive

CHRISTCHURCH SYMPHONY ORCHESTRA, CSO PRESENTS L.A.MITCHELL & FRIENDS (2013).
Photo provided by Christchurch Symphony Orchestra

Introduction

Audience Atlas New Zealand 2014 is the largest audience survey of arts and culture in New Zealand.

The survey covers 43 artforms and cultural activities. It measures lapsed, current and potential markets for arts and culture and provides detailed insight into New Zealand audiences.

This is the second edition of the *Audience Atlas New Zealand*, which was first published in 2011. The 2014 survey is based on 4,041 responses collected between 1 October and 16 November 2014, from people aged 16 years old and over. Fieldwork was undertaken by research company Colmar Brunton with analysis by Morris Hargreaves McIntyre, an international strategic research consultancy working in the culture, heritage, leisure, media and charities sectors.

The market for culture is huge so why aren't our theatres and galleries full?

Most audience development and marketing effort is aimed at demographic target groups, such as young people, families, or specific ethnic groups. While these groups may share characteristics they may not share beliefs, motivations or needs.

Morris Hargreaves McIntyre has developed a range of sector-specific research products, including *Audience Atlas* and Culture Segments - to help organisations better understand their current market and reach potential new markets.

Audience Atlas New Zealand 2014 segments the population using Culture Segments, a system for arts, culture and heritage organisations. Each of the eight segments is set apart by a deeply-held belief about the role that arts and culture play in people's lives (see page 13 for further information). *Audience Atlas* offers arts organisations the opportunity to identify regional trends and analyse audiences using the Culture Segments model.

Glossary of terms

Engagement

Attendance at arts and cultural events (not participation).

Culture market

New Zealanders who have attended or would be interested in attending an arts or cultural event.

Current market

Attended in the past 36 months.

Lapsed market

Last attended more than 36 months ago.

Potential market

Would consider attending in the future, but haven't previously attended.

AUCKLAND ARTS FESTIVAL, FESTIVAL GARDEN (2015).
Gate Photography

Executive summary

New Zealand's culture market has 3,297,300 adults.

Ninety-eight percent of adults attended at least one cultural event or venue[1] in the past three years, compared to 95% in 2011.

People are attending more arts events...

The number of people who attended the major artforms either grew or remained constant over the past three years. That means the rate of attendance continued to match population growth. Asian arts, craft and object arts, literature and music were the areas that experienced the biggest increases in audience size. Pacific arts and dance had the lowest level of growth.

...but they're spending less.

Despite higher attendance the market only spent an average of $41 per person on arts, culture and heritage in a typical four-week period, or a total of $1.8 billion per year. This figure has dropped since 2011. Then, people spent an average of $53 every four weeks or a total of $2.3 billion a year.

We need to build relationships...

While more people are attending the arts, they appear to be attending fewer events or venues on average, which is also reflected in a corresponding fall in memberships, volunteering and donations. This suggests that while we may have built a core loyal following, we're seeing a lower level of commitment from audiences overall: people are willing to try an event, but focus needs to lie in encouraging them to come back, and to form a relationship with venues and companies.

Online platforms are increasingly essential for the arts...

People engage with the arts online in several ways. This includes booking tickets and using reviews and online feedback to select which arts, cultural or heritage events to attend. This means it is important for arts organisations to have a strong digital presence to draw potential visitors and build deeper relationships with audiences.

...and, crucially, it doesn't replace the real thing.

Rather than replacing the in-person arts experience, experiencing the arts online, browsing an online collection, listening to music, or watching a recorded or live-streamed performance, increases the chance that people will seek experiences offline.

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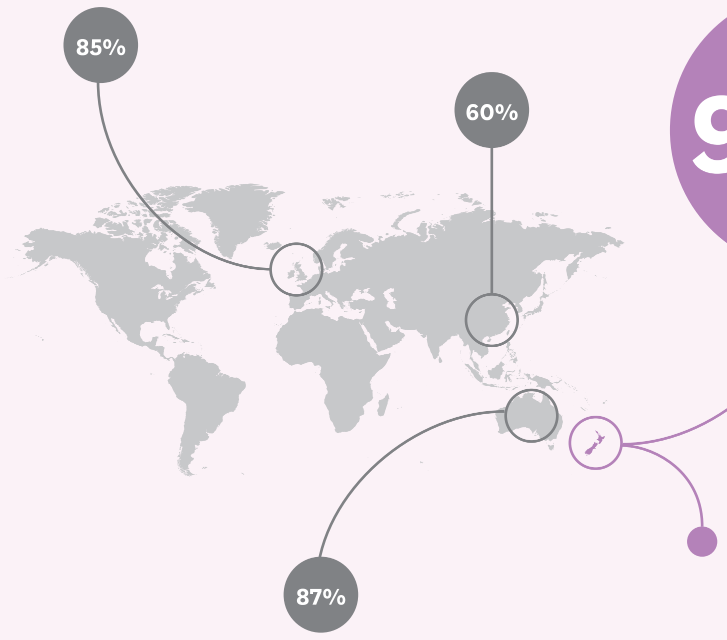
[1] Note that this includes the cinema.

NEW ZEALAND FESTIVAL, THE BIG BANG (2014).
Photographer, Matt Grace

New Zealand's arts and cultural market

The market for arts and culture in New Zealand has grown since 2011.

Ninety-eight percent of adults attended at least one cultural event or location (including cinema[2]) within the last three years, compared to 95% in 2011.



98% of the adult New Zealand (16+) population are in the market for arts, culture and heritage.

3,297,300 individuals

This figure compares favourably with 87% of Australian adults who are in the market for arts, culture and heritage, 85% of adults in the United Kingdom and 60% of adults in China[3].

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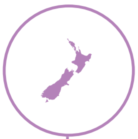
[2] For a full list of all artforms surveyed, please see page 118.

[3] As measured in *Audience Atlas* Australia 2011, United Kingdom 2010 and China 2014.

Regional culture markets

New Zealand's most culturally active areas are Waikato, Nelson and Canterbury. Ninety-nine percent of people in those regions attended a cultural event or location in the past three years. The least culturally active region was Taranaki, although this region still has 94% of its population in the culture market.

More than two-thirds of the country's arts and cultural market are located in regions with the biggest populations – Auckland, Waikato, Wellington and Canterbury – representing more than 2.9 million adults in total.



2.2
MILLION

The culture market for Auckland, Waikato, Wellington and Canterbury represent more than 2.2 million adults in total.

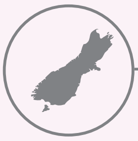
New Zealand overview

2011 CURRENT MARKET	2014 CURRENT MARKET	NUMBER IN CULTURE MARKET	TOTAL CULTURE MARKET
95%	98%	3.297 MILLION	100%

Regional breakdown

NORTH ISLAND

NORTHLAND REGION	95%	98%	116K	4%
AUCKLAND REGION	96%	97%	1091K	34%
WAIKATO REGION	93%	99%	312K	9%
BAY OF PLENTY REGION	96%	95%	200K	6%
GISBORNE REGION	97%	98%	32K	1%
HAWKE'S BAY REGION	94%	97%	114K	3%
TARANAKI REGION	94%	94%	82K	2%
MANAWATU-WANGANUI REGION	95%	97%	173K	5%
WELLINGTON REGION	98%	98%	372K	11%



SOUTH ISLAND

TASMAN REGION	97%	98%	37K	1%
NELSON REGION	98%	99%	37K	1%
MARLBOROUGH REGION	90%	97%	35K	1%
WEST COAST REGION	93%	97%	25K	1%
CANTERBURY REGION	91%	99%	434K	13%
OTAGO REGION	97%	98%	164K	5%
SOUTHLAND REGION	94%	98%	73K	2%

● 2011 current market ● 2014 current market **200k** Number in cultural market ● Total culture market

AUCKLAND WRITERS FESTIVAL (2015).
Photographer, Marcel Tromp

PART 1

NEW ZEALAND'S CULTURE MARKET

AUCKLAND ART GALLERY, TODD FOUNDATION CREATIVE LEARNING CENTRE, WAVELENGTH
Installation view 2014

Segmenting New Zealand's culture market

Culture Segments

Culture Segments is an international, sector-specific segmentation system for arts, culture and heritage organisations.

The principal objective of Culture Segments is to provide the sector with a shared language for understanding audiences, with a view to targeting them more accurately, engaging them more deeply and building stronger relationships.

Culture Segments helps arts organisations understand their audience's needs, allowing them to design and select appropriate programming, carefully judge combinations of products and services, make bespoke offers and transmit differentiated messaging. It also helps organisations profile current and potential markets to identify opportunities for growth. By understanding more about different audiences – why they attend, what their expectations are, and their core values and needs – they can make confident, informed strategic decisions.

The defining characteristics of the eight Culture Segments are:

Essence

Discerning, Spontaneous, Independent, Sophisticated

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.

Expression

Receptive, Confident, Community, Expressive

The Expression segment is in tune with its 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.

Affirmation

Self-identity, Aspirational, 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 are adventurous when it comes to their arts and cultural consumption, viewing it as a means of developing themselves as individuals.

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.

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 home. They have established tastes and enjoy culture that links into their interests in nature, heritage and more traditional artforms.

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

Perspective

Settled, Self-sufficient, Focused, Contented

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

Entertainment

Consumers, Popularist, Leisure, Mainstream

The Entertainment segment tends to include 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.

New Zealand's Culture Segments profile

National profile

The more culturally active segments – Essence, Expression, Affirmation and Stimulation – make up more than two-thirds of New Zealand's culture market (68%).

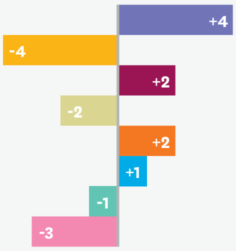
Essence and Expression show the biggest changes since 2011. Essence has grown from 10% to 14%. Expression has dropped from 26% to 22%. Both segments are highly active in their cultural consumption, so this would not have had a significant impact on overall cultural activity.

Culture Segments are thought to be fairly constant over a person's life (with the exception of Release). However, changes in population make-up mean that the composition of Culture Segments may change slightly over time.

CULTURE SEGMENTS PROFILE OF NEW ZEALAND ADULTS IN THE MARKET FOR ARTS, CULTURAL AND HERITAGE

14%	Essence	22%	Expression
19%	Affirmation	8%	Enrichment
13%	Stimulation	10%	Release
7%	Perspective	7%	Entertainment

PERCENTAGE POINT DIFFERENCE BETWEEN 2014 AND 2011



Base: (4008).

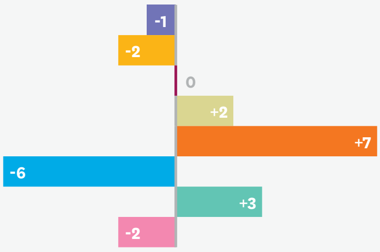
Regional profiles

Culture segments profiles of adults in the market for arts, culture and heritage by region are shown on the opposite page.

Northland

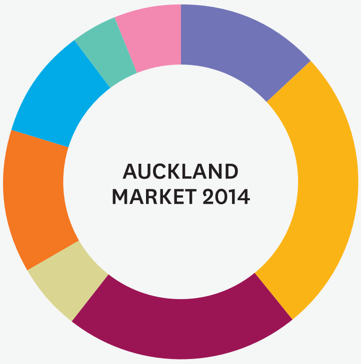
13%	Essence	20%	Expression
19%	Affirmation	9%	Enrichment
20%	Stimulation	4%	Release
10%	Perspective	5%	Entertainment

PERCENTAGE POINT DIFFERENCE COMPARED TO THE NEW ZEALAND AVERAGE



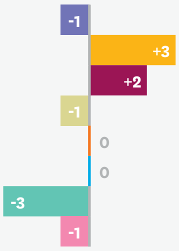
Base: (141).

Auckland



13%	Essence	26%	Expression
21%	Affirmation	6%	Enrichment
13%	Stimulation	10%	Release
4%	Perspective	6%	Entertainment

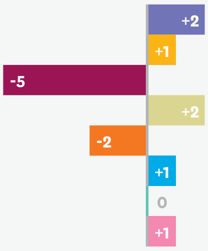
PERCENTAGE POINT DIFFERENCE COMPARED TO THE NEW ZEALAND AVERAGE



Base: (1330).

Waikato

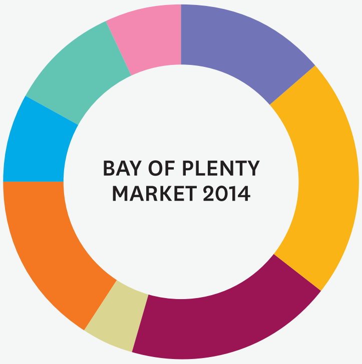
PERCENTAGE POINT DIFFERENCE COMPARED TO THE NEW ZEALAND AVERAGE



15%	Essence	23%	Expression	14%	Affirmation	10%	Enrichment
11%	Stimulation	12%	Release	7%	Perspective	8%	Entertainment

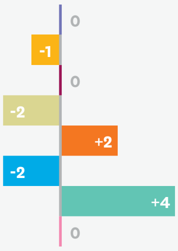
Base: (375).

Bay of Plenty



14%	Essence	22%	Expression
19%	Affirmation	5%	Enrichment
16%	Stimulation	8%	Release
10%	Perspective	7%	Entertainment

PERCENTAGE POINT DIFFERENCE COMPARED TO THE NEW ZEALAND AVERAGE

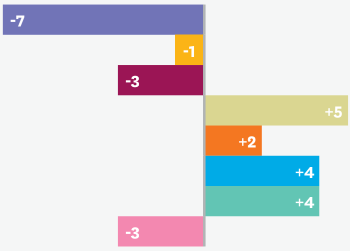


Base: (249).

Gisborne

6%	Essence	21%	Expression
16%	Affirmation	12%	Enrichment
16%	Stimulation	14%	Release
10%	Perspective	4%	Entertainment

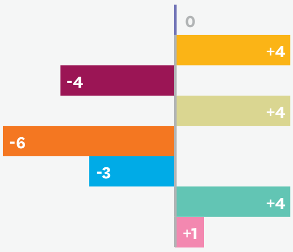
PERCENTAGE POINT DIFFERENCE COMPARED TO THE NEW ZEALAND AVERAGE



Base: (39).

Hawke’s Bay

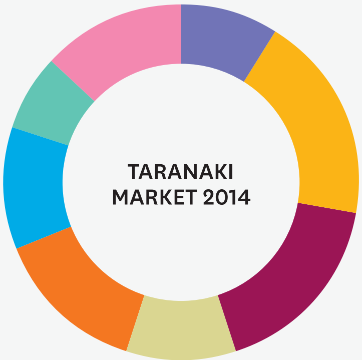
PERCENTAGE POINT DIFFERENCE COMPARED TO THE NEW ZEALAND AVERAGE



14%	Essence	26%	Expression	15%	Affirmation	12%	Enrichment
7%	Stimulation	7%	Release	11%	Perspective	8%	Entertainment

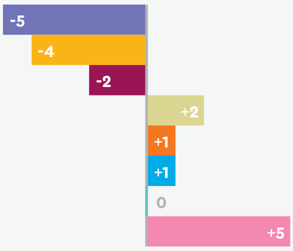
Base: (140).

Taranaki



9%	Essence	19%	Expression
17%	Affirmation	10%	Enrichment
14%	Stimulation	11%	Release
7%	Perspective	13%	Entertainment

PERCENTAGE POINT DIFFERENCE COMPARED TO THE NEW ZEALAND AVERAGE

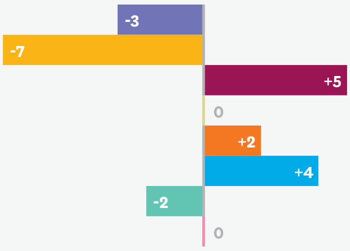


Base: (103).

Manawatu-Wanganui

10%	Essence	16%	Expression
24%	Affirmation	8%	Enrichment
16%	Stimulation	14%	Release
4%	Perspective	8%	Entertainment

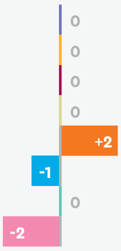
PERCENTAGE POINT DIFFERENCE COMPARED TO THE NEW ZEALAND AVERAGE



Base: (211).

Wellington

PERCENTAGE POINT DIFFERENCE COMPARED TO THE NEW ZEALAND AVERAGE



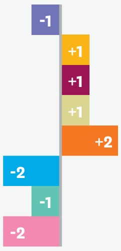
14%	Essence	22%	Expression	19%	Affirmation	7%	Enrichment
7%	Stimulation	10%	Release	7%	Perspective	6%	Entertainment

Base: (450).

Tasman

13%	Essence	24%	Expression
20%	Affirmation	8%	Enrichment
15%	Stimulation	8%	Release
6%	Perspective	5%	Entertainment

PERCENTAGE POINT DIFFERENCE COMPARED TO THE NEW ZEALAND AVERAGE

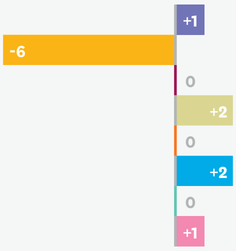


Base: (45).

Nelson

15%	Essence	16%	Expression
19%	Affirmation	10%	Enrichment
13%	Stimulation	12%	Release
7%	Perspective	9%	Entertainment

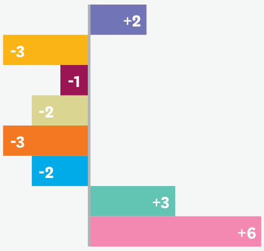
PERCENTAGE POINT DIFFERENCE COMPARED TO THE NEW ZEALAND AVERAGE



Base: (45).

Marlborough

PERCENTAGE POINT DIFFERENCE COMPARED TO THE NEW ZEALAND AVERAGE



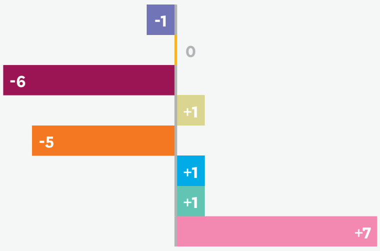
15%	Essence	19%	Expression	18%	Affirmation	6%	Enrichment
10%	Stimulation	8%	Release	9%	Perspective	14%	Entertainment

Base: (43).

West Coast

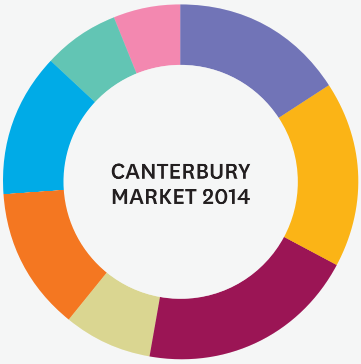
13%	Essence	23%	Expression
13%	Affirmation	9%	Enrichment
9%	Stimulation	11%	Release
7%	Perspective	15%	Entertainment

PERCENTAGE POINT DIFFERENCE COMPARED TO THE NEW ZEALAND AVERAGE



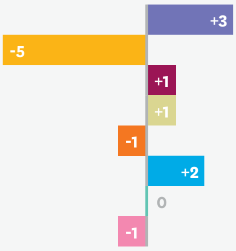
Base: (31).

Canterbury



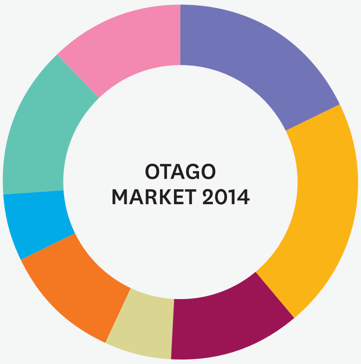
16%	Essence	17%	Expression
20%	Affirmation	8%	Enrichment
13%	Stimulation	13%	Release
7%	Perspective	6%	Entertainment

PERCENTAGE POINT DIFFERENCE COMPARED TO THE NEW ZEALAND AVERAGE

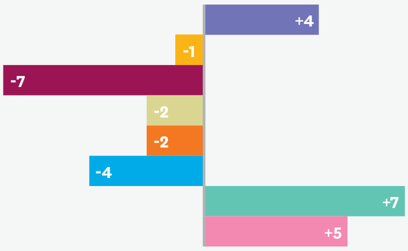


Base: (521).

Otago



PERCENTAGE POINT DIFFERENCE COMPARED TO THE NEW ZEALAND AVERAGE



18%	Essence	21%	Expression	12%	Affirmation	6%	Enrichment
11%	Stimulation	6%	Release	14%	Perspective	12%	Entertainment

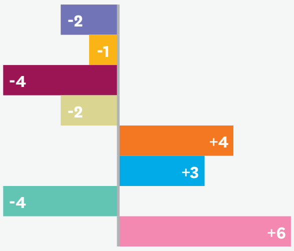
Base: (199).

THE DOWSE ART MUSEUM, ELIZABETH THOMSON, INVITATION TO OPENNESS—SUBSTANTIVE AND TRANSITIVE STATES (2014).
Photographer, Mark Tantrum

Southland

11%	Essence	21%	Expression
15%	Affirmation	6%	Enrichment
18%	Stimulation	13%	Release
3%	Perspective	13%	Entertainment

PERCENTAGE POINT DIFFERENCE COMPARED TO THE NEW ZEALAND AVERAGE



Base: (88).

Arts attendance: Growing the culture market

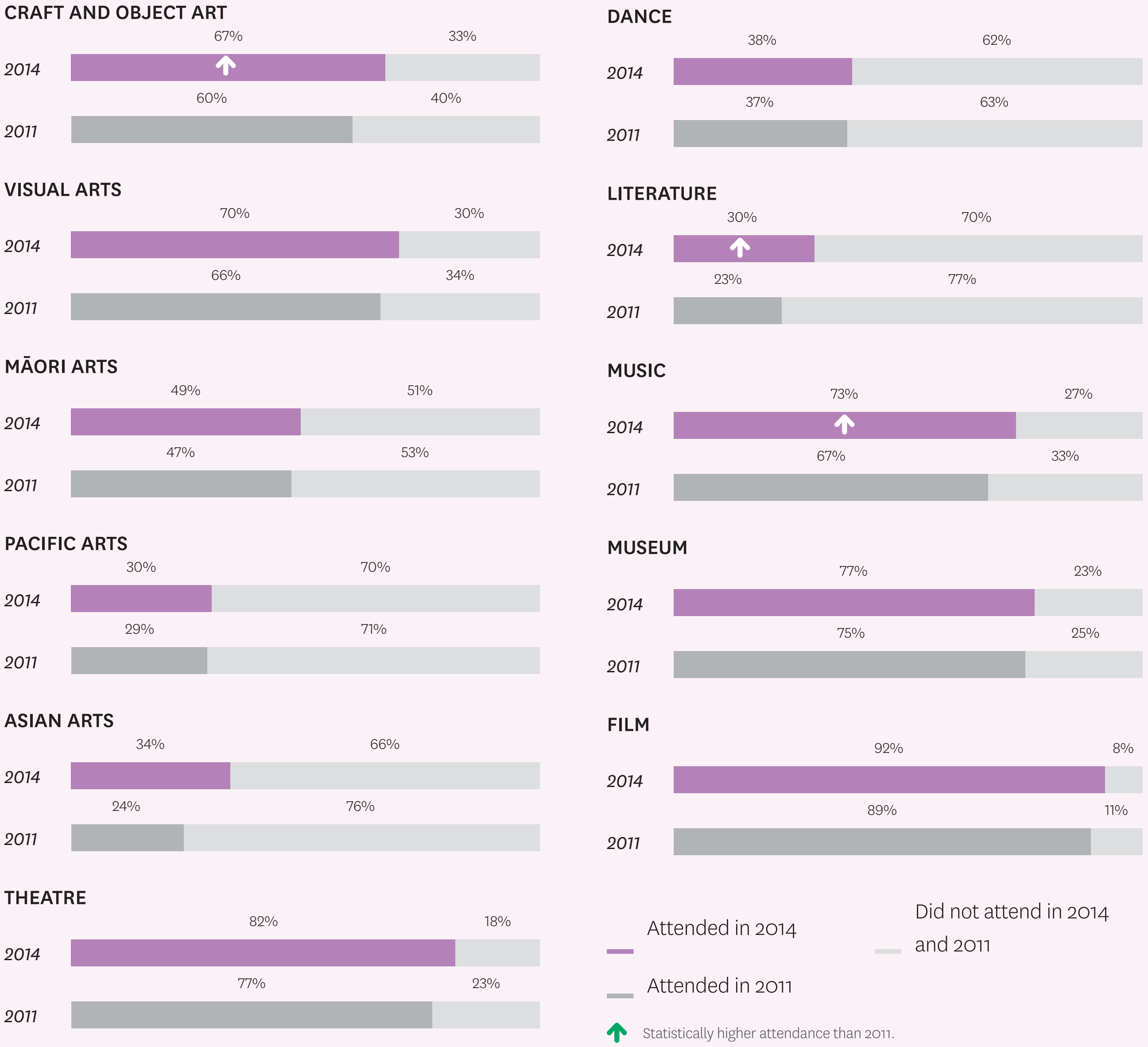
The market for all major artforms has either grown or remained constant over the past three years.

Asian arts experienced the biggest growth. Thirty-four percent of the culture market has attended an Asian cultural festival in the past three years, compared to 24% in 2011.

Literature, craft and object art, and music experienced significant growth.

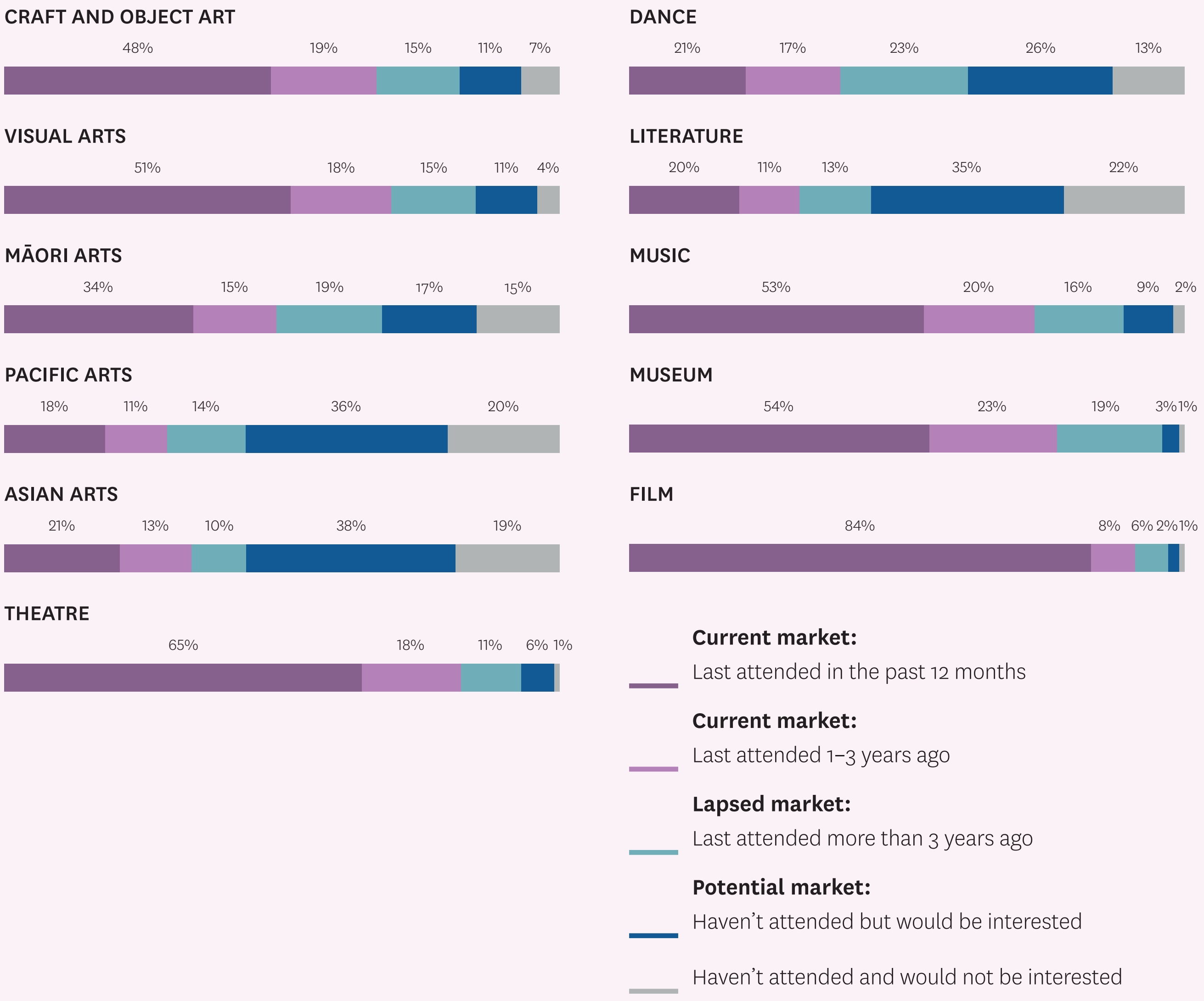
Pacific arts events and dance showed the lowest growth. However, given the size of the potential market for both artforms, particularly Pacific arts, there is significant scope to grow these markets.

Percentage of culture market in current market 2014



Across the art forms, film is the most widely consumed, with 84% of the culture market attending in the past year. Theatre, museums, music and visual arts are also popular art forms, attracting more than half the culture market in the past year.

Pacific arts, literature, dance and Asian arts have the lowest attendance rates.

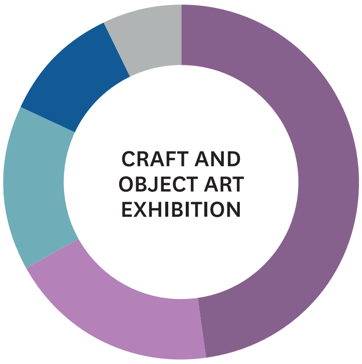


Craft and object art

Craft and object art is one of the larger markets. There is still scope to grow this audience by developing strategies that target its lapsed market (15% of the culture market) and potential market (11% of the culture market).

Just under half of the culture market saw a craft or object art exhibition in the last 12 months, with a further 19% attending an exhibition between one to three years ago.

The national market for craft and object art has grown over the past three years, from 60% of the culture market in 2011 to 67% in 2014. Growth has been observed across all regions, with the largest increases seen in Hawke's Bay and Otago.



48%	Last attended in the past 12 months
19%	Last attended 1–3 years ago
15%	**Lapsed market:** Last attended more than 3 years ago
11%	**Potential market:** Haven't attended but would be interested
7%	Haven't attended and would not be interested

Base: (4011).

Craft and object art market regional breakdown

To grow the craft and object art market, attention should be paid to retaining its current audience so it does not lapse, and encouraging audiences interested in attending a craft or object exhibition for the first time.

A significant proportion of Release, Enrichment and Perspective are in the lapsed market, so retention may be an issue for these segments. Enrichment, Release and Entertainment have the largest potential markets.

A high proportion of Essence is in the current market for craft and object art, followed by Expression, Affirmation and Stimulation.

3.1
MILLION

people are in the market for craft and object arts

New Zealand overview

2011 CURRENT MARKET	2014 CURRENT MARKET	LAPSED MARKET	POTENTIAL MARKET
60%	67%	15%	11%
1994.3K	2260.1K	500.8K	383.6K

Regional breakdown

NORTH ISLAND

NORTHLAND REGION	68% 82.1K	79% 93.9K	11% 13.1K	6% 6.9K
AUCKLAND REGION	50% 537.7K	58% 646.9K	17% 195.7K	17% 192.9K
WAIKATO REGION	61% 186.6K	66% 207.0K	14% 45.4K	13% 39.6K
BAY OF PLENTY REGION	66% 139.9K	68% 142.9K	15% 31.5K	8% 16.0K
GISBORNE REGION	61% 21.4K	72% 23.5K	17% 5.4K	9% 2.8K
HAWKE'S BAY REGION	60% 71.1K	76% 89.9K	10% 12.2K	6% 7.2K
TARANAKI REGION	68% 58.1K	77% 66.7K	10% 8.8K	6% 4.9K
MANAWATU-WANGANUI REGION	64% 116.8K	66% 117.2K	15% 27.0K	11% 20.1K
WELLINGTON REGION	68% 264.9K	73% 275.2K	12% 47.4K	9% 33.3K

SOUTH ISLAND

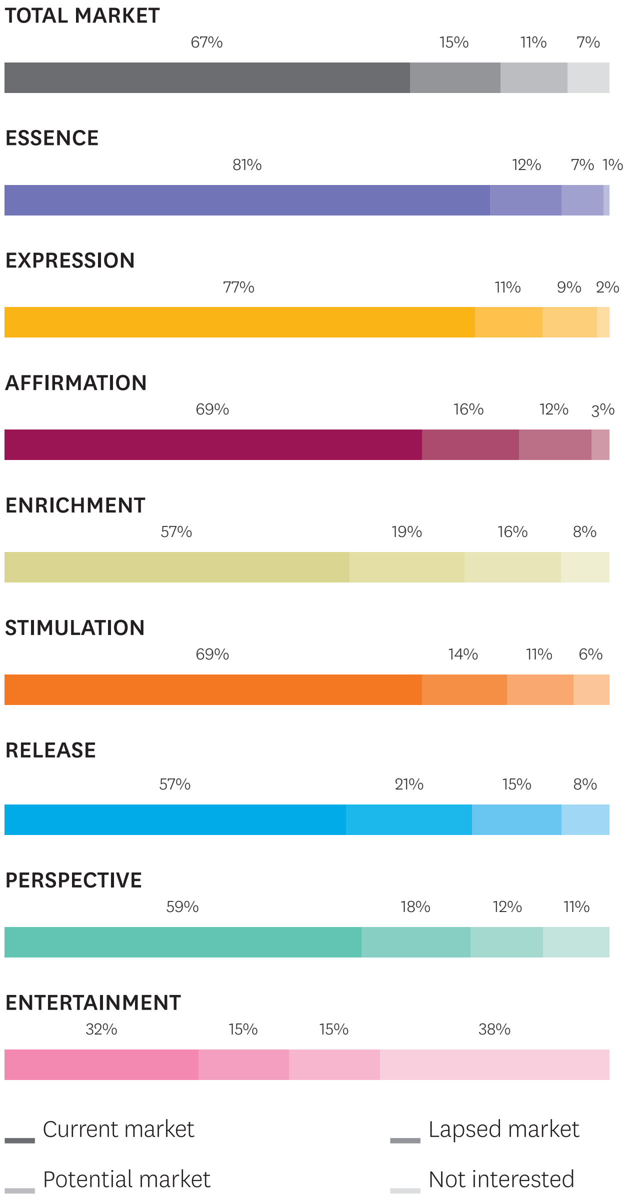
TASMAN REGION	68% 25.7K	75% 28.4K	14% 5.4K	4% 1.6K
NELSON REGION	66% 24.8K	78% 29.5K	8% 3.0K	9% 3.5K
MARLBOROUGH REGION	67% 23.3K	74% 26.9K	11% 4.0K	5% 1.7K
WEST COAST REGION	67% 17.3K	77% 19.9K	16% 4.1K	4% 1.1K
CANTERBURY REGION	62% 262.5K	70% 307.6K	15% 66.0K	9% 40.0K
OTAGO REGION	61% 105.1K	74% 123.7K	14% 23.4K	7% 11.0K
SOUTHLAND REGION	76% 56.6K	82% 61.0K	11% 8.5K	1% 1.0K

● 2011 Current market ● 2014 Current market ● 2014 Lapsed market ● 2014 Potential market

NEW ZEALAND OPERA, NOAH'S FLUDDE (2013).
Photographer, Mark Rosser

Craft or object art exhibition

Craft and object art attendance by Culture Segment

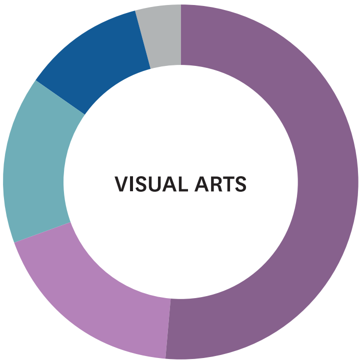


Visual arts

The greatest opportunity for growing the visual arts market is in encouraging people who are interested in attending a digital or video arts event for the first time. They represent more than a third of the culture market, or 1.3 million people.

More than half of the culture market attended a visual arts event in the past 12 months.

Art galleries and exhibitions are attended significantly more than digital or video arts events. There are relatively distinct markets for the two. Only 32% of those who attended an art gallery in the past 12 months attended a digital or video arts event in the same period.



51% Last attended in the past 12 months

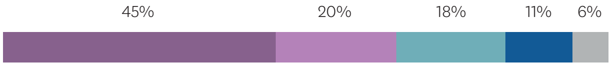
18% Last attended 1–3 years ago

Lapsed market:
15% Last attended more than 3 years ago

Potential market:
11% Haven't attended but would be interested

4% Haven't attended and would not be interested

ART GALLERY OR EXHIBITION



DIGITAL OR VIDEO ARTS EVENT

Base: (4011).

3.3
MILLION

people are in the market for visual arts

New Zealand overview

2011 CURRENT MARKET	2014 CURRENT MARKET	LAPSED MARKET	POTENTIAL MARKET
66%	70%	15%	11%
2213.7K	2356.3K	517.2K	382.7K

Regional breakdown

NORTH ISLAND

NORTHLAND REGION	76% 92.1K	72% 86.1K	10% 12.1K	15% 17.5K
AUCKLAND REGION	55% 591.3K	65% 724.1K	17% 190.7K	15% 173.1K
WAIKATO REGION	67% 204.2K	62% 195.8K	18% 57.9K	15% 46.5K
BAY OF PLENTY REGION	69% 146.6K	69% 145.8K	14% 29.7K	10% 21.3K
GISBORNE REGION	53% 18.7K	66% 21.6K	19% 6.2K	13% 4.3K
HAWKE'S BAY REGION	62% 74.2K	71% 83.5K	14% 16.5K	13% 15.4K
TARANAKI REGION	73% 62.0K	75% 65.2K	13% 10.9K	4% 3.6K
MANAWATU-WANGANUI REGION	67% 122.8K	65% 115.4K	18% 32.4K	10% 17.7K
WELLINGTON REGION	79% 308.8K	82% 313.1K	8% 31.9K	7% 25.0K

SOUTH ISLAND

TASMAN REGION	71% 26.9K	71% 26.6K	19% 7.2K	7% 2.5K
NELSON REGION	72% 27.2K	81% 30.6K	10% 3.8K	7% 2.7K
MARLBOROUGH REGION	72% 25.0K	66% 23.8K	15% 5.5K	10% 3.7K
WEST COAST REGION	74% 19.1K	61% 15.9K	27% 6.9K	5% 1.2K
CANTERBURY REGION	74% 315.1K	74% 323.4K	17% 75.8K	7% 28.7K
OTAGO REGION	72% 123.9K	76% 126.7K	12% 20.5K	10% 17.3K
SOUTHLAND REGION	74% 55.6K	79% 58.6K	12% 9.1K	3% 2.3K

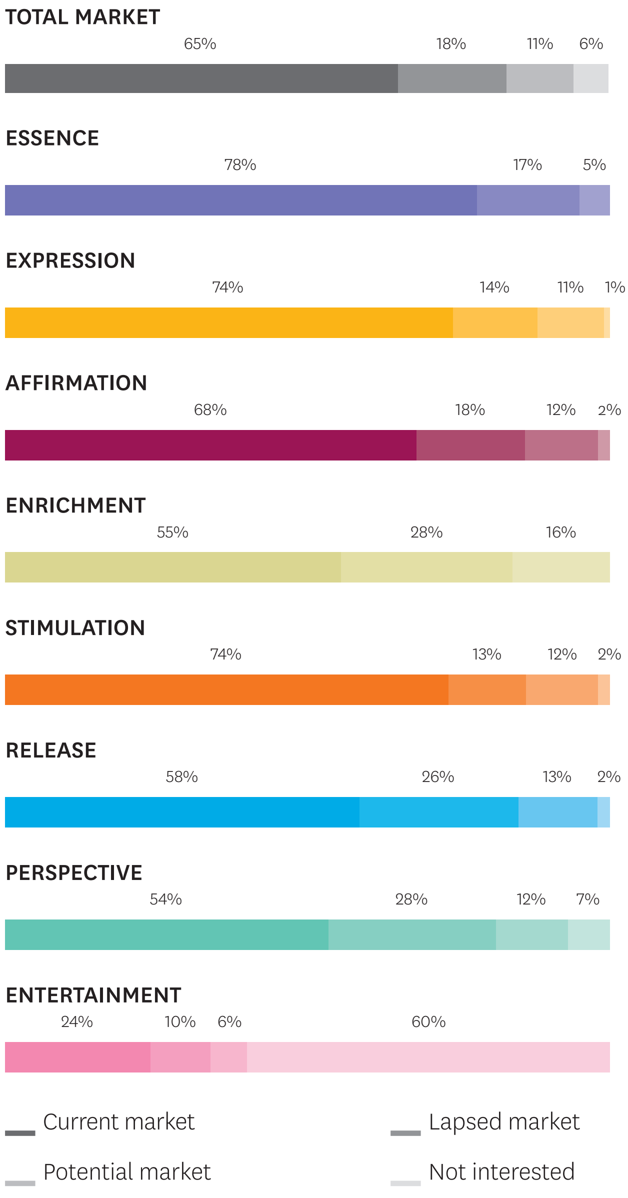
● 2011 Current market ● 2014 Current market ● 2014 Lapsed market ● 2014 Potential market

Visual arts market regional breakdown

Much of the growth in the visual arts market has been in Auckland. Gisborne and Nelson also saw an increase in gallery attendance. The West Coast and Waikato saw the largest decreases.

Visual arts attendance by Culture Segment

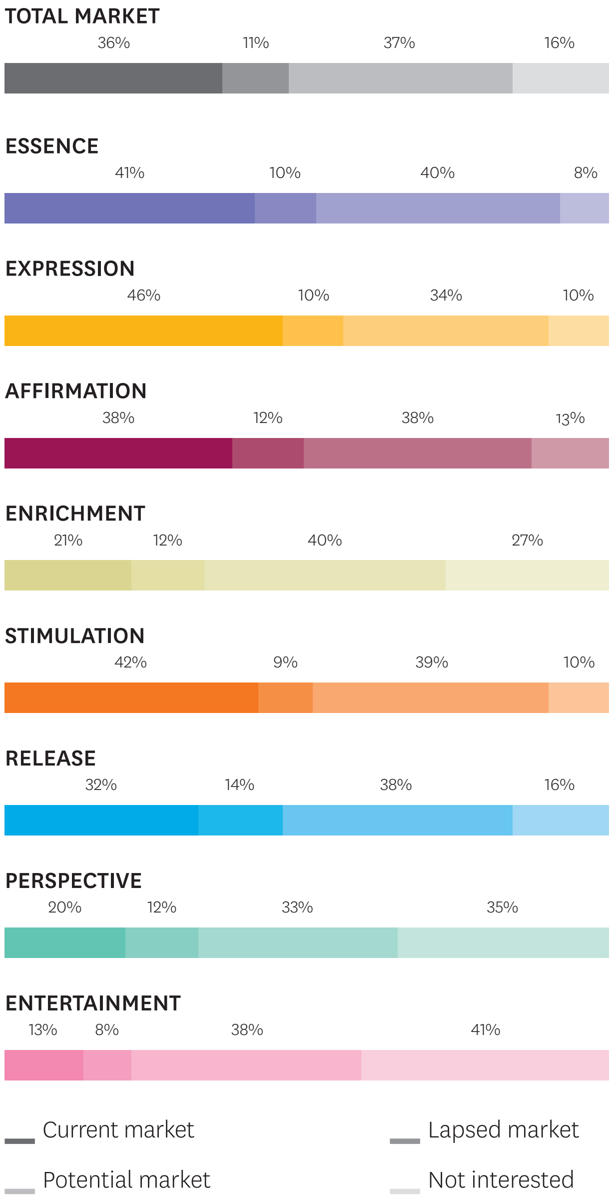
ART GALLERY OR ART EXHIBITION:



Perspective, Enrichment and Release are more likely than other Culture Segments to lapse in their attendance. Strategies to retain these segments would improve their rate of visiting.

Essence and Stimulation are the most likely to have visited an art gallery in the past three years. Entertainment is the least likely.

DIGITAL OR VIDEO ART EVENT:



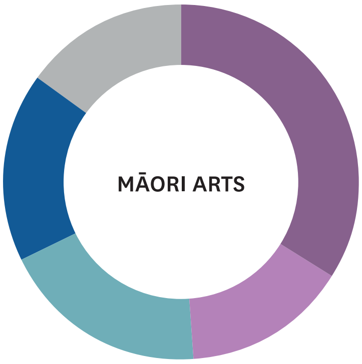
Digital or video arts has broad appeal, with between 30-40% of each Culture Segment interested in attending an event for the first time.

Expression is the most likely Culture Segment to have attended a digital or video arts event in the past three years. Entertainment is the least likely.

Ngā toi Māori

There is significant room to grow the Māori arts market. More than a third of the culture market is either lapsed (having last attended Māori arts more than three years ago) or in the potential market (being interested in attending for the first time).

Over the past three years, nearly half of the culture market has attended Māori arts in some form. The most common form was a performance or kapa haka.



34% Last attended in the past 12 months

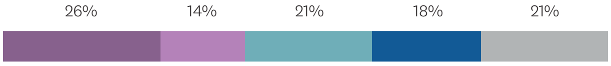
15% Last attended 1–3 years ago

Lapsed market:
19% Last attended more than 3 years ago

Potential market:
17% Haven't attended but would be interested

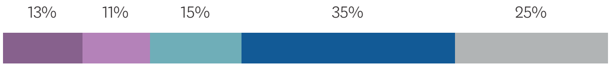
15% Haven't attended and would not be interested

MĀORI PERFORMANCE OR KAPA HAKA



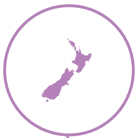
MĀORI CULTURAL FESTIVAL

MĀORI ARTS EXHIBITION



OTHER MĀORI ARTS OR CULTURAL EVENT

Base: (4011).



2.9
MILLION

people are in the market for Māori arts

New Zealand overview

2011 CURRENT MARKET	2014 CURRENT MARKET	LAPSED MARKET	POTENTIAL MARKET
47%	49%	19%	17%
1558.2K	1651.9K	654.4K	574.5K

Regional breakdown

NORTH ISLAND

NORTHLAND REGION	58% 69.9K	58% 69.6K	17% 20.8K	11% 13.5K
AUCKLAND REGION	46% 502.4K	49% 548.9K	21% 230.8K	17% 195.3K
WAIKATO REGION	45% 138.8K	44% 139.6K	22% 69.3K	16% 51.8K
BAY OF PLENTY REGION	48% 103.1K	49% 103.2K	19% 39.5K	17% 36.1K
GISBORNE REGION	61% 21.7K	71% 23.2K	16% 5.1K	7% 2.3K
HAWKE'S BAY REGION	48% 57.0K	51% 60.3K	17% 20.2K	11% 12.6K
TARANAKI REGION	46% 39.1K	51% 43.9K	20% 17.3K	13% 11.4K
MANAWATU-WANGANUI REGION	44% 81.0K	48% 85.1K	18% 31.8K	17% 30.2K
WELLINGTON REGION	54% 210.7K	54% 203.7K	20% 77.7K	14% 52.3K

SOUTH ISLAND

TASMAN REGION	43% 16.2K	45% 16.8K	24% 9.1K	14% 5.3K
NELSON REGION	40% 15.2K	42% 16.0K	23% 8.6K	19% 7.1K
MARLBOROUGH REGION	45% 15.5K	44% 15.8K	23% 8.2K	15% 5.5K
WEST COAST REGION	36% 9.3K	52% 13.6K	18% 4.8K	11% 3.0K
CANTERBURY REGION	41% 176.7K	44% 195.2K	18% 80.4K	23% 102.5K
OTAGO REGION	43% 73.5K	48% 81.0K	14% 22.9K	16% 27.5K
SOUTHLAND REGION	37% 27.9K	49% 36.1K	11% 8.0K	25% 18.2K

● 2011 Current market ● 2014 Current market ● 2014 Lapsed market ● 2014 Potential market

Māori arts market regional breakdown

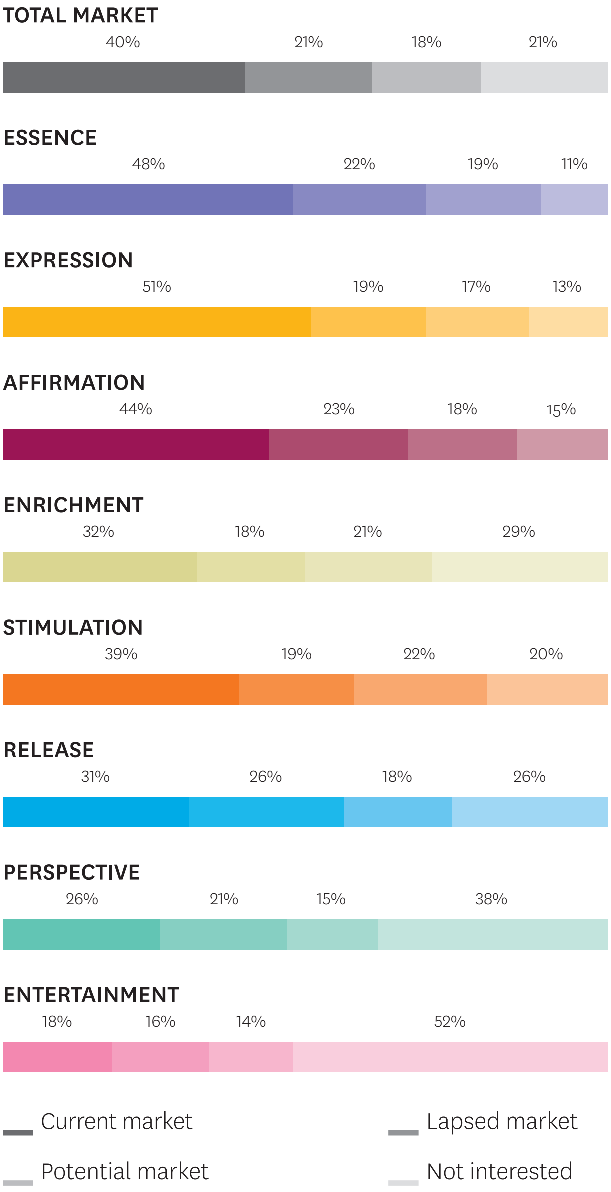
There has been modest growth in the Māori arts market over the past three years, increasing from 47% in 2011 to 49% in 2014.

This growth was primarily in Gisborne, Southland and the West Coast, where the size of the current market has grown by 10 to 17 percentage points over the past three years.

The lapsed market is largest in Tasman, Nelson and Marlborough. This provides an opportunity for audience members to be encouraged to re-enter the current market. The greatest opportunity is in Canterbury and Southland, where the potential market is 23% and 25% of the region's culture market respectively.

Māori arts attendance by Culture Segment

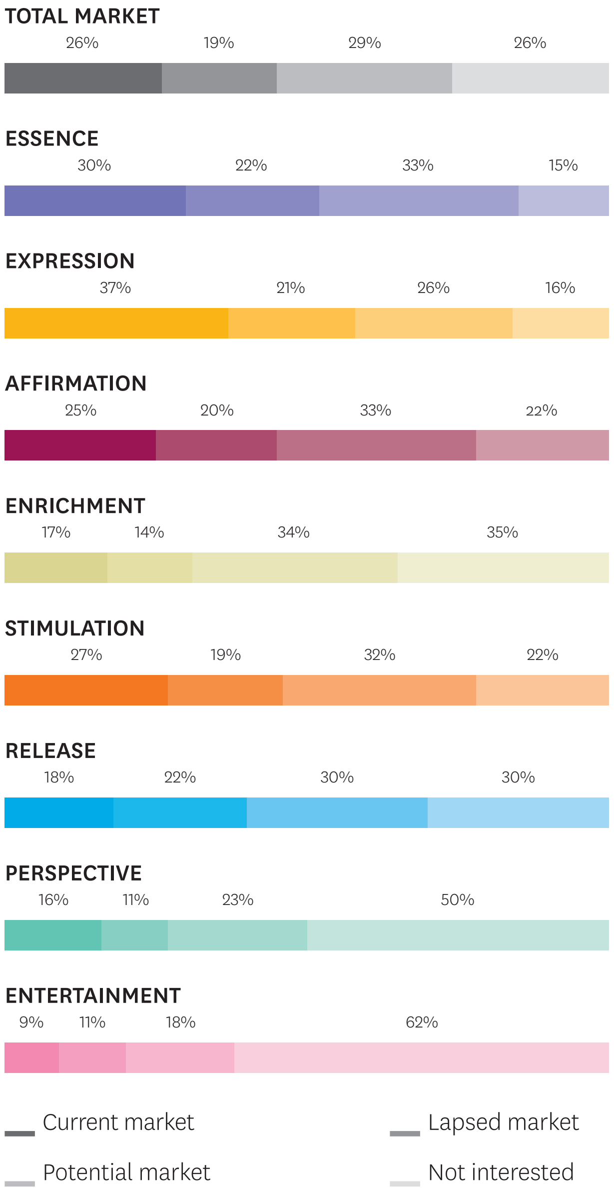
MĀORI PERFORMANCE OR KAPA HAKA:



Expression, Essence and Affirmation are more likely than other Culture Segments to have attended a Māori performance or kapa haka in the past three years.

Entertainment and Perspective are the least likely to have attended, and the most likely to not be interested in attending at all.

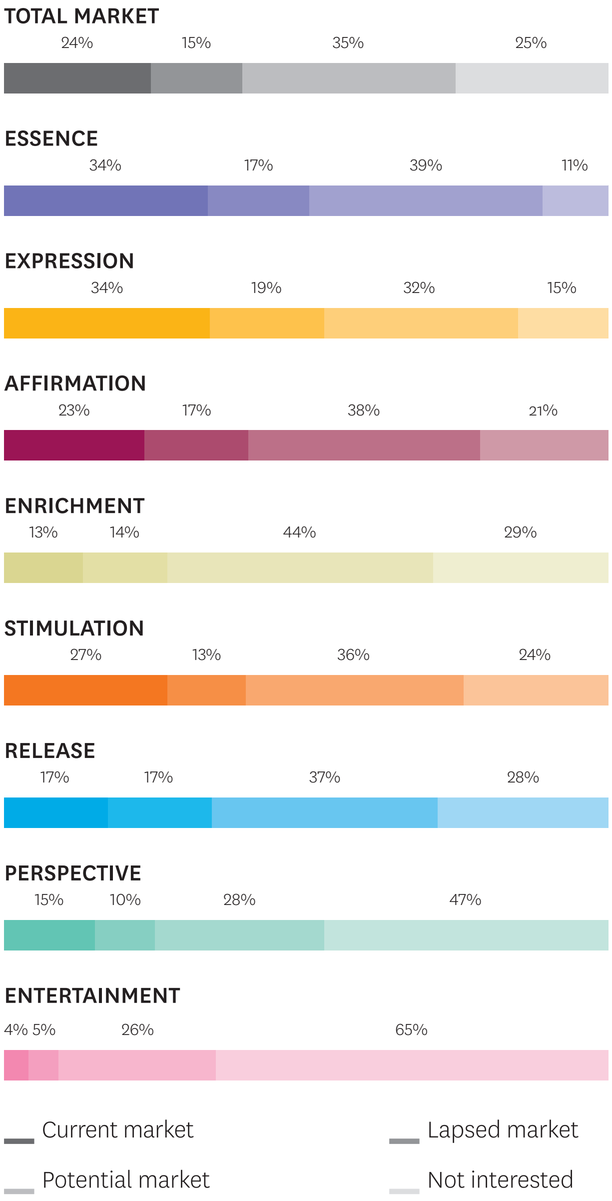
MĀORI CULTURAL FESTIVAL:



There is huge scope for this market to grow, with 29% of the culture market interested in attending a Māori cultural festival for the first time. Focusing on Essence, Enrichment, Affirmation and Stimulation will be key in enabling this growth.

Expression, Essence and Stimulation are the most likely to be in the market for Māori cultural festivals. Perspective and Entertainment are the least likely to be interested in attending.

MĀORI ARTS EXHIBITION:



The market for exhibitions of Māori arts has significant room to grow, with Enrichment, Affirmation and Essence being the most likely to be interested in attending for the first time.

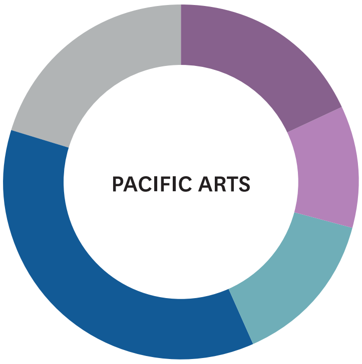
Essence and Expression are the most likely to be in the market for exhibitions of Māori arts. Just over a third of each segment has attended an exhibition of this type in the past three years.

Pacific arts

Pacific arts has shown the lowest growth over the past three years. The size of the current market has grown only marginally from 29% in 2011 to 30% in 2014.

However, this is not due to a lack of interest since more than one-third of the country's culture market is interested in attending a Pacific arts event for the first time. These indicate there are barriers to attending Pacific arts (which may include factors such as location, cost and awareness). Focusing on communication strategies will help to grow the market.

Looking at the different types of Pacific artforms, performance is the most commonly attended, with just over a quarter of the culture market attending a Pacific performance in the past three years. Exhibitions of Pacific arts have the lowest attendance. Only 17% have attended an exhibition of this kind in the past three years. Again the interest is there, as nearly half of the culture market wants to visit an exhibition.



18% Last attended in the past 12 months

11% Last attended 1–3 years ago

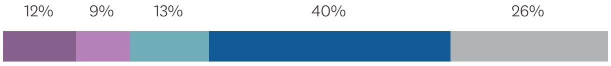
Lapsed market:
14% Last attended more than 3 years ago

Potential market:
36% Haven't attended but would be interested

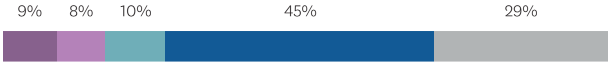
20% Haven't attended and would not be interested

PACIFIC PERFORMANCE

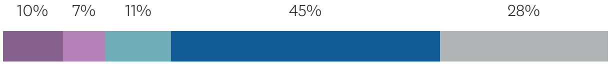
PACIFIC CULTURAL FESTIVAL



PACIFIC ARTS EXHIBITION



OTHER PACIFIC ARTS OR CULTURAL EVENT



Base: (4011).

New Zealand overview

2.7
MILLION

people are in the market for Pacific arts

2011 CURRENT MARKET	2014 CURRENT MARKET	LAPSED MARKET	POTENTIAL MARKET
29%	30%	14%	36%
658.1K	1003.5K	475.1K	1218.6K

Regional breakdown

NORTH ISLAND

NORTHLAND REGION	27% 19.0K	30% 36.1K	18% 21.7K	36% 42.8K
AUCKLAND REGION	41% 331.9K	39% 441.3K	14% 161.7K	29% 329.4K
WAIKATO REGION	26% 54.9K	26% 81.6K	10% 31.2K	39% 123.7K
BAY OF PLENTY REGION	21% 24.8K	16% 33.7K	15% 31.3K	48% 101.7K
GISBORNE REGION	21% 4.3K	31% 10.0K	16% 5.2K	37% 12.2K
HAWKE'S BAY REGION	21% 16.4K	23% 27.3K	9% 11.2K	37% 44.0K
TARANAKI REGION	24% 11.2K	20% 17.2K	17% 14.5K	39% 33.6K
MANAWATU-WANGANUI REGION	20% 19.0K	21% 38.1K	17% 29.6K	42% 74.3K
WELLINGTON REGION	36% 86.6K	33% 126.7K	14% 54.1K	33% 124.0K

SOUTH ISLAND

TASMAN REGION	16% 2.8K	17% 6.3K	20% 7.5K	44% 16.5K
NELSON REGION	16% 3.2K	21% 8.0K	15% 5.9K	36% 13.8K
MARLBOROUGH REGION	16% 2.6K	24% 8.7K	8% 2.8K	39% 14.2K
WEST COAST REGION	14% 2.1K	23% 6.0K	11% 2.9K	36% 9.2K
CANTERBURY REGION	18% 48.9K	18% 81.1K	16% 69.0K	46% 200.9K
OTAGO REGION	20% 21.4K	33% 54.4K	12% 19.9K	31% 52.0K
SOUTHLAND REGION	20% 9.2K	37% 27.2K	9% 6.7K	35% 26.2K

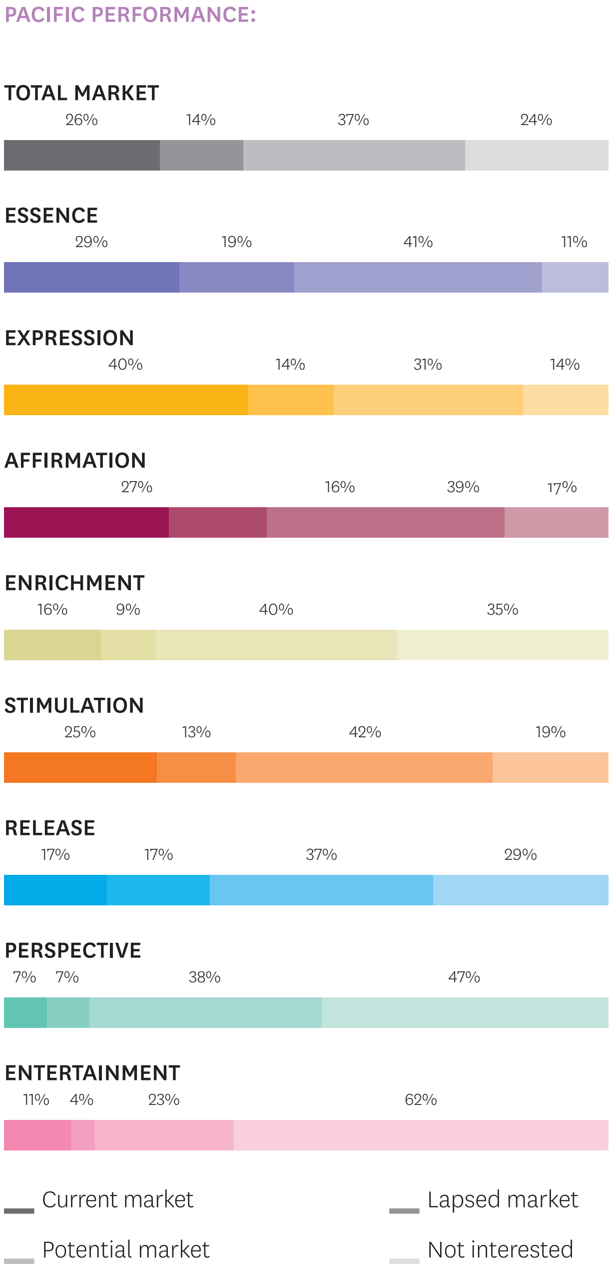
● 2011 Current market ● 2014 Current market ● 2014 Lapsed market ● 2014 Potential market

Pacific arts market regional breakdown

The market for Pacific arts had only marginal national growth. However, the regional breakdown reveals growth in most regions, most noticeably Southland, Otago and Gisborne, where the current market has grown by between 10 to 17 percentage points.

This has been offset by a slightly shrinking current market in the main city centres, Auckland and Wellington, as well as in Taranaki. This explains the overall decline in Pacific arts attendance.

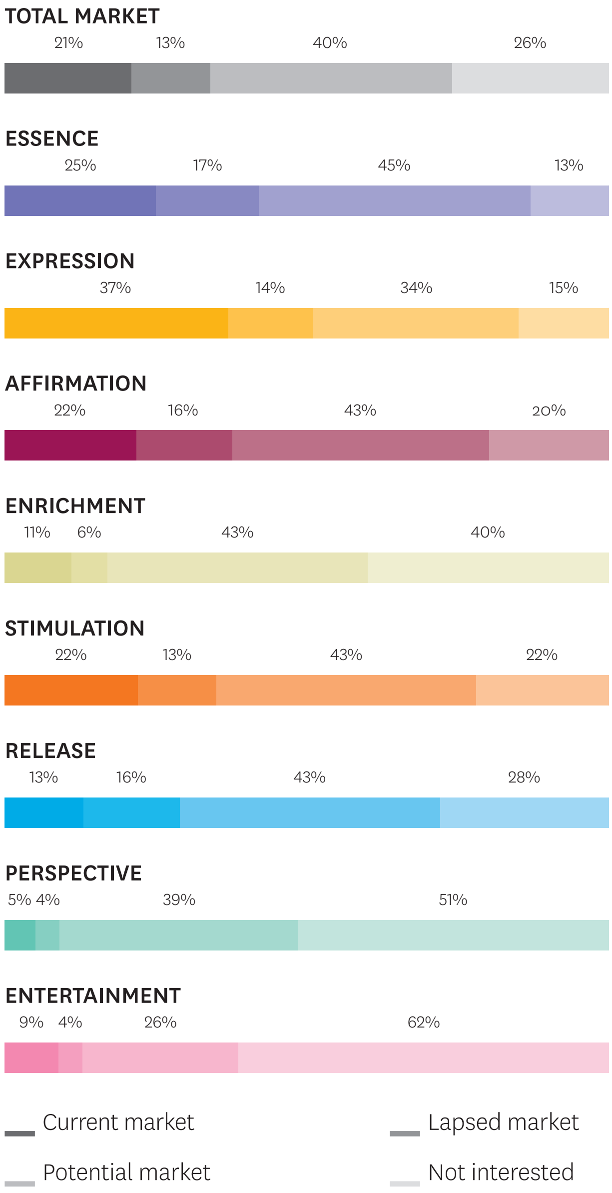
Pacific arts attendance by Culture Segment



Stimulation, Essence and Enrichment are the most likely to be interested in attending a Pacific performance for the first time. Encouraging these segments will help to grow the market over the coming years.

Expression is significantly more likely than any other segment to have attended a Pacific performance in the last three years. Essence, Affirmation and Stimulation also have high attendance rates.

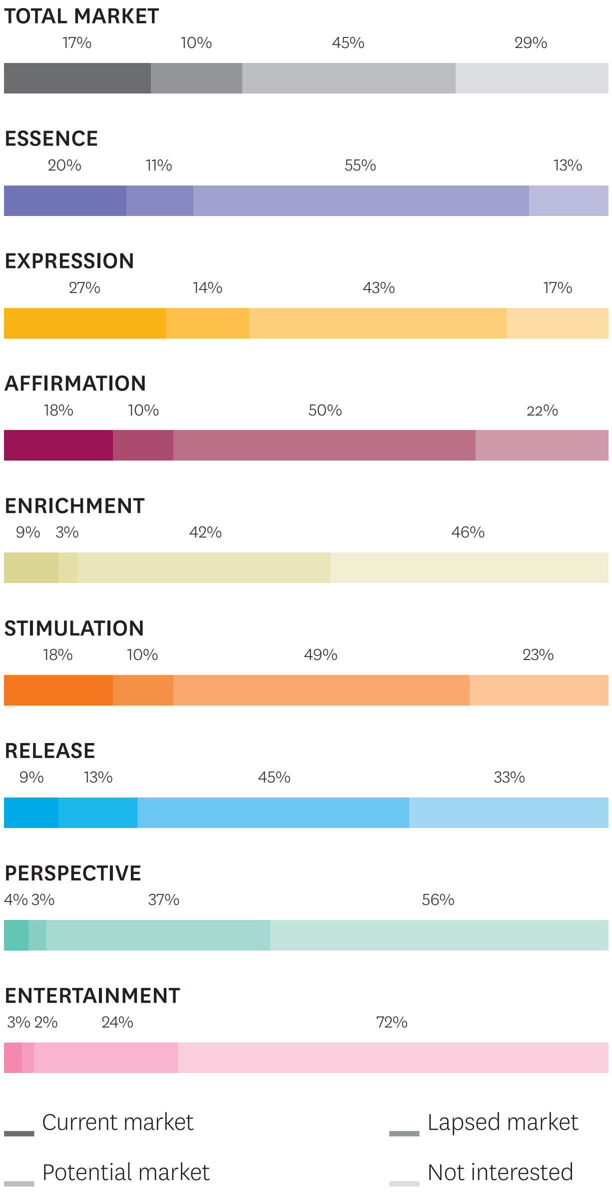
PACIFIC CULTURAL FESTIVAL:



Encouraging people to attend a Pacific cultural festival for the first time will be integral to any marketing strategy. With the exception of Entertainment, more than a third of each segment is interested in attending, indicating the broad appeal of Pacific cultural festivals.

Expression is the most likely to have attended a Pacific cultural festival in the past three years. Essence, Affirmation and Stimulation also have high attendance rates.

PACIFIC ARTS EXHIBITION:



Pacific arts exhibitions have the smallest current market, but have huge scope to grow. More than half of the culture market is interested in attending a Pacific arts exhibition for the first time.

Essence, Affirmation and Stimulation have the largest potential market. These are important segments to help grow the market for Pacific arts.

Asian arts

Asian cultural festivals have shown the greatest growth over the past three years. The current market has grown from 24% of the culture market in 2011 to 34% in 2014.

The size of the potential market indicates it is likely to continue growing, since more than a third of the culture market is interested in attending an Asian cultural festival for the first time.

21%	Last attended in the past 12 months
13%	Last attended 1–3 years ago
	Lapsed market:
10%	Last attended more than 3 years ago
	Potential market:
38%	Haven't attended but would be interested
19%	Haven't attended and would not be interested

Base: (4011).

2.7
MILLION

people are in the market for Asian arts

New Zealand overview

2011 CURRENT MARKET	2014 CURRENT MARKET	LAPSED MARKET	POTENTIAL MARKET
24%	34%	10%	38%
814.8K	1135.4K	338.6K	1269.4K

Regional breakdown

NORTH ISLAND

NORTHLAND REGION	15% 18.5K	20% 24.3K	12% 14.4K	47% 56.4K
AUCKLAND REGION	37% 399.1K	51% 569.5K	9% 103.0K	25% 284.2K
WAIKATO REGION	16% 47.9K	27% 84.8K	5% 15.2K	44% 137.6K
BAY OF PLENTY REGION	11% 23.2K	13% 27.6K	8% 16.0K	53% 111.9K
GISBORNE REGION	16% 5.5K	11% 3.5K	13% 4.2K	51% 16.7K
HAWKE'S BAY REGION	14% 16.7K	22% 26.3K	11% 12.6K	42% 49.5K
TARANAKI REGION	16% 13.8K	20% 17.2K	9% 8.1K	46% 39.8K
MANAWATU-WANGANUI REGION	15% 27.8K	16% 27.6K	14% 24.4K	53% 94.6K
WELLINGTON REGION	31% 120.5K	35% 134.3K	10% 39.8K	39% 147.8K

SOUTH ISLAND

TASMAN REGION	11% 4.2K	12% 4.4K	15% 5.7K	54% 20.5K
NELSON REGION	15% 5.8K	21% 8.1K	8% 3.1K	49% 18.5K
MARLBOROUGH REGION	15% 5.2K	12% 4.4K	12% 4.2K	51% 18.5K
WEST COAST REGION	4% 1.1K	13% 3.4K	16% 4.1K	39% 10.1K
CANTERBURY REGION	22% 93.6K	33% 142.9K	13% 56.2K	38% 164.6K
OTAGO REGION	15% 26.5K	27% 44.4K	13% 21.8K	37% 61.5K
SOUTHLAND REGION	7% 5.3K	17% 12.7K	8% 5.7K	50% 37.2K

● 2011 Current market ● 2014 Current market ● 2014 Lapsed market ● 2014 Potential market

NEW ZEALAND PAVILION AT THE TAIPEI INTERNATIONAL BOOK EXHIBITION (2015).
Photographer Chris Shaw.
Image courtesy of the Publishers Association of New Zealand

Asian cultural festivals market regional breakdown

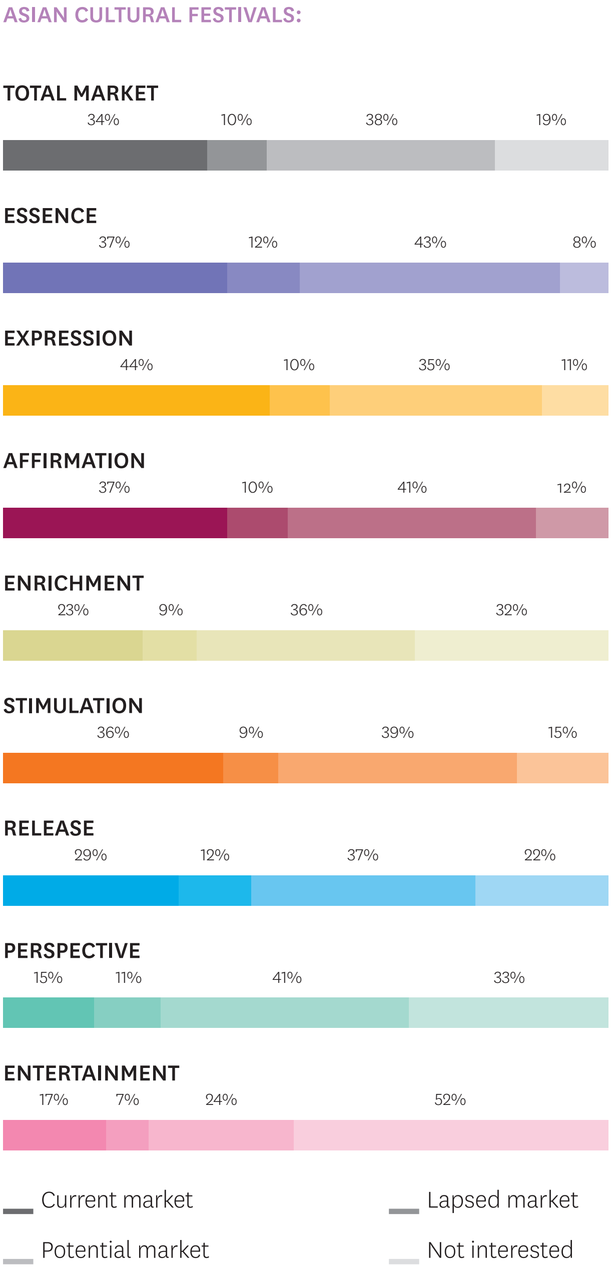
Asian cultural festivals have seen the greatest growth of any artform. This is largely due to massive growth in Auckland, where the current market has grown by 14 percentage points. Significant growth has also been seen in Waikato, Canterbury, Otago and Southland.

Gisborne and Marlborough have both seen the current market for Asian cultural festivals fall.

Given the size of the potential market, focusing on encouraging audiences who haven't attended before will help to ensure the continued growth of attendance at Asian cultural festivals. With the exception of Entertainment, more than a third of all Culture Segments are in the potential market, indicating that an extensive, broad-reaching communications strategy would work well for this artform.

The more culturally active Culture Segments, Expression, Essence, Affirmation and Stimulation, are the most likely to have attended an Asian cultural festival in the past three years. They are also the least likely to be 'not interested' in attending one.

Asian cultural festivals attendance by Culture Segment



Theatre

Despite its popularity within the culture market, there is still scope for the overall theatre audience to grow. Fourteen percent to 38% of each theatre artform market has lapsed in attendance.

This suggests strategies aimed at retaining audiences will be important in growing audiences.

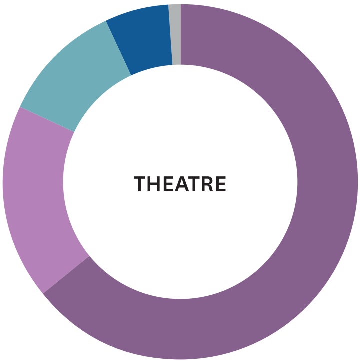
A significant proportion of people are also interested in attending individual theatre artforms for the first time, most noticeably cabaret or burlesque. Nearly half of the culture market hasn't previously been but would like to do so.

With the exception of film, theatre is the most attended artform. Nearly two-thirds of the culture market attended a theatrical performance of some description in the past 12 months.

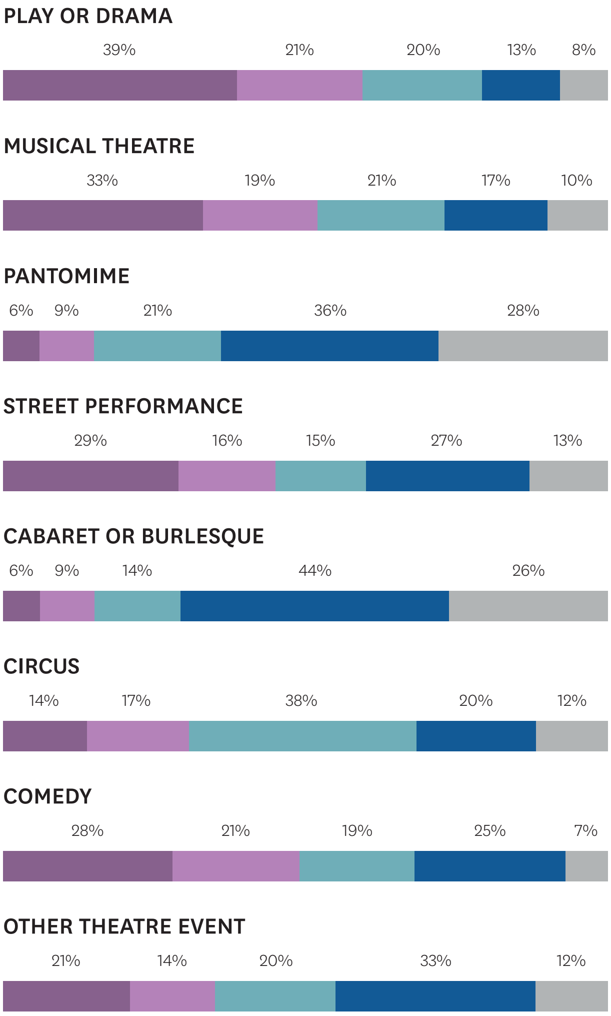
Within this broad genre, the most commonly attended artforms are:

- plays or dramas (60% of the culture market attended in the past three years)
- musical theatre (52%)
- comedy (49%)

The least commonly attended artforms were pantomime and cabaret or burlesque. Just 15% of the culture market attended either type of performance in the past three years.



65%	Last attended in the past 12 months
18%	Last attended 1–3 years ago
	Lapsed market:
11%	Last attended more than 3 years ago
	Potential market:
6%	Haven't attended but would be interested
1%	Haven't attended and would not be interested



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3.3
MILLION

people are in the market for theatre

New Zealand overview

2011 CURRENT MARKET	2014 CURRENT MARKET	LAPSED MARKET	POTENTIAL MARKET
77%	82%	11%	6%
2591.2K	2773.4K	373.6K	189.2K

Regional breakdown

NORTH ISLAND

NORTHLAND REGION	78% 93.8K	83% 98.7K	12% 14.3K	3% 3.3K
AUCKLAND REGION	78% 841.2K	81% 895.4K	11% 120.4K	7% 90.3K
WAIKATO REGION	71% 216.1K	81% 256.6K	12% 37.0K	6% 19.6K
BAY OF PLENTY REGION	83% 176.6K	78% 164.1K	12% 26.0K	8% 16.4K
GISBORNE REGION	81% 28.7K	71% 23.2K	26% 8.5K	1% 0.4K
HAWKE'S BAY REGION	72% 85.9K	83% 98.1K	14% 16.6K	2% 2.1K
TARANAKI REGION	80% 68.6K	88% 76.6K	4% 3.4K	3% 3.0K
MANAWATU-WANGANUI REGION	74% 136.0K	81% 143.2K	15% 27.4K	3% 6.0K
WELLINGTON REGION	83% 322.3K	89% 336.1K	8% 28.8K	2% 8.8K

SOUTH ISLAND

TASMAN REGION	78% 29.4K	87% 32.8K	9% 3.5K	3% 1.2K
NELSON REGION	79% 29.8K	88% 33.4K	8% 3.1K	2% 0.6K
MARLBOROUGH REGION	82% 28.6K	79% 28.5K	13% 4.6K	7% 2.6K
WEST COAST REGION	67% 17.3K	71% 18.4K	20% 5.1K	7% 1.9K
CANTERBURY REGION	74% 316.2K	83% 365.6K	12% 53.2K	4% 19.3K
OTAGO REGION	81% 139.1K	83% 138.1K	11% 17.6K	5% 9.1K
SOUTHLAND REGION	81% 60.9K	87% 64.6K	6% 4.2K	6% 4.4K

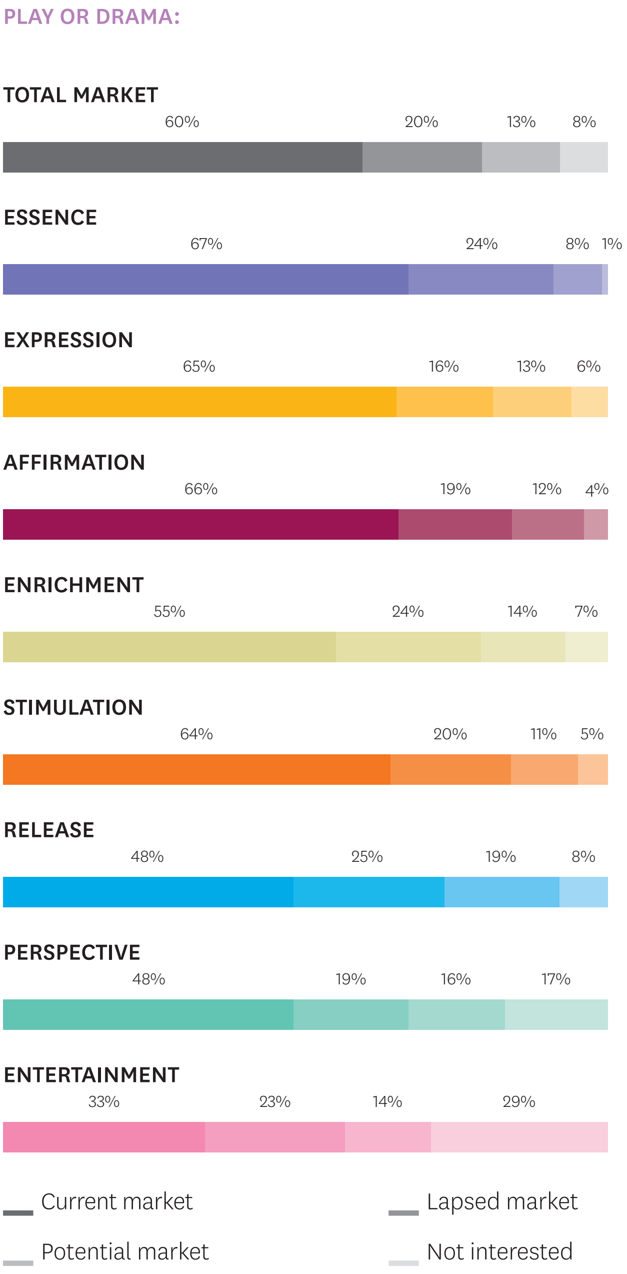
● 2011 Current market ● 2014 Current market ● 2014 Lapsed market ● 2014 Potential market

Theatre market regional breakdown

Much of the growth that has been seen in theatre is attributed to a higher proportion of people going to shows in most regions, particularly in Waikato, Hawke's Bay, Tasman, Nelson and Canterbury.

Growth in attendance has dropped in the Bay of Plenty and Gisborne.

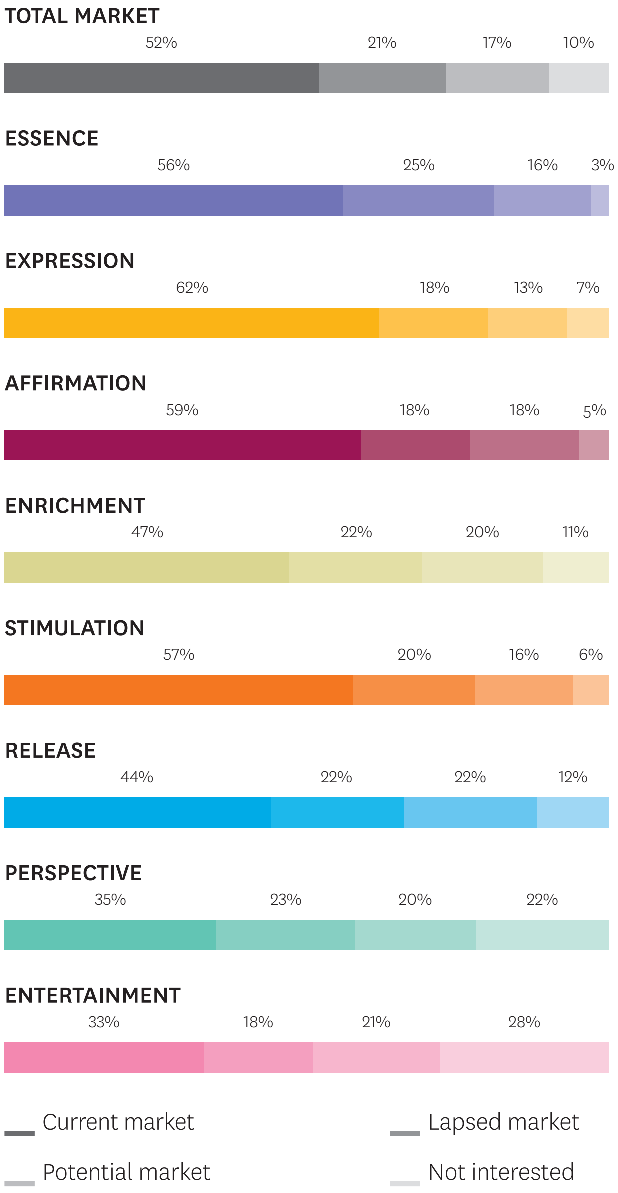
Theatre attendance by Culture Segment



Plays are highly attended by the more culturally active segments. Two-thirds of Essence, Affirmation, Expression and Stimulation attended at least once in the last three years.

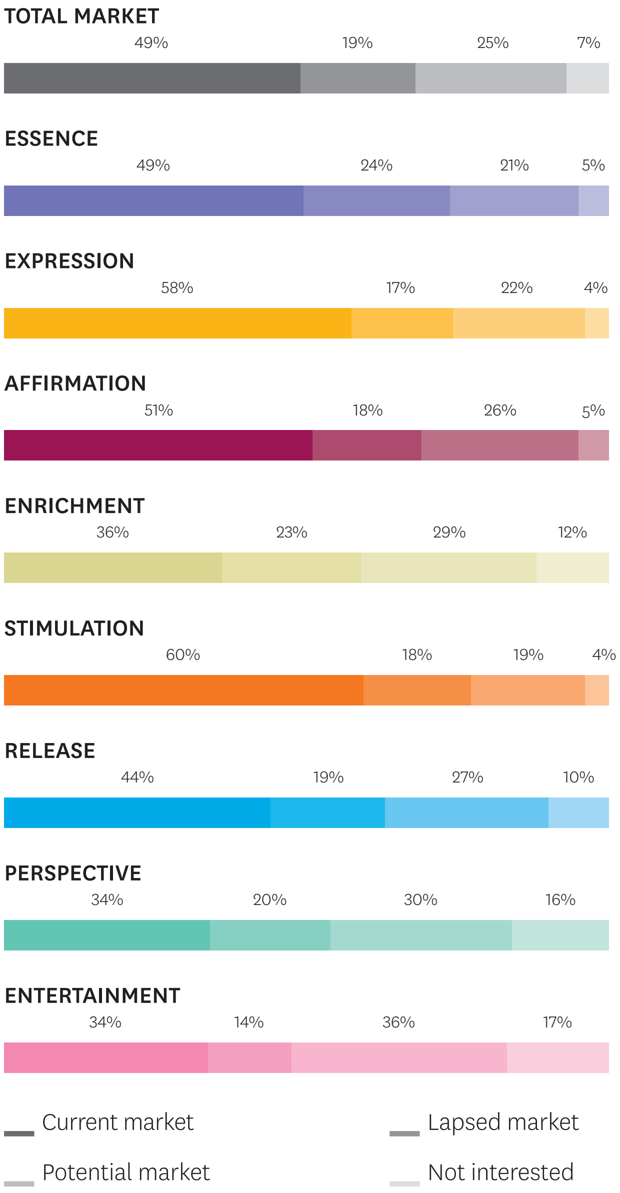
Entertainment, Perspective and Release have the highest proportion of people who have never attended, and are the most resistant to attending for the first time.

MUSICAL THEATRE:



Expression, Affirmation, Stimulation and Essence are the most likely to have attended a musical in the last three years. Entertainment, Perspective and Release are the least likely.

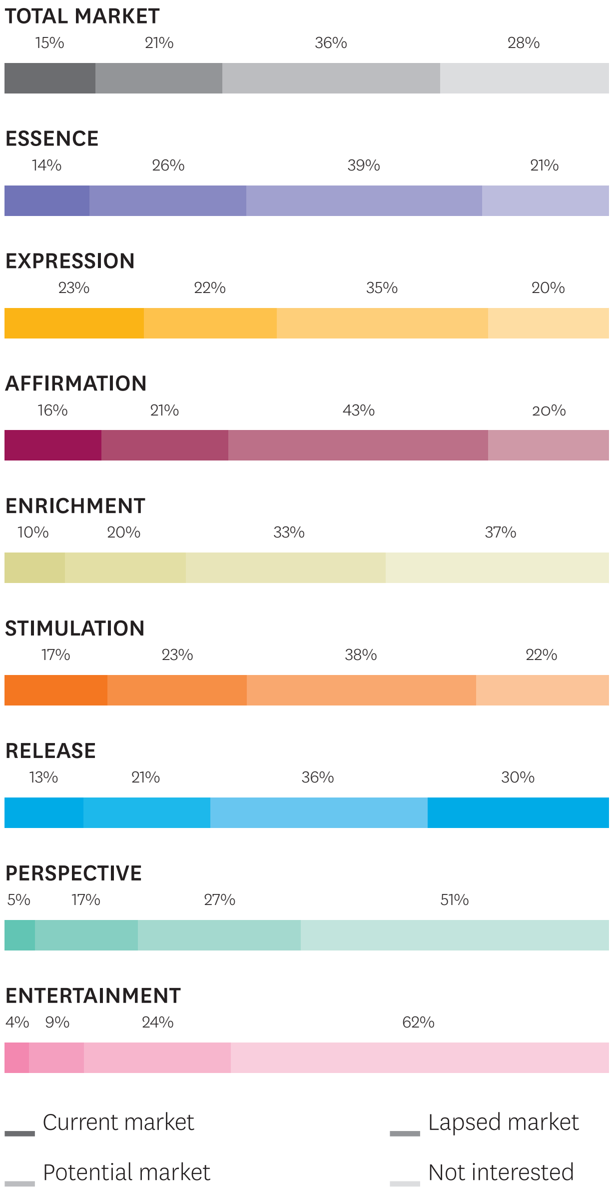
COMEDY:



Encouraging previous visitors and new ones is the key to growing this audience. The lapsed and potential market for comedy makes up nearly half of the entire culture market at 44%.

Comedy has relatively broad appeal. Expression and Stimulation are the most likely to have attended a show in the last three years.

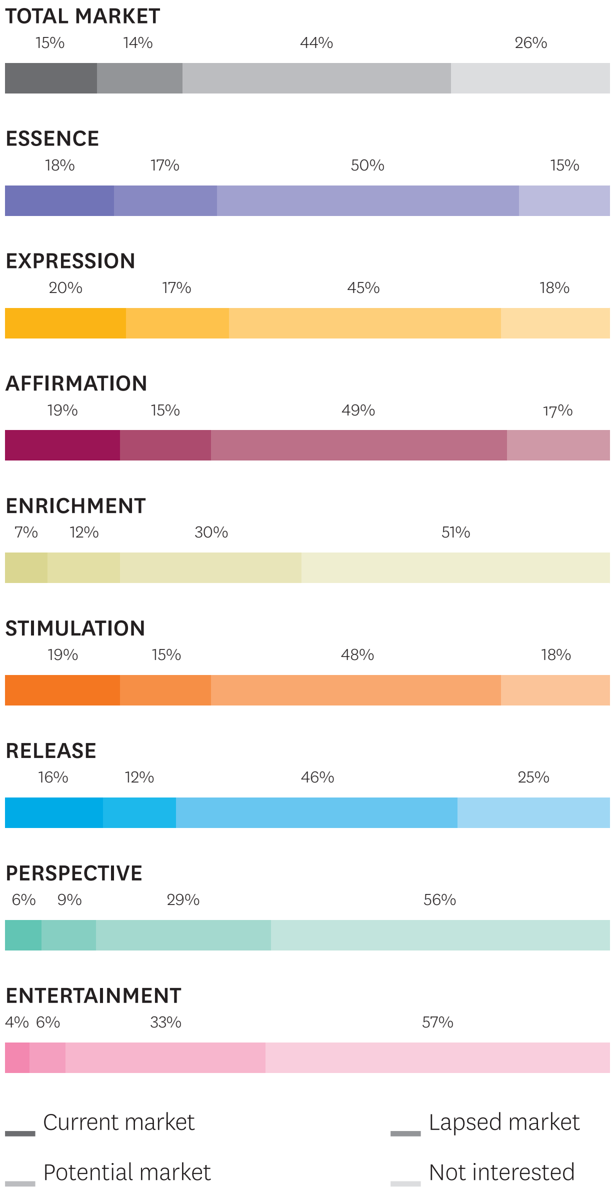
PANTOMIME:



Pantomime has one of the smaller markets within the theatre artform, possibly due to its availability. However, more than a third of the culture market is interested in attending for the first time.

Entertainment, Perspective and Enrichment are relatively resistant to attending at all. However, the size of the potential market across each Culture Segment is sizeable, ranging between 24% for Entertainment to 43% for Affirmation.

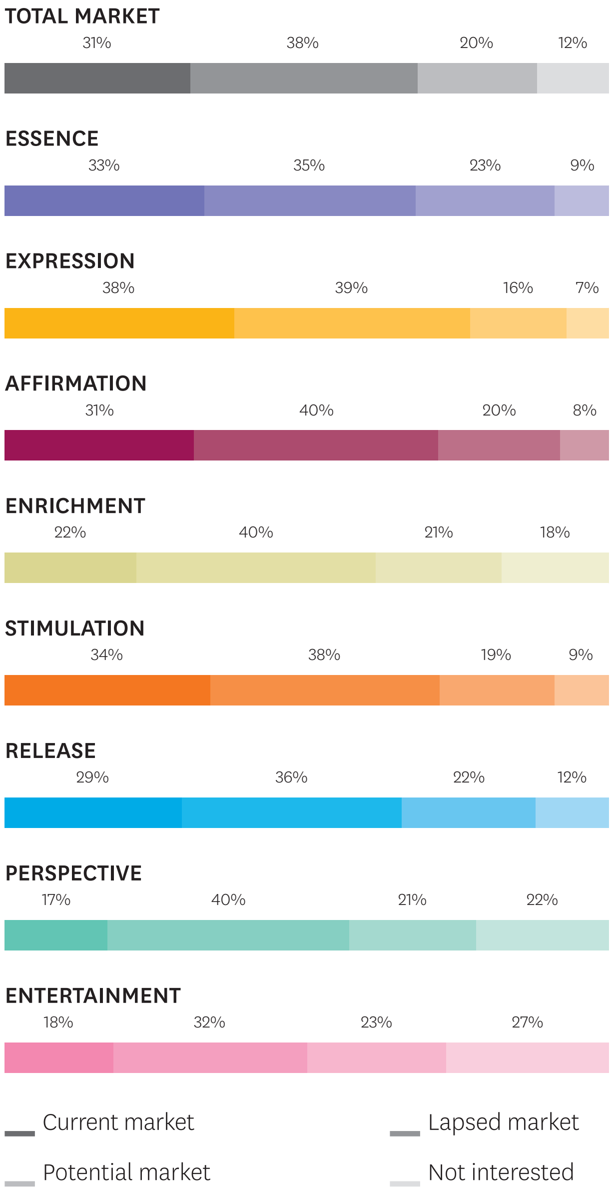
CABARET OR BURLESQUE:



Cabaret has huge potential for growth. Nearly half of the culture market is interested in attending for the first time. Efforts focusing on encouraging this new audience will be essential to any growth.

The more culturally active segments – Essence, Expression, Affirmation and Stimulation – are the most likely to have attended a cabaret or burlesque show in the past three years. This still accounts for only a small proportion of the culture market.

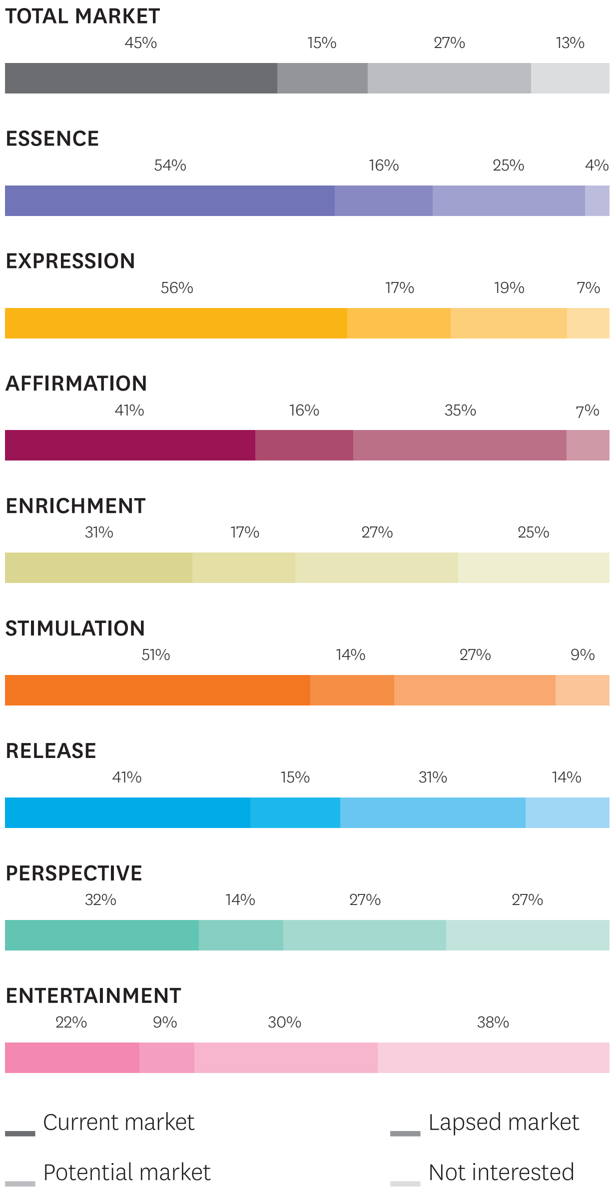
CIRCUS:



Focusing on encouraging lapsed audience members will be important to sustaining the growth of this artform.

Circus has broad appeal, but has one of the largest lapsed markets of any artform. More than a third of the culture market last attended a circus show more than three years ago. This is presumably due to the sporadic nature of performances being staged.

STREET PERFORMANCE:



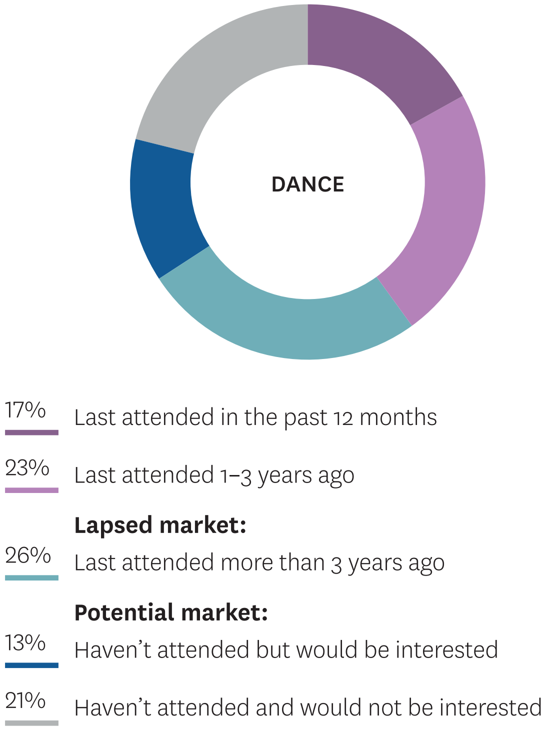
There is scope for this market to grow. Its broad appeal suggests targeted communications to all Culture Segments would be the best strategy towards achieving this. The potential market is large with 27% of the culture market interested in seeing a street performance for the first time.

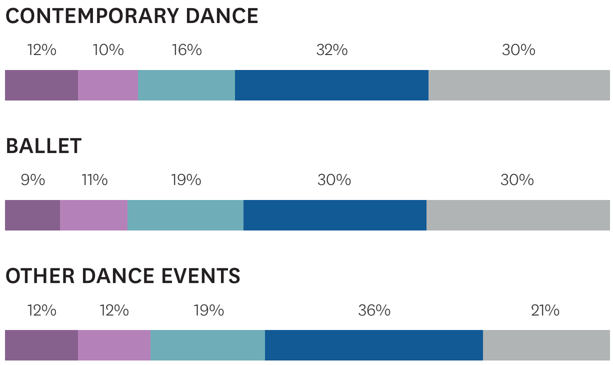
Stimulation, Essence and Expression are the most likely to have seen a street performance in the past three years. Entertainment and Enrichment are the least likely to have done so.

Dance

Nearly a third of the culture market is in the lapsed market for dance (last attending a dance show more than three years ago). This is the largest lapsed market of any artform.

Within this, the largest lapsed market is for ballet and other dance events[4]. Nineteen percent of the culture market last attended more than three years ago. Encouraging the lapsed market to return – and to keep returning – will be key to growing the dance market. Persuading people who haven't been, but are interested in going, will also be important.





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[4] Other dance events include ballroom dancing, line dancing, swing dancing and tap.

2.9
MILLION

people are in the market for dance

New Zealand overview

2011 CURRENT MARKET	2014 CURRENT MARKET	LAPSED MARKET	POTENTIAL MARKET
37%	38%	23%	26%
1226.6K	1289.4K	762.9K	884.9K

Regional breakdown

NORTH ISLAND

NORTHLAND REGION	37% 44.9K	31% 37.4K	24% 29.0K	27% 32.0K
AUCKLAND REGION	38% 408.5K	42% 466.2K	21% 236.5K	25% 283.6K
WAIKATO REGION	33% 100.6K	29% 92.1K	27% 83.9K	29% 92.9K
BAY OF PLENTY REGION	35% 73.6K	33% 69.6K	24% 50.2K	30% 63.5K
GISBORNE REGION	35% 12.5K	22% 7.2K	21% 7.0K	43% 14.1K
HAWKE'S BAY REGION	39% 46.6K	40% 46.8K	22% 26.2K	25% 29.6K
TARANAKI REGION	36% 30.4K	39% 33.7K	16% 13.6K	23% 20.2K
MANAWATU-WANGANUI REGION	28% 50.8K	33% 58.0K	24% 42.8K	33% 58.6K
WELLINGTON REGION	47% 183.3K	45% 169.3K	21% 78.7K	21% 78.1K

SOUTH ISLAND

TASMAN REGION	27% 10.4K	40% 15.2K	22% 8.4K	23% 8.5K
NELSON REGION	34% 12.8K	48% 18.1K	25% 9.6K	15% 5.7K
MARLBOROUGH REGION	40% 13.8K	37% 13.3K	19% 6.8K	29% 10.3K
WEST COAST REGION	33% 8.6K	29% 7.4K	32% 8.3K	22% 5.7K
CANTERBURY REGION	34% 144.7K	36% 156.8K	26% 112.9K	27% 116.7K
OTAGO REGION	33% 56.6K	39% 65.5K	24% 40.8K	26% 43.9K
SOUTHLAND REGION	38% 28.5K	44% 32.8K	11% 8.2K	29% 21.5K

● 2011 Current market ● 2014 Current market ● 2014 Lapsed market ● 2014 Potential market

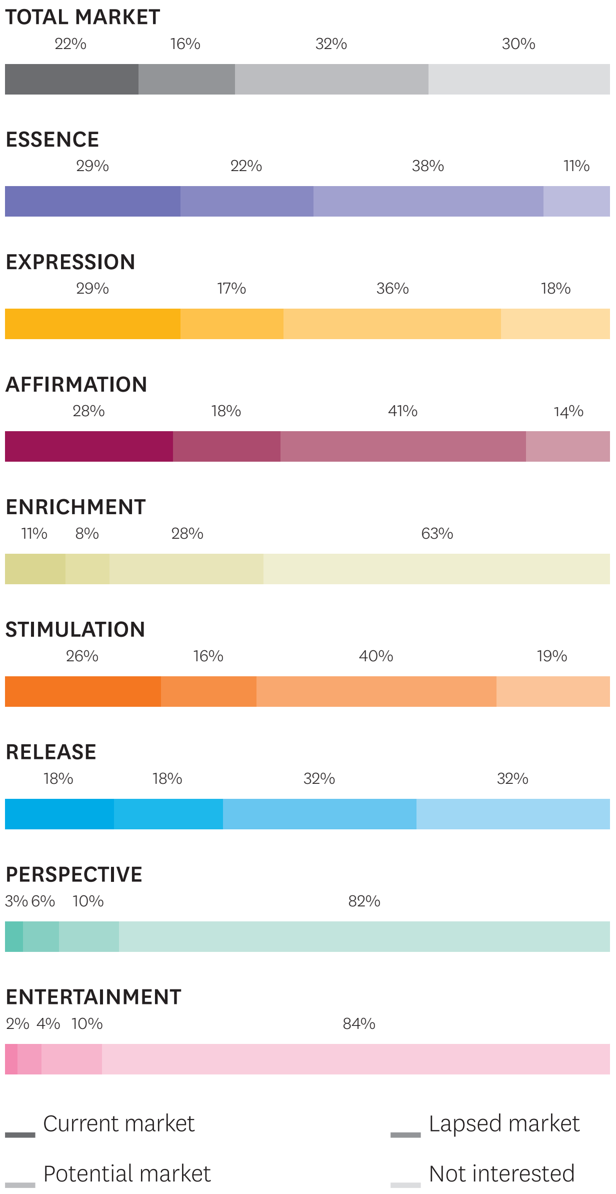
Dance market regional breakdown

The size of the national market for dance has stayed relatively consistent over the past three years, with only marginal growth.

However significant growth is shown in Tasman and Nelson. The Gisborne market has shrunk significantly and has the largest lapsed market (nearly half of the culture market in this region last attended a dance show more than three years ago).

Dance attendance by Culture Segment

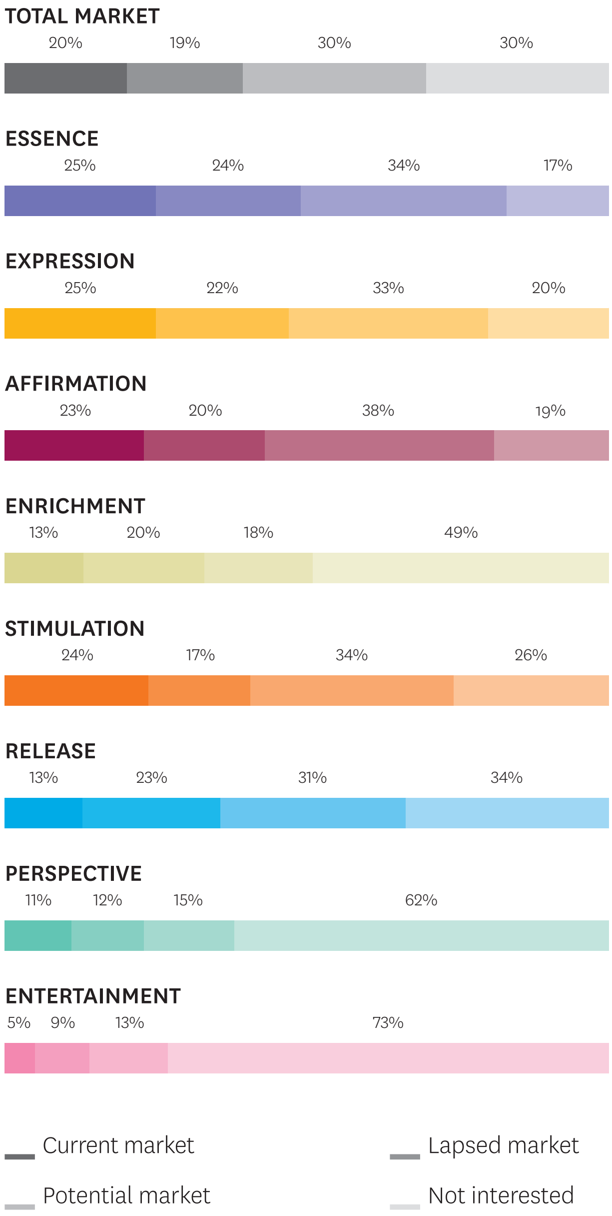
CONTEMPORARY DANCE:



With the exception of Perspective, Entertainment and Enrichment, there is a relatively equal chance that each Culture Segment has lapsed in attendance over the past three years. This indicates a retention issue that needs addressing.

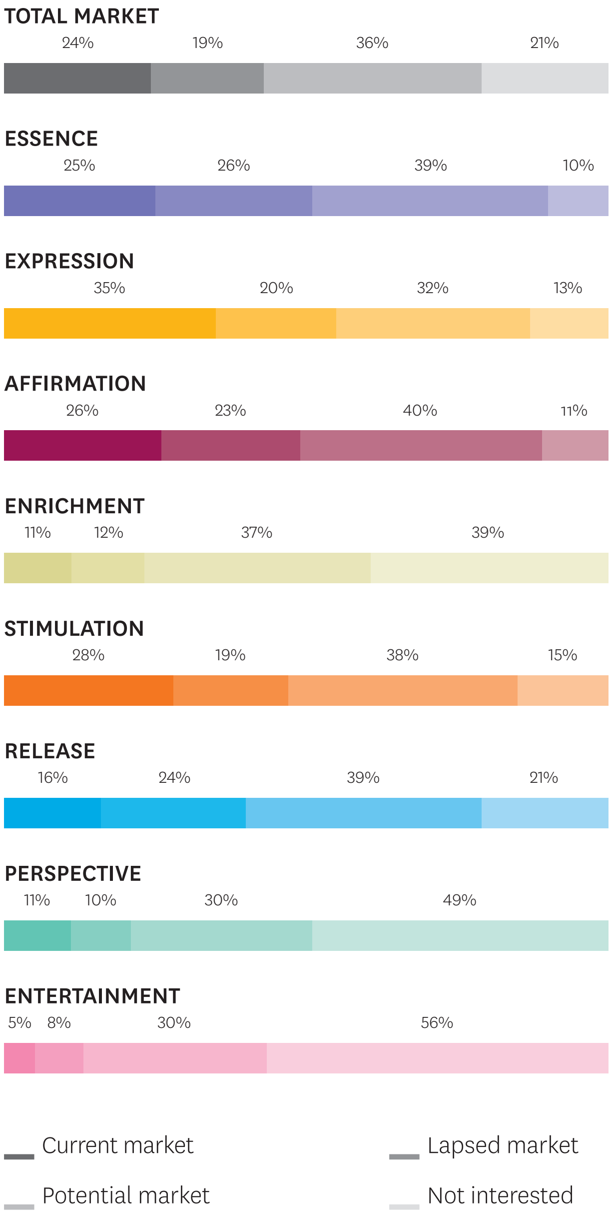
Essence, Expression, Affirmation and Stimulation are the most likely to be in the current market for contemporary dance. Perspective, Entertainment and Enrichment are highly unlikely to be interested in attending at all.

BALLET:



Essence, Expression, Affirmation and Stimulation are more likely to be in the current market for ballet. Perspective, Entertainment and Enrichment are more likely to be resistant to attending at all.

OTHER DANCE EVENTS:



Expression, Stimulation, Affirmation and Essence are the most likely to have attended another kind of dance event in the past three years. It's worth noting that Essence also has the largest lapsed market, suggesting high levels of interest that need to be nourished with targeted retention strategies.

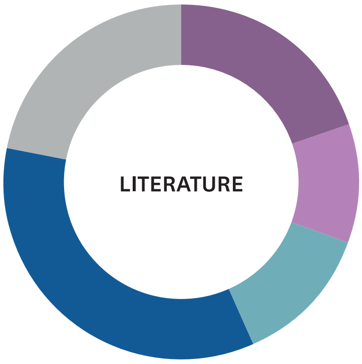
Enrichment, Perspective and Entertainment are the most resistant to attending another kind of dance event.

Literature

There is room for growth in the literature market. This is one of the smallest markets with the biggest room for growth. More than a third of the culture market is interested in attending for the first time.

However, more than any other artform, literature is faced with the greatest resistance. Twenty-two percent of the culture market has never been to a literary event of any form, and is not interested in attending in the future.

Just under a third of the culture market attended a literary event of some form in the last three years. The most popular event was a book event, such as a book launch, not connected with a literary festival. A literary festival was the second most popular type of event.



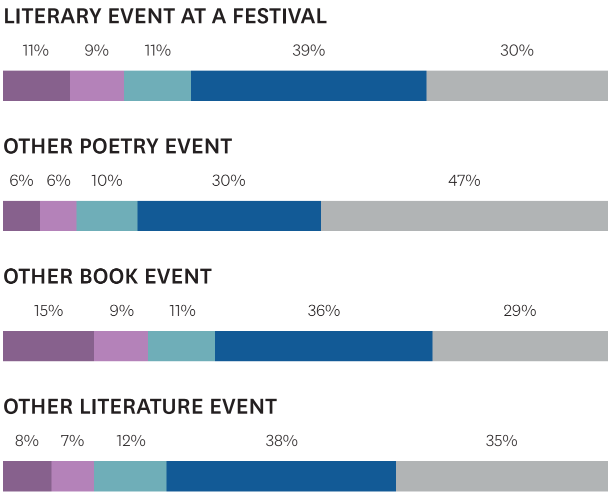
20% Last attended in the past 12 months

11% Last attended 1–3 years ago

Lapsed market:
13% Last attended more than 3 years ago

Potential market:
35% Haven't attended but would be interested

22% Haven't attended and would not be interested



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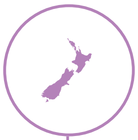


2.6 MILLION

people are in the market for literature

New Zealand overview

2011 CURRENT MARKET	2014 CURRENT MARKET	LAPSED MARKET	POTENTIAL MARKET
23%	30%	13%	35%
778.5K	1024.8K	434.9K	1182.3K

Regional breakdown

NORTH ISLAND

NORTHLAND REGION	24%	29.5K	28%	33.0K	20%	23.6K	30%	35.3K
AUCKLAND REGION	21%	232.4K	32%	356.9K	13%	150.6K	34%	382.8K
WAIKATO REGION	23%	71.0K	31%	98.4K	7%	21.8K	35%	110.3K
BAY OF PLENTY REGION	19%	40.0K	22%	45.7K	11%	23.2K	41%	87.1K
GISBORNE REGION	24%	8.4K	29%	9.5K	29%	9.4K	22%	7.1K
HAWKE'S BAY REGION	22%	25.8K	21%	24.9K	13%	14.9K	41%	47.9K
TARANAKI REGION	36%	30.7K	33%	28.5K	11%	9.3K	32%	27.7K
MANAWATU-WANGANUI REGION	20%	37.3K	22%	38.7K	10%	17.8K	43%	76.5K
WELLINGTON REGION	27%	103.3K	38%	144.3K	13%	49.4K	32%	120.6K

SOUTH ISLAND

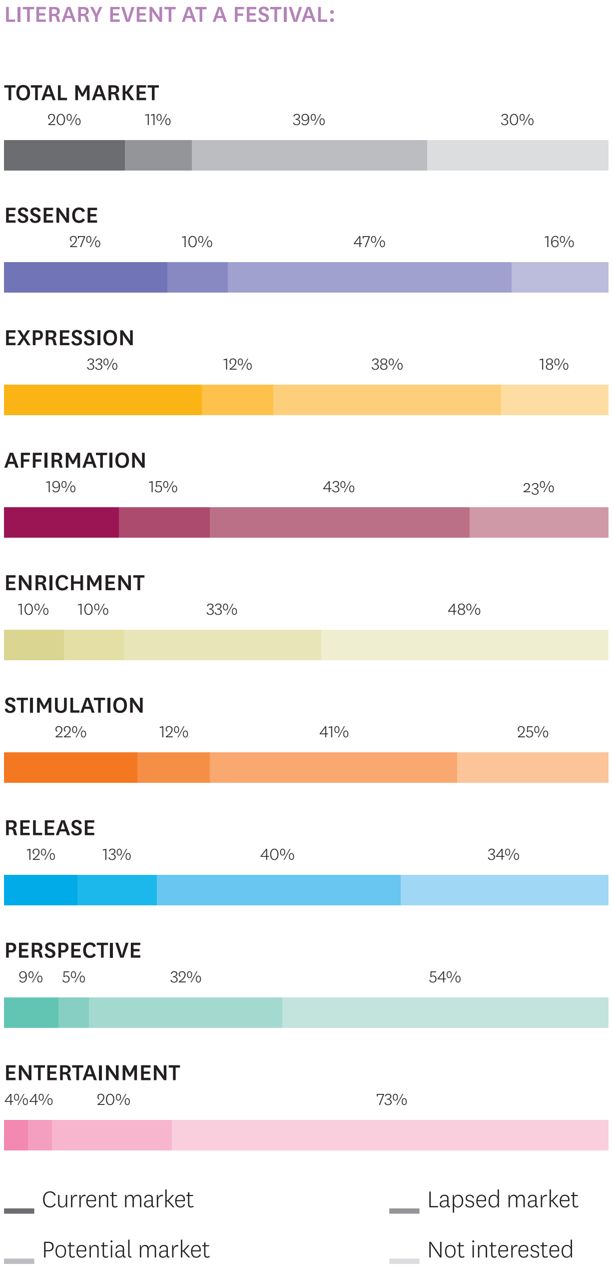
TASMAN REGION	28%	10.8K	38%	14.5K	11%	4.1K	33%	12.6K
NELSON REGION	30%	11.3K	41%	15.6K	10%	3.9K	30%	11.4K
MARLBOROUGH REGION	19%	6.4K	35%	12.7K	8%	2.9K	32%	11.5K
WEST COAST REGION	25%	6.4K	30%	7.8K	13%	3.5K	36%	9.3K
CANTERBURY REGION	24%	100.3K	27%	119.1K	14%	60.4K	37%	162.4K
OTAGO REGION	27%	46.6K	34%	56.0K	18%	29.9K	31%	51.0K
SOUTHLAND REGION	24%	18.3K	26%	19.0K	14%	10.2K	39%	28.8K

● 2011 Current market ● 2014 Current market ● 2014 Lapsed market ● 2014 Potential market

Literature market regional breakdown

The market for literature demonstrated some of the highest growth compared to all other artforms. The most significant increases in attendance were in Marlborough, with a jump from 19% to 35% of the culture market in the current market for literature. Auckland, Wellington, Tasman, and Nelson also showed increases.

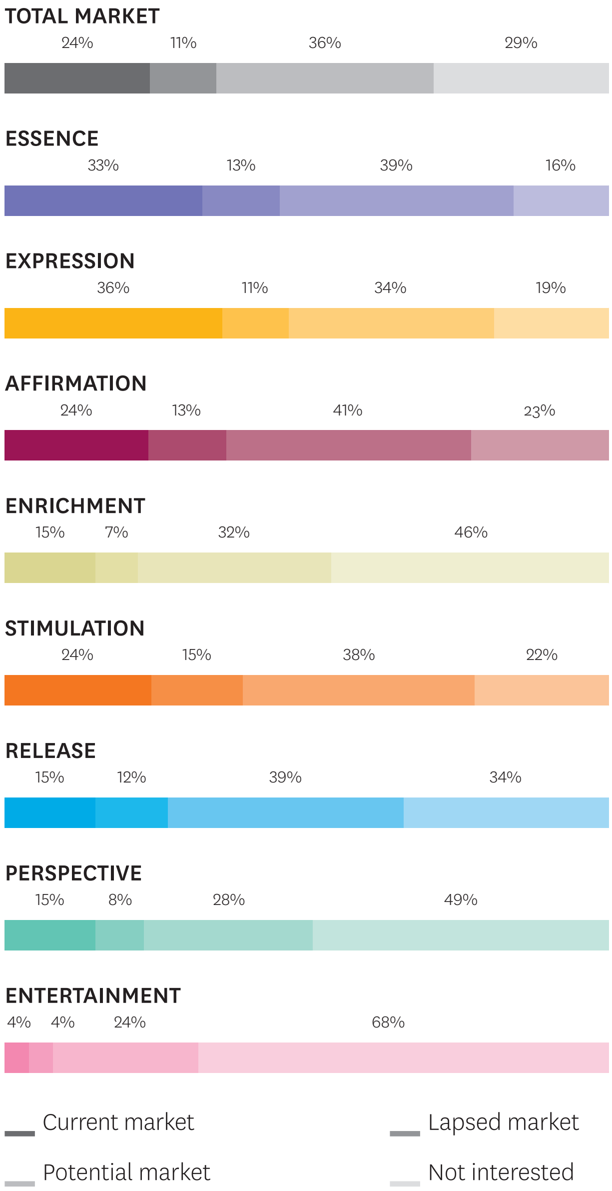
Literature attendance by Culture Segment



Expression is the most likely to have attended a literary event at a festival in the past three years, followed by Essence, Stimulation and Affirmation.

These four segments are also highly likely to be interested in attending a literature event for the first time if they hadn't already attended, so are important groups to effectively target in order to grow this market.

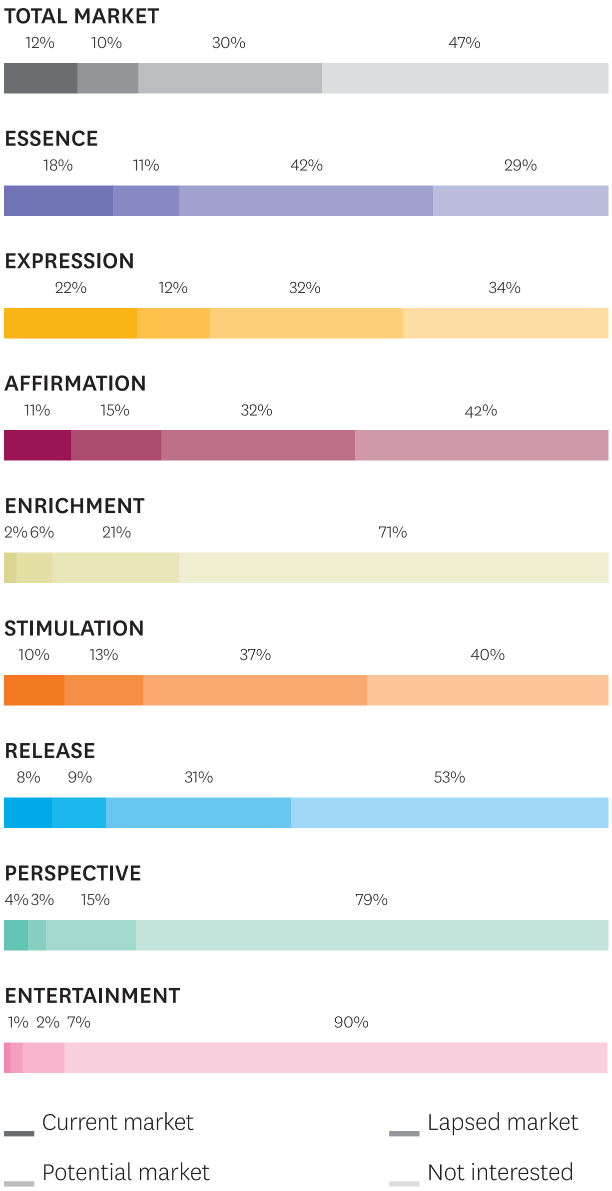
OTHER BOOK EVENT:



Expression is the most likely to have attended a literary event outside a festival in the past three years, followed by Essence, Affirmation and Stimulation.

These four segments are the most likely to be in the market for a book event. Entertainment, Enrichment and Perspective demonstrate strong resistance towards attending.

OTHER POETRY EVENT:



There is strong resistance to poetry events. Even the more culturally active and interested Culture Segments have a higher than average resistance to attending.

Focusing on targeting Expression, Essence, Stimulation and Affirmation will be essential to growing this market.

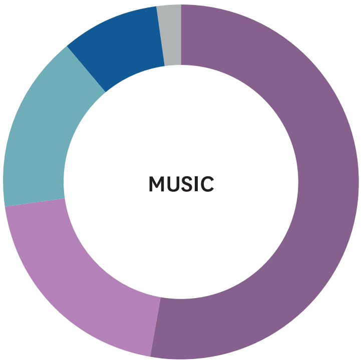
Music

Music is one of the most popular artforms. More than half of the culture market attended at least one musical event in the past 12 months.

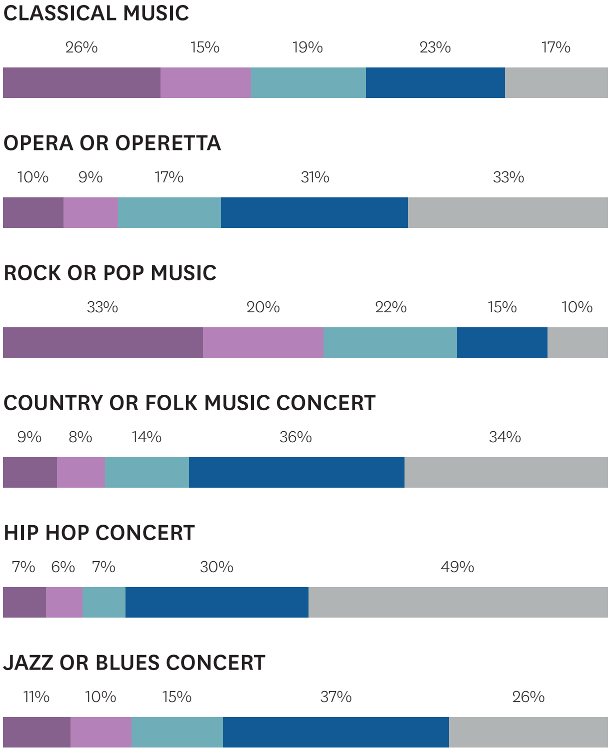
The relatively small size of the lapsed market suggests that this audience is also retained over time, unlike other artforms.

Rock or pop is the most attended type of musical event. Fifty-three percent of the culture market attended in the last three years, followed by classical music with 41% attendance.

Hip-hop is the smallest market of all music types. Nearly half of the culture market is not interested in attending at all. However, nearly a third is interested in attending for the first time, so there is still room to grow this market.



53%	Last attended in the past 12 months
20%	Last attended 1–3 years ago
	Lapsed market:
16%	Last attended more than 3 years ago
	Potential market:
9%	Haven't attended but would be interested
2%	Haven't attended and would not be interested



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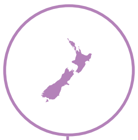


3.3
MILLION

people are in the market for music

New Zealand overview

2011 CURRENT MARKET	2014 CURRENT MARKET	LAPSED MARKET	POTENTIAL MARKET
67%	73%	16%	9%
2230.1K	2457.1K	555.7K	295.0K

Regional breakdown

NORTH ISLAND

NORTHLAND REGION	66% 79.8K	71% 85.0K	19% 22.2K	7% 8.0K
AUCKLAND REGION	63% 680.0K	72% 809.1K	14% 154.5K	12% 130.7K
WAIKATO REGION	69% 211.6K	70% 222.4K	17% 54.0K	11% 34.2K
BAY OF PLENTY REGION	72% 153.4K	75% 158.7K	18% 36.8K	6% 12.1K
GISBORNE REGION	66% 23.2K	68% 22.3K	23% 7.6K	8% 2.6K
HAWKE'S BAY REGION	72% 86.4K	71% 83.3K	21% 24.4K	7% 8.1K
TARANAKI REGION	71% 60.7K	80% 69.6K	9% 8.0K	8% 7.1K
MANAWATU-WANGANUI REGION	61% 112.6K	62% 110.0K	29% 51.7K	6% 11.5K
WELLINGTON REGION	72% 280.0K	80% 301.9K	14% 52.9K	5% 19.2K

SOUTH ISLAND

TASMAN REGION	64% 24.0K	81% 30.6K	12% 4.7K	6% 2.4K
NELSON REGION	66% 24.8K	75% 28.3K	12% 4.5K	13% 4.9K
MARLBOROUGH REGION	65% 22.5K	67% 24.2K	15% 5.5K	16% 5.9K
WEST COAST REGION	60% 15.5K	60% 15.4K	27% 7.1K	10% 2.6K
CANTERBURY REGION	66% 283.3K	74% 324.2K	18% 79.4K	7% 29.7K
OTAGO REGION	71% 122.8K	68% 113.2K	20% 33.4K	7% 12.2K
SOUTHLAND REGION	66% 49.2K	80% 59.0K	12% 9.2K	5% 3.8K

● 2011 Current market ● 2014 Current market ● 2014 Lapsed market ● 2014 Potential market

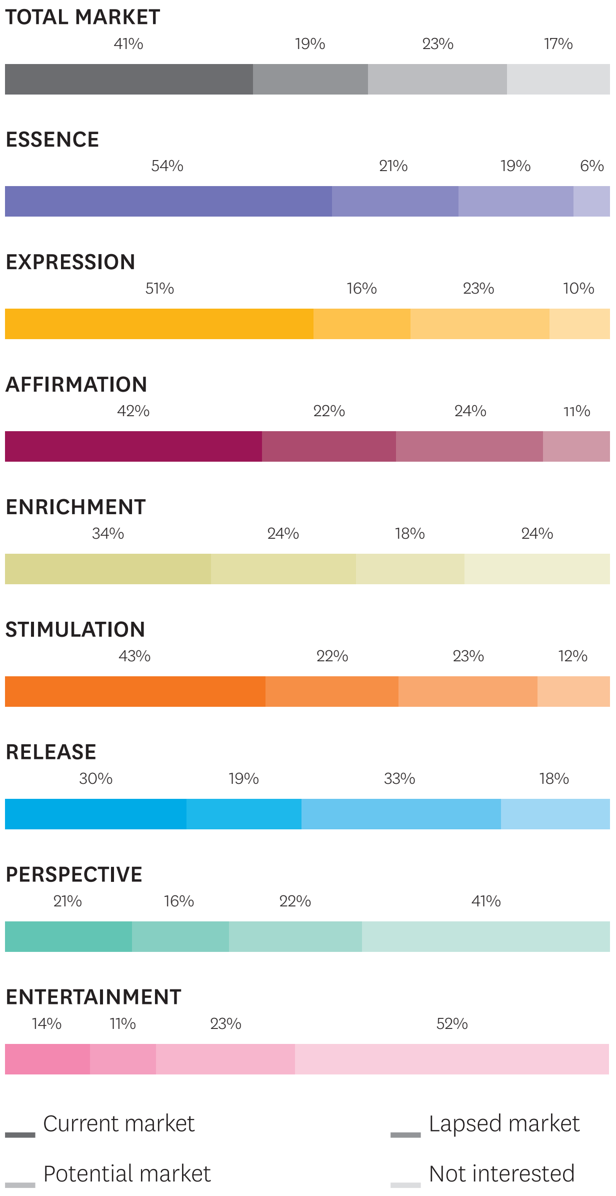
Music market regional breakdown

Attendance at music events has grown over the past three years, from 67% of the culture market in 2011 to 73% in 2014.

The highest growth is in Tasman, Southland and Auckland. Hawke's Bay is the only region where the proportion of the culture market in the current market has decreased.

Music attendance by Culture Segment

CLASSICAL MUSIC:

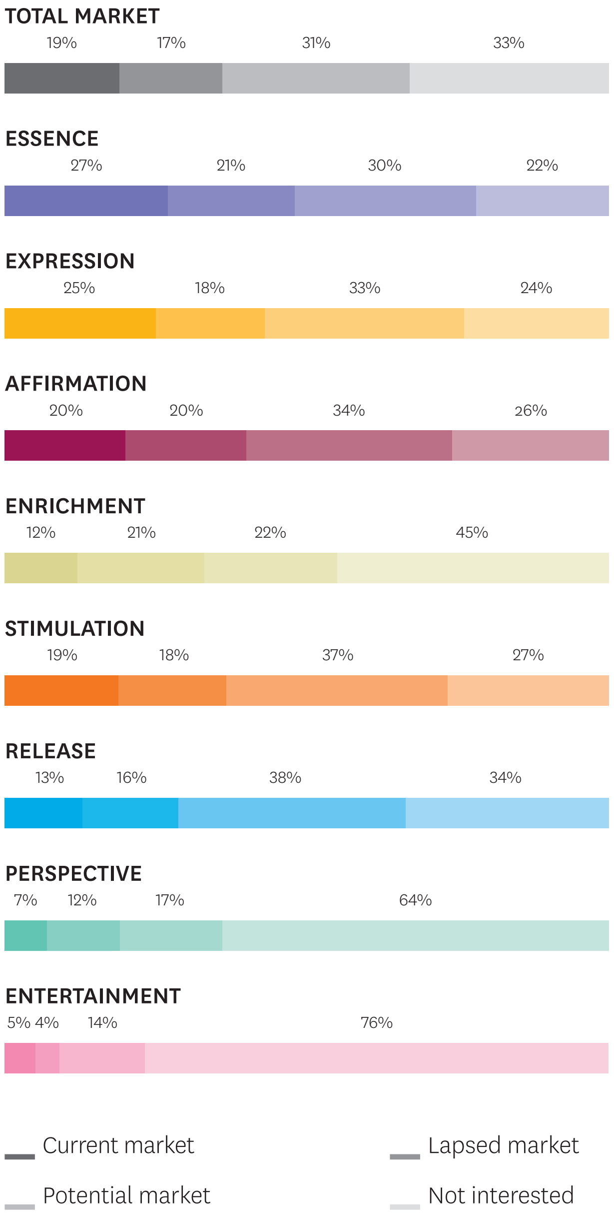


Enrichment is the most likely to lapse in attendance, so a focus on retention is particularly important for this audience.

Essence and Expression are most likely to have attended a classical music concert in the past three years.

Entertainment and Perspective are the least likely to have attended a classical music concert and are the most likely to be not interested in attending at all.

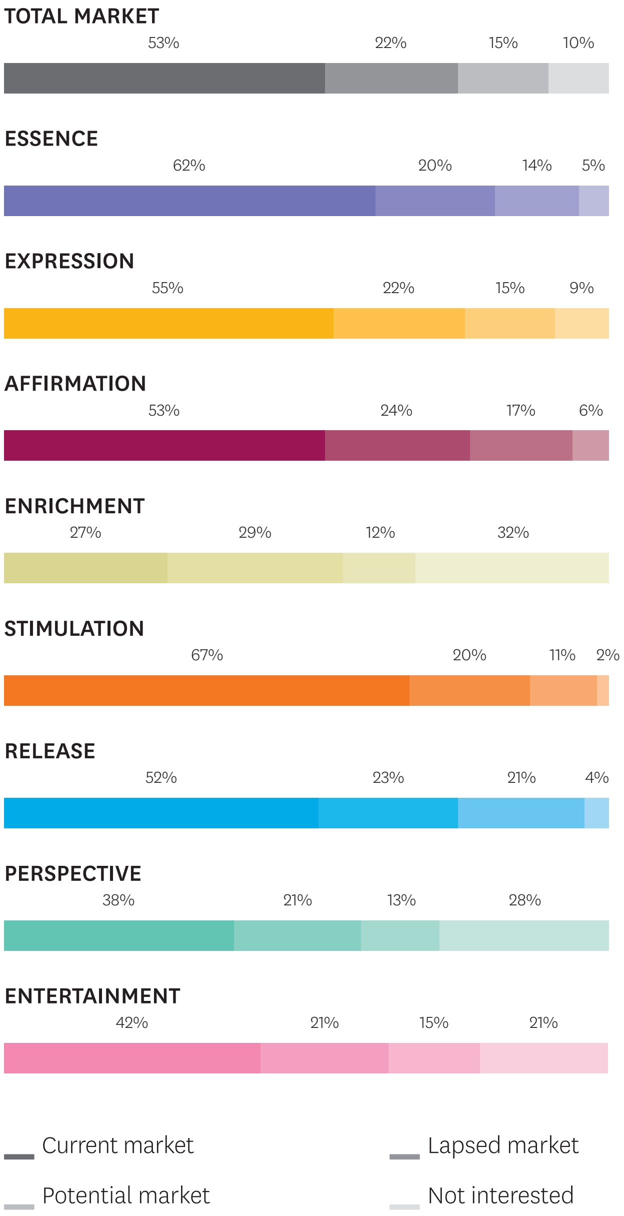
OPERA OR OPERETTA:



The potential market for opera and operetta makes up nearly a third of the culture market (31%). Focusing on this market will be an essential strategy in growing the audience for opera. In particular, Stimulation, Release, Affirmation and Expression are more likely than other Culture Segments to have not attended in the past, but are interested in attending for the first time.

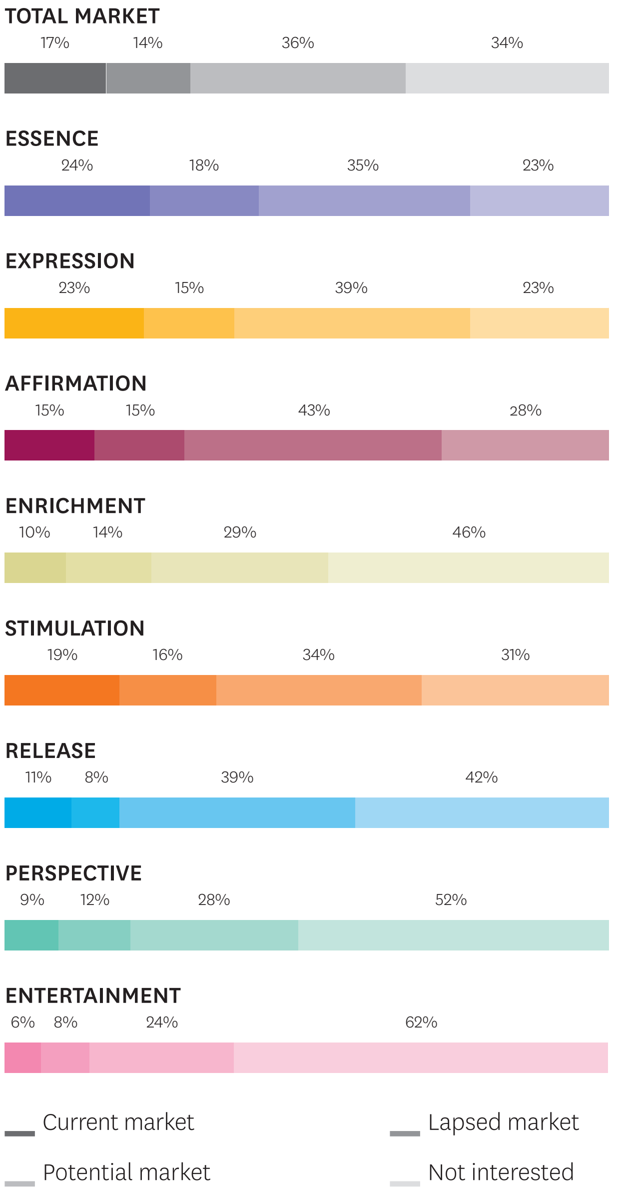
Essence and Expression are the most likely to attend opera. Entertainment, Perspective and Enrichment are the least likely.

ROCK OR POP MUSIC:



With the exception of Enrichment, almost all Culture Segments attend rock and pop music events regularly, particularly Stimulation and Essence.

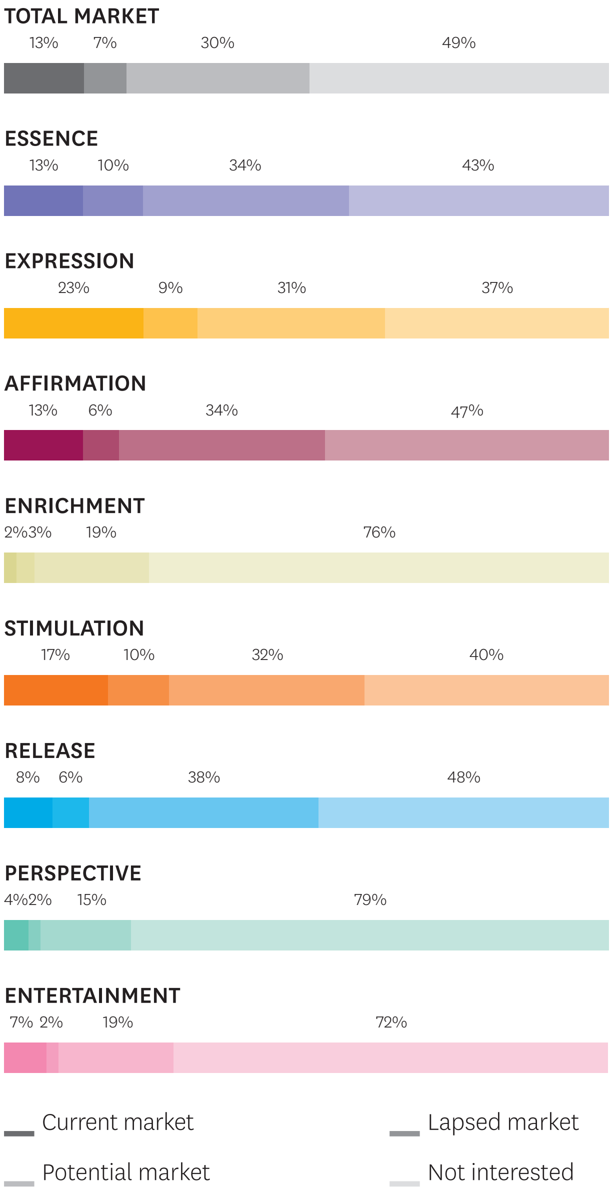
COUNTRY OR FOLK:



The potential market for country or folk music comprises more than a third of the culture market (36%). Focusing on encouraging this market will be essential to the growth of this genre.

Country and folk music has the greatest appeal to Essence, Expression and Stimulation. It appeals least to Entertainment, Perspective and Release.

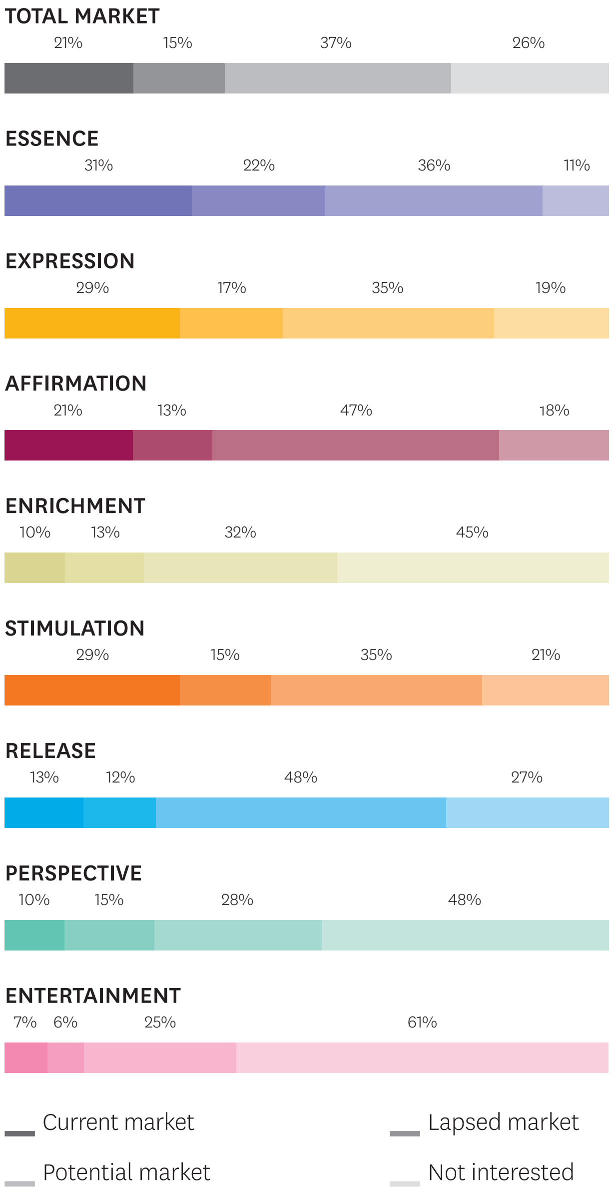
HIP HOP CONCERT:



Hip-hop has the smallest market of any artform, but has room to grow. It appeals most to Expression and Stimulation.

Growing the audience for hip-hop will involve targeting the 30% who are interested in attending a hip-hop concert for the first time, in particular, Stimulation, Affirmation, Release, Essence and Expression.

JAZZ OR BLUES CONCERT:



The key to developing and sustaining the jazz and blues market will be in enticing those who have never been to a concert and then to keep them coming.

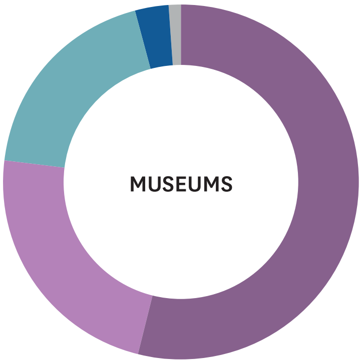
Essence, Expression and Affirmation are the most likely to have ever attended a jazz or blues concert.

Release has the highest proportion of people interested in attending for the first time.

Museums

More than half of the culture market last visited a museum in the last 12 months, making it one of the largest artform markets.

Very few people are in the potential market, however there is scope to grow this market by encouraging people who last visited more than three years ago to return.



54% Last attended in the past 12 months

23% Last attended 1–3 years ago

Lapsed market:
19% Last attended more than 3 years ago

Potential market:
3% Haven’t attended but would be interested

1% Haven’t attended and would not be interested

Base: (4011).

3.2
MILLION

people are in the market for museums

New Zealand overview

2011 CURRENT MARKET	2014 CURRENT MARKET	LAPSED MARKET	POTENTIAL MARKET
75%	77%	19%	3%
2524.9K	2600.9K	648.5K	87.5K

Regional breakdown

NORTH ISLAND

NORTHLAND REGION	75%	90.9K	73%	86.6K	24%	28.6K	1%	1.4K
AUCKLAND REGION	73%	795.9K	75%	833.9K	22%	242.0K	3%	31.7K
WAIKATO REGION	73%	223.7K	69%	218.1K	27%	84.7K	3%	9.1K
BAY OF PLENTY REGION	70%	149.8K	67%	140.1K	23%	48.8K	8%	17.3K
GISBORNE REGION	70%	24.6K	76%	24.8K	15%	5.1K	9%	2.8K
HAWKE'S BAY REGION	68%	81.3K	72%	84.9K	25%	29.0K	2%	2.3K
TARANAKI REGION	85%	72.4K	80%	69.3K	17%	14.9K	1%	1.0K
MANAWATU-WANGANUI REGION	71%	130.9K	75%	133.1K	20%	35.3K	2%	3.7K
WELLINGTON REGION	86%	336.2K	91%	344.5K	8%	31.6K	1%	2.6K

SOUTH ISLAND

TASMAN REGION	74%	28.1K	80%	30.2K	14%	5.2K	5%	1.7K
NELSON REGION	70%	26.5K	82%	31.1K	11%	4.4K	6%	2.2K
MARLBOROUGH REGION	77%	26.8K	76%	27.3K	18%	6.5K	3%	1.2K
WEST COAST REGION	79%	20.3K	69%	17.8K	29%	7.4K	2%	0.4K
CANTERBURY REGION	72%	306.1K	78%	343.1K	19%	83.1K	2%	8.2K
OTAGO REGION	85%	146.9K	89%	149.3K	10%	17.0K	0%	0.8K
SOUTHLAND REGION	85%	64.0K	90%	66.7K	7%	5.0K	1%	0.9K

● 2011 Current market ● 2014 Current market ● 2014 Lapsed market ● 2014 Potential market

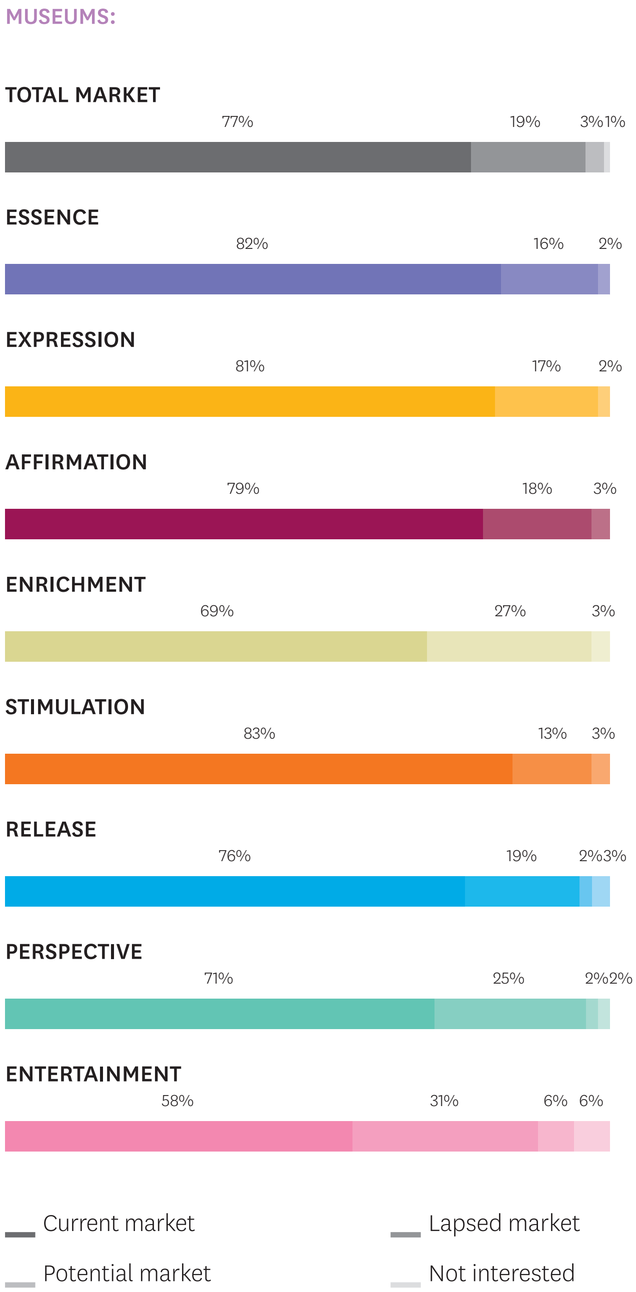
TE PAPA, NGĀ TOI|ARTS TE PAPA SEASON 3 (2014).
Photographer, Michael Hall

Museum market regional breakdown

The size of the current market has grown the most in Nelson. It has even more room to grow, indicated by the size of its lapsed and potential market.

The largest drop is seen in the West Coast. Given the size of the lapsed market, there is an opportunity to encourage people who last visited more than three years ago to return.

Museum breakdown by Culture Segment



Museums have broad appeal. A high proportion of each Culture Segment visited one in the past three years.

Entertainment has the largest potential market, indicating a small market that could be converted to grow the museum market even further. Entertainment and Enrichment are the most likely to have lapsed in attendance, suggesting the importance of developing strategies to retain these segments.

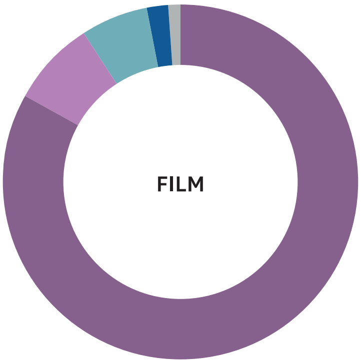
Film

The market for film is larger than for any other artform. Ninety-two percent of New Zealand's culture market has been to at least one film in the past three years.

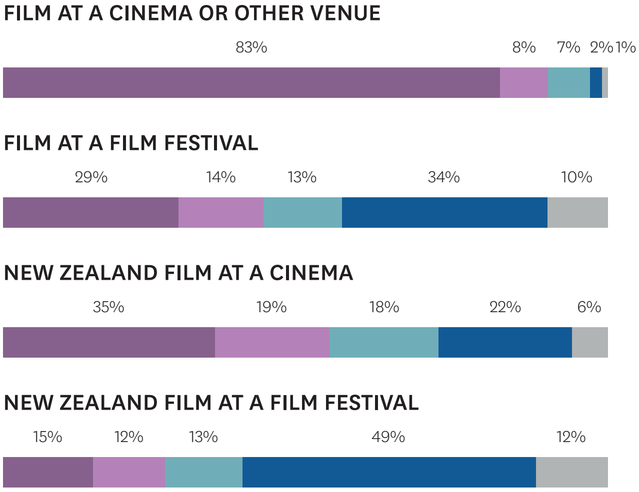
Film has enjoyed even further growth from 2011 but there is still scope to grow the audience:

- for New Zealand film where there is a large lapsed and potential market
- for film festivals where a major proportion of the market are interested in attending for the first time.

Growth of the overall film market is fairly evenly spread across the regions, with the exception of Bay of Plenty, Hawke's Bay and Marlborough, where the rate of attendance has not matched the increase in population.



84%	Last attended in the past 12 months
8%	Last attended 1–3 years ago
	Lapsed market:
6%	Last attended more than 3 years ago
	Potential market:
2%	Haven't attended but would be interested
1%	Haven't attended and would not be interested


FILM AT A CINEMA OR OTHER VENUE

FILM AT A FILM FESTIVAL

NEW ZEALAND FILM AT A CINEMA

NEW ZEALAND FILM AT A FILM FESTIVAL

Base: (4011).

3.4
MILLION

people are in the market for film

New Zealand overview

2011 CURRENT MARKET	2014 CURRENT MARKET	LAPSED MARKET	POTENTIAL MARKET
89%	92%	6%	2%
2966.5K	3096.0K	209.9K	53.2K

Regional breakdown

NORTH ISLAND

NORTHLAND REGION	86% 104.0K	91% 108.7K	7% 8.3K	1% 1.3K
AUCKLAND REGION	88% 957.2K	93% 1044.5K	4% 44.6K	2% 27.7K
WAIKATO REGION	88% 270.3K	94% 296.3K	5% 17.3K	1% 2.3K
BAY OF PLENTY REGION	91% 193.4K	88% 186.0K	9% 18.7K	2% 4.7K
GISBORNE REGION	83% 29.4K	90% 29.3K	9% 2.9K	0% 0.2K
HAWKE'S BAY REGION	90% 107.9K	89% 104.5K	8% 8.9K	2% 2.8K
TARANAKI REGION	87% 74.8K	90% 77.6K	8% 6.8K	2% 1.6K
MANAWATU-WANGANUI REGION	87% 159.2K	92% 163.8K	6% 9.8K	2% 2.8K
WELLINGTON REGION	92% 357.1K	93% 354.3K	5% 20.4K	1% 4.1K

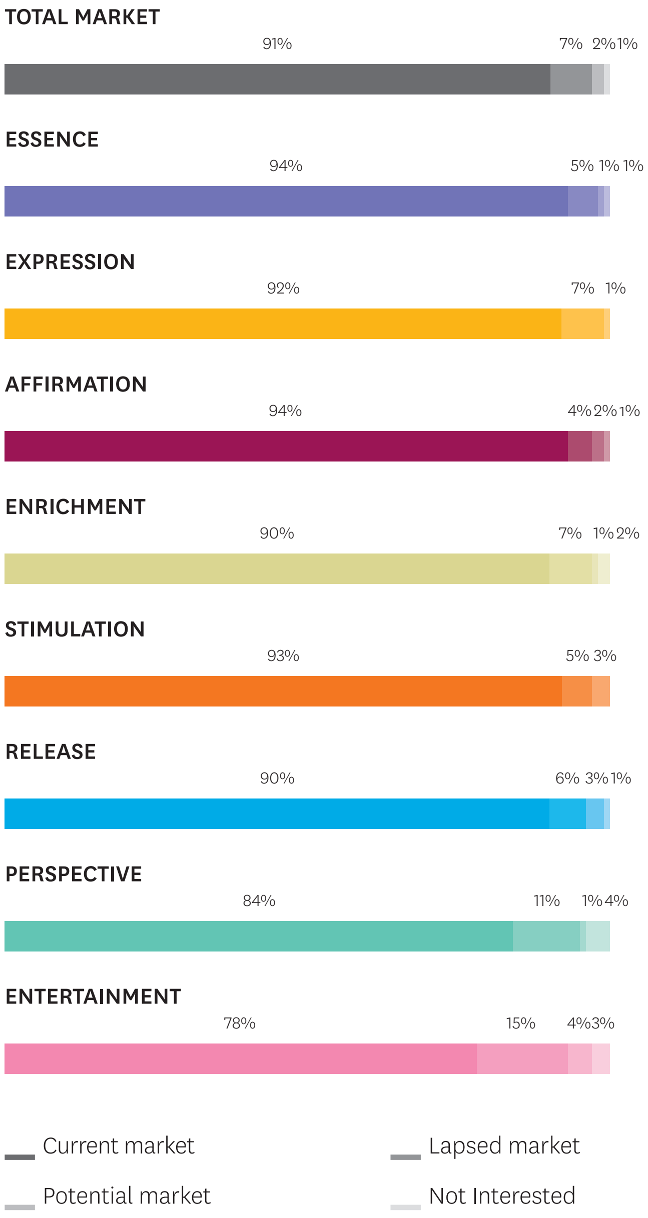
SOUTH ISLAND

TASMAN REGION	88% 33.4K	95% 35.7K	4% 1.7K	– –
NELSON REGION	92% 34.8K	91% 34.5K	5% 1.9K	2% 0.8K
MARLBOROUGH REGION	89% 30.8K	85% 30.8K	13% 4.8K	1% 0.5K
WEST COAST REGION	78% 20.2K	80% 20.7K	17% 4.5K	2% 0.6K
CANTERBURY REGION	89% 381.1K	90% 396.5K	8% 35.2K	1% 2.2K
OTAGO REGION	86% 148.3K	87% 144.6K	11% 18.9K	1% 1.1K
SOUTHLAND REGION	86% 64.1K	92% 68.1K	7% 5.4K	1% 0.7K

● 2011 Current market ● 2014 Current market ● 2014 Lapsed market ● 2014 Potential market

Film breakdown by Culture Segment

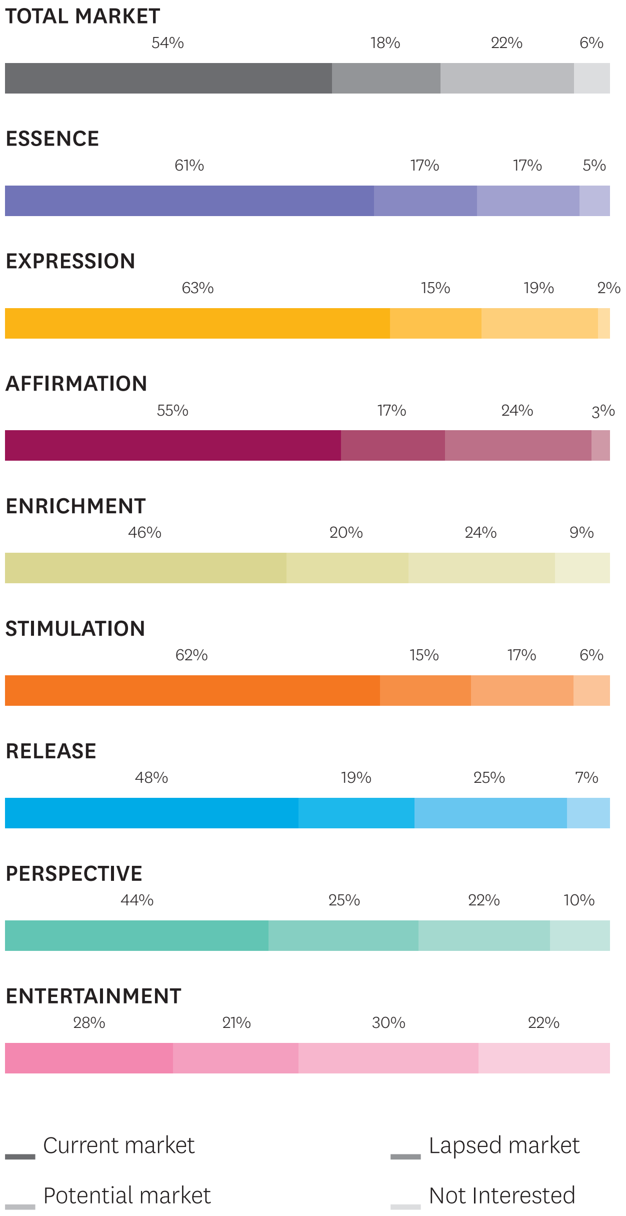
FILM AT A CINEMA OR OTHER VENUE:



Strategies aimed at retaining audiences within the general film market should be aimed at Entertainment and Perspective.

Film has universal appeal, with all Culture Segments exhibiting high attendance.

NEW ZEALAND FILM AT A CINEMA:



Expression, Essence and Stimulation are the most likely to have seen a New Zealand film in the last three years (with the exception of *The Hobbit*[5]).

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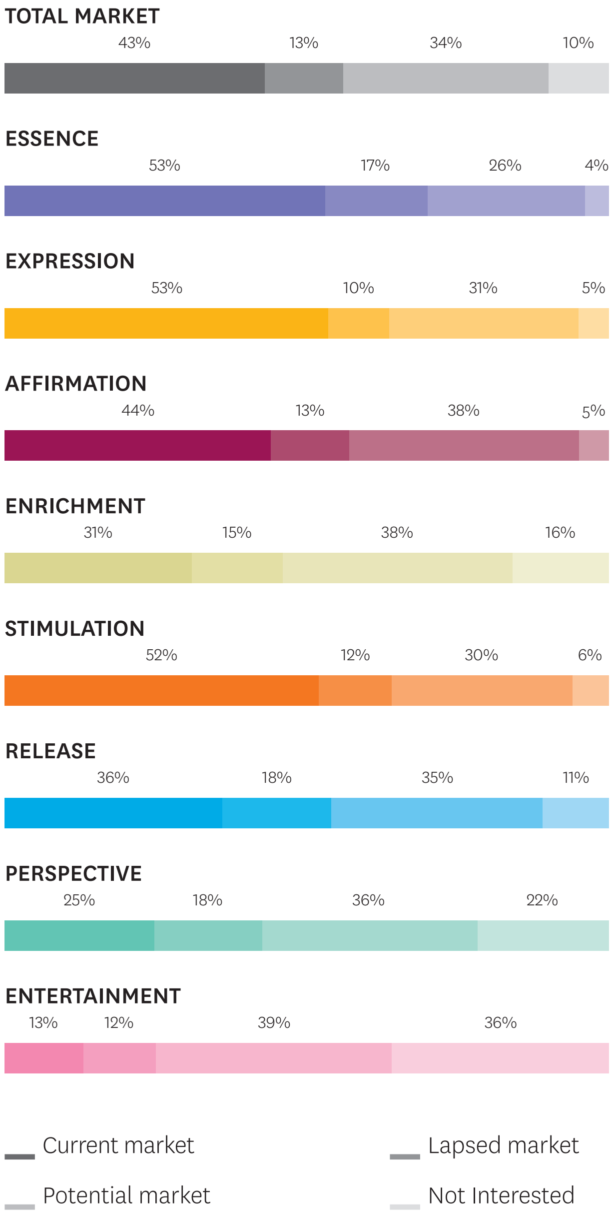
[5] To find out about the existing and potential market for New Zealand film, Creative New Zealand asked: "Have you seen a New Zealand film (not including *The Hobbit*) at a cinema in the past three years?" It was thought that including *The Hobbit*, with more mainstream audience appeal, would skew the results.

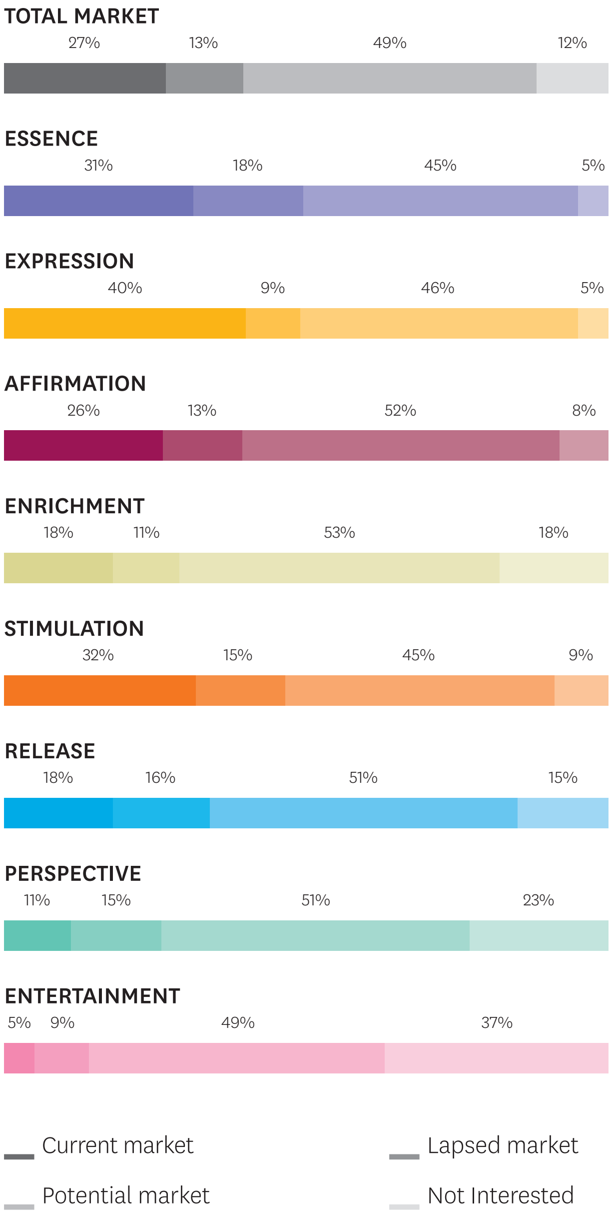
FILM AT A FILM FESTIVAL:



Essence, Expression and Stimulation are the most likely to attend film festivals. They are also likely to keep attending those festivals, as evidenced by their high retention rates.

Film festivals are less likely to appeal to Entertainment, Perspective and Enrichment.

NEW ZEALAND FILM AT A FILM FESTIVAL:



Expression, Stimulation and Essence are the most likely to have seen a New Zealand film at a festival in the past three years. This pattern of attendance is more similar to film festival attendance in general rather than New Zealand film consumption, suggesting the festival (as an art form) attracts a certain audience above and beyond what New Zealand films attract.

Perspective and Entertainment were the least likely to be interested in watching a New Zealand film at a festival.

WOMAD (2013).
Photographer Dominika Zielinska

PART 2

HOW AUDIENCES ENGAGE WITH THE ARTS

Levels of Engagement

An individual's engagement level describes how deeply and how widely the person is engaging with culture.

Unlike Culture Segments, engagement levels can fluctuate and change over the course of a person's life. A key strategy for any arts organisation lies in deepening emotional engagement through meeting high-level needs and facilitating emotional (rather than functional) interactions. When individuals are more engaged, not only are they more likely to take risks, but they're more likely to be committed and generous towards the arts.

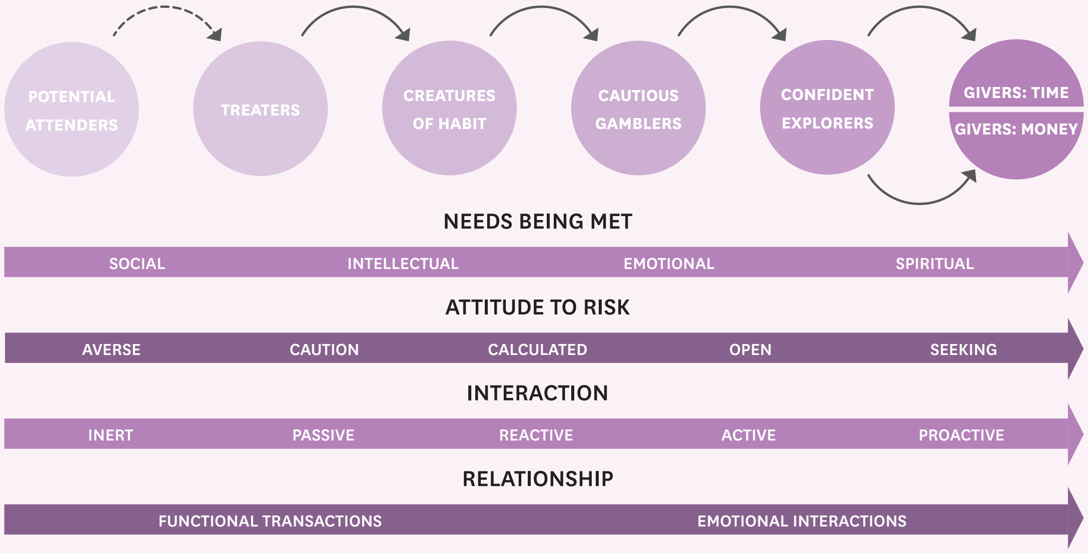
Potential Attenders

Potential Attenders have not attended a cultural event or venue in the past three years, but would be interested in doing so.

Treaters

While Treaters have attended at least one cultural event in the past three years, they do not consider the arts an essential part of their lives. To them, culture is just one leisure activity of many, mentioned in the same breath as going for a bushwalk or to the beach.

Because Treaters are cautious about trying new cultural experiences, they tend to fall back on activities that are closely aligned to their interests (for instance, attending a festival or film festival because they are regular consumers of film). Treaters are also price sensitive and are likely to place emphasis on the social benefits of culture, driven by their desire to spend quality time with friends and family in an enjoyable setting.



Creatures of Habit

Compared to Treaters, Creatures of Habit attend more cultural events across a wider spectrum. However, they are ambivalent about the benefits that culture can deliver to them and are risk averse, making them more likely to stay with 'safe' options like museums, art galleries and the cinema. They may also have a few tried-and-trusted venues they return to again and again.

Creatures of Habit are most interested in trying new artforms, but their aversion to risk prevents them from trying new experiences, as they are unsure of the benefits that unfamiliar arts and cultural venues could deliver to them.

Cautious Gamblers

Cautious Gamblers engage in a fairly broad range of culture and, because they are aware of some of the emotional and spiritual benefits that cultural engagement can deliver, they are open to taking controlled risks.

While they may have one or two artforms they are passionate about, Cautious Gamblers try to consume a balanced cultural diet. Culture fills a variety of needs for them: they are happy to attend a musical as part of a fun night out with their family, but will also visit a contemporary art exhibition looking for a deeply moving experience.

Cautious Gamblers consider themselves relatively well informed and independently minded. However, if prompted, they may admit that they 'don't really go to the more obscure stuff'.

Cautious Gamblers treasure stand-out cultural experiences and are looking for opportunities to experience something a bit different. They find it difficult to identify these opportunities, partly as a result of their broad tastes across genres and venues. Even when they do see things that appeal to them, they will often end up missing out.

Confident Explorers

Confident Explorers actively search for a wide range of cultural experiences and visit as many venues and types of artforms as they can, constrained only by budget and time.

Confident Explorers may have particularly treasured organisations, venues, or types of work, but they are stimulated by new experiences and delight in discovering new things. Because of this, they can also be powerful advocates for culture, 'converting' friends and relatives.

Confident Explorers are driven by an awareness and acute enjoyment of the wide range of personal benefits they derive from culture. They often have transformative, self-actualising experiences and are renewed by engaging with the arts.

Despite this, their fiercely independent and inner-directed approach to culture means they may sometimes miss out on new experiences because it doesn't appear on their radar.

Givers of time and/or money

Givers are highly engaged with a wide range of culture. They are Confident Explorers who have gone one step further, voluntarily giving their time and/or money to one or more cultural organisations on a regular basis.

This generosity is driven by their deep appreciation of the benefits that culture can deliver to individuals and to society, and while they may get a variety of benefits from giving, there is no direct transactional return on their investment (for instance, membership benefits aren't an indicator of engagement, as members of cultural organisations can be found at every engagement level).

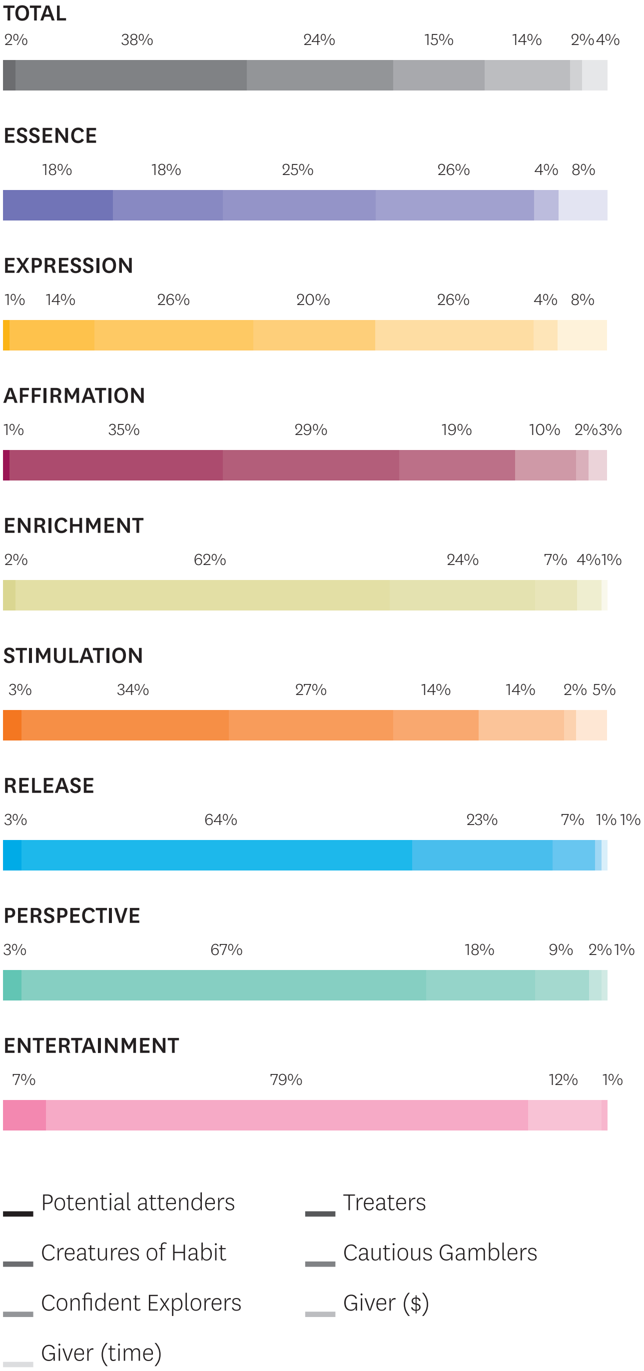
AUCKLAND THEATRE COMPANY, DOMINION ROAD STORIES (2013).
Photographer, Andrew Malmo

Levels of Engagement in New Zealand

Overall engagement levels have dropped since 2011, which is likely due to more people joining the culture market over the past three years. As a result, Treaters now make up a higher proportion of the culture market (these are people who attend the arts, but do not see it as a crucial element of their lives).

Givers, on the other hand, now make up a smaller proportion of the market. These are people who are highly engaged and are willing to give time and money.

Levels of Engagement	2011	2014
Giver (time)	6%	4%
Giver ($)	6%	2%
Confident Explorers	12%	14%
Cautious Gamblers	17%	15%
Creatures of Habit	25%	24%
Treaters	31%	38%
Potential attenders	4%	2%



Entertainment, Perspective, Release and Enrichment place less priority on attending the arts, with the majority of these Culture Segments viewing art as just another leisure option of many.

Essence and Expression, on the other hand, are the most engaged. They are more likely to be givers of time and money, and see the arts as a priority in their lives.

Support for the arts

Support for the arts takes a number of forms. Support ranges from transactional expenses for individual visits (including tickets, food or drink and programmes) to subscriptions, volunteering and donating time and money.

Overall, support for these activities has decreased over the past three years with people spending less on arts and cultural activities, and also volunteering and donating less.

This may seem at odds with the finding that more people are engaged with the arts than three years ago. However, it seems that while more people are experiencing arts and culture, on average they are doing so with less frequency, and spending less when they do.

Expenditure

More people are attending, but they are spending less.

Thirty-nine percent of New Zealand's culture market spends $106.30 going to cultural events and places in an average four-week period.

New Zealanders in the total culture market spend an average of $41 each every four weeks. This is a marked decrease from $53 in 2011.

Type of expenditure	2011	2014
Admission	$35	$29
Food and drink at cultural events or venues	$14	$9
Programmes or souvenirs	$5	$3
Total	$53	$41

Gisborne, Northland and Auckland show the biggest drop in expenditure with arts spend dropping by half in an average four-week period.

This drop is, in part, explained by the findings of *Audience Atlas New Zealand* in 2011 regarding future cultural spending, which showed 22% of people expected to spend less over the following 12 months. (Only 14% expected to spend more, 41% expected to spend the same amount, and the remainder was unsure.)

$1.78
BILLION

spent by New Zealanders in total on arts, culture and heritage in the last 12 months

New Zealand overview

2011 FOUR-WEEKLY CULTURAL SPEND PER PERSON	2011 TOTAL	2014 FOUR-WEEKLY CULTURAL SPEND PER PERSON	2014 TOTAL
$53	$2.3 BILLION	$41	$1.8 BILLION

Regional breakdown

NORTH ISLAND

	2011		2014	
NORTHLAND REGION	$54	$83.9 MILLION	$20	$50.1 MILLION
AUCKLAND REGION	$63	$885.7 MILLION	$29	$629.9 MILLION
WAIKATO REGION	$38	$150.2 MILLION	$23	$131.0 MILLION
BAY OF PLENTY REGION	$46	$128.6 MILLION	$15	$82.0 MILLION
GISBORNE REGION	$51	$23.4 MILLION	$16	$10.0 MILLION
HAWKE'S BAY REGION	$41	$63.4 MILLION	$32	$65.6 MILLION
TARANAKI REGION	$42	$46.7 MILLION	$44	$75.5 MILLION
MANAWATU-WANGANUI REGION	$26	$62.9 MILLION	$15	$47.9 MILLION
WELLINGTON REGION	$66	$333.3 MILLION	$45	$274.0 MILLION

SOUTH ISLAND

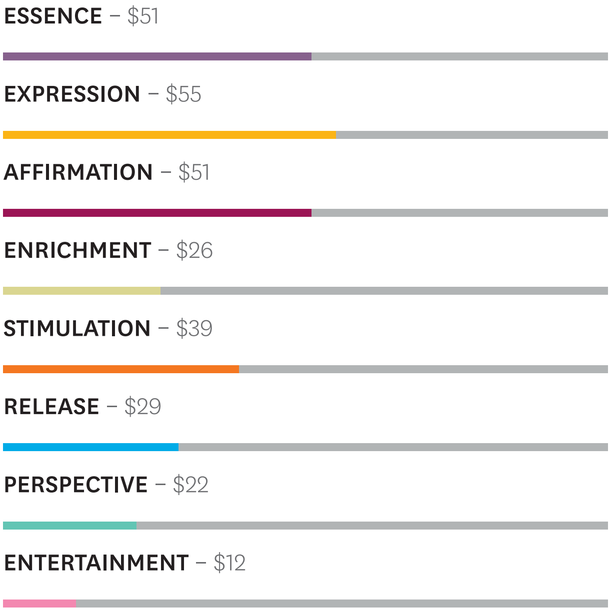
	2011		2014	
TASMAN REGION	$56	$27.4 MILLION	$26	$17.3 MILLION
NELSON REGION	$54	$26.6 MILLION	$32	$22.3 MILLION
MARLBOROUGH REGION	$44	$20.0 MILLION	$15	$13.8 MILLION
WEST COAST REGION	$31	$10.3 MILLION	$16	$6.7 MILLION
CANTERBURY REGION	$58	$322.3 MILLION	$36	$255.4 MILLION
OTAGO REGION	$36	$81.4 MILLION	$26	$69.4 MILLION
SOUTHLAND REGION	$43	$41.4 MILLION	$20	$25.9 MILLION

● Four-weekly cultural spend per person ● Total ● Four-weekly cultural spend per person ● Total

Spend by Culture Segment

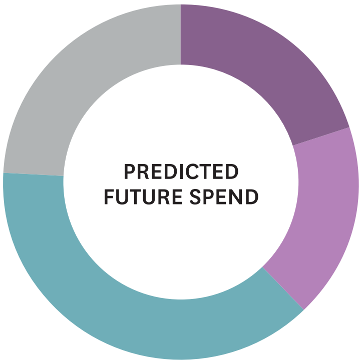
Expression spends the most on arts and culture in a typical four-week period, averaging $55 on admission, food and drinks, and souvenirs or programmes. Affirmation and Essence also spend a high amount, particularly compared to Entertainment, who spends the least of any Culture Segment, averaging $12 every four weeks.

AVERAGE SPENT BY EACH CULTURE SEGMENT IN A TYPICAL FOUR-WEEK PERIOD:



Future spend

PREDICTED FUTURE SPEND BY NEW ZEALAND'S CULTURE MARKET:



20% **Less**
of the culture market are likely to spend less on arts and culture in the next 12 months

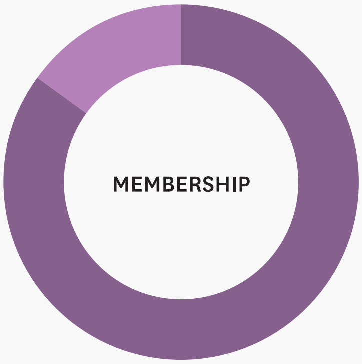
18% **More**
of the culture market are likely to spend more on arts and culture in the next 12 months

38% **Same**
of the culture market are likely to spend the same amount on arts and culture in the next 12 months

24% **Don't know**
of the culture market don't know how their spend will change in the next 12 months

Future cultural spending is expected to decrease very slightly in 2015. Thirty-eight percent of people say they are likely to spend the same amount on arts, 20% expect to spend less, 18% expect to spend more, and 24% are unsure.

Membership



85% **Not members**
of the culture market are not subscribers, members or friends of an arts organisation or cultural venue.

15% **Members**
of the culture market are subscribers, members or friends of an arts organisation or cultural venue.

Fifteen percent of the culture market are subscribers, members or friends of arts organisations or cultural venues. This is a slight decrease from 2011, when 17% of the culture market were subscribers or members.

Regional breakdown of membership

Marlborough shows the biggest drop in membership rates. Subscription and membership there halved (from 24% to 12%).

Wellington shows increases in membership (from 16% to 20%), as does Otago (from 16% to 26%).

New Zealand overview

2011 MEMBERS	2014 MEMBERS
17%	15%
497.0K	569.2K

Regional breakdown

NORTH ISLAND

NORTHLAND REGION	21% 17.6K	15% 25.0K
AUCKLAND REGION	17% 170.1K	15% 182.7K
WAIKATO REGION	18% 31.6K	10% 55.4K
BAY OF PLENTY REGION	16% 26.8K	13% 34.2K
GISBORNE REGION	17% 4.0K	12% 6.0K
HAWKE'S BAY REGION	17% 18.5K	16% 20.5K
TARANAKI REGION	17% 14.7K	17% 14.6K
MANAWATU-WANGANUI REGION	14% 20.6K	12% 26.6K
WELLINGTON REGION	16% 74.8K	20% 60.8K

SOUTH ISLAND

TASMAN REGION	14% 4.4K	12% 5.5K
NELSON REGION	14% 5.4K	14% 5.4K
MARLBOROUGH REGION	24% 4.3K	12% 8.2K
WEST COAST REGION	13% 1.9K	7% 3.5K
CANTERBURY REGION	20% 50.6K	12% 83.4K
OTAGO REGION	16% 43.0K	26% 27.1K
SOUTHLAND REGION	14% 8.8K	12% 10.4K

Please note: All the percentages on this page are correct, but the numbers cited underneath should be reversed. For example, in 2011, 14% (10.4K) of the population in Southland were subscribers, members or friends of an arts organisation, while 12% (8.8K) were not.

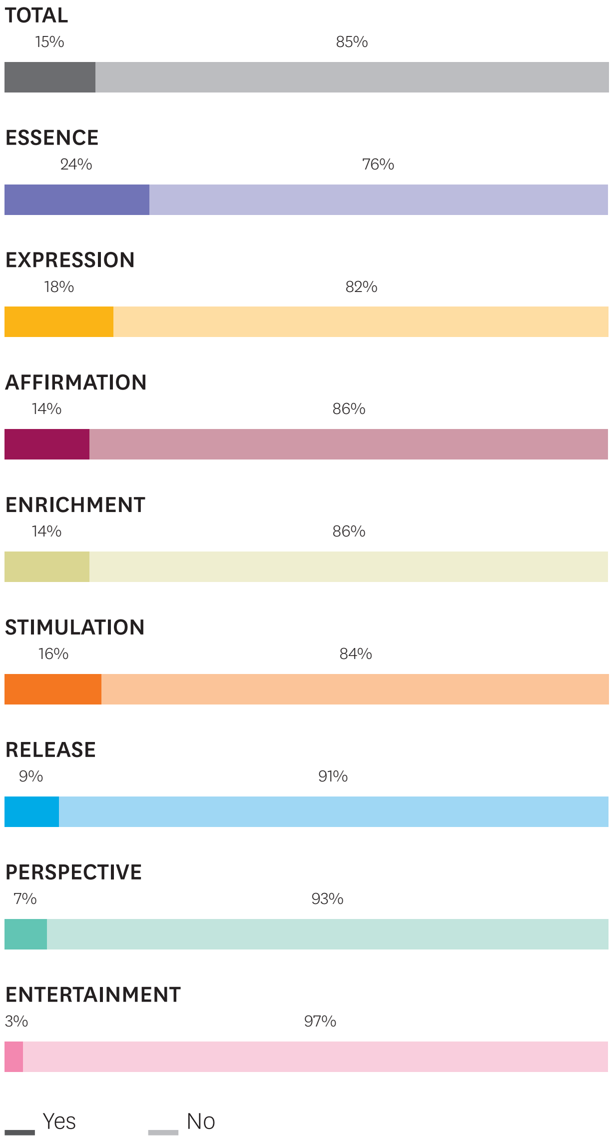
● 2011: members ● 2014: members

Membership by Culture Segment

Essence is the most likely to be subscribers or members (24%), followed by Expression and Stimulation (18% and 16%), suggesting they are the best segments to target due to an existing commitment to cultural organisations.

By contrast, Entertainment is the least likely to be a subscriber or member (3%).

SUBSCRIBER, MEMBER OR FRIEND OF AN ARTS ORGANISATION OR CULTURAL VENUE BY CULTURE SEGMENT:



Volunteering

VOLUNTEERING BY NEW ZEALAND'S CULTURE MARKET AT ARTS, CULTURAL OR HERITAGE ORGANISATIONS:

9% **Volunteered in the last 12 months** of the culture market have volunteered in the past 12 months

13% **Volunteered more than 12 months ago** of the culture market have volunteered, but not in the past 12 months

77% **Never volunteered** of the culture market have never volunteered

In the last 12 months, 9% of the culture market volunteered their time to help an arts, cultural or heritage organisation compared to 12% in 2011.

Marlborough, Canterbury and Nelson saw the sharpest declines in volunteering, with drops ranging from 7 to 8 percentage points.

New Zealand overview

2011: VOLUNTEERED IN THE PAST 12 MONTHS	2014: VOLUNTEERED IN PAST 12 MONTHS
12%	9%
417.9K	320.0K

Regional breakdown

NORTH ISLAND

NORTHLAND REGION	17%	20.8K	11%	20.9K
AUCKLAND REGION	13%	135.9K	7%	80.6K
WAIKATO REGION	13%	38.4K	14%	28.4K
BAY OF PLENTY REGION	12%	26.4K	10%	26.1K
GISBORNE REGION	16%	5.7K	13%	6.8K
HAWKE'S BAY REGION	10%	12.1K	5%	8.4K
TARANAKI REGION	16%	13.5K	14%	12.9K
MANAWATU-WANGANUI REGION	12%	22.5K	8%	15.6K
WELLINGTON REGION	7%	27.8K	6%	31.8K

SOUTH ISLAND

TASMAN REGION	12%	4.4K	6%	4.1K
NELSON REGION	15%	5.5K	8%	4.4K
MARLBOROUGH REGION	17%	6.0K	9%	4.0K
WEST COAST REGION	11%	2.9K	6%	2.9K
CANTERBURY REGION	14%	61.6K	7%	30.9K
OTAGO REGION	14%	24.0K	12%	27.8K
SOUTHLAND REGION	14%	10.4K	10%	14.3K

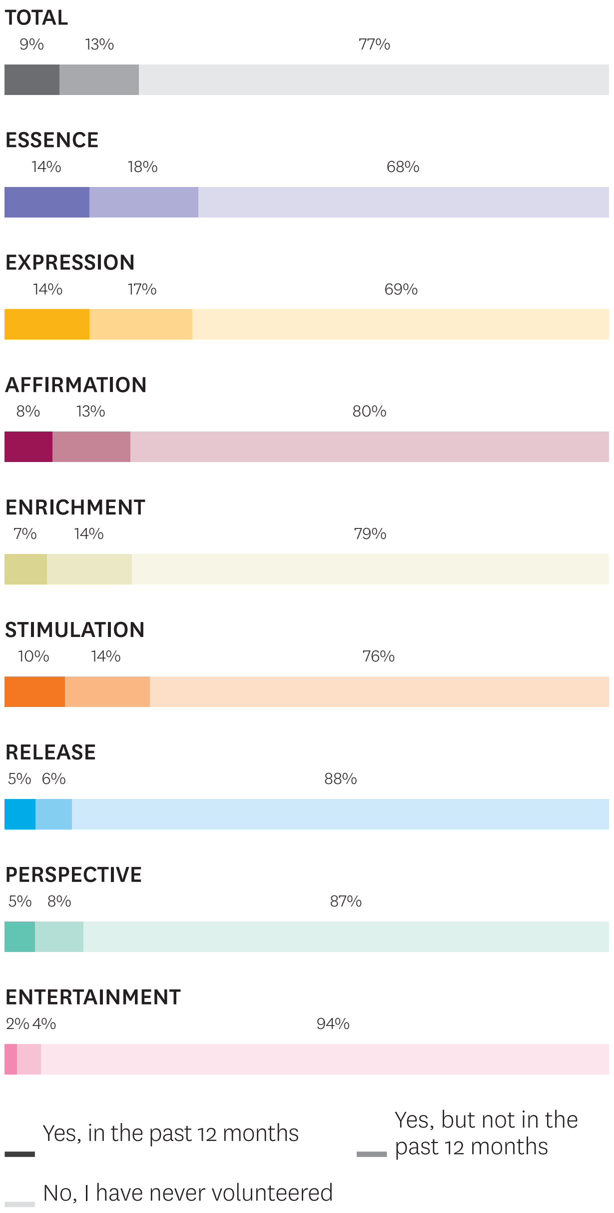
● 2011: volunteered in the past 12 months ● 2014: volunteered in the past 12 months

Volunteering by Culture Segment

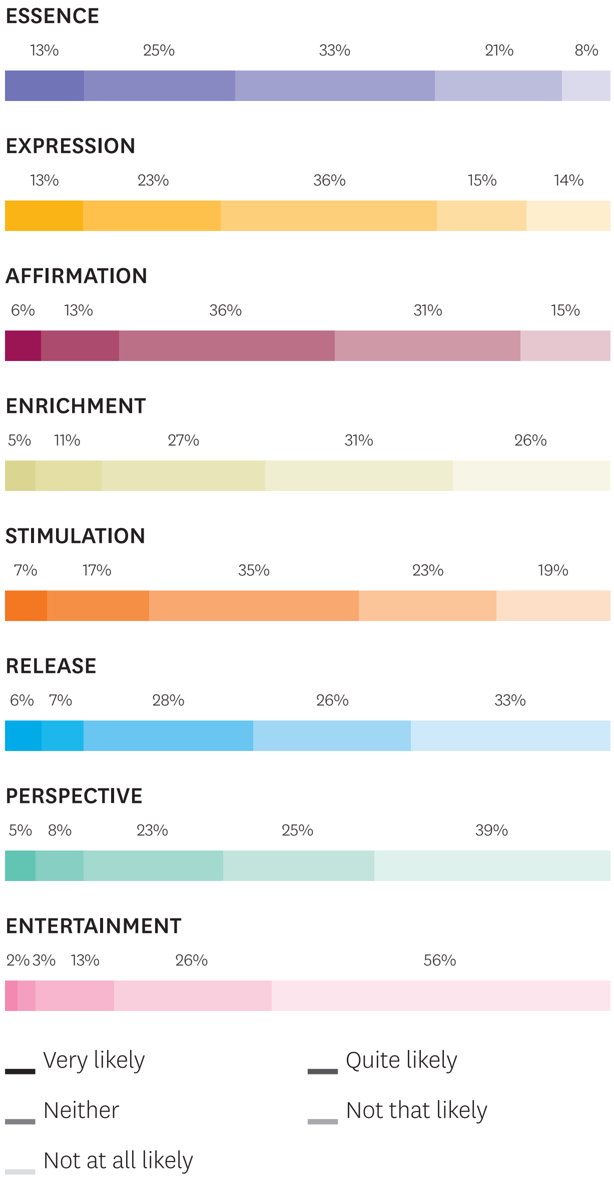
Essence and Expression are the most likely to have volunteered in the last 12 months (14% of each segment), followed by Stimulation (10%). These three segments were also the most likely to volunteer in the future (Essence 38%, Expression 35% and Stimulation 24%).

Entertainment is the least likely to have volunteered (2%) and the least likely to volunteer in the future.

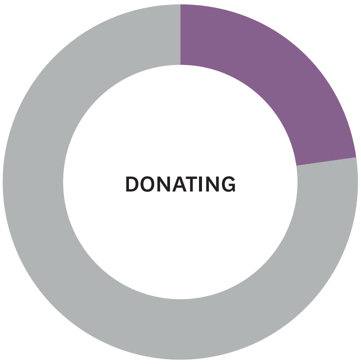
HAVE YOU VOLUNTEERED YOUR TIME TO HELP AN ARTS, CULTURAL OR HERITAGE ORGANISATION?



LIKELIHOOD OF VOLUNTEERING AT ARTS, CULTURAL OR HERITAGE ORGANISATIONS IN THE FUTURE:



Donating behaviour



23% 🟪	**Arts Donors** have donated money to an arts organisation or cultural venue in the last three years
77% ⬜	**Non-Donors** have not donated money to an arts organisation or cultural venue in the last three years

Base: (4008)

DONATION TYPES

7%	donate through regular automatic payments
51%	donate through in-venue donations
19%	donate through add-ons when purchasing a ticket
62%	donate through one-off donations

Nearly a quarter of the culture market donated money to arts, cultural or heritage organisations in the last three years. This is a significant drop[6] since 2011, when 50% of the culture market had donated money.

This is consistent with an overall decrease in donating behaviour, not specific to the arts, eg health or environmental charities. Of those who hadn't donated money to arts organisations, 29% had donated no money at all in previous years, compared to 24% in 2011.

The most common method of donating was a one-off donation in response to fundraising appeals or crowdfunding projects. This was followed by donations at venues like galleries or museums.

Gisborne and the West Coast have the highest rate of donating (39% for both). Manawatu-Wanganui and Southland had the lowest rates (14% each).

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[6] The decrease may in part be explained by the wording of the question, "Have you donated any money to arts, cultural or heritage **organisations** in the last three years?" The growth of crowdfunding platforms has meant that a much wider group of people have been able to fundraise for their arts or cultural projects, and the perception may be that these aren't for 'organisations' in the traditional sense, but one-off projects that are tied to artists but not organisations.

JULIA MORISON,
TREE HOUSES FOR SWAMP DWELLERS (2013).
Photographer Bridgit Anderson. © SCAPE Public Art.

New Zealand overview

2011: DONATED IN THE PAST 3 YEARS	2014: DONATED IN THE PAST 3 YEARS
50%	23%
1664.5K	736.8K

Regional breakdown

NORTH ISLAND

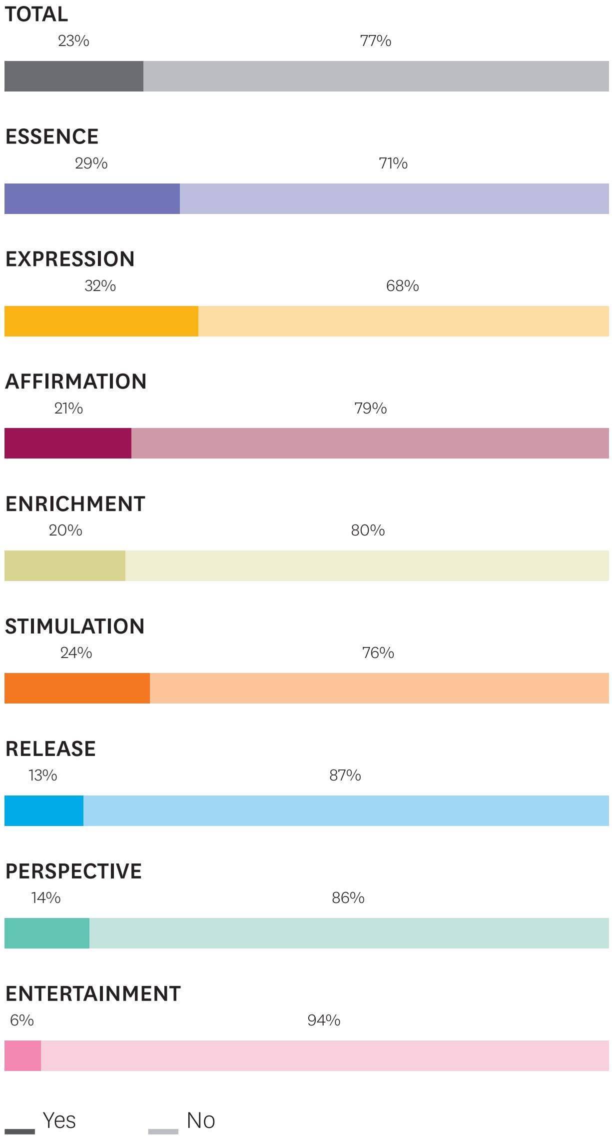
NORTHLAND REGION	53%	64.1K	20%	23.0K
AUCKLAND REGION	48%	515.9K	22%	240.2K
WAIKATO REGION	45%	137.3K	17%	50.1K
BAY OF PLENTY REGION	50%	106.9K	17%	34.3K
GISBORNE REGION	51%	17.9K	39%	12.9K
HAWKE'S BAY REGION	48%	56.9K	28%	30.8K
TARANAKI REGION	43%	37.1K	22%	18.5K
MANAWATU-WANGANUI REGION	49%	89.9K	14%	23.4K
WELLINGTON REGION	54%	208.2K	20%	114.1K

SOUTH ISLAND

TASMAN REGION	49%	18.5K	22%	7.7K
NELSON REGION	52%	19.6K	17%	9.3K
MARLBOROUGH REGION	53%	18.2K	17%	7.7K
WEST COAST REGION	59%	15.2K	39%	5.5K
CANTERBURY REGION	54%	231.4K	28%	100.6K
OTAGO REGION	53%	91.8K	22%	41.7K
SOUTHLAND REGION	47%	35.4K	14%	17.0K

Expression, Essence and Stimulation are the most likely to have donated to the arts. Entertainment, Release and Perspective are the least likely.

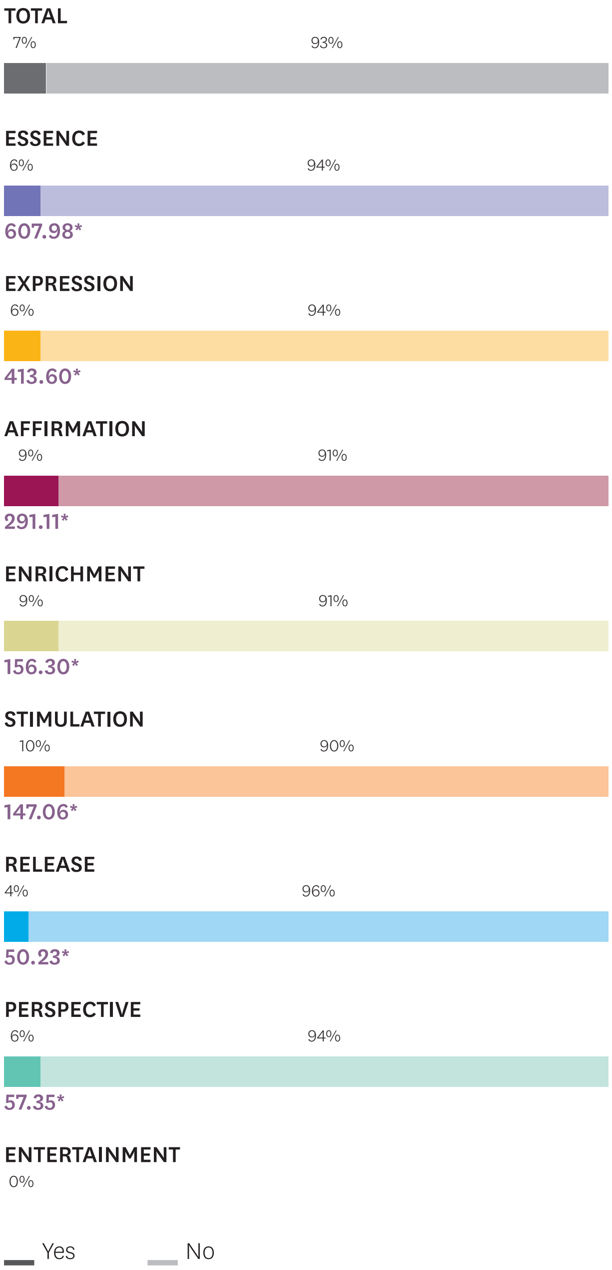
HAVE YOU EVER DONATED MONEY TO AN ARTS, CULTURAL OR HERITAGE ORGANISATION IN THE LAST THREE YEARS?



Regular donations

Stimulation, Enrichment and Affirmation are the most likely to donate through regular payments such as a direct debit. However, the amount they donate on average is much less than Essence or Expression ($608 and $413.60).

DONATES THROUGH REGULAR AUTOMATIC PAYMENTS:



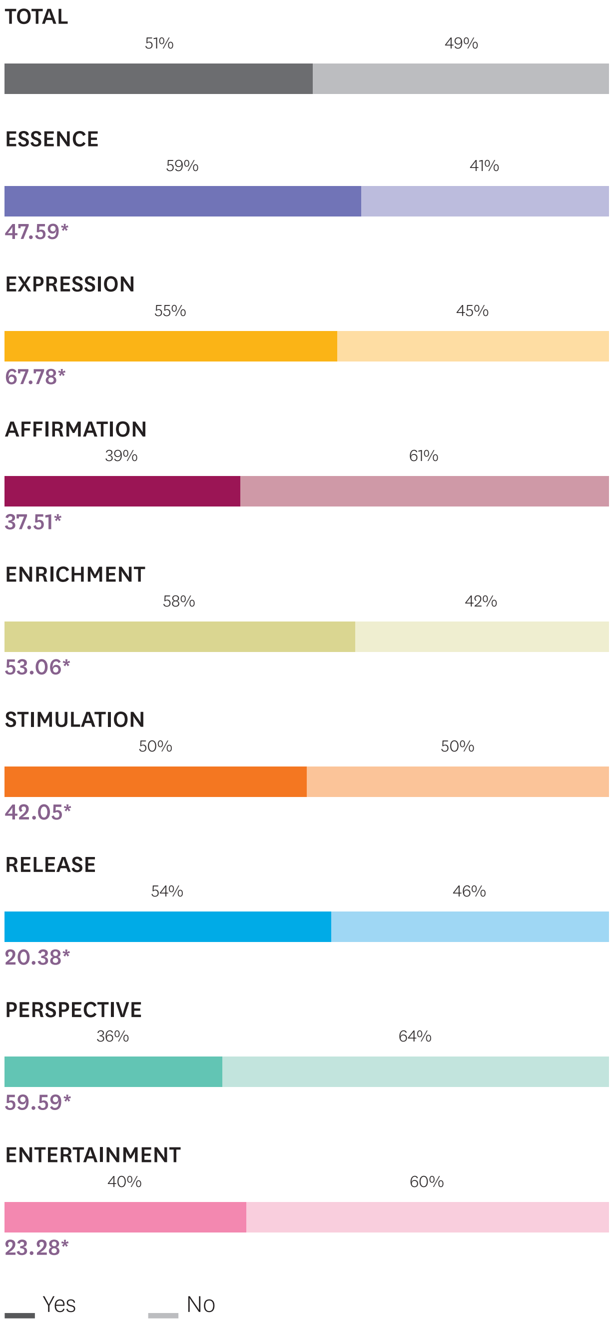
* Amount donated through regular automatic payments in past 12 months.

In-person donations when visiting a venue

Essence, Enrichment, Expression and Release are more likely to make donations in person when visiting a gallery, museum or other arts venue. Perspective and Affirmation are less likely to donate.

However, Perspective donates more than Essence, Enrichment and Release when they do donate, giving $59.60 on average in venues in the past year.

DONATION IN PERSON WHEN VISITING A MUSEUM, GALLERY OR ARTS VENUE:

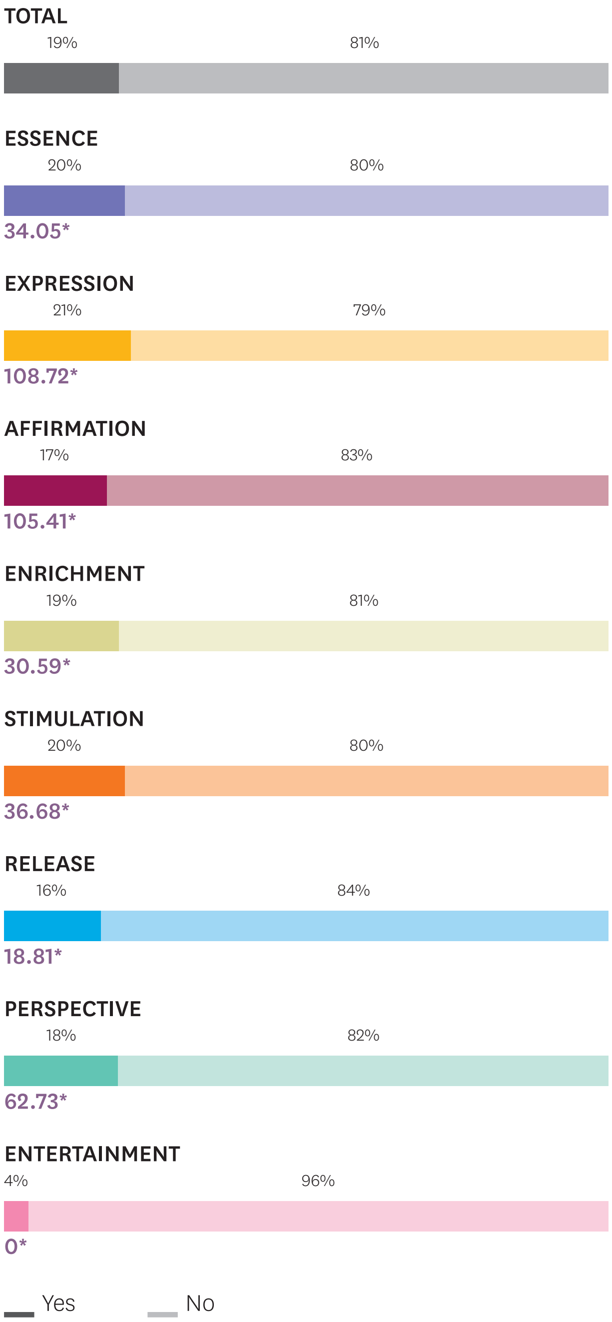


* Amount donated in person in the past 12 months.

Donation add-ons when purchasing a ticket

With the exception of Entertainment, all Culture Segments are likely to donate through a ticket add-on. This presents a significant opportunity for arts organisations to ask for a donation at the point of purchase that not many are taking advantage of currently. Affirmation and Expression are likely to donate significantly more.

DONATION ADD-ONS WHEN PURCHASING A TICKET AT A MUSEUM, GALLERY OR ARTS VENUE:

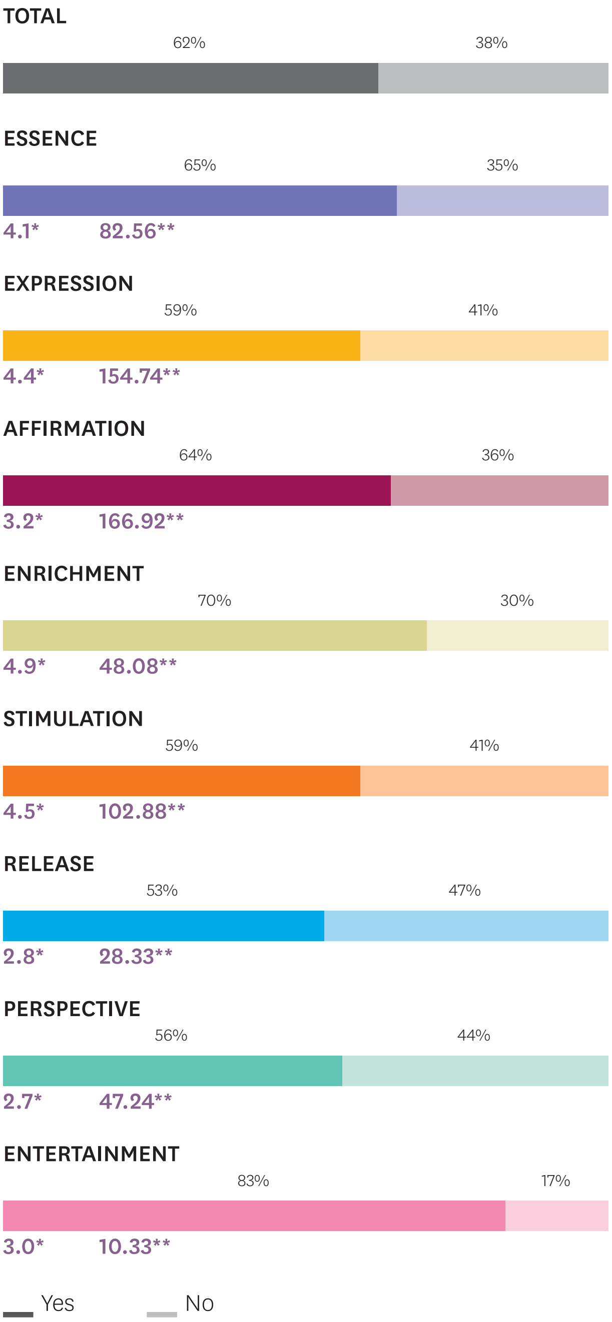


* Amount donated with an add-on when purchasing a ticket in the past 12 months.

One-off donations

One-off donating patterns differ significantly across the segments. Entertainment is highly likely to make one- off donations, but they do so less regularly and donate less when they do, giving $3.5 on average. Affirmation makes fewer donations than most other segments, but they donate the most amount of money (giving $52.89 on average). Expression is the next most generous Culture Segment (donating $35.38 on average), followed by Stimulation (donating $22.70 on average).

ONE-OFF DONATIONS IN THE PAST THREE YEARS:



* Frequency of one-off donations in the past 12 months.
** Dollar amount donated through one-off donations in the past 12 months.

Media consumption

How people find out about arts and cultural events

Word of mouth is the most popular way for people to find out about arts and cultural events, along with print newspapers and television.

Although online newspapers are a more commonly read media source, when people are actively searching for information about forthcoming events, print newspapers are used significantly more than their online equivalents.

HOW PEOPLE FIND OUT ABOUT ARTS AND CULTURAL EVENTS BY CULTURE SEGMENT:

Newspapers (print)	**50%**	**54%**	**59%**	**55%**	**52%**	**47%**	**39%**	**48%**	**28%**
Newspapers (online)	25%	32%	28%	31%	14%	29%	20%	16%	12%
Magazines: Lifestyle or special interest (print)	11%	17%	14%	13%	8%	12%	6%	7%	3%
Magazines: Lifestyle or special interest (online)	4%	6%	5%	4%	0%	5%	3%	1%	1%
Listings magazines (print)	3%	5%	3%	5%	1%	2%	2%	1%	1%
Listings magazines (online)	2%	3%	2%	3%	0%	2%	1%	3%	0%
Television	**43%**	**43%**	**49%**	**47%**	**42%**	**44%**	**33%**	**35%**	**28%**
Radio	36%	38%	46%	38%	26%	35%	28%	29%	25%
Venue mailing lists	13%	17%	14%	13%	11%	19%	8%	12%	4%
Venue websites	32%	42%	32%	34%	26%	36%	28%	27%	16%
Artist websites	9%	15%	10%	6%	3%	12%	7%	5%	3%
Email newsletters	29%	41%	30%	31%	24%	34%	19%	21%	18%
Social networking sites	31%	36%	36%	36%	14%	40%	23%	17%	18%
Blogs or message boards	4%	7%	3%	5%	2%	7%	2%	2%	2%
Street press	7%	13%	7%	7%	3%	9%	5%	4%	1%
Word of mouth	**51%**	**67%**	**54%**	**55%**	**50%**	**47%**	**39%**	**49%**	**30%**
Other	3%	4%	3%	3%	2%	4%	3%	4%	2%
None of these	15%	6%	8%	9%	20%	15%	25%	24%	39%

Culture market
Essence
Expression
Affirmation
Enrichment
Stimulation
Release
Perspective
Entertainment

TELEVISION CONSUMPTION BY CULTURE SEGMENT:

TV One	**75%**	**71%**	**77%**	**78%**	**83%**	**72%**	**69%**	**76%**	**78%**
TV One (On demand)	21%	18%	24%	24%	24%	22%	22%	16%	14%
TV2	**61%**	52%	**63%**	**63%**	55%	**63%**	**59%**	59%	**71%**
TV2 (On demand)	20%	18%	21%	21%	13%	22%	25%	15%	15%
TV3	**72%**	**72%**	**73%**	**73%**	**71%**	**71%**	**67%**	**71%**	**78%**
TV3 (On demand)	20%	19%	21%	20%	15%	21%	24%	17%	15%
FOUR	32%	29%	33%	32%	32%	34%	33%	33%	33%
FOUR (On demand)	5%	5%	7%	5%	3%	7%	5%	4%	2%
Māori Television	17%	23%	21%	19%	13%	16%	10%	16%	7%
Māori Television (On demand)	2%	4%	3%	2%	0%	1%	2%	-	1%
Prime	61%	**57%**	61%	62%	**69%**	58%	56%	**62%**	63%
SKY TV Channels	47%	39%	47%	48%	49%	49%	43%	52%	55%
SKY TV (On demand)	6%	5%	7%	6%	6%	6%	6%	5%	7%
LightBox	1%	1%	1%	2%	1%	2%	3%	0%	1%
Other on demand service	6%	6%	6%	5%	4%	8%	6%	6%	5%
None of these	6%	8%	5%	6%	4%	5%	6%	5%	6%

Culture market
Essence
Expression
Affirmation
Enrichment
Stimulation
Release
Perspective
Entertainment

Television

TV One is the most watched channel; 75% of the market watch it in a typical week. This is followed by TV3 (72%) and TV2 (61%).

These viewing patterns differ by Culture Segment. TV One is, on average, the most viewed channel, but this is not true for Essence or Entertainment, who are more likely to watch TV3.

Essence, Enrichment and Perspective are more likely to watch Prime than TV2.

RADIO CONSUMPTION BY CULTURE SEGMENT:

Radio New Zealand	**21%**	**31%**	20%	22%	**31%**	18%	16%	**21%**	11%
Radio New Zealand Concert	7%	11%	8%	6%	7%	6%	5%	8%	1%
Live Sport	6%	4%	9%	7%	5%	5%	3%	10%	6%
Coast	16%	15%	19%	16%	16%	14%	12%	**21%**	14%
Flava	4%	3%	9%	6%	0%	3%	2%	0%	2%
George FM	5%	4%	8%	5%	2%	4%	4%	4%	1%
Kiwi FM	2%	5%	3%	2%	0%	2%	1%	2%	1%
Newstalk ZB	18%	16%	19%	19%	**22%**	**18%**	14%	16%	17%
Radio Hauraki	9%	10%	8%	8%	5%	11%	9%	13%	7%
Radio Live	9%	10%	8%	10%	8%	9%	10%	7%	8%
Radio Sport	7%	6%	8%	7%	6%	5%	4%	10%	11%
The Edge	**23%**	**18%**	**29%**	**24%**	**17%**	**27%**	**24%**	17%	**17%**
The Rock	**18%**	16%	**20%**	18%	9%	**24%**	18%	**19%**	**19%**
The Sound	11%	9%	10%	12%	9%	12%	10%	14%	10%
ZM	18%	14%	20%	**23%**	14%	18%	**19%**	13%	**18%**
Mai FM	7%	5%	12%	5%	3%	7%	6%	3%	6%
The Hits	15%	15%	15%	16%	12%	17%	15%	15%	11%
More FM	18%	13%	20%	22%	17%	16%	**19%**	13%	15%
The Breeze	18%	**16%**	**22%**	**22%**	17%	17%	15%	14%	13%
Listening to other radio station	12%	13%	16%	14%	15%	8%	6%	8%	11%
None of these	11%	11%	9%	8%	13%	9%	17%	13%	12%

Culture market
Essence
Expression
Affirmation
Enrichment
Stimulation
Release
Perspective
Entertainment

Radio

The most listened-to radio station in a typical week is The Edge, with just under a quarter of the culture market (23%) tuning in. This is followed by Radio New Zealand and The Rock (21% and 18% of the culture market).

Across the Culture Segments, Radio New Zealand is the most listened-to station for Essence, Enrichment and Perspective. The Rock is the most listened-to station for Entertainment.

Newspaper

The following section looks at newspaper consumption across each of the regions. Culture Segments analysis is not available for regions where the sample size is too small.

NORTHLAND
NEWSPAPER CONSUMPTION:

Region	%
The New Zealand Herald (online)	52%
The Northern Advocate	45%
The New Zealand Herald (in print)	37%
stuff.co.nz	35%
Herald on Sunday	13%
The Sunday Star Times	8%
National Business Review (in print)	2%
The Sunday News	2%
The Otago Daily Times (online)	1%
National Business Review (online)	1%
Any other regional or local free paper (in print)	53%
Any other regional or local free paper (digital)	8%
Any other regional or local paid-for paper (in print)	13%
Any other regional or local paid-for paper (digital)	4%
None of these	8%

AUCKLAND
NEWSPAPER CONSUMPTION:

The New Zealand Herald (online)	**58%**	**60%**	**55%**	**57%**	**51%**	**62%**	**56%**	**69%**	**65%**
The New Zealand Herald (in print)	**41%**	**36%**	**50%**	**37%**	**53%**	**38%**	**34%**	**45%**	**26%**
stuff.co.nz	**40%**	**51%**	**39%**	**37%**	**33%**	**48%**	**36%**	**35%**	**32%**
Herald on Sunday	22%	16%	32%	18%	23%	25%	17%	19%	12%
The Sunday Star Times	11%	10%	13%	8%	16%	12%	15%	10%	7%
The Sunday News	5%	8%	6%	3%	3%	1%	8%	1%	7%
National Business Review (online)	5%	12%	8%	1%	2%	2%	2%	4%	1%
National Business Review (in print)	3%	1%	4%	3%	9%	2%	3%	4%	-
Any other regional or local free paper (in print)	38%	48%	33%	39%	52%	27%	40%	45%	29%
Any other regional or local free paper (digital)	8%	7%	11%	9%	5%	6%	7%	4%	5%
Any other regional or local paid-for paper (in print)	4%	3%	3%	6%	4%	5%	2%	6%	2%
Any other regional or local paid-for paper (digital)	2%	-	3%	3%	1%	3%	1%	2%	2%
None of these	7%	7%	5%	6%	3%	6%	12%	9%	14%

Culture market
Essence
Expression
Affirmation
Enrichment
Stimulation
Release
Perspective
Entertainment

WAIKATO
NEWSPAPER CONSUMPTION:

Region	%
stuff.co.nz	51%
The New Zealand Herald (online)	38%
Waikato Times (in print)	33%
The New Zealand Herald (in print)	30%
Herald on Sunday	11%
The Sunday Star Times	6%
The Sunday News	5%
National Business Review (online)	1%
The Otago Daily Times (online)	1%
National Business Review (in print)	0%
Any other regional or local free paper (in print)	53%
Any other regional or local free paper (digital)	13%
Any other regional or local paid-for paper (in print)	4%
Any other regional or local paid-for paper (digital)	3%
None of these	8%

BAY OF PLENTY
NEWSPAPER CONSUMPTION:

Region	%
stuff.co.nz	40%
The New Zealand Herald (online)	40%
Bay of Plenty Times	39%
The New Zealand Herald (in print)	28%
Herald on Sunday	16%
The Daily Post	11%
The Sunday Star Times	7%
The Sunday News	2%
National Business Review (online)	1%
National Business Review (in print)	1%
Any other regional or local free paper (in print)	43%
Any other regional or local free paper (digital)	20%
Any other regional or local paid-for paper (in print)	11%
Any other regional or local paid-for paper (digital)	6%
None of these	9%

GISBORNE
NEWSPAPER CONSUMPTION:

Region	%
Gisborne Herald	84%
stuff.co.nz	48%
The New Zealand Herald (online)	25%
The New Zealand Herald (in print)	14%
The Sunday News	11%
The Sunday Star Times	10%
Herald on Sunday	9%
Any other regional or local free paper (in print)	3%
Any other regional or local free paper (digital)	3%
Any other regional or local paid-for paper (in print)	1%
Any other regional or local paid-for paper (digital)	-
None of these	7%

HAWKE'S BAY
NEWSPAPER CONSUMPTION:

Region	%
Hawke's Bay Today	65%
stuff.co.nz	53%

The New Zealand Herald (online)	27%
The New Zealand Herald (in print)	14%
The Sunday Star Times	12%
Herald on Sunday	7%
National Business Review (online)	3%
The Sunday News	1%
Any other regional or local free paper (in print)	46%
Any other regional or local free paper (digital)	5%
Any other regional or local paid-for paper (in print)	8%
Any other regional or local paid-for paper (digital)	4%
None of these	11%

TARANAKI
NEWSPAPER CONSUMPTION:

Region	%
The Taranaki Daily News	84%
stuff.co.nz	48%
The New Zealand Herald (online)	18%
The Sunday Star Times	11%
The New Zealand Herald (in print)	8%
Herald on Sunday	6%
The Sunday News	2%
National Business Review (in print)	1%
National Business Review (online)	1%
The Otago Daily Times (online)	1%
Any other regional or local free paper (in print)	38%
Any other regional or local free paper (digital)	9%
Any other regional or local paid-for paper (in print)	4%
Any other regional or local paid-for paper (digital)	1%
None of these	6%

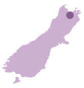
MANAWATU-WANGANUI
NEWSPAPER CONSUMPTION:

Region	%
stuff.co.nz	52%
Manawatu Standard	34%
Wanganui Chronicle	18%
The New Zealand Herald (online)	17%
The Sunday Star Times	8%
The New Zealand Herald (in print)	6%
Herald on Sunday	2%
The Otago Daily Times (online)	1%
National Business Review (in print)	1%
Daily Chronicle	1%
National Business Review (online)	0%
The Sunday News	0%
Any other regional or local free paper (in print)	45%
Any other regional or local free paper (digital)	8%
Any other regional or local paid-for paper (in print)	7%
Any other regional or local paid-for paper (digital)	5%
None of these	13%

WELLINGTON
NEWSPAPER CONSUMPTION:

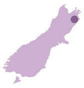
Region	%
stuff.co.nz	71%
The Dominion Post (in print)	53%
The New Zealand Herald (online)	21%
The Sunday Star Times	16%
The New Zealand Herald (in print)	11%
Wairarapa Times-Age	6%

Herald on Sunday	6%
The Sunday News	4%
The Otago Daily Times (online)	3%
National Business Review (online)	2%
National Business Review (in print)	1%
Any other regional or local free paper (in print)	42%
Any other regional or local free paper (digital)	11%
Any other regional or local paid-for paper (in print)	6%
Any other regional or local paid-for paper (digital)	7%
None of these	7%



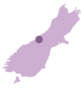
NELSON
NEWSPAPER CONSUMPTION:

Region	%
The Nelson Mail	69%
stuff.co.nz	57%
The New Zealand Herald (online)	14%
The Sunday Star Times	13%
National Business Review (online)	2%
The Sunday News	1%
National Business Review (in print)	1%
Any other regional or local free paper (in print)	39%
Any other regional or local free paper (digital)	7%
Any other regional or local paid-for paper (in print)	4%
Any other regional or local paid-for paper (digital)	3%
None of these	8%



MARLBOROUGH
NEWSPAPER CONSUMPTION:

Region	%
The Marlborough Express (in print)	61%
stuff.co.nz	54%
The New Zealand Herald (online)	14%
The Sunday Star Times	13%
The Sunday News	5%
The Otago Daily Times (online)	4%
National Business Review (online)	4%
National Business Review (in print)	2%
Any other regional or local free paper (in print)	65%
Any other regional or local free paper (digital)	13%
Any other regional or local paid-for paper (in print)	15%
Any other regional or local paid-for paper (digital)	7%
None of these	8%



WEST COAST
NEWSPAPER CONSUMPTION:

Region	%
stuff.co.nz	53%
Greymouth Star	51%
The New Zealand Herald (online)	9%
The Sunday Star Times	7%
The News	5%
The Sunday News	2%
National Business Review (in print)	1%
The Otago Daily Times (online)	1%
Any other regional or local free paper (in print)	38%
Any other regional or local free paper (digital)	4%

Any other regional or local paid-for paper (in print)	23%
Any other regional or local paid-for paper (digital)	0%
None of these	17%

CANTERBURY
NEWSPAPER CONSUMPTION:

Region	%
stuff.co.nz	65%
The Press (in print)	58%
The New Zealand Herald (online)	18%
The Sunday Star Times	11%
The Timaru Herald	8%
Ashburton Guardian	4%
The Sunday News	4%
The Otago Daily Times (online)	3%
National Business Review (in print)	2%
National Business Review (online)	2%
Oamaru Mail	1%
Any other regional or local free paper (in print)	37%
Any other regional or local free paper (digital)	8%
Any other regional or local paid-for paper (in print)	3%
Any other regional or local paid-for paper (digital)	4%
None of these	4%

OTAGO
NEWSPAPER CONSUMPTION:

Region	%
The Otago Daily Times (in print)	58%
stuff.co.nz	49%
The Otago Daily Times (online)	35%
The New Zealand Herald (online)	19%
The Sunday Star Times	10%
The Oamaru Mail	6%
The Sunday News	4%
National Business Review (online)	2%
National Business Review (in print)	1%
Any other regional or local free paper (in print)	44%
Any other regional or local free paper (digital)	7%
Any other regional or local paid-for paper (in print)	9%
Any other regional or local paid-for paper (digital)	5%
None of these	9%

SOUTHLAND
NEWSPAPER CONSUMPTION:

Region	%
The Southland Times	76%
stuff.co.nz	52%
The New Zealand Herald (online)	12%
The Sunday Star Times	10%
The Otago Daily Times (online)	9%
The Sunday News	2%
National Business Review (online)	2%
National Business Review (in print)	1%
Any other regional or local free paper (in print)	41%
Any other regional or local free paper (digital)	3%
Any other regional or local paid-for paper (in print)	2%
Any other regional or local paid-for paper (digital)	2%
None of these	10%

MAGAZINE CONSUMPTION BY CULTURE SEGMENT:

New Idea	8%	5%	12%	10%	6%	9%	7%	3%	**6%**
New Zealand Woman's Weekly	**13%**	10%	**20%**	**15%**	**14%**	**13%**	**7%**	**7%**	**8%**
The Listener	8%	**14%**	11%	5%	**11%**	10%	4%	6%	3%
Woman's Day	**14%**	**12%**	**21%**	**16%**	**11%**	**12%**	**11%**	**9%**	**12%**
Australian Women's Weekly	8%	6%	10%	10%	9%	7%	5%	5%	4%
Metro	4%	4%	8%	3%	1%	6%	4%	0%	1%
Mindfood	6%	8%	10%	7%	4%	6%	4%	1%	1%
Next	5%	5%	9%	7%	3%	4%	3%	1%	2%
North and South	7%	11%	10%	6%	4%	6%	3%	3%	4%
NZ House and Garden	**13%**	**13%**	**19%**	**13%**	10%	**14%**	**8%**	**9%**	4%
Other magazines	31%	33%	34%	29%	36%	32%	24%	35%	21%
None of these	49%	47%	40%	50%	43%	50%	65%	53%	62%

Culture market
Essence
Expression
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Entertainment

Magazines

Around half of the culture market reads magazines in a typical week, with the most popular magazine being *Woman's Day*, followed by the *NZ Woman's Weekly* and *NZ House and Garden*.

This pattern varies across Culture Segments. The segment most likely to read magazines in a typical week is Expression. Release is the least likely to read magazines.

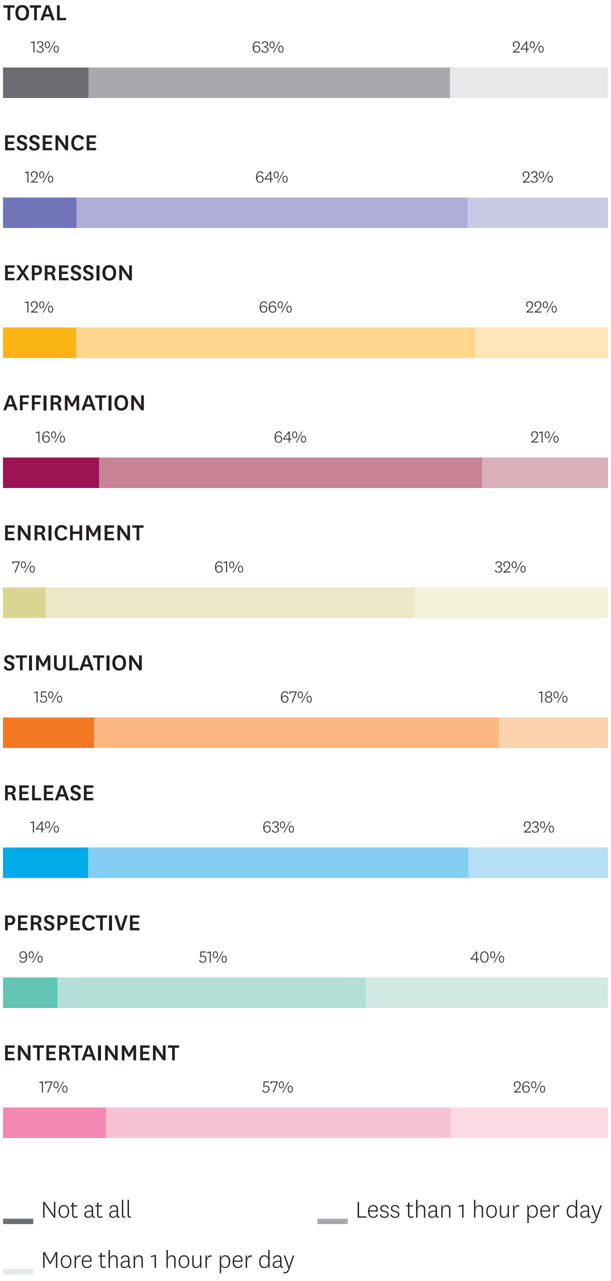
Woman's Day was the most-read magazine for many segments. Essence is more likely to read *The Listener*. Enrichment is more likely to read *New Zealand Woman's Weekly*. Stimulation is more likely to read *NZ House and Garden*.

Social media

Facebook

More than three-quarters of the culture market use Facebook in a typical week. Thirteen percent use it for more than an hour each day and 63% use it for less than an hour each day. Affirmation, Stimulation and Entertainment use Facebook more often than other Culture Segments. Enrichment and Perspective are least likely to be on Facebook at all.

HOW OFTEN DO YOU USE FACEBOOK IN A TYPICAL WEEK?



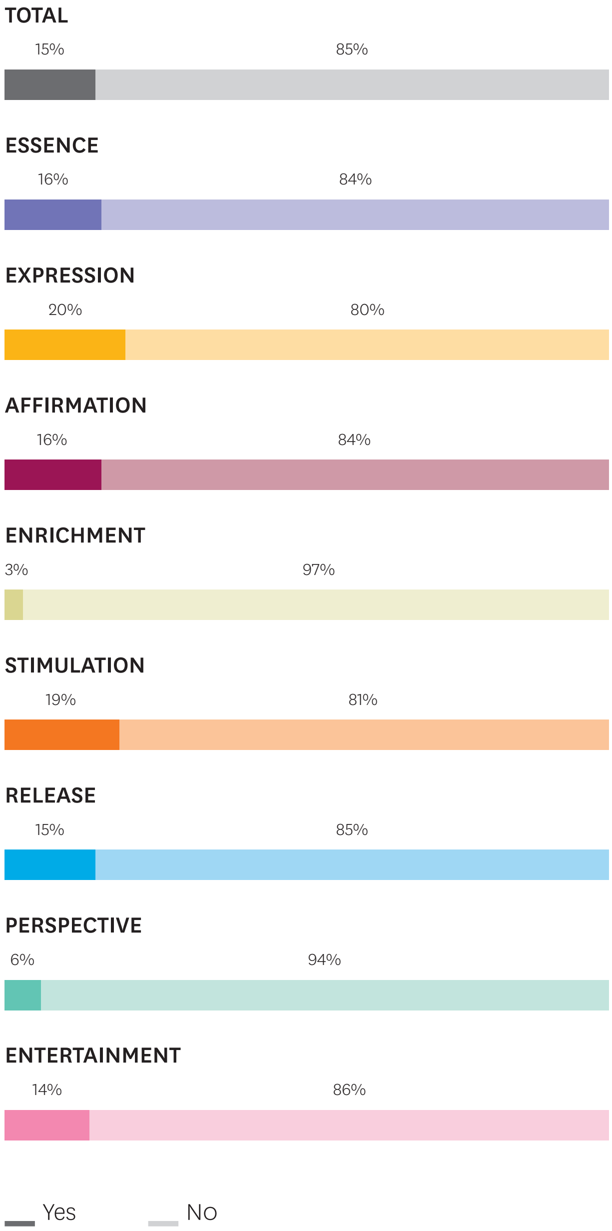
Base: (4008).

Twitter

Only 15% of the culture market use Twitter in a typical week, and only 1% use it more than one hour per day.

Expression and Stimulation are more likely to be regular users of Twitter. Enrichment and Perspective are the least likely.

DO YOU USE TWITTER IN A TYPICAL WEEK?

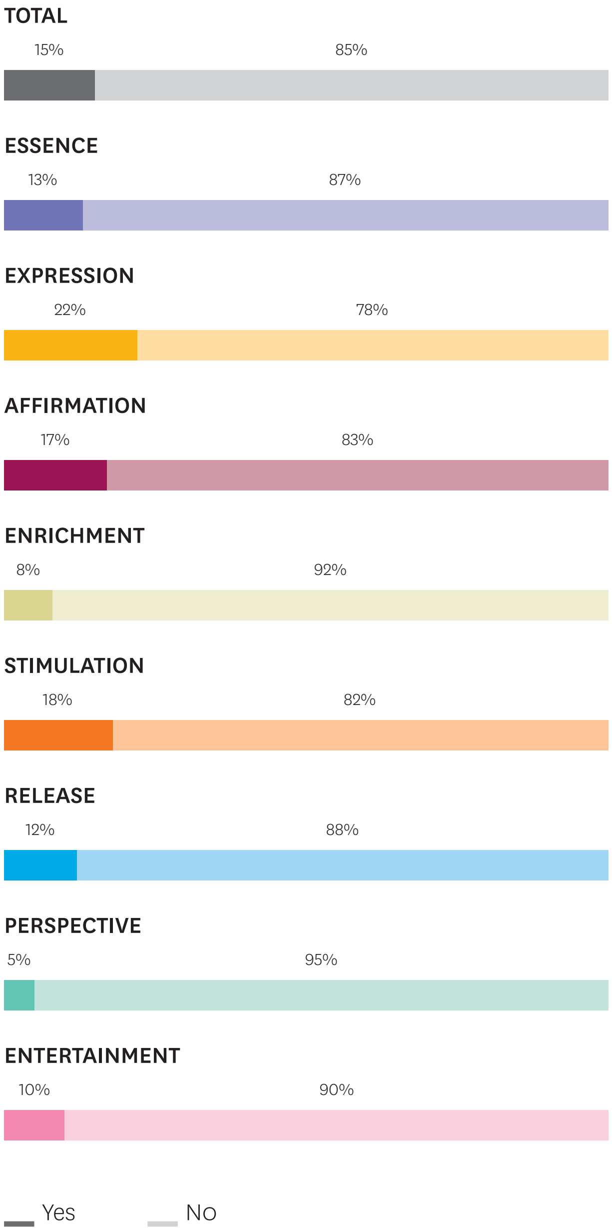


Base: (4008).

Instagram

Fifteen percent of the culture market use Instagram in a typical week. Expression, Stimulation and Affirmation are the most likely to use this platform.

DO YOU USE INSTAGRAM IN A TYPICAL WEEK?



Base: (4008).

Engaging with the arts online

The majority of the culture market is engaging with the arts online. This includes downloading or streaming music or video content, planning a visit and learning more about the arts in general.

Rather than replacing the in-person arts experience, experiencing the arts online increases the likelihood that people will seek out similar experiences offline.

Websites are important in hooking people in

More people are going online to plan and share their visit, highlighting the increasing importance of an organisation's website, not only in enticing potential visitors, but also in building deeper relationships.

PREPARING FOR A VISIT:

70%	have booked tickets online
67%	have gone online to acquire information in order to plan a visit
54%	visited a website before a visit to get more content (photos, videos, descriptions)
30%	have chosen an arts, cultural or heritage visit after reading a review online
25%	have downloaded content to enhance a visit

Base: (4008).

AFTER A VISIT:

60%	have visited a website following a cultural experience to find out more information

GENERAL ARTS BROWSING:

30%	have used an arts, cultural or heritage website to improve knowledge and understanding
20%	have made a 'virtual visit', engaging with interesting content online without visiting in person

Online platforms are generating word of mouth

Nearly a third of the culture market have chosen to make an arts, cultural or heritage visit after reading a review online. This highlights the importance of online platforms in spreading word of mouth and influencing attendance.

43%	have uploaded photos or videos of a visit
38%	have mentioned a visit on Facebook
21%	have reviewed or rated a visit online (eg on TripAdvisor)
20%	have 'checked in' during a visit
9%	have mentioned a visit to an arts, cultural or heritage venue in a blog
7%	have mentioned a visit on Twitter

Streaming and downloading

Stream or download music	54%	58%	59%	53%	34%	60%	61%	40%	48%
Use Spotify	18%	17%	22%	19%	10%	23%	16%	10%	12%
Use iTunes	32%	30%	35%	37%	20%	40%	28%	22%	26%
Use Soundcloud	8%	12%	12%	7%	1%	10%	8%	2%	5%
Stream or download podcasts	43%	48%	50%	44%	30%	45%	45%	30%	31%
Stream or download video content	55%	57%	59%	57%	41%	58%	59%	43%	50%
Use YouTube	59%	66%	60%	61%	47%	63%	55%	46%	61%
Use Vimeo	10%	12%	11%	10%	3%	14%	10%	4%	5%

Culture market
Essence
Expression
Affirmation
Enrichment
Stimulation
Release
Perspective
Entertainment

Around half of the culture market stream or download content of some form (eg music, podcasts or video content) in a typical week. However, in the past year, only 28% of the culture market has downloaded content by New Zealand artists, the most common form being popular music and video content.

Downloaded New Zealand content	28%	36%	31%	30%	19%	32%	22%	18%	20%
Classical music	8%	5%	12%	9%	5%	12%	-	9%	2%
Contemporary popular music	82%	80%	82%	83%	81%	85%	86%	86%	73%
Other audio recording eg spoken word	5%	7%	5%	4%	5%	2%	7%	15%	4%
Video content	20%	27%	25%	15%	16%	16%	17%	15%	18%
Visual art	8%	17%	10%	5%	6%	7%	5%	4%	-
Other	9%	7%	5%	9%	11%	12%	11%	4%	21%

Culture market
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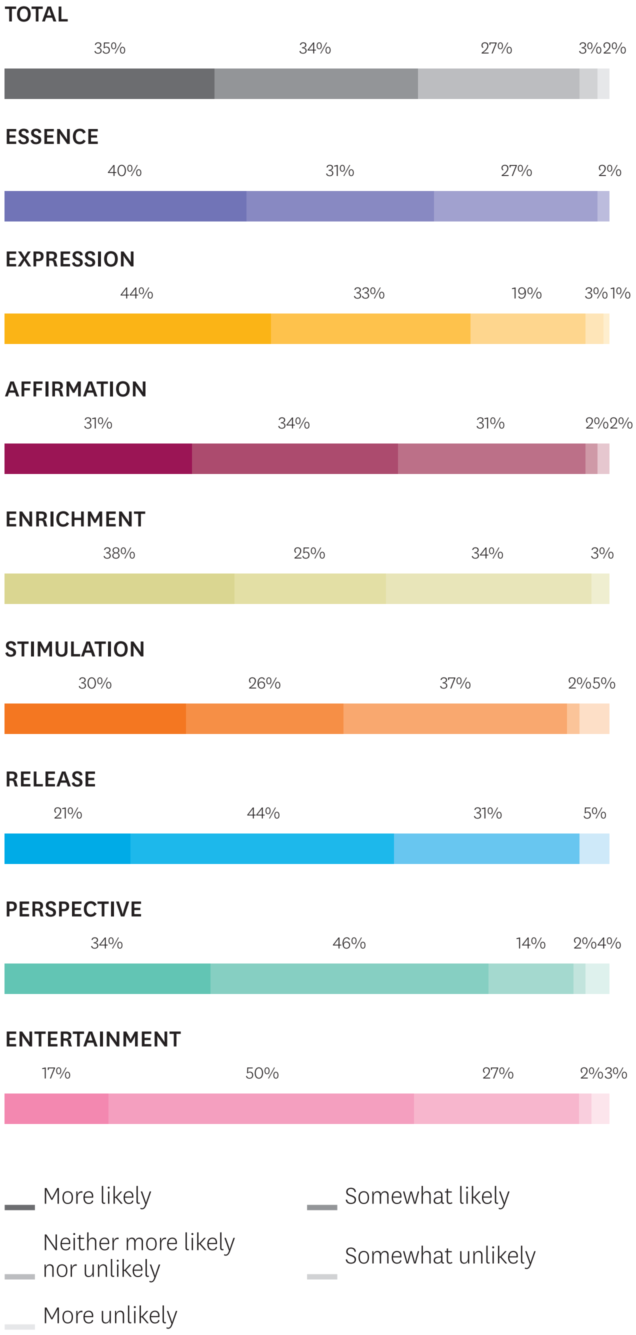
People who had downloaded New Zealand content are more likely to download more by the same artist as well as attend a show by the artist.

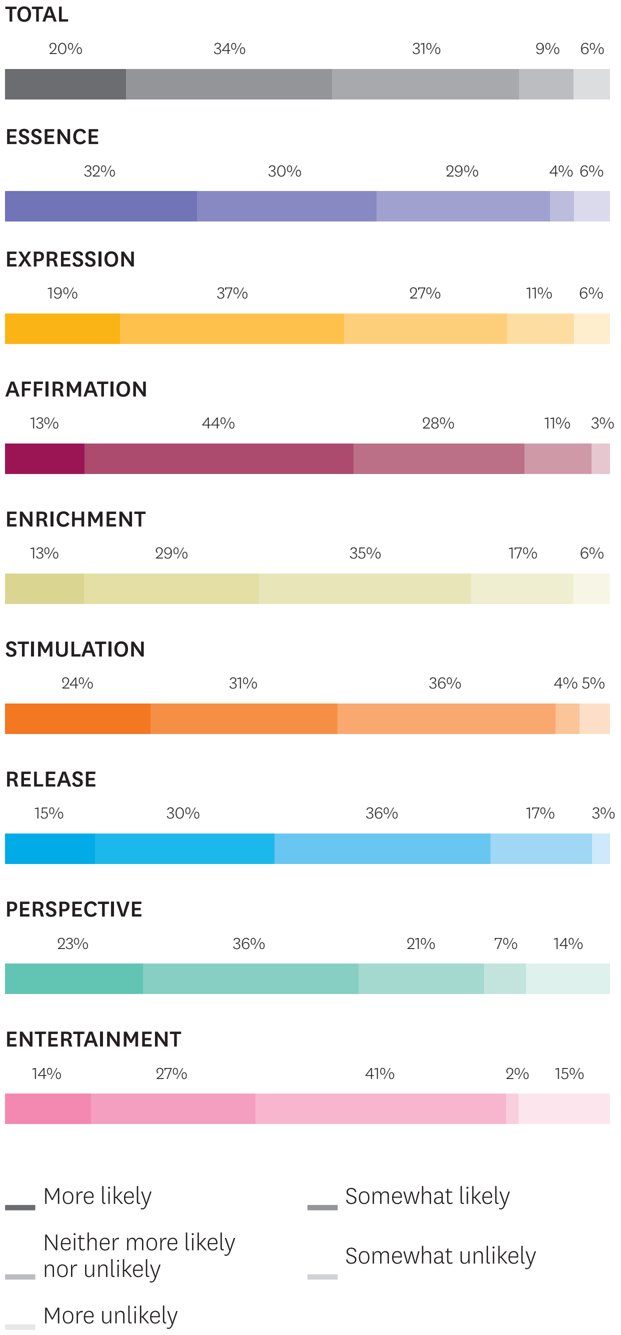
Likelihood of downloading more work by the artist and attending a show in person by Culture Segment.

LIKELIHOOD OF DOWNLOADING MORE BY THE SAME ARTIST FOR FREE:



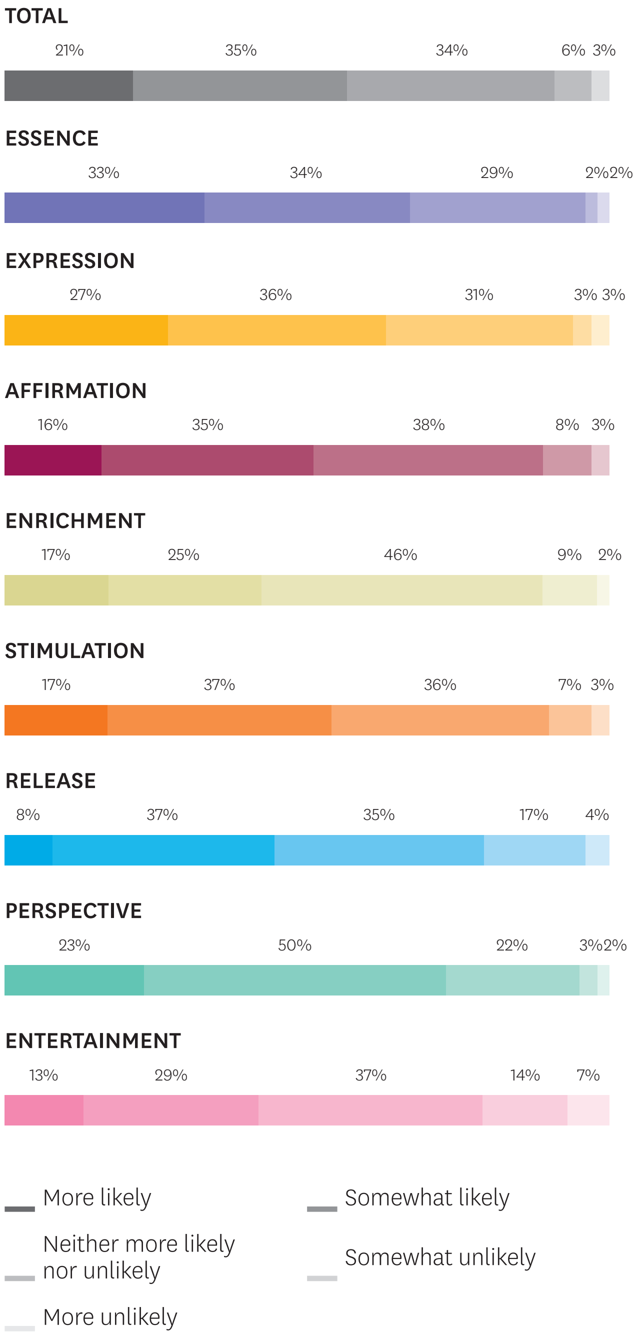
Base: (1050).

LIKELIHOOD OF DOWNLOADING PAID CONTENT BY THE SAME ARTIST:



Base: (1050).

LIKELIHOOD OF ATTENDING A SHOW BY THE ARTIST AFTER DOWNLOADING THEIR WORK:



Base: (1050).

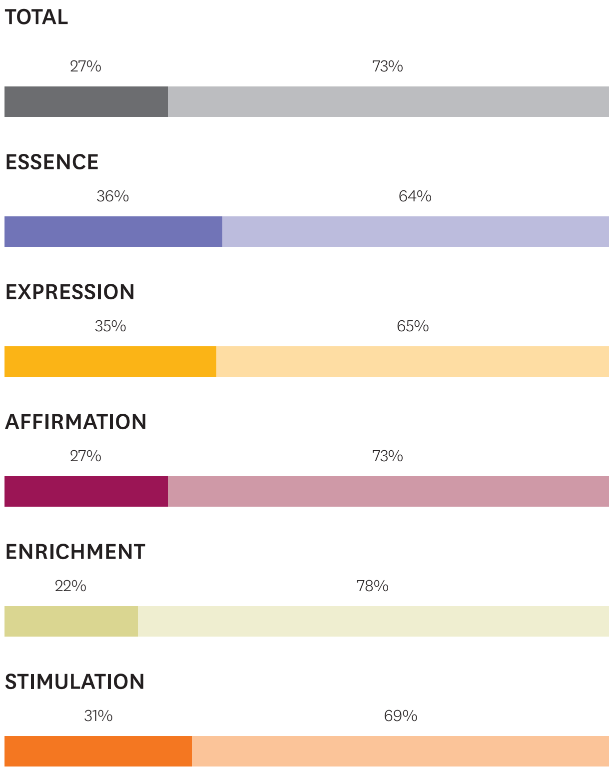
Recorded or live-streamed arts events

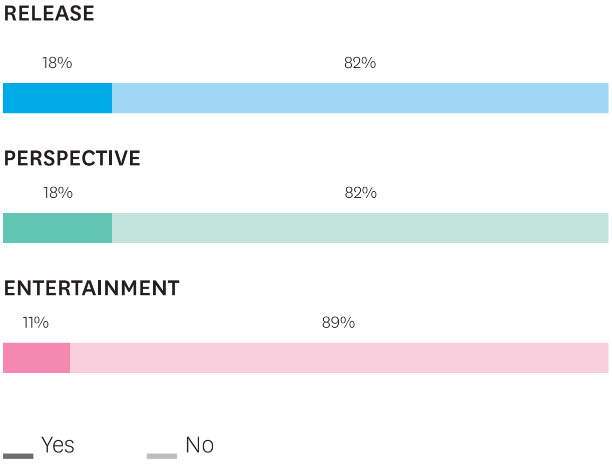
More than a quarter of the culture market have watched a recording or a live-stream of an arts, cultural or heritage event, either online or at a venue different to the one where it was recorded.

27% of the New Zealand culture market have watched a live-stream or recording of an arts, cultural or heritage event

Of those who hadn't previously watched a live-streamed or recorded arts event, 42% said they would consider doing so, indicating the potential growth of this medium.

PROPORTION WHO HAVE WATCHED A RECORDING OR A LIVE-STREAM OF AN ARTS, CULTURAL OR HERITAGE EVENT (EITHER ONLINE OR AT A VENUE DIFFERENT TO THE ONE WHERE IT WAS RECORDED):





Base: (1050).

The main reason people watch recorded or live-streamed arts events is because they are unable to attend. This is either because the event is too far away or because they have other commitments.

Perspective is more likely than other segments to watch recorded events because they didn't know the event was on in time to attend. Enrichment is more likely than other segments to prefer watching a live-stream or recording instead of attending in person.

REASON PEOPLE WATCH RECORDED OR LIVE-STREAMED ARTS EVENTS:

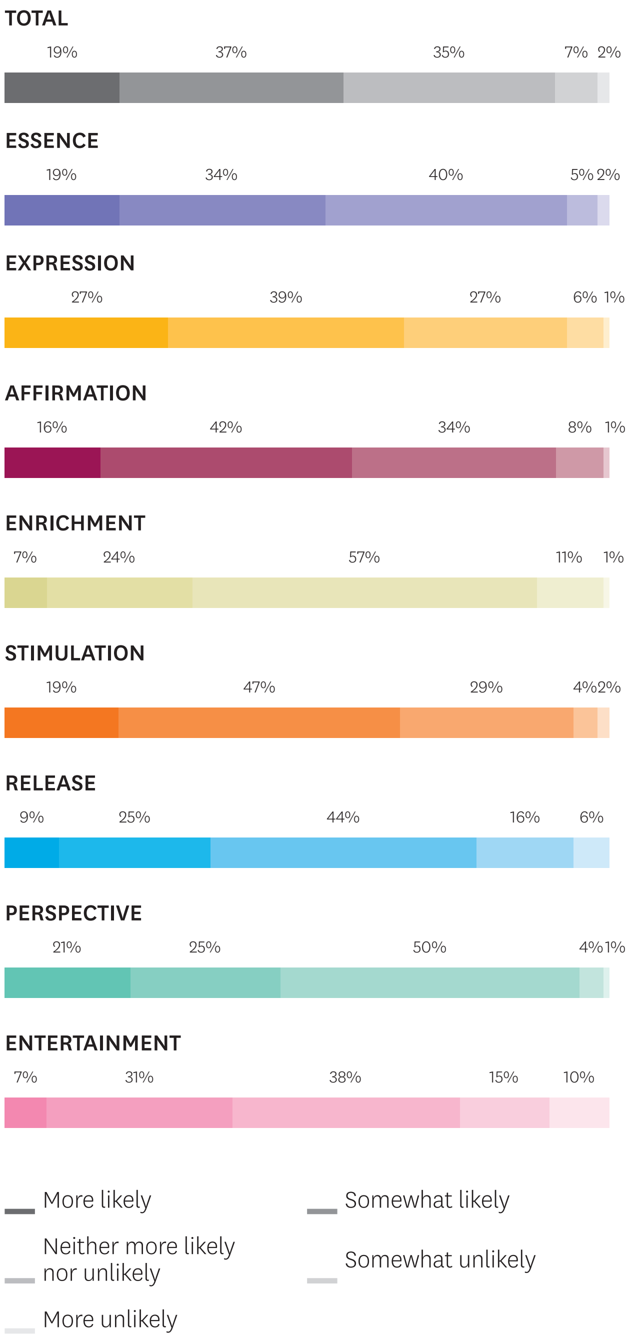
I was unable to attend the event in person due to other commitments	**39%**	**38%**	**43%**	**31%**	19%	**55%**	**41%**	**28%**	**28%**
I was unable to attend the event in person because it was too far away	**44%**	**61%**	**40%**	**33%**	**42%**	**46%**	**55%**	**32%**	**39%**
I didn't want to purchase a ticket/couldn't afford a ticket	**22%**	**30%**	21%	**24%**	19%	14%	**22%**	19%	**28%**
I didn't know the event was on in time to attend	20%	20%	**22%**	17%	19%	**21%**	11%	**33%**	10%
I preferred this to attending in person	10%	10%	11%	6%	**19%**	8%	14%	12%	13%
I attended in person but wanted to watch it again	10%	12%	16%	5%	4%	6%	6%	10%	6%
Other	14%	15%	12%	15%	29%	13%	6%	12%	13%

Culture market
Essence
Expression
Affirmation
Enrichment
Stimulation
Release
Perspective
Entertainment

A key finding is the correlation between watching live-steamed or recorded events and attendance in person. **People are more likely to attend in person as a result of watching a live-streamed or recorded arts event.**

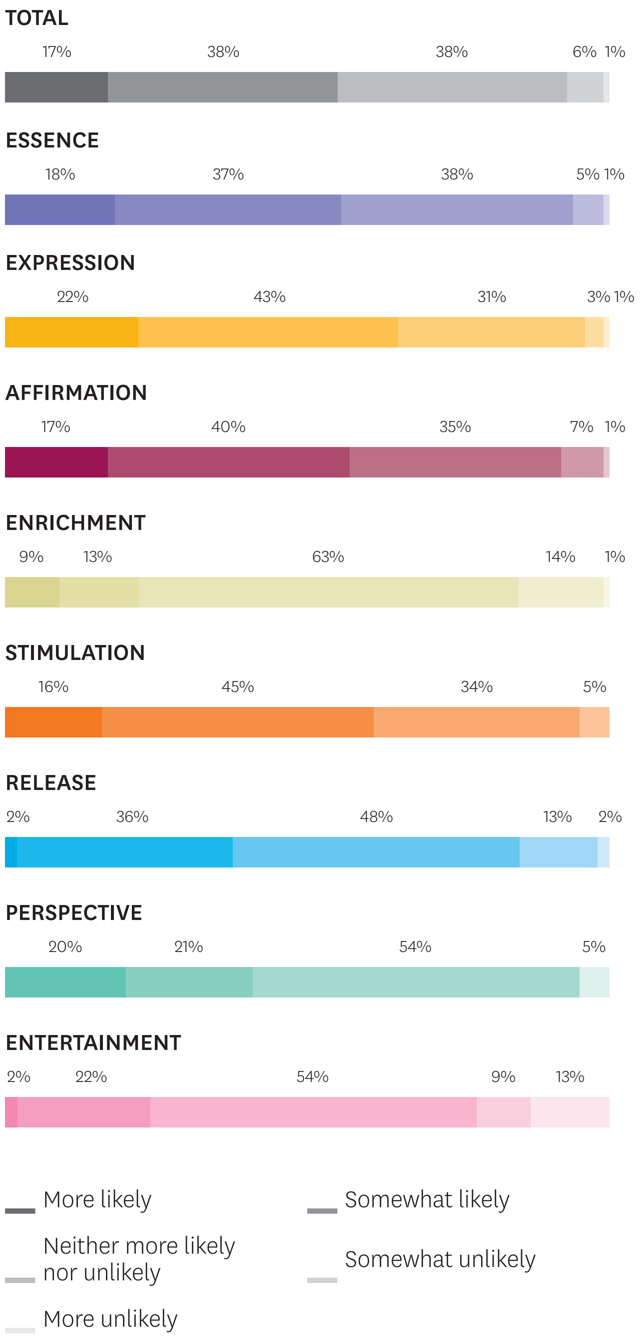
After watching a live-streamed or recorded arts event, 56% of the culture market is more likely to attend one of the company's shows in person. This, again, presents a real opportunity for arts organisations to encourage audience engagement. It is particularly true of Expression and Stimulation, and less so for Enrichment and Release.

LIKELIHOOD OF ATTENDING ONE OF THE COMPANY'S SHOWS IN PERSON AFTER WATCHING ONE OF ITS LIVE-STREAMED OR RECORDED EVENTS:



People are also more likely to attend a show within the same artform as a result of having watched a live-stream or recording of an event. This suggests this may act as a gateway experience to attendance. Expression and Stimulation are especially likely to attend a show of the same artform after seeing a live-streamed or recorded event. This is less true for Entertainment and Enrichment.

LIKELIHOOD OF ATTENDING A SHOW OF THE SAME ARTFORM IN PERSON AFTER WATCHING A LIVE-STREAMED OR RECORDED EVENT:



Online collections

Just over a fifth of the culture market have browsed a gallery or museum collection online. Of those who haven't previously done so, 47% would consider doing so in the future. Given the size of the visual arts and museum markets, there is room for this type of experience to grow exponentially, as long as organisations are able to support the interest.

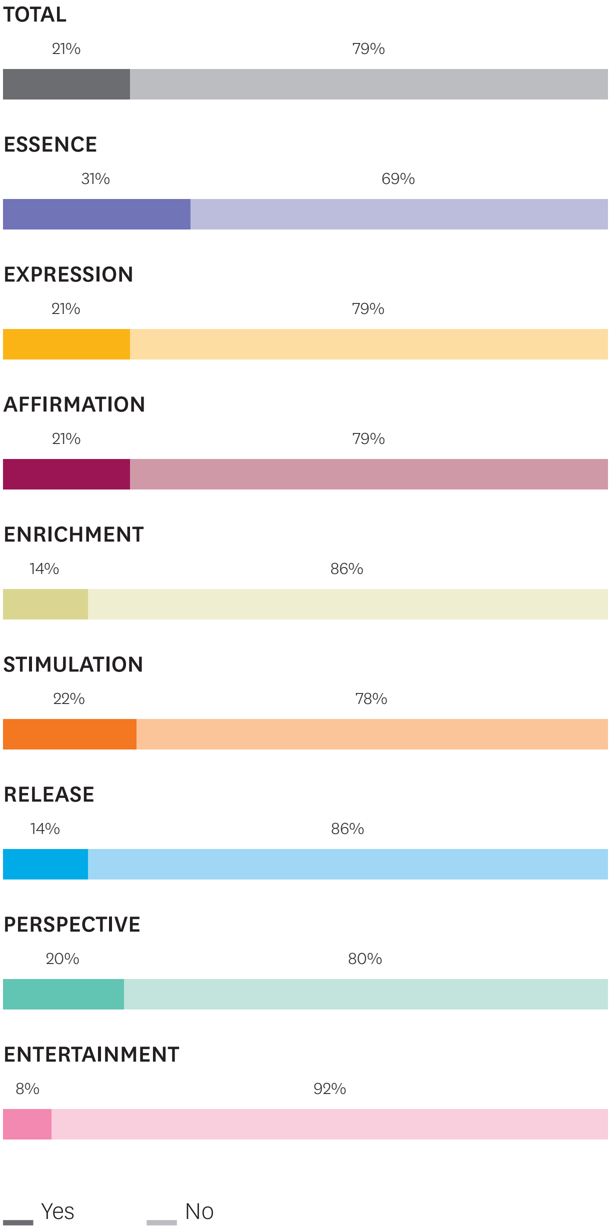
21% of the New Zealand culture market have browsed a museum or gallery collection online

Essence is most likely to have browsed a gallery or museum collection online, and is also most likely to consider doing so in the future (58% of those who haven't yet would consider this). Entertainment is least likely (only 8% have browsed a museum or gallery collection online and of those who haven't, only 18% would consider this in the future).

The most common reason people browse a gallery or museum collection online is to plan a visit to the gallery in person.

Entertainment was significantly more likely than other segments to use this opportunity as a replacement for an in-venue experience. A quarter of this Culture Segment prefers browsing online to attending in person. For the more active Culture Segments, Essence, Expression, Affirmation and Stimulation, planning a trip was the primary reason for engaging in this experience, or being unable to attend the gallery in person.

PROPORTION WHO HAVE BROWSED A GALLERY OR MUSEUM COLLECTION ONLINE:



REASON PEOPLE BROWSE A GALLERY OR MUSEUM COLLECTION ONLINE:

To plan a visit to the gallery	**49%**	**53%**	**53%**	**50%**	**41%**	**58%**	**32%**	**37%**	**24%**
I was unable to attend the exhibition or gallery in person	**40%**	**51%**	**40%**	**43%**	**28%**	**41%**	**39%**	**22%**	**16%**
I didn't want to purchase a ticket/couldn't afford a ticket to the gallery or exhibition	9%	9%	14%	6%	8%	7%	**10%**	4%	10%
I preferred this to attending in person	9%	5%	12%	6%	10%	9%	8%	**17%**	**25%**
I attended in person but wanted to browse the collection again	**14%**	**21%**	**13%**	**9%**	**14%**	**15%**	5%	16%	3%
Other	13%	9%	10%	10%	18%	11%	24%	22%	46%

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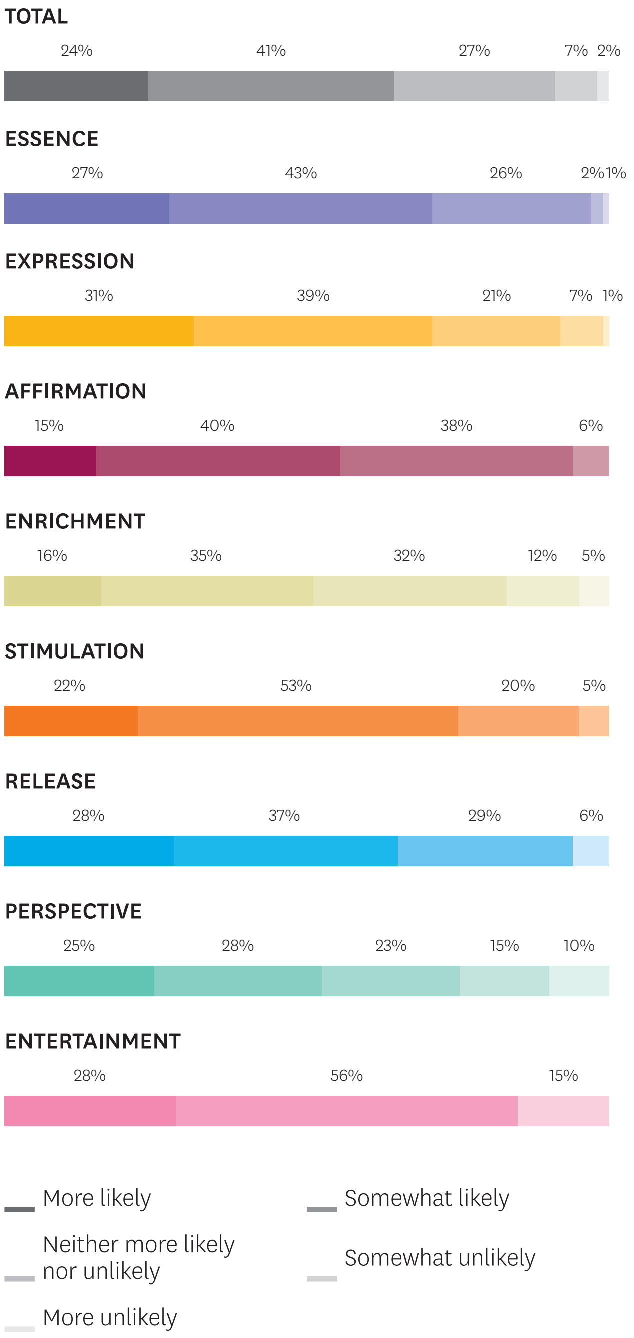
Stimulation
Release
Perspective
Entertainment

People are more likely to visit a gallery or museum after seeing a collection online

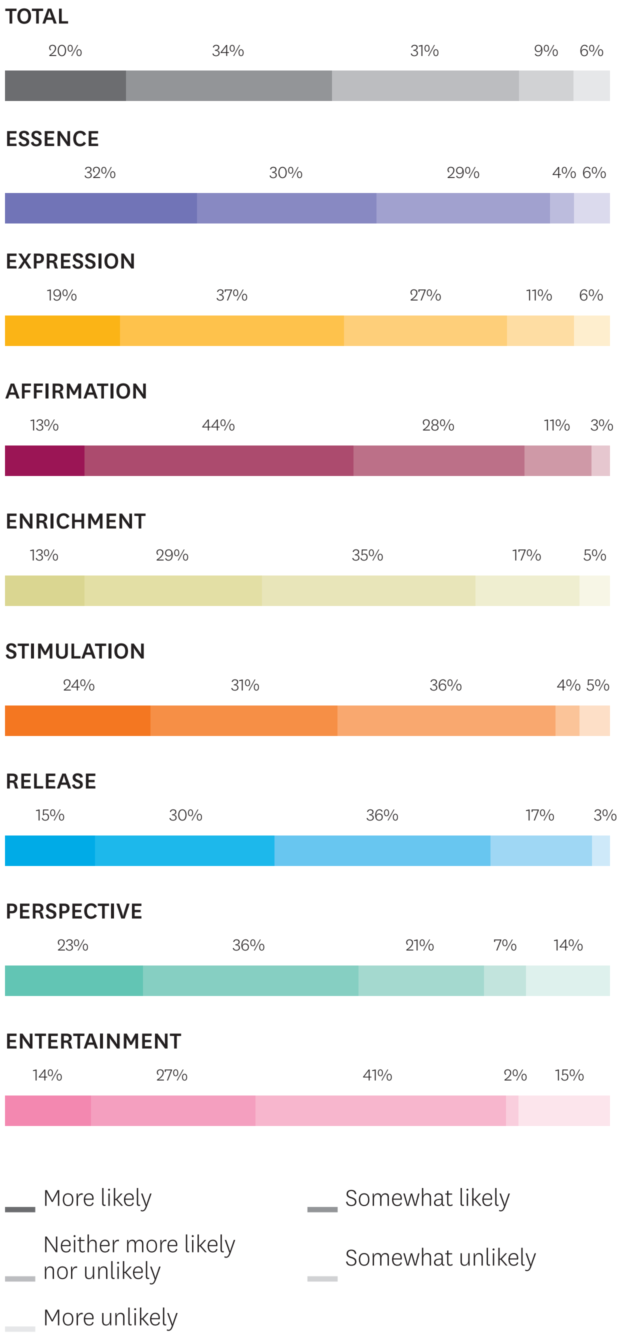
As a result of browsing a collection online, people are not only more likely to visit the gallery or museum in person, they are more likely to visit a different gallery or museum exhibiting similar art to the content they saw online.

This is especially true of the more culturally active Essence, Expression and Stimulation. It is less true of Entertainment, who is more likely to use online browsing as a replacement for in-person experience.

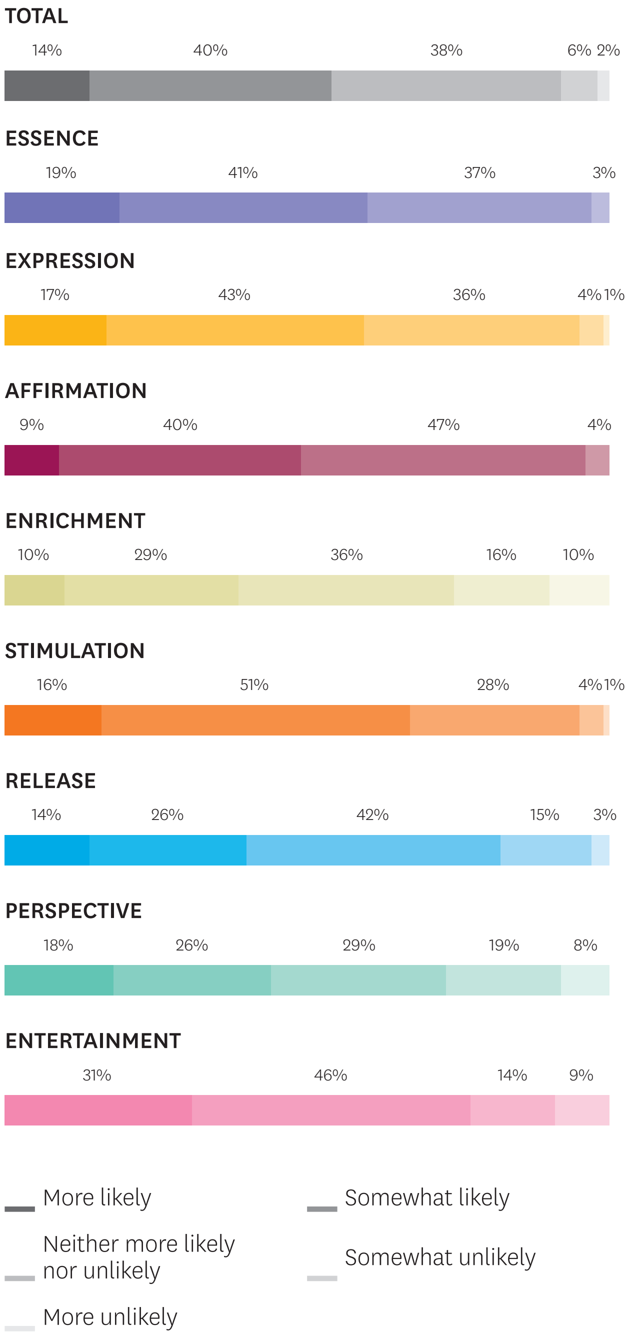
LIKELIHOOD OF ATTENDING A GALLERY OR MUSEUM IN PERSON AFTER BROWSING ITS COLLECTION ONLINE:



LIKELIHOOD OF VISITING A DIFFERENT GALLERY EXHIBITING AN ARTIST THAT HAS BEEN SEEN ONLINE WHILE BROWSING:



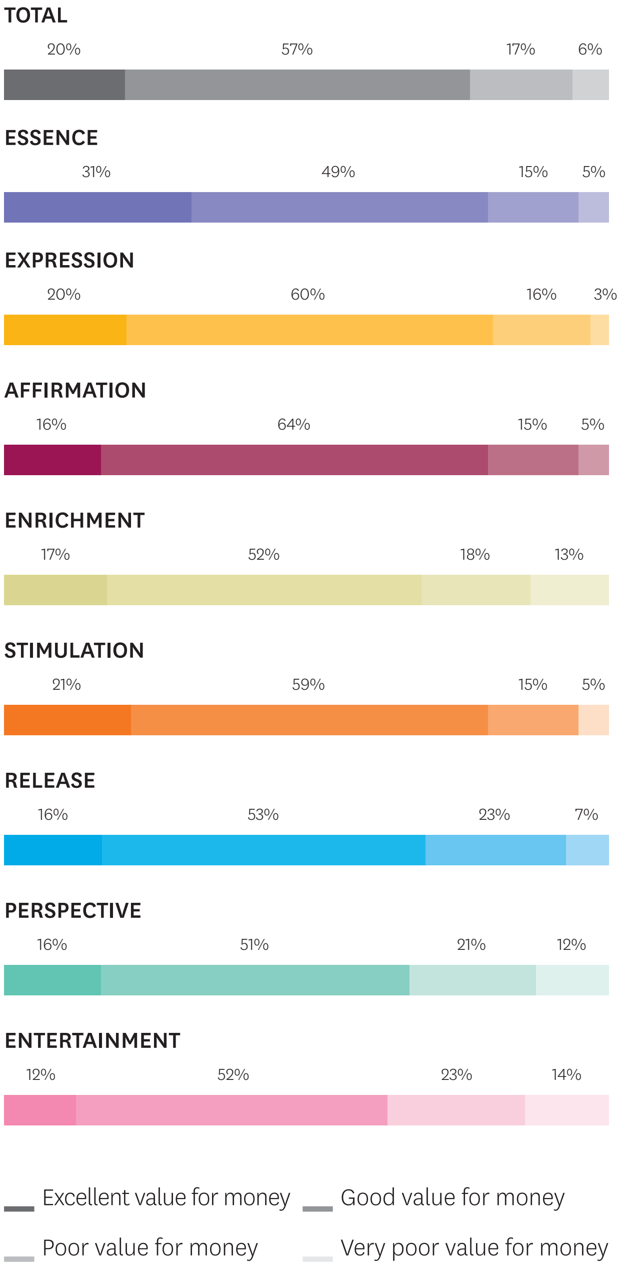
LIKELIHOOD OF ATTENDING A GALLERY OR MUSEUM IN PERSON AFTER BROWSING A SIMILAR COLLECTION ONLINE:



Funding

Creative New Zealand spent $50.5 million on opportunities for New Zealanders to experience the arts in 2013, including funding for artists and arts organisations. With 3.4 million adults in New Zealand, this represents an average of almost $15 per adult per year.

Twenty percent of the culture market considered this excellent value for money. A further 57% considered it good value for money.



The way forward

Audience Atlas New Zealand 2014 shows an even higher level of public engagement with arts and culture within New Zealand than in 2011, with only 2% not in the arts and cultural market.

However, support for some activities in the arts has decreased over the past three years, with people spending less on arts and cultural activities, and also volunteering and donating less.

This may seem at odds with the finding that more people are engaged with the arts than three years ago. While more people are experiencing arts and culture, on average they are doing so with less frequency, and spending less when they do. These findings point to a significant opportunity for arts organisations to focus on infrequent attenders in order to stimulate greater engagement.

The research also sheds new light on ways we may encourage donating behaviour. For instance, there's significant potential in offering donation add-ons when purchasing a ticket, with most New Zealanders likely to donate through a ticket add-on.

The popularity of fundraising efforts that focus on one-off donations, such as crowdfunding websites or fundraising drives, highlights the appeal of developing clearly associated outcomes with donations.

The majority of the arts and cultural market are engaging with the arts online. This includes downloading or streaming music or video content, planning a visit and learning more about the arts in general.

Rather than replacing the in-person arts experience, experiencing the arts online increases the likelihood that people will seek out similar experiences offline. This represents another key opportunity for arts organisations to cultivate attendance in person by offering similar online offerings which are often considered 'lower risk'.

Unsurprisingly, word of mouth remains the most popular way for people to find out about arts and cultural events. Given the proportion of people using social media (Twitter, Facebook and Instagram) to share their experiences, read reviews and talk about a visit, this has immense power in attracting and retaining audiences when harnessed effectively.

People are also going online to find out more information about an organisation, which highlights the importance of having a strong digital presence – not only in terms of programming information but to enhance people's relationship with the organisation.

Looking forward, the challenge for the sector is to use the findings to unlock the potential audience and increase engagement with the arts. Culture Segments and Levels of Engagement are fast becoming a common language for the sector and many organisations are using these frameworks as a way to release the potential within the market, by widening the audience and deepening engagement in the arts. This, in turn, will result in increased support for the sector.

Encouragingly, organisations are starting to realise the benefits of greater insight into their audiences. However, it requires continual effort and 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) if this momentum is to continue.

Appendix A: How did we do the research?

Data collection

Data was collected between 1 October and 16 November 2014. People recruited by Colmar Brunton responded to an online questionnaire so results could be compared to the 2011 results.

The sample source for the survey was Colmar Brunton's Fly Buys research panel. As New Zealand's largest multi-partner loyalty programme Fly Buys has a consumer database of over 2.2 million New Zealanders, covering 1.1 million New Zealand households (80% of 18+ year old population). Currently about 200,000 Fly Buys members aged 18 years old and over have agreed to take part in Colmar Brunton research in exchange for Fly Buys points.

In order to achieve sufficient interviews with New Zealanders aged 15 to 17, we targeted households on the panel who had school-aged children at home and asked parents if they had any children aged 15-17 living in the home. If so we asked parents' permission for the 15 to 17 year old with the next birthday to take part in the survey.

Sample size

The survey collected 4041 responses.

Respondents were screened out if they were under the age of 16 or if they were unable to identify which region they lived in.

A disproportionate regional sampling scheme was implemented (outlined to the right) to ensure robust results at regional-level analyses. This quota imbalance was corrected post-collection, with weighting methods applied so that the final sample matched the demographic breakdown of the New Zealand population as per the 2013 Census.

QUOTA FOR COLLECTION IN THE 2014 AUDIENCE ATLAS:

	INTERVIEWS PER REGION
Northland	150
Rodney/North Shore	250
Waitakere	250
Auckland City	250
Manukau/Papakura/Franklin	250
(TOTAL Auckland)	(1000)
Canterbury	400
Wellington	400
Waikato	250
Bay Of Plenty	200
Manawatu-Wanganui	200
Otago	200
Hawke's Bay	150
Taranaki	150
Southland	150
Gisborne	150
Tasman	150
Nelson	150
Marlborough	150
West Coast	150
Overall	4,000

Minimum sample quotas were also implemented on ethnic groups (specifically, Māori, Pacific and Asian peoples) to ensure reliable analysis within specific ethnic groups.

Weighting procedure

Responses were weighted according to age, gender, ethnicity and region in order for the sample to be representative of the population of New Zealand based on Census data.

Cultural spend calculations

Spend calculations include the amount people spent on tickets to arts, cultural or heritage events, food or drink or souvenirs purchased at those events. The figures presented in the report are for a four-week period.

To calculate the total amount spent in an average four-week period, we multiplied the overall average spend by the number of people in the cultural market, accounting for those in the population who hadn't spent any money on cultural activity in that particular period.

To calculate the total yearly spend, we multiplied the average four-weekly spend by 13 (to reach 52 weeks).

Appendix B: Defining the arts and culture market

The artforms included in *Audience Atlas New Zealand 2014* are:

Museum

Art gallery or art exhibition

Craft or object art exhibition

Digital or video art event

Any film at a cinema or other venue

Any film shown as part of a film festival

New Zealand film at a cinema (not including *The Hobbit*)

New Zealand film shown as part of a film festival

Māori performance or kapa haka

Māori cultural festival

Māori arts exhibition

Another kind of Māori arts, cultural event, or celebration

Pacific performance

Pacific cultural festival

Pacific arts exhibition

Another kind of Pacific arts, cultural event or celebration

Asian cultural festival (eg Diwali or Lantern festival)

Play or drama

Musical theatre

Comedy

Pantomime

Another kind of theatre event

Contemporary dance

Ballet

Cabaret or burlesque

Circus

Another kind of dance event

Street performance

Literary event as part of a festival

Other event connected with poetry

Other event connected with books

Other literature event

Classical concert (eg orchestra, chamber music)

Opera or operetta

Choral concert

Contemporary classical, electronic music or sound art event

Rock or pop concert

Rock or pop music festival (eg Rhythm & Vines, Laneway)

Other music festival

Jazz or blues concert

Country or folk music concert

Hip hop concert

Another kind of live music event

Want to know more?

New Zealanders and the arts: Attitudes, attendance and participation in 2014

Did you know the vast majority of New Zealanders are incredibly positive about the arts and in 2014 we experienced record levels of engagement in the arts? Did you also know that 85% of New Zealanders think the arts are of high quality?

You can learn more in Creative New Zealand's tri-annual New Zealanders and the Arts survey which measures the attendance, participation and attitudes towards the arts of:

- New Zealanders (15 year olds and over)
- young New Zealanders (10 to 14 year olds).

This three-yearly research began in 2005 and was repeated in 2008, 2011 and 2014. It delivers on-going information to the arts sector about New Zealanders' level of involvement in, and attitudes towards, the arts and can be used to advocate for the value and contribution the arts makes to the people of New Zealand.

As part of our role as an arts-development agency, Creative New Zealand commissions research that adds value and provides insight for the arts sector.

For more detailed findings from the research projects, please visit:

www.creativenz.govt.nz/research

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Creative New Zealand is the national arts development agency developing, investing in and advocating for the arts.

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