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MEASURING AND ARTICULATING THE VALUE OF LIVE PERFORMANCE IN AOTEAROA

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Ehara taku toa i te toa takitahi, engari he toa takitini.

My strength is not that of one, but of many.

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Over the eighteen months of this mahi we worked with a large number of data collection teams, led by Regional Data Leads, who facilitated surveying of audiences at live performances across the motu. These are as follows:

REGIONAL DATA LEADS

Laurel Devenie, Pauline Stephinson, Correna Davies, Jess Covell, Giles Burton, Andre Manella, Jen Treacy, Andrew Ross, Jazmine Phillips, Juliet McLean, and Michelle Dodd.

We want to give a special acknowledgment to Connie Matoe who partnered with us on the Ōtautahi arm of this project, who sadly passed earlier this year. We send all of our aroha to Connie's friends and whānau. Moe mai rā i ngā ringaringa o ōu matua tīpuna, e te māreikura.

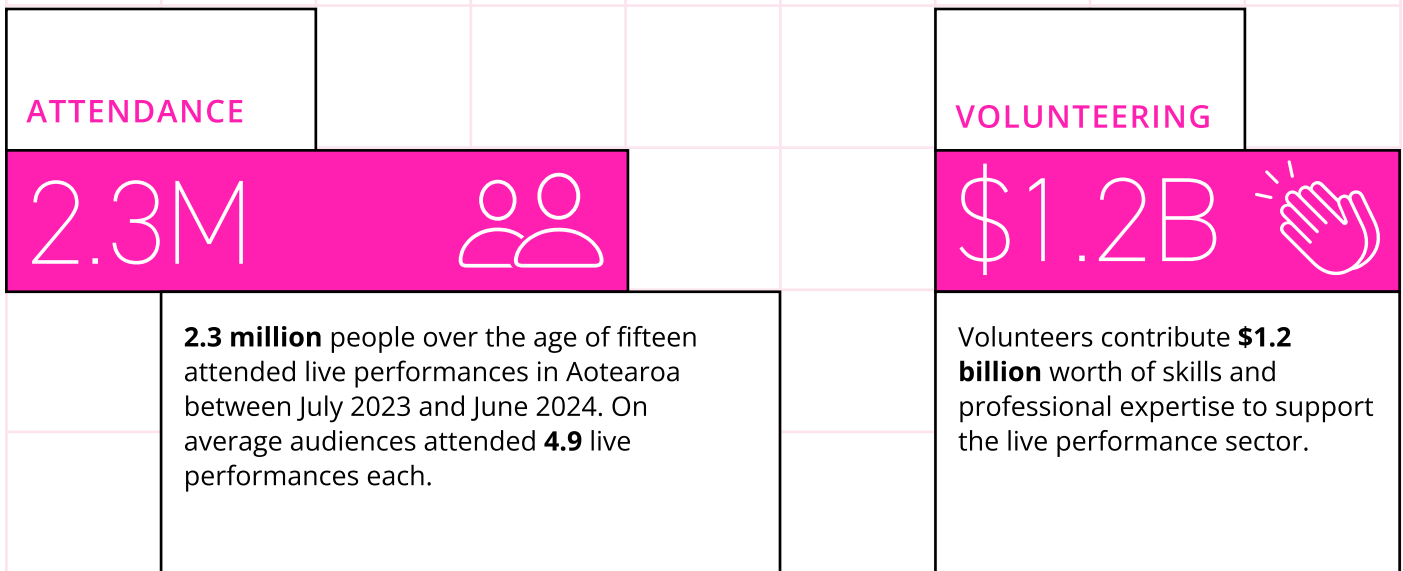
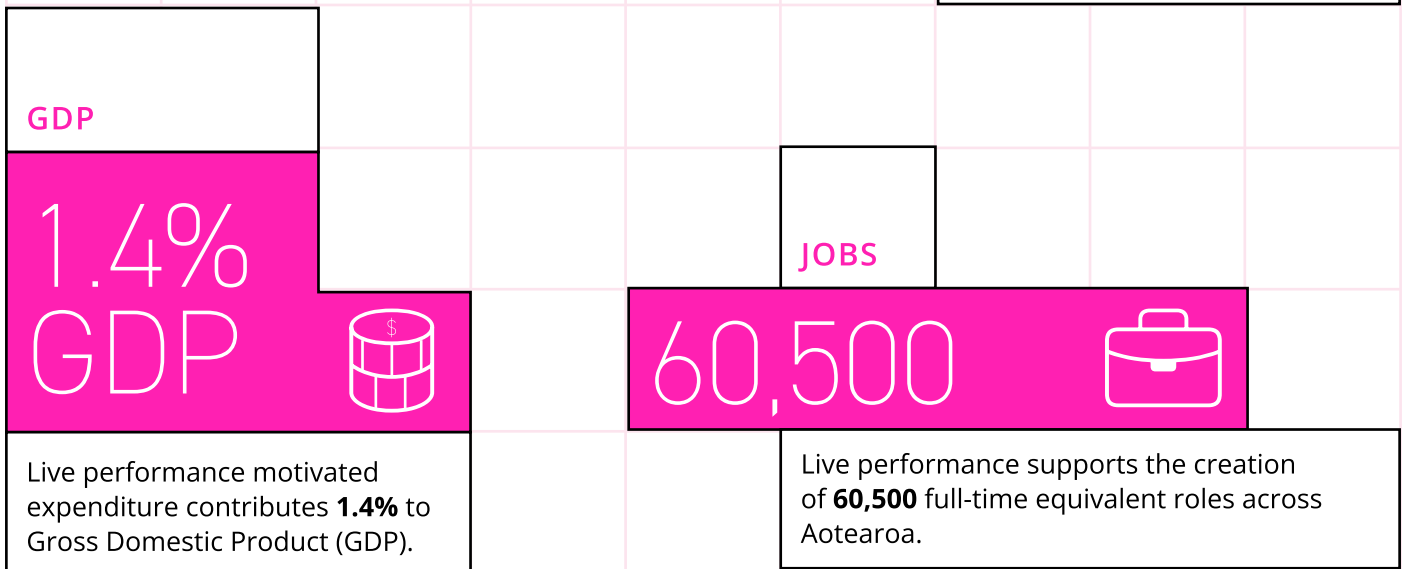
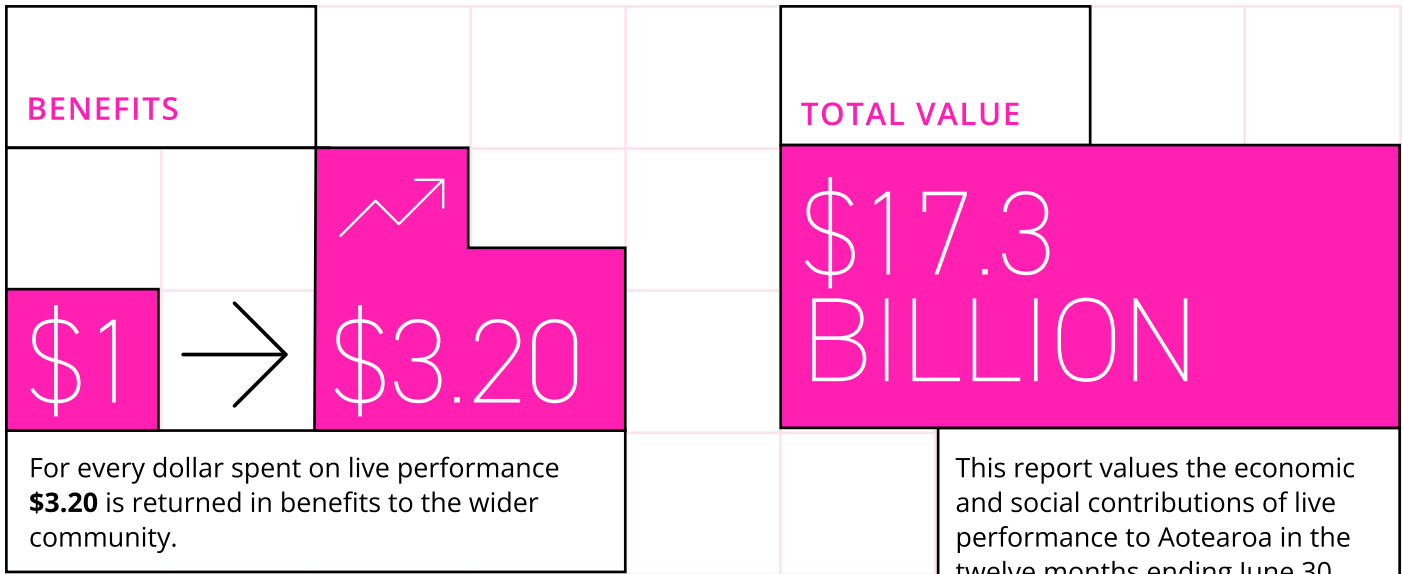
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Mike Wood	Clark Shanholtzer	Tammy Savage	

Finally, to everyone who completed a survey for this research — ngā mihi nunui ki a koutou katoa. This mahi would not have been possible without you.

EXECUTIVE SUMMARY

LIVE PERFORMANCE
CONTRIBUTES SIGNIFICANT
ECONOMIC, SOCIAL, AND
WELLBEING BENEFITS TO
AOTEAROA.



<p>MOTIVATIONS</p>	<p>ENJOYMENT CONNECTION INSPIRED </p>	<p>WELLBEING</p>	<p>IMMEDIATE & LASTING BOOST </p>
<p>Audiences are motivated to attend live performance for enjoyment, social connection and to be inspired.</p>	<p>Attending live performances provides an immediate boost to life satisfaction and contributes to a lasting improvement in overall wellbeing.</p>		
<p>MAIN BARRIER</p>		<p>OTHER BARRIERS</p>	<p>DISABILITIES ↓ 32.4%</p>
<p>Cost is the main barrier to people attending more live performances.</p>	<p>Disabled people are 32.4% less likely to report attending live performances than non-disabled people.</p>	<p>AGE ↓ 1.0%</p>	<p>As people age, their likelihood of attending decreases by approximately 1.0% each year.</p>
	<p>LOCATION ↓ 9.7%</p>	<p>People in regional locations are 9.7% less likely to attend live performances than those in urban centres.</p>	

Our analysis values the sum of social and economic benefits enabled by live performance in Aotearoa at \$17.3 billion in the twelve months ending June 30, 2024.

During this period live performance motivated expenditure contributed 1.4% to Gross Domestic Product (GDP) and generated \$209 million in tax revenue. For every dollar invested by the community, \$3.20 was returned in value (benefit: cost ratio = 3.2:1).

In addition to this significant return on investment, live performance supported the creation of 60,500 full-time equivalent jobs over the same period:

- 25,000 jobs were directly created in the live performance sector
- Another 12,000 jobs were directly created in other sectors
- 13,000 jobs were indirectly created in industries that supply goods and services to the sectors impacted by live performances
- 10,500 jobs were created by the spending of income earned by workers in both the direct and indirect jobs.

Beyond these economic benefits, live performance contributes significant social and wellbeing benefits to audiences and the wider community.

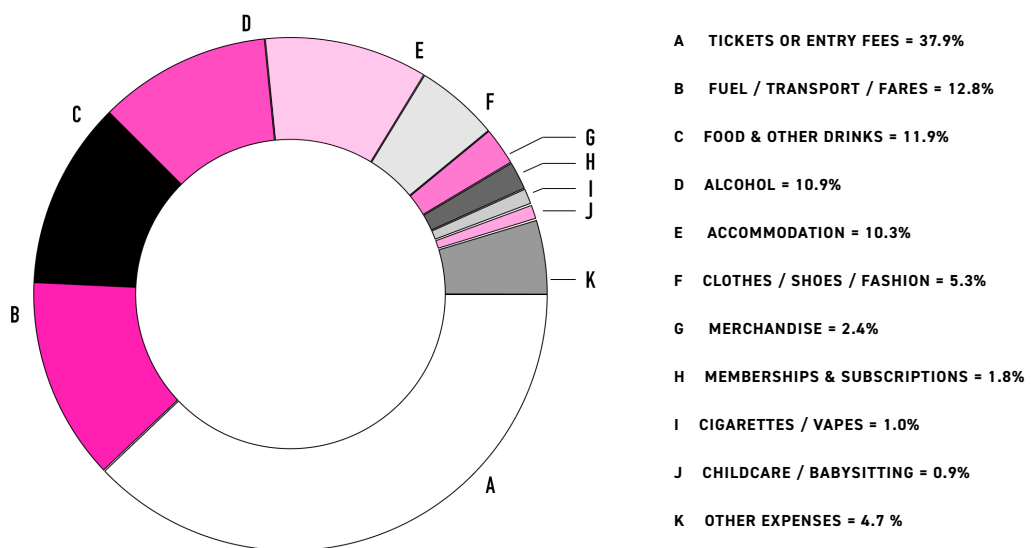
Attending live performances provides an immediate boost to life satisfaction and contributes to a lasting improvement in overall wellbeing. Controlling for other factors, live performance attendees report their wellbeing to be 7.6% higher than those who hadn't attended in the last twelve months. Rather than being an immediate post-event 'high', this indicates that a longer-term, sustained boost to well-being persists even after the immediate effects of attendance have faded. People who attended live performances more frequently, or with other people, were more likely to report higher wellbeing overall. Between attendees and non-attendees of live performances, a difference of 0.48 points on the 0–10 well-being scale was observed. The Te Tai Ōhanga The Treasury CBAX Model (December 2023) values a one-point change in life satisfaction at low, midpoint, and high estimates. Taking the lowest of these estimates the wellbeing benefits of attending live performance are valued at \$7.5 billion for the twelve months from July 2023 to June 2024.

Over this period volunteers contributed \$1.2 billion worth of their time, skills, and professional expertise to support the live performance sector. Volunteering represents a positive choice by individuals to invest their limited time to achieve prosocial outcomes, building social capital within communities, creating networks, nurturing trust, and improving community cohesion.

Between July 2023 and June 2024, **2.3 million** Aotearoa residents over the age of fifteen attended at least one live performance. On average, these people spent **\$210** at each performance and attended **4.9** live performances. Collectively, they spent a total of **\$2.3 billion** attending live performances.

Reported audience spending on live performance included tickets, food and drink, alcohol, accommodation, transport, and other expenses such as babysitting. While audiences paid more to attend some events than others, their proportional spending patterns did not differ significantly across performance type (for example theatre or comedy) or between urban and regional centres. Audiences attending events with international headline performers spent proportionally more on tickets, clothes, and merchandise and less on alcohol, accommodation and transport, than audiences for events with local headline performers. Audiences for free/non-ticketed events spent proportionally more on food and alcohol and less on accommodation, transport, and other expenses than audiences for ticketed events.

Figure 1: Average expenditure at live performances by expenditure category (percentage breakdown)



Audiences are motivated to attend live performance for enjoyment, social connection, and to be inspired. They value live performance as somewhere their cultural identity can be upheld and shared with other people.

Audiences also value live performance for its ability to build and maintain social connections. People typically attend live performances with two or three others. Not having others to go with was a barrier for people attending live performances more often.

Audiences believe it is important that all members of the community can access live performance. They value live performance as an inter-generational and family activity that can enliven public space.

Cost was identified as the most significant barrier to attending live performances by both audiences and non-attendees. People with higher household incomes were 48.3% more likely to attend live performance. Women were 70.4% more likely to report cost as a barrier than men.

Disabled people experience significant barriers to accessing live performance. They were 32.4% less likely to attend than non-disabled people and were 56.0% more likely to report having no one else to attend with. Disabled people were 44.1% more likely to report their location as a barrier to attending live performances. They were also 31.7% more likely to report cost as a barrier.

Age, stage of life, and a lack of family-friendly options impact live performance attendance. As people age, their likelihood of attending decreases by approximately 1.0% each year. Those with caring responsibilities were more likely to cite cost and time as barriers to access. Older audiences and those with children pointed to changing needs around physical comfort and amenity as well as expectations for audience behaviour.

Safety concerns around negative audience behaviour, particularly excessive alcohol consumption, impacts live performance attendance. Producers also raised concerns that reliance on alcohol sales as a primary source of income constrained the types of events they were able to offer. Parents expressed concern about the safety of their children attending events without supervision, or would not allow their children to attend events alone. Non-attendees were 2.9 times more likely to report safety concerns as a barrier to experiencing live performance.

Location impacts live performance attendance. Audiences in regional locations were 9.7% less likely to attend live performance than those in urban centres. People living in cities of 100,000 or more were 7.6% more likely than people in communities of less than 10,000 to report cost as a barrier.

Other demographic factors influencing live performance attendance are educational attainment and gender. People with higher education levels were 30.1% more likely to attend live performance. Women were 34.3% more likely to report attending live performances than men.

Producers of live performance derive a strong sense of purpose and satisfaction from their work. Producers value live performance for its contribution to the cultural identity of Aotearoa. They want to be able to give greater visibility to local content and prioritise work by Māori and Pacific creators. They value the way performance can foster community and wellbeing.

The live performance sector is currently facing several structural challenges impacting operations and sustainability. In the aftermath of the COVID-19 pandemic and weather events such as the 2023 Auckland floods and Cyclone Gabrielle, producers report significant inflationary pressures impacting production costs, sponsorship, philanthropic giving, and audience numbers.

On top of these inflationary pressures, producers identified changes in audience purchasing behaviour, particularly last-minute ticket purchases, as an ongoing challenge. Despite this, audience outlook and demand appear positive with 36.0% of attendees and 24.9% of non-attendees expressing an intention to attend more live performances in the next twelve months.

While recognising the valuable role volunteers play, producers are concerned about a reliance on unpaid labour in operational roles. Many said they wished they could pay their staff more, and that budget constraints often meant they and their staff were working more than their paid allocation. Across the sector there is concern about the prevalence of unpaid labour leading to worker burnout and attrition, posing a risk to the longer-term sustainability of the workforce.

Live performance in Aotearoa receives relatively modest government subsidy (estimated at \$75.5 million in FY 24) relative to consumer and producer investments, and funding for the Arts has declined as a proportion of GDP over the last decade (Toi Mai, 2023, p.18). While existing subsidies play a valuable role in maintaining the current ecosystem, producers suggest new funding could improve overall benefits by prioritising numerous smaller, sustainable investments aimed at broadening access.

Amongst producers there is an overwhelming sense that the status quo is delivering valuable, but not optimal, outcomes for the community, and that a new way forward is needed.

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INTRODUCTION



This report establishes a national evidence base for the benefits of live performance to inform public policy and decision-making and enable the sector to articulate its value to the wider community.

This introduction provides an overview of the work and a guide to the structure and content of this document.

The **Literature Review** (p.19) discusses existing approaches to articulating the value of live performance and arts and culture more generally. It calls attention to the absence of reliable data and standardised approaches to valuing live performance in Aotearoa and internationally. This has resulted in an incomplete and inconsistent evidence base, which poses challenges for sector and government decision-making. Recent literature emphasises the importance of recognising a comprehensive range of benefits attributable to live performance activity including intrinsic, or non-market, outcomes such as wellbeing impacts. Recent work co-commissioned by Manatū Taonga Ministry for Culture and Heritage and The Australia Council for the Arts (Gattenhof et al., 2022) echoes calls in international literature for holistic approaches that incorporate cultural participation and community engagement indicators, as well as indigenous worldviews.

Our **Methodology** (p.27) explains how this report responds to these challenges by combining a cost benefit analysis of the live performance sector with quantitative and qualitative accounts of audience and producer experience. It describes the type of information we collected for this report, and how we've used it. It explains our approach to cost benefit analysis, and how this applies Te Tai Ōhanga The Treasury's modelling of market and non-market outcomes to produce a conservative estimate of the benefits attributable to live performance. It also explains how Rōpū Whānau, a Māori research methodology based on the facilitation of whakawhiti kōrero (crossing of conversations), was used to facilitate and present audience experiences of live performance. Finally, it explains how qualitative interviews with industry professionals furnish insights into the operation and challenges of the live performance sector.

Following the Methodology, the document presents in-depth findings on audience demographics and behaviour; qualitative audience accounts of their experiences attending live performance; producer accounts of the sector; and a cost benefit analysis of the value of live performance in Aotearoa.

The Audience for Live Performance in Aotearoa (p.46) finds that 2.3 million Aotearoa residents over the age of fifteen attended at least one live performance in the last twelve months. Those who attended at least one live performance attended, on average, 4.9 live performances in total. These figures provide the basis for a robust and conservative volume estimate for live performance attendance and are comparable with the most recent Stats NZ Tatauranga Aotearoa General Social Survey (2021).

The Audience for Live Performance in Aotearoa presents substantial granular detail on factors influencing or inhibiting live performance attendance. The most significant are:

- **Household income:** Individuals with higher household incomes are 48.3% more likely to attend live performances than those with lower household incomes
- **Education:** Individuals with higher education levels are 30.1% more likely to attend live performances than those with lower levels
- **Age:** As individuals age, their likelihood of attending live performances decreases by approximately 1.0% each year
- **Disability and Accessibility:** Disabled individuals are 32.4% less likely to attend live performances than non-disabled individuals
- **Gender:** Women are 34.3% more likely to report attending live performances than men
- **Location:** Audiences in regional locations are 9.7% less likely to attend live performances than those in urban centres

Audience Experiences of Live Performance (p. 67) provides qualitative accounts from audiences using Rōpū Whānau, a Māori research methodology based on the facilitation of whakawhiti kōrero (crossing or exchange of conversations) in a formal hui (meeting) setting. It provides insight into why audiences value live performance and helps contextualise the quantitative data on audience behaviour in the previous section. Audience accounts emphasise the value of live performance to affirm cultural knowledge, identity, and traditions; as well as distinguishing Aotearoa in a global context. They highlight the significant role attending live performances plays in building and maintaining relationships, inter-generational meaning-making, and enlivening public space to the benefit of the wider community. In this context audience accounts consistently upheld the importance of live performance being enjoyable for all members of the community. Cost, venue accessibility, the absence of public transport, negative audience behaviour, and excessive alcohol consumption were all notable barriers to attendance. This was particularly true for d/Deaf and disabled audiences who experience many significant barriers to accessing live performance, ranging from physical barriers through to a lack of understanding or manaaki (generous care) for people with access needs. Older audiences and those with children pointed to changing needs around physical comfort and amenity, as well as expectations around audience behaviour, impacting their attendance. These findings align with observations from the quantitative audience data, particularly that disabled people are much less likely to attend live performance; those with caring responsibilities are more likely to cite cost and time as barriers to access; and that live performance attendance tends to decline as people age.

However, the Rōpū Whānau research showed exceptions to this. Many kuia/kaumātua (elderly women/men) are frequent and valued attenders at all forms of kapa haka (Māori performing arts), and the 60+ audience claimed that they attend more live performances due to having more disposable income.

Producer experiences, motivations and constraints (p.90) summarises 31 qualitative producer interviews with professionals working in the live performance sector in Aotearoa. Producers describe being intrinsically, rather than financially, motivated and derive a strong sense of job satisfaction and purpose from their work. They value live performance in ways that align with sentiments expressed by audiences in the previous section. Producers emphasise the value of live performance to the cultural identity of Aotearoa, our communities, and civic wellbeing. Associated with this, many producers expressed a desire to prioritise work by Māori and Pacific creators and provide greater visibility for local content. Producers note several structural challenges and risks impacting the ongoing operation and sustainability of the sector. These include inflationary pressures on audiences, production costs, and income from sponsorship and philanthropic giving; changes in ticket buying behaviour post-COVID-19; reliance on alcohol sales to subsidise live performance; increased competition for a shrinking pool of funding; and the prevalence of unpaid labour leading to worker burnout and attrition.

The Value of Live Performance in Aotearoa (p.104) provides a detailed cost benefit analysis of audience and producer costs using Te Tai Ōhanga The Treasury modelling tools. By considering both tangible and intangible benefits, alongside the full spectrum of costs, this analysis aims to comprehensively articulate the value of live performances in Aotearoa. The cost benefit analysis derives consumer costs from 13,067 survey responses to an Attendance Survey of live performance audiences, married to volume estimates discussed above. The Attendance Survey was conducted at 323 live performances across seventeen regions and 94 venues in the twelve months from July 2023 to June 2024. These performances ranged from free community events through to international headlining stadium shows and represent a comprehensive cross-section of activity in this period.

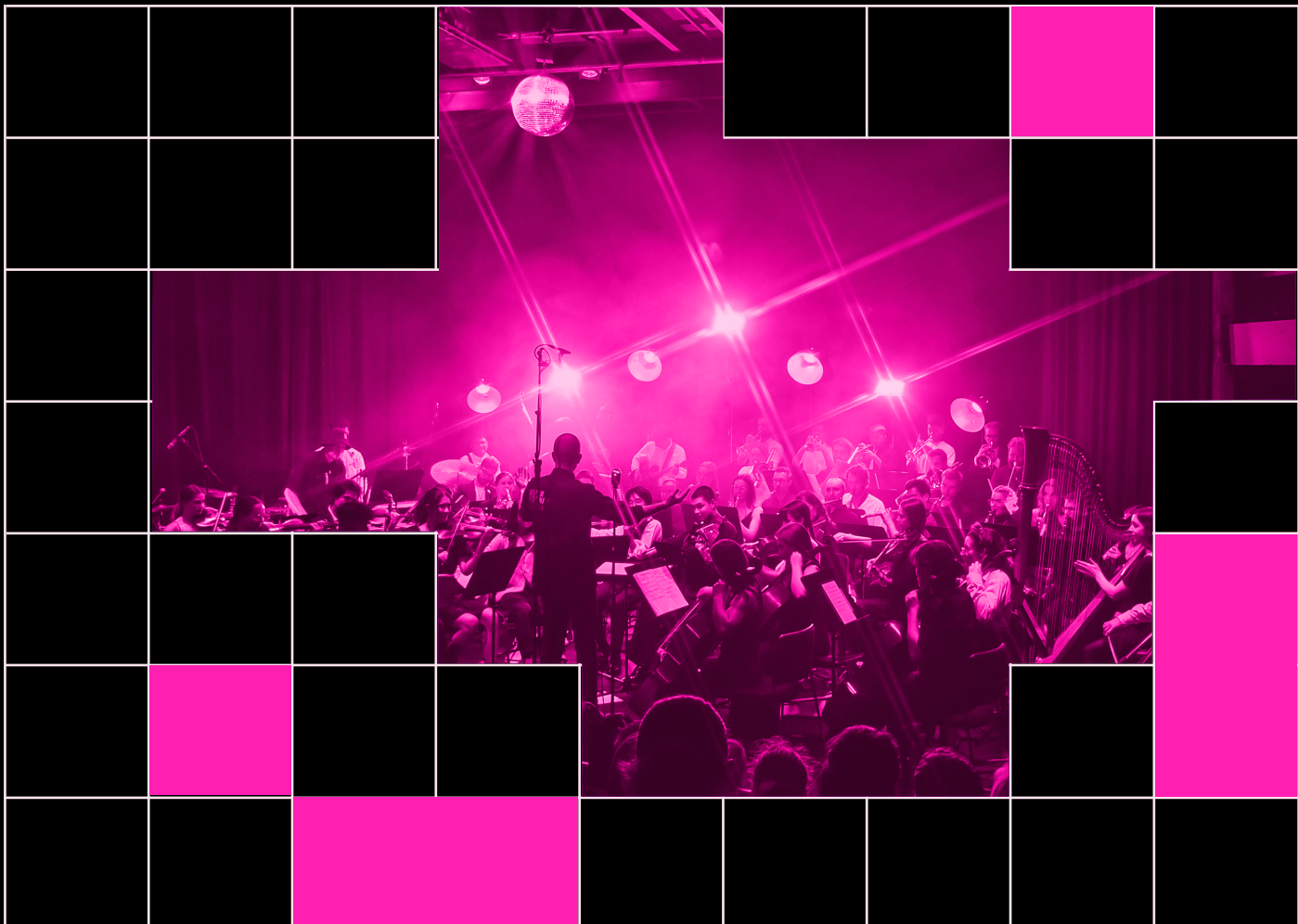
Data from the Attendance Survey was used to derive average consumer spending on live performances across categories related to their attendance including tickets, food and drink, alcohol, accommodation, transport, and other expenses such as babysitting. This was combined with audience volume estimates to provide baseline accounts of audience costs.

Wellbeing impacts associated with live performance attendance were derived from these same data sources. Producer data from a survey of 741 annual reports provided estimates of volunteer labour and producer subsidies. Levels of government subsidy to the sector through funding were drawn from Te Tai Ōhanga The Treasury budget papers.

From these costs, our analysis values the sum of social and economic benefits enabled by live performance in Aotearoa at \$17.3 billion in the twelve months ending June 30, 2024. By contrasting the net value of live performance in Aotearoa with the cost of inputs, for every dollar invested by the community, \$3.20 is returned (the benefit-to-cost ratio). The net (or social) return on investment — the difference between benefits and economic and social costs — is \$11.8 billion.

This valuation of live performance is significantly greater than previous estimates based only on financial or economic impact, yet it is likely to be an underestimation given the limitations of the available data and forensic techniques. Wherever necessary, our application of Te Tai Ōhanga The Treasury modelling overestimates costs and underestimates benefits to produce a conservative and defensible account of the value contributed by the live performance sector.

Finally, **Areas for future research** (p.126) identifies challenges for the sector moving forward, and points to questions emerging from this research that we were unable to address due to the scope and scale of the work.



LITERATURE REVIEW



In existing literature, the value of live performance is articulated in the context of the social, cultural, and economic impacts of arts and culture on individuals and the wider community.

In this context 'value' is understood as encompassing both instrumental and extrinsic value — with a means-to-an end, such as a measurable economic outcome, as well as intrinsic value — with a purpose unto itself, such as an emotional or personal outcome. (Arts Council England, 2014; Carnwath & Brown, 2014; Gielen, 2005; Hazelkorn et al., 2013; Hutter & Throsby, 2008; McCarthy et al., 2004; O'Connor, 2010; Pedroni & Sheppard, 2013; Reeves, 2002; Throsby, 1999; Throsby, 2012).

Attempts to measure the value of live performance usually employ economic frameworks concerned with extrinsic and instrumental value. In a review of economic approaches for monetary valuation of culture and heritage assets, Lawton et al. (2020) found that stated preference and revealed preference methods were more common in academic research than wellbeing and benefit-transfer methods. In the grey literature they found that contingent valuation and stated preference studies (individually, or part of a benefit transfer) are the most common, but noted a rise in the number of valuations focusing on wellbeing outcomes. (Lawton et al., 2020). Researchers elsewhere have proposed a range of alternative approaches to account for non-market impacts, recognising that cultural value is constituted through the process of subjective meaning making (Belfiore, 2015; Crossick & Kaszynska, 2016; Kaszynska, 2024; O'Brien, 2015).

However, a lack of standardised approaches has resulted in an inconsistent evidence base concerning the impacts of intangible social and cultural outcomes (Brown et al., 2015). There is also a lack of consensus within research regarding the definition of 'culture'. This is largely due to the inherently subjective nature of culture, with definitions shaped by various social, cultural, and contextual factors. Cultural value is "a collective endeavour which is normative, intersubjectively warranted and interpretative or hermeneutic" (Kaszynska, 2024, p.8). Compounding the issue, some argue that the discourse on the value of the arts and culture has been distorted by ideological and political forces (Meyrick et al., 2018; Phiddian, 2017); influenced by motivations to grow or safeguard public funding; or influence policy in favour of certain arts practices and institutions (Crossick, 2016).

There are no existing national valuations of live performance as a discrete activity in Aotearoa. Value estimates that do exist are typically subsumed within wider cultural sector analyses and inconsistently consider benefits to audiences and the wider community.

The most recent economic assessment of the national arts and creative sector in Aotearoa is the '2023 Sector Profile: Arts and Creative in New Zealand' by Infometrics. This report estimates that the arts and creative sector made an annual contribution of \$16.3 billion to the Aotearoa economy, contributed 117,500 jobs, added 4.3% to GDP, and grew at a rate of 5.3% (Infometrics, 2024).¹ Drawing on Linked Employer Employee Data (LEED) from Stats NZ Tauranga Aotearoa using standardised (ANZSCO) occupation categorisations, the report does not isolate contributions from live performance domains.

Similarly, an estimate on the value of the national sector, referred to as 'Toi Puaki performing arts', was included in a 2024 report by Toi Mai, the Ohu Ahumahi Workforce Development Council for the creative, cultural, recreation, and technology sectors. Based primarily on occupation data,² it estimated that 'Toi Puaki performing arts' contributed \$880m to GDP in 2023, and directly employed 10,500 people in 2022 (Toi Mai, 2024). However, occupations listed in scope were limited to mostly artistic and technical roles, and the report did not distil specific contributions or employment figures within live performance domains.

Finally, in 2020 Infometrics estimated the nighttime economy contributed approximately \$10 billion to the Aotearoa economy and 180,000 jobs annually (comprising 7% of total jobs in Aotearoa). The report suggests that more robust funding, as well as better urban planning regulation and public transport, would produce an 'easy win' for the night time economy of Aotearoa (Hayes, 2020; see also Stahl, 2019 for a discussion of regulatory issues facing the Aotearoa nightlife sector; and Edwards & License, 2023 and NTIA, 2024 for Australian and UK research).

These examples highlight a lack of granular data and coherent whole-of-sector approaches to valuing live performance in Aotearoa. Attempts at valuing discrete activity within the live performance sector are similarly limited.

¹ Manatū Taonga Ministry for Culture and Heritage's 2022/2023 annual report estimates that the sector contributed \$14.91b to GDP in 2022 accounting for 4.17% GDP, but like the Infometrics (2024) reports, does not further distil this information into specific domains (Manatū Taonga Ministry of Culture and Heritage 2023a).

² Analysis was reported as being based primarily on artistic and technical occupations created from Integrated Data Infrastructure (IDI) and Longitudinal Business Database (LBD), as well as tax data supplied by Inland Revenue to Stats NZ Tauranga Aotearoa.

MUSIC

PricewaterhouseCoopers (PwC) has published regular economic reports on the Aotearoa music industry since 2013. These reports estimate the economic impact of live performance via ticket sales alone, which it achieves by

... dividing the value of songwriter royalties by the royalty rate applied to ticket sales [and then] applying the ratio of value added to gross output in the "heritage and artistic activities" industry to estimated gross output. (PricewaterhouseCoopers, 2023, p.42)

This method excludes all non-ticketed attendance at live music events (including festivals); unreported ticket sales (for example, to private events or those not reported to or licensed through APRA); and spending on live music by what might be termed 'tier 2 venues', such as pubs and clubs. It also does not capture or account for other values, including producer inputs or consumer spending. Outside of this work, several smaller studies (see Insight Economics, 2019; Phillips, 2024) examine the social and economic impact of proposed concert events.

Numerous studies internationally have demonstrated the economic impacts of live music sectors, applying a range of mostly market-based methodologies and frameworks. A recent review of global literature on live music ecologies concluded that international benchmarks that do account for a wider economic contribution tend to overlook intrinsic and subjective impacts (Van der Hoeven & Hitters, 2019). For example, the most recent evaluation of the UK's live music industry captures ticket income, venue spend, and spending ancillary to the event, but does not monetise intrinsic value (LIVE & CGA, 2024),³ nor does similar EY research commissioned by the Live Music Office in Australia (EY, 2020).

³ The UK's LIVE report acknowledges that it also misses less formal live music (bars and pubs), and other festivals and events that have a large musical element (LIVE & CGA 2024).

COMEDY

There is a significant gap in research on the value of the Aotearoa live comedy sector. Live comedy has also been overlooked in broader national estimations and workforce analyses, except for a 2022 report by Toi Mai. This report explored how creative sectors adapted to COVID-19 restrictions and included comedy practitioners in its qualitative study (Toi Mai, 2022). The economic impacts of live comedy have also been neglected internationally. Scholars have contributed this neglect to "a lingering sense that the topic is less worthy of scrutiny or more trivial than other art forms because of its intrinsic nature" (Collins, 2024, p.345).

DANCE

Extant literature on the dance sector in Aotearoa focuses primarily on dance within education settings, practice-based reflections, and the role of dance in community building and local identity formation. This research employs qualitative methods to explore how dance in educational contexts can foster cultural and social cohesion, as well as a sense of community (Greenwood, 2016; Mortimer, 2021). It argues that the value of dance lies in its capacity to embody senses of place, uplift Māori and Pacific identities, and offer a space for diversity (East, 2014; Nairn & Guinibert, 2020). However, there is no existing research exploring the unique economic contributions of live dance performance in Aotearoa, and dance is not readily identifiable within broad national estimates.⁴ Recent international literature does not feature national economic valuations of live dance sectors but has included national profiles (Throsby, 2004), explorations of the impacts of dance organisations on audiences (del Barrio-Tellado, 2020), and assessments of their ability to deliver policy outcomes in various contexts (del Barrio-Tellado, 2021). Recent work explores social impacts at a national scale (Canada Council for the Arts, 2016), and identifies challenges within dance workforces (Aujla et al., 2019; Baybutt et al., 2021; Bennett, 2009).

⁴Toi Mai's 'Kia Mura!' (2024) report includes dance within scope, but does not distil dance from GDP or workforce size estimates.

THEATRE

Research on theatre in Aotearoa focuses on educational contexts (Greenwood, 2009), assessments of funding environments (Kelly, 2001) and, most commonly, its capacity to express identities and promote decolonisation and multi-culturalism (examples include Halba, 2007; Peterson, 2007; Warrington, 2007). While there is no current literature that attempts to value the Aotearoa theatre sector, some qualitative research has explored issues of economic sustainability and audience development (Creative New Zealand, 2015), as well as audience and producer motivations (Mullen, 2017; Vyas, 2021). Theatre has received comparatively more attention in international contexts, though scholars point to the historical disconnect between the efforts of higher education researchers and the theatre sector's own needs for evaluation (Sedgman, 2023). Recent examples of evaluations include a cost benefit analysis of the economic contributions of the small to medium theatre sector in Sydney, Australia (Carter et al., 2020), and an impact assessment of theatre sectors in the UK, which examines direct, indirect and induced impacts via audience spending, but overlooks intrinsic impacts (Sound Diplomacy, 2023).

OTHER LIVE PERFORMANCE DOMAINS

Often comprising a variety of live performance domains, festivals in Aotearoa have been the subject of a notable body of literature where they are framed as important sites for identity formation and contestation. Drawing on qualitative approaches, this predominantly ethnomusicological research has questioned the effectiveness of Western analytical frameworks in articulating festivals as vital sites for cultural meaning-making among diverse communities (Bhatt, 2019; Booth, 2015; Booth & Johnson, 2021; Homolja, 2019; Johnson, 2015; Mackley-Crump, 2017).

The exception is research commissioned by Te Matatini kapa haka festival, which has focused primarily on direct economic impacts, and is supplemented by qualitative narratives that highlight subjective benefits for attendees. In the report 'Te Matatini Herenga Waka Herenga Tangata Impact Evaluation', Angus & Associates (2023) estimated the festival's economic contribution based on visitor, producer, and other stakeholder expenditure. Reporting that the sum of spending among groups totalled approximately \$22 million. They also reported that subjective impacts included enhanced social cohesion, as well as the promotion of Māori culture and language (Angus & Associates, 2023; see also Meade, 2021 and Takoko, 2019 for other impact research on Te Matatini).

Economic valuations of festivals within public and private contexts are common internationally. For example, 'state of the sector' reports, as well as festival-specific economic impact studies have recently been published in Australia (Creative Australia, 2024; Green & Strong, 2023), as well as the UK and Europe, amongst other locations (BOP Consulting, 2023; Nermond et al., 2022). In Aotearoa, publicly available festival assessments tend to rely on attendee figures and audience surveys to narrativise the positive subjective outcomes of attendance (c.f. Nelson Arts Festival, 2023). Interestingly, an impact assessment prepared for investors in the New Zealand Festival also reported non-user benefits; that "people who did not attend any Festival events feel almost as positively about its worth as people who did not attend" (New Zealand Festival, 2019, p.41).

ALTERNATIVE APPROACHES

Recent research in Aotearoa has questioned the efficacy of existing models for valuing arts and culture. In 2013, Manatū Taonga Ministry for Culture and Heritage published a paper by Motu that emphasised the need for frameworks to incorporate both economic and intrinsic values related to culture. The paper acknowledged the challenges of using conventional economic tools to assess market and non-market values and concluded by urging policymakers to consider a more comprehensive range of benefits when developing cultural policies (Allan et al., 2013). Academic critiques have voiced similar concerns. In a comparison of UK and Aotearoa approaches to valuing public art, for example, King-Wall (2024) observed a deficiency in available tools to measure value in both contexts, which poses a risk to the ongoing sustainability and support of council public art programs. They also noted a lack of literature on this topic in Aotearoa in particular (King-Wall, 2024).

In 2022 Manatū Taonga Ministry for Culture and Heritage published a discussion paper (co-commissioned by The Australia Council for the Arts) reviewing extant assessment and conceptual frameworks for the valuation of arts and culture. The paper argues that

The economic lens has the ability to diminish the efficacy of arts and cultural engagement related to social outcomes or social impact” and proposes that policymakers adopt “a new discourse about what the arts contribute, how the contribution can be described, and what opportunities exist to assist the arts sector to communicate outcomes. (Gattenhof et al., 2022, p.8)

Echoing calls from international literature, the paper argues that assessments should go beyond conventional economic methods. It suggests that in Australian and Aotearoa contexts, a new ‘people centred’ model that incorporates cultural participation and community engagement indicators, as well as indigenous world-views, is needed.

WELLBEING

Exploring the relationships between arts and culture and health and wellbeing across a range of psychological and physical health outcomes is an increasingly common approach when articulating the potential value of live performance (see APNG, 2017; Centre for Cultural Value, 2023; Pesata et al., 2022). A recent scoping review for the World Health Organisation concluded that engagement with the arts “can potentially impact both mental and physical health” (Fancourt & Finn, 2019, p.vii). These findings are echoed in reviews specifically focusing on live performance domains (McCrary et al., 2021; Siltainsuu & Peltola, 2024) and are supported by a substantial body of literature linking health and wellbeing outcomes to various modes of participation in music (Dingle et al., 2021; see also Croom, 2015; Daykin et al., 2018; MacDonald, 2013), laughter and humour (see Martin, 2001, 2002; and more recently, Brooks et al., 2023),⁵ dance (Karpati et al., 2015; Karkou, Oliver, & Lycouris, 2017; Karkou et al., 2019; Koch et al., 2019; Koch et al., 2024), and theatre (Brownett, 2018; Centre for Wellbeing at NEF, 2013; Jepson & Stadler, 2017; Meeks et al., 2018; Vandenbroucke & Meeks, 2018; see also Walmsley, 2011 for a critique of theatre-specific audience-assessment methods).

However, some researchers argue there is insufficient evidence of a causal link between participation in or engagement with arts, including live performance, and positive health and wellbeing outcomes. And that narratives regarding the impacts of arts participation fail to consider the value of effectiveness of outcomes relative to alternatives (Clift et al., 2022; Fancourt & Finn, 2019). Other cautions are raised in surveys of the potential health benefits of music (Sheppard & Broughton, 2020; Viola et al., 2023), and festivals (Topping, 2021), noting that these activities can be “risky practices”, that may also lead to negative well-being impacts such as injuries and drugs and alcohol abuse. These negative consequences tend to be well-defined, while the positive outcomes — such as improvements in wellbeing — are often vague and subjective.

⁵Although no reviews specifically address comedy, links between laughter (which could be considered an outcome of attending live comedy) and both objective and subjective health and wellbeing have been noted in an emerging body of literature in medicine and psychology that explores the potential health benefits associated with humour and laughter.

While studies that factor wellbeing outcomes within economic impact assessments have become increasingly common, challenges remain in attributing a dollar value to such outcomes. Studies, including in Aotearoa, tend to narrativise benefits as producing healthcare savings and improvements to civic life, but stop short of quantifying economic value. Despite this, there is a growing demand to “monetise the welfare impacts of cultural policies, and to quantify culture and heritage goods and services” (Lawton et al., 2020, p.11). In their Rapid Evidence Assessment of culture and heritage valuation studies, Lawton et al. endorsed wellbeing valuation methods that allow subjective wellbeing to be converted into a monetary amount by comparing the impact of income on subjective wellbeing (see Fujiwara et al., 2014 for example). They also argue the need for methods that align with cost benefit analysis models, which are widely accepted as best-practice tools for policy evaluation.

LIVE PERFORMANCE AND WELLBEING IN AOTEAROA

Audience participation surveys in Aotearoa have positioned subjective wellbeing outcomes as a key indicator of the sector's value and contributions, however none attempt to attribute economic value to this. The most significant research has been through Creative New Zealand, who has commissioned reports since 2005 to measure engagement with various creative arts.⁶ Their 2023 survey estimated that 51% of residents attended at least one ‘performing arts’ event in the previous year, showing an increase of six percent from 2020 (Creative New Zealand, 2023a). The report also claimed that 41% of Aotearoa residents believe that the arts positively contribute to wellbeing. However, the ‘performing arts’ category includes only three distinct domains: concerts of musical performances, theatre, and dance performances. As such, these findings reflect a broad measurement of general arts participation.

A comparison between attendees and non-attendees was included in a recent study for Creative Waikato by Huber Social (Creative Waikato, 2022), which reported that individuals who engage with arts, culture, and creativity experience a 5% increase in their wellbeing on average. In approaching this study, it is useful to note that a significant portion of the sample population (70%) comprised arts sector workers, as practitioners or enablers. Further, Creative Waikato's report does not attempt to attribute a monetary value to the increase in wellbeing. Instead, it conceptually links wellbeing to social impacts using a bespoke framework that connects wellbeing with enhanced capabilities, such as resilience, life skills, and self-development. Kantar Public employs an alternative method in their Creative New Zealand Profile of Creative Professionals research, using self-reported life satisfaction as a proxy for subjective wellbeing among arts sector workers. The findings reveal that arts workers who reported high levels of career satisfaction also tended to report high levels of life satisfaction. They also did not report the economic impact of this relationship (Kantar Public, 2023).

⁶Manatū Taonga Ministry for Culture and Heritage has undertaken audience engagement research since 2020, with the most recent published in 2023. Domain groupings are narrow, and are inconsistent with Creative New Zealand's 2023 participation survey: Performing Arts comprises four domains: ‘musical, dance or theatre performance’, ‘live performance of New Zealand Music’, ‘Māori performing arts’ and ‘Pacific performing arts’. There is no mention of Comedy, and Festivals feature as a separate domain called Festivals and commemorations (Manatū Taonga Ministry of Culture and Heritage, 2023).

METHODOLOGY



Attempts to measure and articulate the value of live performance in Aotearoa, both in terms of its economic and wellbeing impacts, have been complicated by insufficient data and methodological constraints. In response to these issues, this project has undertaken primary data collection to provide baseline evidence for the economic and wellbeing benefits of live performance in Aotearoa.

For the purposes of this study, live performance is defined as any in-person real-time performance of any type that is promoted and presented to a public audience as a ticketed event or as subsidised activity, through a mix of government funding, voluntary labour, or private philanthropy. This includes, but isn't limited to, music, dance, comedy, and theatre.

In order to represent the various ways live performance is valued in Aotearoa, this study uses an interconnected series of research instruments comprising qualitative discussions with audience members using Rōpū Whānau, a mātauranga Māori-based, decolonising research methodology; qualitative interviews with sector professionals; quantitative surveys of over 15,000 Aotearoa residents on their live performance engagement, and cost benefit analysis to articulate and quantify social and economic impacts.

This approach provides current, granular, and reliable data on the contributions and benefits the sector delivers to the broader community, while integrating qualitative perspectives that articulate the lived experiences of sector workers and audiences.

In our research on the live performance sector in Aotearoa, we chose to employ a cost benefit analysis (CBA) approach. This decision was motivated by two key factors: first, it allowed us to navigate around many of the methodological challenges highlighted in existing literature, and second, it aligned with the value assessment frameworks used by Te Tai Ōhanga The Treasury and central government in their decision-making processes.

Aotearoa central government, guided largely by the Te Tai Ōhanga The Treasury's CBAX model, prefers CBA as its primary approach to policy decision-making (Te Tai Ōhanga The Treasury, 2015). However, measuring the economic impact of live performance presents a unique challenge. Live performance is not discretely defined as an industry in the national accounts, a situation common to several economic sectors. To address this, we adopted the concept of a satellite account, a standard developed by the United Nations to measure such undefined economic sectors (UNWTO, 2002).

Our methodology involved analysing producer, consumer, and government expenditure motivated by live performance attendance across categories defined in the Aotearoa national accounts. We then used official input/output tables to estimate the economic impact of this expenditure. This economic analysis was complemented by an assessment of social impacts, including the opportunity and replacement costs of volunteer labor, as well as the wellbeing impacts of live performance attendance, quantified using the Te Tai Ōhanga The Treasury CBAX model.

In this study, we expanded the application of CBAX beyond its traditional role in policy intervention forecasting. We repurposed the model to compare the current social and economic impact of live performance in Aotearoa with a hypothetical state where it doesn't exist. This approach maintains the established inputs and outputs methodology of CBAX while adhering to the price guidance provided in its impacts database to quantify social benefits.

To ensure a conservative estimate and mitigate the risk of overstating or double-counting benefits, we adopted a single wellbeing metric at its most conservative setting. This approach is consistent with emerging literature in this field and maintains the integrity of our findings.

By adapting the CBAX framework in this manner, we preserved its core principles: taking a long-term and broad view of societal impacts, ensuring consistency with Te Tai Ōhanga The Treasury's valuation methods, and maintaining transparency in our assumptions and evidence base. This novel application demonstrates the flexibility of the CBAX tool and its potential for broader use in sector evaluation and policy analysis. It has enabled us to provide a cautious yet robust assessment of the live performance sector's impact in Aotearoa, bridging the gap between economic analysis and social value measurement in a methodologically sound manner.

DATA COLLECTION

Data collection for the cost benefit analysis used two survey instruments to capture audience demographics, motivation, spending, and attendance patterns at live performance in Aotearoa.

First, we conducted an in-person survey of people who attended live performances in Aotearoa between July 2023 and June 2024. This Attendance Survey was designed to be as broad as possible to ensure representativeness, covering all regions, venues of all sizes, and events of all genres.

Second, we conducted an online Public Survey from a random sample of the Aotearoa population from March to May 2024.⁷ This survey included individuals who both did and did not attend live performances in the past twelve months. The survey instruments shared several design features to facilitate cross-comparison and validation.

Additionally, we analysed the financial statements from the annual reports of many Aotearoa live performance producers (n = 743). This was complemented with data from Stats NZ Tatauranga Aotearoa to provide a comprehensive overview of the live performance landscape in Aotearoa.

DATA CLEANING

Data cleaning is the process of preparing a sample for analysis by removing or excluding incorrect, incomplete, duplicated, or irrelevant data. This standard practice in the statistical sciences is necessary to improve the quality of the data so that the results of the analysis can be trusted.

Both the online Public Survey and in-person Attendance Survey had built-in integrity checks to ensure the data was of high quality. The online surveys employed conditional logic to ensure only relevant questions were shown to respondents, answer options were randomised to reduce position bias, and where appropriate, numeric entry fields were capped with logical limits to prevent the inadvertent overstatement of value.

The following individual survey responses were further excluded from the analysis:

- Responses commenced before the survey officially opened (pilot and test responses)
- Incomplete responses (Public Survey only)

As respondents to the Public Survey were being paid for their participation, very strict qualification criteria were applied to their responses. Cleaning criteria for the Public Survey that disqualified responses included:

- Responses geo-located outside Aotearoa
- Total expenditure on live performances in the last twelve months being greater than 20% of the upper limit of self-reported household income

⁷ Respondents to the Public Survey were compensated for their participation. Respondents to the Attendance Survey were not.

- Free-text responses to 'Other' questions that were given in bad faith (for example, giving "Attack helicopter" as gender)

Careless responses to the expenditure questions in both surveys were also encountered. A response to the expenditure question was considered "careless" if it met any of the following criteria:

- Entering the same number for each category of expenditure (for example, \$2000 for all)
- Inputting a number that appeared to be randomly typed (for example, \$5643685)
- Providing a sequence of numbers that was highly improbable (for example, \$1, \$2, \$3, \$4, \$5)

Careless responses to the expenditure question in the Public Survey voided the entire response. The assumption here was that if a respondent was careless on one question, there was a reasonable likelihood that they may not have been attentive or truthful in their other answers as well.

In total, 6.5% of Public Survey responses were excluded from the analysis. A further 27.3% of responses were cleaned from the Attendance Survey. The bulk of these were people who opened the survey link, but did not proceed past the initial demographic questions.

When cleaning survey data, it was also noted that several 'Other' free-text responses fully matched one or more options in the relevant question taxonomy. To maintain the integrity and accuracy of the data, these responses were manually recoded into their correct categories. This process ensured that all responses were consistently categorised, reflecting the intended options in the survey and facilitating more accurate data analysis.

NEW VARIABLES

To aid analysis, several new variables were created from the sample data in its raw form. The following new variables for each respondent were derived from their original responses. The validity of the new variables was assured through confirmation of the new sample sizes and rigorous spot checks to assess data integrity. These variables are as follows:

- Continuous variables
 - Age this year (from Year of Birth)
 - Total attendance (the sum of attendance events by category)
 - Total expenditure (the sum of the individual expenditure categories in both surveys)

- Ordinal variables
 - Age by cohort (from Age this year)
 - Intent to attend in the next twelve months (excluding “Don’t know” responses)
- Categorical variables
 - Ethnicity (New Zealand European / Pākehā, or Māori / Pasifika, or Other)
 - Work for pay, disability and carer status (yes/no)

DATA WEIGHTING

Data weighting is a statistical technique used to adjust the contribution of individual data points in a dataset. The method is widely applied in survey analysis and research to ensure that the sample accurately represents the target population. By assigning different weights to specific responses, biases or imbalances in the sample data can be corrected. This ensures that groups underrepresented in the sample have a proportional influence on the overall results, thereby enhancing the validity and reliability of the findings.

PUBLIC SURVEY

In the Public Survey, responses were drawn from an online panel of residents of Aotearoa aged fifteen years and over. Quotas were used to ensure a representative cross-section of Aotearoa residents by location. As a result, this variable was sufficiently representative of the Aotearoa population for analysis.

Further analysis revealed age and gender as the most unrepresentative variables in the sample, prompting the need for data weighting. The initial distribution of responses skewed young and female. Given the unbalanced representation, a weighting scheme was applied to specifically address these discrepancies and mitigate potential biases. The aim was to bring the proportion of responses in each age and gender cohort closer to an equitable representation relative to the population of Aotearoa.

To do this, weighting coefficients were calculated by dividing the population proportion of each age and gender cohort by the actual proportion observed in our sample. These weights were then applied to all cases within each group, before conducting statistical analyses. This weighting strategy normalises representation across age and gender, minimising the potential for biased results due to the initially skewed sample distribution.

ATTENDANCE SURVEY

The Attendance Survey used a convenience sampling method (i.e. where units are selected for inclusion in the sample because they are the easiest for the researcher to access). This approach involved distributing and promoting either a survey link (presented as a QR code) or paper survey to audiences at live performances across Aotearoa during the survey period. By targeting attendees directly at these events, the survey was able to gather responses from individuals who were actively participating in live performances.

Although this method did not provide for a perfectly random sample of live performance attendees, it allowed for the practical and efficient collection of data from a large number of respondents, ensuring that the survey captured a diverse range of live performance experiences across different regions, venue sizes, and event genres.

The volume, breadth, and diversity of responses significantly reduced the risk of the sample being unrepresentative. While this did not completely eliminate the limitations inherent in the sampling method, it did provide a more robust dataset that was less susceptible to error.

To correct for sampling error, we weighted the responses in the Attendance Survey by key demographics of attendees from the Public Survey, which we knew to be representative. Specifically, we adjusted the data based on age and gender. By doing so, we were able to mitigate the biases introduced by the convenience sampling method and improve the overall representativeness and accuracy of our findings.

SAMPLE DEMOGRAPHICS

While the actual sample size of the online Public Survey was 5,071, the post-weighting process resulted in an effective sample size of 5,042. This slight reduction in the sample size was due to the application of weights, which slightly altered the total number of responses to accurately reflect the demographic proportions of the representative Public Survey.

The post-weighted demographic characteristics of the sample were as follows.

Table 1: Self-reported identity of Aotearoa residents responding to the Public Survey

AGE	15-24	25-34	35-44	45-54	55-64	OVER 65
	16.1%	18.1%	16.6%	15.0%	14.0%	20.1%

GENDER	WOMAN	MAN	NON-BINARY / OTHER / DECLINED
	49.6%	49.1%	1.3%
LOCATION (WHERE THEY LIVED)	TOWN < 10,000	10,000 - 100,000	CITY > 100,000
	21.6%	28.9%	49.4%
ETHNIC IDENTITY	MĀORI / PASIFIKA	NEW ZEALAND EUROPEAN / PĀKEHĀ	OTHER
	22.4%	57.4%	20.2%

HIGHEST EDUCATION	PRIMARY	SECONDARY	DIPLOMA OR TRADE CERT	UNDERGRAD	POSTGRAD
	1.4%	31.7%	30.9%	21.8%	14.2%
HOUSEHOLD INCOME VS NATIONAL AVERAGE	LOWEST 20%	LOW	MEDIAN	HIGH	HIGHEST 20%
	16.9%	18.5%	22.1%	23.5%	19.1%

	YES	NO
Work for pay	75.6%	24.4%
Disabled	26.9%	73.1%
Caring duties	36.3%	63.7%

Table: 2 Self-reported identity of Aotearoa residents responding to the Attendance Survey

The in-person Attendance Survey was conducted in seventeen regions across 94 venues at 323 events, receiving 13,067 valid responses. The post-weighted demographic characteristics of the sample were as follows.

AGE	15-24	25-34	35-44	45-54	55-64	OVER 65
	16.3%	20.3%	18.5%	13.7%	10.4%	16.0%

GENDER	WOMAN	MAN	NON-BINARY / OTHER / DECLINED
	49.8%	46.7%	3.6%

LOCATION (WHERE THE DATA WAS CAPTURED)	AUCKLAND, CHRISTCHURCH OR WELLINGTON (MAJOR CITY)	OTHER AOTEAROA
	58.1%	41.7%

ETHNIC IDENTITY	MĀORI / PASIFIKA	NEW ZEALAND EUROPEAN / PĀKEHĀ	OTHER
	11.0%	87.5%	8.1%

HIGHEST EDUCATION	PRIMARY	SECONDARY	DIPLOMA OR TRADE CERT	UNDERGRAD	POSTGRAD
	1.0%	19.4%	21.7%	25.3%	30.3%
HOUSEHOLD INCOME V NATIONAL AVERAGE	LOWEST 20%	LOW	MEDIAN	HIGH	HIGHEST 20%
	9.8%	10.3%	15.8%	20.3%	29.6%

	YES	NO
Work for pay	77.9%	21.1%
Disabled	15.7%	84.3%
Caring duties	23.1%	72.4%

SAMPLE USE

In this study, we tailored our sample sets to the requirements of each research question. Unless otherwise stated for specific variables, the table below details the specific sample used for each inquiry, along with its corresponding size.

Table 3: Sample utilisation

RESEARCH QUESTION	SAMPLE(S) USED	SAMPLE SIZE
Attendance volume	Public Survey	5,042
Attendance type	Public Survey — attendee subset	2,689
Attendance frequency	Public Survey — attendee subset	2,689
Attendance motives	Public Survey — attendee subset Attendance Survey	15,756
Group attendance	Public Survey — attendee subset	2,689
Mode of transport	Attendance Survey	13,067
Attendance constraints (attendees)	Public Survey – attendee subset Attendance Survey	15,756
Attendance constraints (non-attendees)	Public Survey — non-attendee subset	2,353
Attendance barriers (attendees)	Public Survey — attendee subset Attendance Survey	15,756
Attendance barriers (non-attendees)	Public Survey — non-attendee subset	2,353
Attendance intention (attendees)	Public Survey — attendee subset Attendance Survey	2,689 13,067
Attendance intention (non-attendees)	Public Survey — non-attendee subset	2,353
Consumer costs	Attendance Survey	13,067
Producer subsidies	Producer survey	743
Government subsidies	Producer survey	743
Volunteers' labour	Producer survey	743
Wellbeing benefits	Public Survey Attendance Survey	5,042 13,067
Non-use value	Public Survey — non-attendee subset	2,353

STATISTICAL METHODS

The selection of the statistical tools used in this research depended on the nature of the data and the question being considered, or the hypothesis being tested. Descriptive statistics provided an initial understanding of the data's distribution and central tendencies; cross-tabulations explored categorical data associations; and linear and binary logistic regressions addressed relationships and predictions. These tools were chosen and strategically applied to extract meaningful insights that might support evidence-based decision-making. These statistical tools are described below.

Descriptive statistics, including frequencies and means, were used to provide a summary overview of the data. Frequencies gave insight into the distribution of categorical variables, indicating the count of observations within each category. Means, on the other hand, were calculated for continuous variables, offering a measure of central tendency.

Cross-tabulations were used to explore relationships between two categorical variables. This tool allowed us to create contingency tables to visualise the distribution and association between variables. Pearson's chi-square test of significance was used to assess whether the differences between variables correlated.

Linear regression was employed to examine the relationship between a continuous or ordinal dependent variable and one or more independent variables, with the assumption that the relationship was linear in nature. Binary logistic regression was applied when the dependent variable was binary and categorical. It was used to model the probability of an event occurring, such as whether or not someone attended a live performance in the last twelve months (yes/no). For the outcome of either regression to be reported in this study, the model itself had to meet our threshold of statistical significance ($p < 0.05$).

Regression analyses in this study included the following independent variables:

- Location (Which of the following best describes where you live?)
- Gender
- Ethnicity
- Education
- Household income
- Disability
- Carer status
- Age
- Hours worked each week
- Frequency of attendance (at live performances)

The collinearity diagnostics for these independent variables indicated that there were no severe multicollinearity issues present. The Variance Inflation Factor (VIF) values for all predictors were below 10, with the highest VIF being 1.429 for the variable 'Hours worked each week,' suggesting that none of the variables are excessively correlated with each other. Correspondingly, the tolerance values were all above 0.1, reinforcing that multicollinearity was not a significant concern. These results implied that the predictors could be safely used in regression models without the risk of inflated standard errors, which could otherwise affect the reliability of the coefficient estimates.

Additionally, the condition index values revealed that while one index exceeded 10, indicating potential mild collinearity, none were alarmingly high (above 30). 'Hours worked each week' had a condition index of 10.699, and variance proportions indicated that 'Education' and 'Household income' largely accounted for this higher variance; however, these levels of collinearity were not sufficient to warrant exclusion or significant concern.

Therefore, the predictors were confidently used in our regression analyses, ensuring stable and reliable estimates.

STATISTICAL SIGNIFICANCE

Descriptive statistics are numbers that summarise and describe the main features of a dataset. This report uses descriptive statistics to report on things like the percentage of the population who attend live performances, the motivations of attendees, and the amount individuals spend on their attendance.

When comparisons are made across groups — for example, comparing the attendance patterns of different demographic cohorts — inferential tests of statistical significance are routinely applied.

Tests of statistical significance are used to determine whether there is a significant relationship between two variables. In simpler terms, they help us understand whether changes in one variable are related to changes in another.

For example, in this report, it is important to know whether or not attendance at live performances is related to a person's age. To learn this, an appropriate test of statistical significance is applied to see if the distribution of attendees significantly differs according to respondents' self-reported year of birth.

If the test shows a significant result, it means that the variables in the sample are related, and this is unlikely to be due to random chance. If it is not significant, then any difference observed is probably just random, and not indicative of a real relationship between the variables.

In this report, the threshold for statistical significance is set at less than five percent ($p < 0.05$). In simpler terms, this means that any relationship labelled as 'significant' has less than a one-in-twenty chance of occurring randomly.

Another way to understand this is to imagine surveying a different group of 1,000 people from the same population twenty times. If a result is “significant,” you would expect to see the same result at least nineteen out of those twenty times. While it can't be known for sure if this sample is the one-in-twenty exception without running the survey twenty times, it is reasonable to conclude that the significant findings from this sample are likely to be true for the entire population of Aotearoa.

Tests of statistical significance help researchers decide if what is observed in the data is likely to hold true for the wider population, or if it is probably just a coincidence.

It is important to keep in mind that a non-significant finding may have meaning, especially if it rebuts an assumption. For example, one could jump to the conclusion that because the frequency with which people attend live performances positively correlates to their self-reported wellbeing, this also means that the more money they spend, the better the experience. However, because the amount of money individuals spend on live performance attendance fails the test of statistical significance, it is not safe to draw the general conclusion that expenditure is linked to wellbeing.

Importantly, statistically significant results discussed in this report cannot fully explain all the factors that might impact a finding. For example, even though a person's age does significantly affect whether a person reported being an attendee, a whole range of other factors not measured could also be important, including their health, religious and political beliefs, social status, and environment.

Please do not take from the findings that the factors reported are the only variables of significant (or insignificant) influence.

ROUNDING ERROR

Where figures have been rounded, discrepancies may occur between totals and the sums of the component items. Proportions, ratios, and other calculated figures shown in this report have been calculated using unrounded estimates. They may be different from, but are more accurate than, calculations based on rounded estimates.

⁸This understanding of conventional focus-group methodology is largely based on Bogardus (1959; 1967), Kitzinger (1994), Merton (1987), Merton et al., (1956), Morgan (1988; 1993), Single & Powell (1996), and Wibeck et al., (2007), all of whom point to the various elements considered fundamental to the optimal focus group, including of numbers, locations, question design, how to facilitate but not be part of the conversation, and the expected behaviours of the researcher during facilitation.

⁹Linda Tuhiwai Smith made strong statements about this in *Decolonizing Methodologies: Research and Indigenous Peoples* (1999).

In addition to the quantitative approach, we undertook qualitative data collection to further our understanding of the value of live performance in Aotearoa, and to articulate this value with reference to lived experience. This approach recognises that audiences and producers may value live performance in ways that are not, or cannot, be articulated within an economic valuation framework such as CBAX. It also recognises the critique of quantitative economic assessment and valuation as Euro-Western methodologies that may not speak to our context in Aotearoa if used in isolation (c.f. Wilson et al., 2021). As such, this qualitative aspect of the work seeks to uphold what Wilson et al. refer to as a “relational orientation” that is grounded in connectedness between people and their environments, and collective obligations and responsibilities to others (Wilson et al., 2021, p.380).

RŌPŪ WHĀNAU: WHAKAMĀRAMA POTO

*He aha te kai a te rangatira? He kōrero, he kōrero, he kōrero.
What is the food of the chiefs? It is talk.*

Developed by Associate Professor Jani Wilson, Rōpū Whānau are community-based hui designed to challenge conventional focus group facilitation norms. In Rōpū Whānau, participants are usually recruited within whakapapa (genealogical) relationships to the researcher and are positioned as research partners rather than participants. While there are similarities with ‘focus group’ methods,⁸ Rōpū Whānau maintain a formal hui structure and therefore differ from these particularly in terms of ‘payment procedures’, as well as ongoing post-research accountabilities with partners and the way findings are established and communicated (Wilson, 2022).

It has been acknowledged that conventional focus group research methods do not accommodate diverse communities, such as Māori, Pasifika, migrants, refugees, d/Deaf and disabled people, neurodivergent folk and audiences over 60 (Willis & Woollen, 1990, p.199).⁹ Further, existing methods for exploring the experience of Māori audiences are limited (Limbrick, 2010; Poihipi, 2007; Thornley, 2012). Rōpū Whānau has been established using distinctive tikanga (correct procedures, customs) that are recognisable to most Māori, many of whom identify with hui. In this format the facilitator typically conducts conversations across the floor/table/marae (‘traditional’ complexes) in a porowhita (circle) where they are equally part of the audience, the research, and the whānau at the same time. The key methodological principles that underpin Rōpū Whānau are as follows:

¹⁰Associate Professor Jani Wilson notes: My own whānau hui are generally organised as follows, which I have tweaked very slightly for this research by adding koha and whakatakohanga:

Whakawhanaungatanga
(informal making of connections)

Karakia taki/timata (opening incantation/prayer)

Mihi/Whakatauiti (greetings and short formalities)

Himene/Waiata (hymns, song)

Mihi (response, if there is a speaker)

Kaupapa/Take (purpose or rationale of the hui)

Whānau pānui (family notices)

Mihi/Koha
(acknowledgements, gifting)

Karakia Whakamutunga
(closing incantation, prayer)

Karakia mo te whakaritenga o te kai (incantation prior to the food)

Kai, whakawhanaungatanga
(establishment of connections over food)

Whakawātea (release, exit)

Whakatakohanga (post-research responsibilities)

METHOD 1: WHAKAWHITI KŌRERO

Whakawhiti kōrero is an essential part of te ao Māori (the Māori world) and fundamental to understanding Māori society. The building blocks of these dual terms uncover a deeper concept that research and researchers usually evade. 'Whaka' is an activating prefix that brings to motion the subsequent verb, and in this case, 'whiti' means to cross or exchange. Whaka + whiti then, means to exchange or cross, back-and-forth. Kōrero isn't simply talk; one of the various meanings of kō is to resound or sing; rero has been considered a contraction of arero, the tongue. Understanding this, kōrero is an idiom intended to both hear and be heard. There is an expectation that whakawhiti kōrero receives as much as is delivered. Methodologically, this is a mode that acknowledges 'tauiratanga', where those involved in the exchange interchangeably and simultaneously model (tauirā) and apprentice (tauirā).

METHOD 2: HUI

Across whānau, hapū, and various organisations, hui procedures vary, and this is also the case in research. While the method was being developed, Associate Professor Jani Wilson's own whānau required a familiar process (Wilson, 2013).¹⁰ As such, Rōpū Whānau always involve a hui agenda/run-sheet of the event prepared in advance to ensure whānau could be available either for the entire sessions, or in part, but always in accordance with the needs of the whānau first. For this reason research partners partaking in Rōpū Whānau are encouraged to bring children if they need to; the whānau are the most important part of the methodology. Rōpū Whānau are organised around whānau needs and particularly those of tamariki and kuia/kaumātua.

METHOD 3: KŌRERO KI TE WHAKAAHUA

To initiate kōrero (discussions), kaihuawaere (discussion facilitator) invite research partners to bring along images to be shared, generally on a screen, with the rest of the whānau. This serves as a vehicle for the whakawhiti kōrero by providing the partner an opportunity to speak from their personal pakiwaitara (personal, chit-chat story). Once the whakaahua is displayed, partners are invited to kōrero about that moment in time: Who is in the photo? Where are you? What is the kaupapa? Who did you go with? Who planned it? and other such pātai (questions). Ordinarily, these pātai only need to be asked for the first image, as following this the whakawhiti kōrero proceeds without the kaihuawaere having to directly facilitate. The whakaahua narrative concludes organically as the rest of the whānau proceed to ask questions, curious about the moment represented and/or how it fits into the broader kaupapa.

¹¹ Mataora is an important ancestor in toi Māori (arts) who according to some pūrākau is understood to be the person who brought tā moko (tattooing) from Rarohenga (the underworld) to te ao tūroa (the world of light).

¹² Whānau is a most foundational building block of Māori social organisations (L. T. Smith, 1992). The definition of whānau in this part of this report has emerged from Cunningham et al.'s understanding that considers whānau as beyond a genealogical connection, and considers three distinct groups; whakapapa whānau (shared whakapapa), kaupapa whānau (shared interests), and statistical whānau (who may share a living situation, but not ancestry) (2005).

METHOD 4: KOHA

Koha were initially contributions of kai, usually delivered to spaces of food preparation to help with manaakitanga (generosity without expectation). Other koha of value such as cloaks or ornamental taonga (prized possessions) would often be presented in a formal situation and sometimes expected to be returned if this hadn't been stipulated in the terms of takohatia (giving tokens, gesture). There is a longstanding misunderstanding about koha within research institutions, who are aware of its importance as a means of acknowledging the contribution of research participants. However koha in research can involve awkward exchanges of invoices and become fraught for researchers and participants navigating institutional bureaucracy. In this study research partners did not invoice for their contribution; instead, context-specific cash contributions were offered.

METHOD 5: KAI

Kai dispels the tapu (prohibition) by making situations noa (common). Whakawhiti kōrero may require whakanoa (removal of tapu), and importantly, kai is also acknowledged as a form of koha and manaakitanga. All Rōpū Whānau conclude with the sharing of kai.

NUMBER AND MAKEUP OF RŌPŪ WHĀNAU

For this project eleven Rōpū Whānau were undertaken. Importantly, two distinct groups are represented here; first, the Māori, Pasifika and Indigenous Rōpū Whānau set up through Associate Professor Jani Wilson's own networks (seven groups). These were promoted as Whakaaturanga Mataora,¹¹ literally 'the living face,' which over time has come to be known as 'live performance'. The remaining Rōpū Whānau (four groups) were drawn from communities aligned with the other researchers in this project. These groups were not drawn together as specifically Māori or Pasifika, though some participants do whakapapa Māori.¹²

Table 4: Whakaaturanga Mataora

RESEARCH PARTNERS	MEN	WOMEN	18-25	26-59	60+
48	15	33	19	27	2

Table 5: Community Rōpū Whānau coordinated by other project members

RESEARCH PARTNERS	MEN	WOMEN	18-25	26-59	60+
28	12	16	-	15	7

Table 6: All regions, 'whānau' connection, main performances discussed

REGION/GROUP	PRIMARY CONNECTION	PRIMARY DISCUSSION
Auckland City July 2023	Mostly early career academics and whānau	Festivals, kids concerts, gigs, conferences, kapa haka
South Auckland November 2023	University students	Polyfest, Te Pētihana, festivals
Whakatāne July 2023	Students & service providers	Pre-sport entertainment, festivals, kapa haka, darts
Wainuiomata 1 October 2023	Creatives & Sports people	Festivals, concerts, Oktobertfest
Wainuiomata 2 December 2023	Sports & family	Cruise-ship, surprise Siva Samoa, musicals, kapa haka
Wellington 1 June 2024	Young Musicians	Bar gigs, fiesta, random musical gigs
Wellington 2 June 2024	Parents of young children	Comedy, light exhibition, Pecha Kucha presentations
Wellington 3 September 2024	d/Deaf and Disabled musicians and gig-goers	Bar gigs, concerts, festivals
Christchurch 1 February 2024	Teachers/ex-teachers	Plays, musicals, theatre
Christchurch 2 April 2024	Dancers & Dance Mums	Ballet, hip-hop, kapa haka, kid's dance recitals
Christchurch 3 May 2024	Theatre & performance, retired or near retirement	Busking, theatre, dance, karaoke

PRODUCER INTERVIEWS

The second qualitative tool used was semi-structured interviews with live performance producers. These interviews were conducted by various members of the research team with 31 participants across the first half of 2024. The participants were drawn from organisations that had supported the project by allowing surveying of their audiences, broadly identified as producers of live performance. Participants were selected and then invited to take part in an interview with an eye to ensuring equitable representation from various sectors, as well as ensuring a strong mix of regional and urban operations, organisations with small through to nation-wide scope, public and private organisations, and diversity of roles undertaken within the live performance sector. Data on interviewee demographics was not recorded as this may have compromised confidentiality in the small, highly networked, sector workforce. A broad breakdown of the types of performance represented through these producer interviews is below.

Table 7: Breakdown of sectors of interviewees

FESTIVAL	COMEDY/VARIETY	LARGE ARTS ORGANISATIONS	MUSIC VENUES	CLASSICAL	THEATRE	DANCE
3	3	3	8	4	6	4

Participants were invited to take part in an interview through an initial email and were provided with a consent form and information sheet. Interview questions were shared with participants in advance, and participants were welcome to withdraw consent or leave the interview at any time. The interviews took around one hour, with interviewees asked a series of semi-structured questions about their own background and pathways into the industry, organisational structure, risks, trends, benefits, and outlook. Interviews took place via Zoom, phone calls, or through written correspondence, and were recorded with transcripts generated from the kōrero and used to inform the findings from this method (see Producer Experiences, Motivations, and Constraints (p.90)).

LIMITATIONS

INTERPRETATION OF FINDINGS

It is beyond the scope of this report to propose hypotheses for or explanations of its findings. While it is evident that factors like household income significantly influence whether someone attends live performances, the report does not attempt to explain why this is the case. Such an exploration is beyond the scope of this study, especially as the underlying reasons are likely to be contextual, complex, and nuanced.

GENDER DIVERSE AUDIENCES

A limitation of this data is the insubstantial reporting on experiences and profiles of gender diverse audiences at live performances. As noted above, people who responded 'Non-binary or other', or declined to disclose their gender, accounted for 3.6% of respondents to the Attendee Survey, and thus this grouping was too small to generate statistically significant data and has not been reported on. We are reminded here of Fiani & Han's call to confront the professional silencing of non-binary narratives:

Given the increasing preponderance of non-binary identifications and the unique needs and experiences of non-binary participants, it is crucial that professional and lay communities alike begin to take two steps moving forward: 1) explicitly acknowledge the existence of non-binary TGNC identities and 2) work to achieve fluency regarding the unique needs and experiences of this population. (2019, p.181)

This 'fluency' is a vital reminder of the need for researchers and data collection systems alike to do better to amplify the experiences and respond to the needs of gender diverse audiences.

TE MATATINI

Kapa haka was a consistent point of discussion during the Rōpū Whānau in Whakaaturanga Mataora, and the kōrero organically ventured into Te Mana Kuratahi (primary school level), Polyfest and Te Whakataetae Kapa Haka o Te Kura Tuarua (secondary school level), and some discussions about live regional kapa haka performances. However, the period in which this study was completed fell outside both the 2023 and 2025 Te Matatini cycles. Subsequently consumer spending data collected at kapa haka performances did not include this event. The key findings in 'Te Matatini Herenga Waka Herenga Tangata Impact Evaluation' (Angus & Associates, 2023) were Live Attendee profiles (first timers and frequenters), Event Experience (spectator satisfaction), Economic Contribution (\$22 million), and Wider Impacts on Tāmaki Makaurau (social, cultural and wellbeing), show some significant correlation to elements in this study.

THE AUDIENCE FOR LIVE PERFORMANCE IN AOTEAROA



Of 5,042 respondents to the Public Survey, 2,689 (53.3%) reported attending at least one live performance in the last twelve months. 2,353 (46.7%) did not attend any live performances. Extrapolated to the population this means 2.3 million Aotearoa residents aged over fifteen attended a live performance in the last twelve months.

The Stats NZ Tatauranga Aotearoa General Social Survey (2021) reported selected civic and cultural participation measures for the total population for the previous twelve months. Of these, the only directly comparable measure was attendance at a musical, dance or theatre performance, which was reported to be 34.4% (± 1.2 ppt).

In our Public survey, 26.9% of Aotearoa residents reported attending a musical, dance or theatre performance in the last twelve months (± 0.6 ppt).

Given the lower attendance rate observed in our survey compared to the Stats NZ Tatauranga Aotearoa General Social Survey, it is plausible that our findings might understate the true level of attendance at live performances. Factors such as differences in timing (2021 v 2024), context (pandemic proximity), the ongoing cost of living crisis (see Stats NZ Tatauranga Aotearoa, 2024), and differences in survey methodology could contribute to this misalignment.

Therefore, while our data provides valuable insights into attendance patterns, the actual attendance rates might be higher than reported.

ATTENDANCE FREQUENCY

Once the threshold of attending at least one live performance had been met, we analysed how many other live performances respondents had attended in the previous twelve months. On average, these respondents attended 4.9 different live performances in the last twelve months. Interestingly, while NZ European/Pākehā audiences were more likely to attend at least one performance; Māori / Pasifika audiences were likely to attend live performances more frequently when they did go.

The frequency of attendance at live performances was analysed using linear regression analysis, which was suitable for the count nature of the dependent variable. This analysis was limited to those who attended at least once in the previous twelve months. Factors that influenced the frequency of attendance at live performances are discussed below.

KEY FINDINGS

01. EDUCATION

Educational attainment was the most significant predictor of the total number of live performances attended. Higher education levels were associated with an increased likelihood of attendance at multiple performances. Specifically, individuals with higher education levels were 9.8% more likely to attend more performances (Standardised Coefficient Beta = .098, $t = 4.742$, $p < .001$).

03. ETHNICITY (NZ EUROPEAN/PĀKEHĀ)

Individuals who identified as NZ European/Pākehā were less likely to attend multiple performances compared to other ethnic backgrounds. NZ Europeans/Pākehā were approximately 6.4% less likely to attend more performances (Standardised Coefficient Beta = $-.064$, $t = -2.556$, $p = .011$).

02. GENDER

Gender differences were observed, with men attending fewer performances than women. Men were approximately 7.9% less likely to attend more performances compared to women (Standardised Coefficient Beta = $-.079$, $t = -3.941$, $p < .001$).

04. ETHNICITY (MĀORI/PASIFIKA)

Individuals who identified as Māori / Pasifika who attended at least one performance were more likely to attend multiple performances. Māori individuals were approximately 5.4% more likely to attend more performances (Standardised Coefficient Beta = $.054$, $t = 2.138$, $p = .033$).

Once the attendance threshold was met, the influence of location, household income, hours worked, disability, carer status, and age on attendance frequency was minimal and not statistically significant.

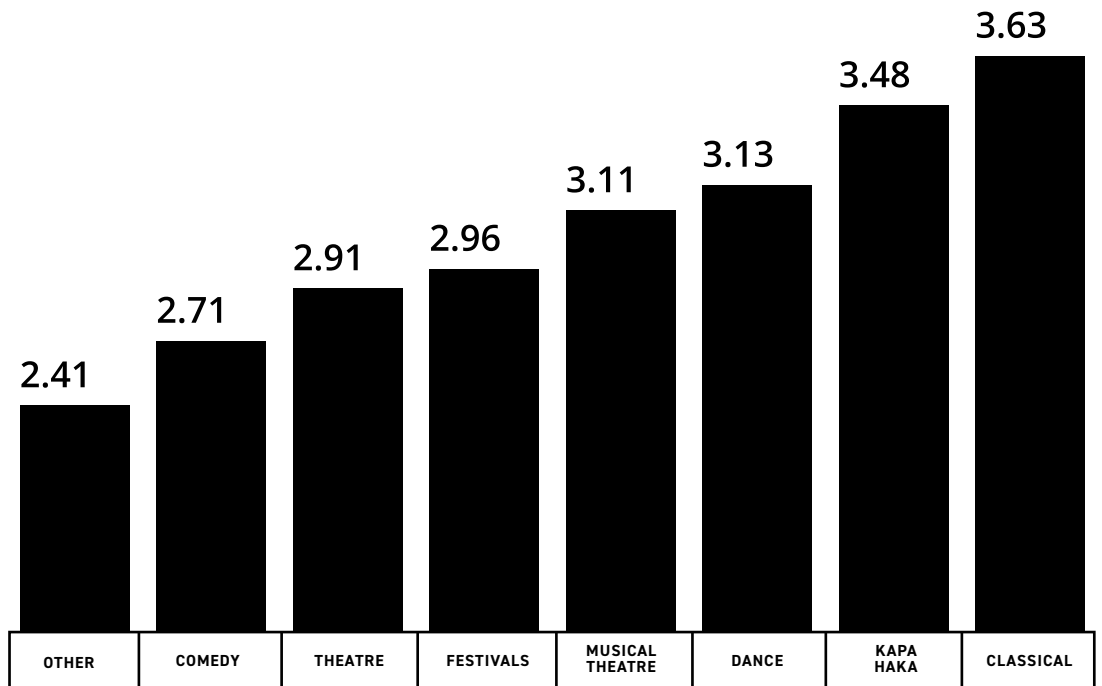
The R-square values indicate that the model explained only about 2.5% to 2.9% of the variability in the total number of live performances attended. Despite the modest R-square values, these predictors provide meaningful insights into attendance patterns, though the complexity of human behaviour suggests the presence of additional, unmeasured factors.

GROUP ATTENDANCE

On average, people reported attending live performances with 2.8 other people. The most social live performance categories were classical music and kapa haka, with comedy being the least social.

Note that the data in the figure below is imperfect because it reflects overall averages for individuals attending at least one performance in each category, rather than specific group sizes per performance type. It should, therefore, be treated as a useful proxy for group size by category.

Figure 2: Average number of people per group by live performance category



The size of groups attending live performances was analysed using linear regression analysis, which was suitable for the count nature of the dependent variable. This analysis was limited to those who attended at least once in the previous twelve months. Factors that influenced the size of a group attending a live performance are discussed below.

KEY FINDINGS

01. AGE

Age negatively influenced group size, with older individuals typically attending in smaller groups. Older participants were approximately 21.7% less likely to attend in larger groups (Standardised Coefficient Beta = -.217, $t = -10.507$, $p < .001$).

02. GENDER

Gender differences were observed, with men attending in smaller groups than women. Men were approximately 8.6% less likely to attend in larger groups compared to women (Standardised Coefficient Beta = -.086, $t = -4.408$, $p < .001$).

03. HOUSEHOLD INCOME

Higher household income was associated with smaller group sizes. Individuals with higher income were approximately 8.3% less likely to attend in larger groups (Standardised Coefficient Beta = -.083, $t = -3.838$, $p < .001$).

04. CARER STATUS

Carers were approximately 5.4% more likely to attend in larger groups (Standardised Coefficient Beta = .054, $t = 2.712$, $p = .007$).

The influence of location, ethnicity, education, hours worked, and disability status on group size was minimal and not statistically significant.

The R-square value indicates that the model explained only about 7.5% of the variability in the size of groups attending live performances. Despite the modest R-square value, these predictors provide meaningful insights into group attendance patterns, even in the presence of additional, unmeasured factors.

MODE OF TRANSPORT

In the Attendance Survey ($n = 13,067$), respondents reported using the following mix of transport options to get to their live performance. As the table below indicates, private transportation is by far the most common mode of transport undertaken by respondents.

Table 8: Mode of transport

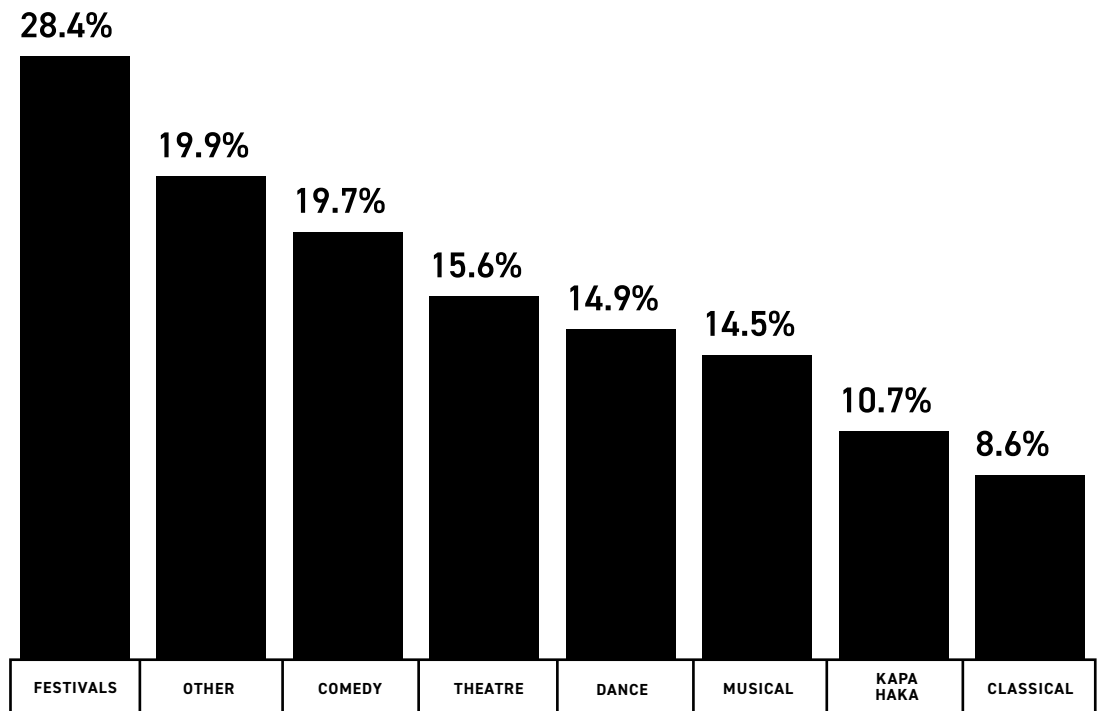
MODE OF TRANSPORT	
Private transport (e.g. car, taxi, Uber)	73.4%
Walk, bike or scooter more than 15 minutes	16.5%
Public transport (e.g. train, bus, ferry)	10.4%
By air	3.4%

ATTENDANCE TYPE

For those respondents who attended at least one event, we analysed the distribution of attendance across various categories of live performances.

On average, people who attended at least one performance attended 2.5 different types of performances from the list of eight given, where these types correspond to different performance categories — festival, comedy, theatre, dance, musical, kapa haka, classical, or other.

Figure 3 : Distribution of Attendance Across Different Categories of Live Performances



NOTABLE FINDINGS PERTAINING TO ATTENDANCE TYPE ARE AS FOLLOWS:

1. **1.2 million** Aotearoa residents aged fifteen and over attended a festival in the last twelve months.
 - Younger people, and those people with higher household incomes, were more likely to attend festivals.
2. **850,000** Aotearoa residents aged fifteen and over attended a comedy performance in the last twelve months.
 - Younger people, and people who identified as men, were more likely to attend comedy performances.

3. **670,000** Aotearoa residents aged fifteen and over attended a theatre performance in the last twelve months.
 - Older people, and people with higher levels of education and household income, were more likely to attend theatre performances.
4. **640,000** Aotearoa residents aged fifteen and over attended a dance performance in the last twelve months.
 - Carers, disabled people, and people with higher levels of education and household income, were more likely to attend dance performances.
5. **630,000** Aotearoa residents aged fifteen and over attended a musical theatre performance in the last twelve months.
 - Older people, and people with higher levels of education, were more likely to attend musical theatre performances.
6. **460,000** Aotearoa residents aged fifteen and over attended a kapa haka performance in the last twelve months.
 - Māori and/or Pasifika people, carers, urban residents, and people with higher levels of education, hours of work, and household income, were more likely to attend kapa haka performances.
7. **370,000** Aotearoa residents aged fifteen and over attended a classical music performance in the last twelve months.
 - Older people, people who identified as men, and people with higher levels of education and household income were more likely to attend classical music performances.
8. **860,000** Aotearoa residents aged fifteen and over attended another form of live performance in the last twelve months.
 - Apart from people who identified as men, there were no demographic predictors of people likely to attend other forms of live performance.

The distribution illustrates a diverse range of preferences among attendees, with festivals and comedy shows being particularly popular. The substantial 'Other Events' category suggests a wide variety of contemporary music, niche, or specialised performances that collectively form a significant portion of overall attendance.

FACTORS INFLUENCING ATTENDANCE

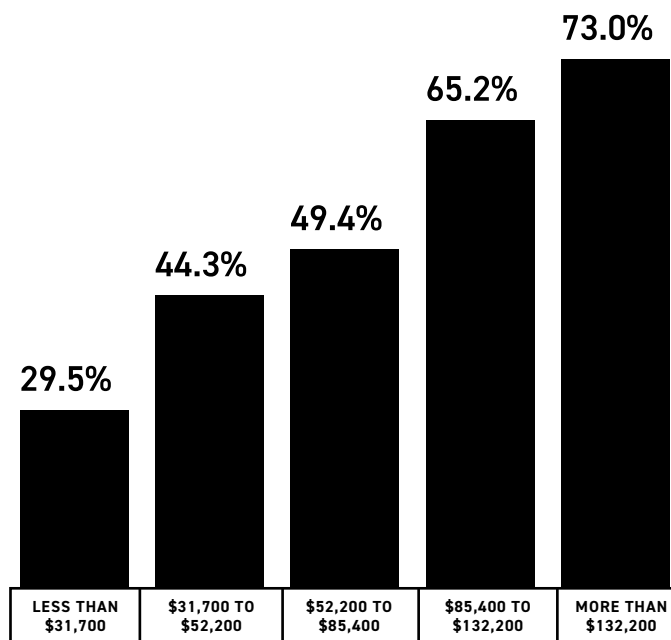
A binary logistic regression model was prepared to understand the factors influencing individuals' attendance at live performances in the last twelve months (yes/no). The findings from this are discussed below.

KEY FINDINGS

01. HOUSEHOLD INCOME

Income level emerged as the most influential factor in our model, significantly affecting attendance at live performances. As illustrated in the below figure, individuals with higher household incomes were substantially more likely to attend live performances. Specifically, those in the highest household income quintile were 48.3% more likely to attend than those in the lowest income quintile (Wald = 224.146, $p < .001$).

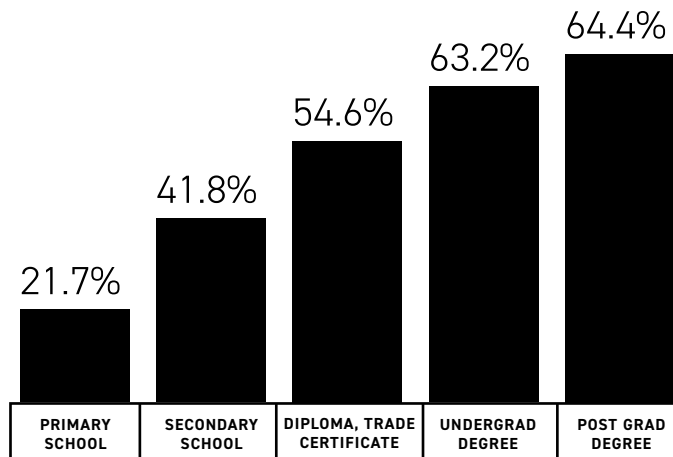
Figure 4 : Aotearoa live performance attendance by household income



02. EDUCATION

Educational attainment was the second most impactful factor. Higher education levels, particularly undergraduate and postgraduate university degrees, were associated with an increased likelihood of attendance. Individuals with higher education levels were 30.1% more likely to attend live performances than those with lower education levels (Wald = 71.042, $p < .001$).

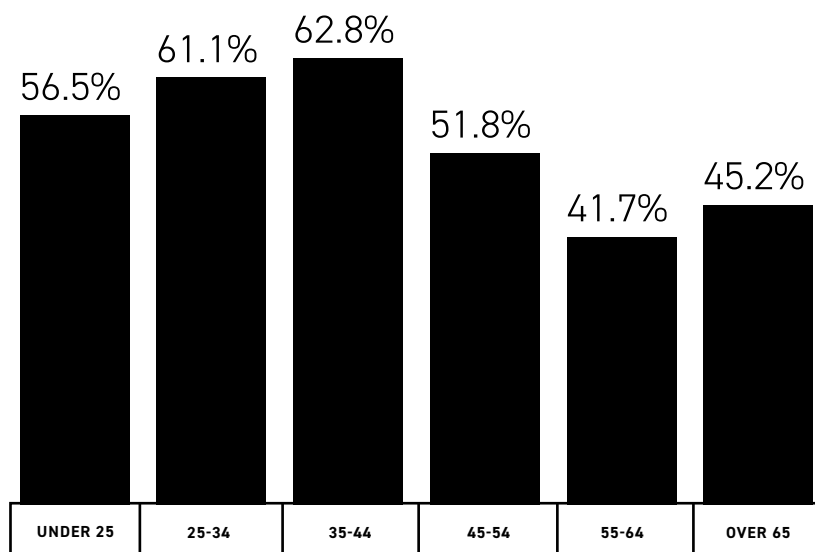
Figure 5 : Aotearoa live performance attendance by highest level of education



03. AGE

Age showed an inverse relationship with attendance. As individuals aged, their likelihood of attending live performances decreased slightly. For each additional year of age, the likelihood of attending decreased by approximately 1.0% (Wald = 66.462, $p < .001$). However, it can be seen in the chart below that this relationship is not perfectly linear.

Figure 6 : Aotearoa live performance attendance by age (10-year cohorts)



04. DISABILITY

Disability status affected attendance, with disabled individuals being 32.4% less likely to attend live performances than non-disabled individuals (Wald = 15.344, $p < .001$).

05. GENDER

Gender differences were observed, with women being 34.3% more likely to report attending live performances than men (Wald = 22.049, $p < .001$).

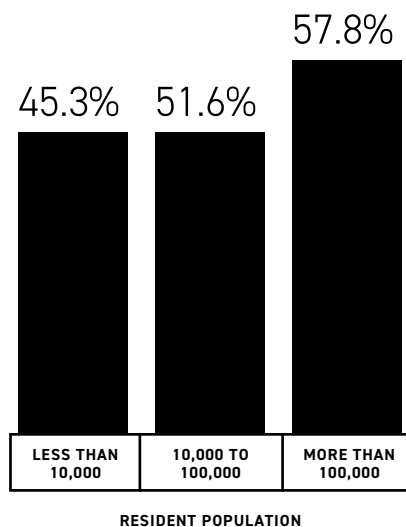
06. ETHNICITY

Ethnicity significantly influenced whether audiences attended live performance, with individuals who identified as NZ European/Pākehā being 45.3% more likely to attend live performances than those who identified as another ethnicity (Wald = 20.844, $p < .001$).

06. LOCATION

Geographic location significantly influenced attendance. Individuals in communities of less than 10,000 were 9.7% less likely to attend live performances than those living in cities of more than 100,000 (Wald = 5.683, $p = .017$).

Figure 7: Aotearoa live performance attendance by location



The number of hours worked per week, carer status, and identification as Māori/Pasifika did not significantly predict attendance.

The R-square values indicate that the model explained between 12.5% and 16.7% of the variability in attendance at live performances. While these values are not particularly high, they indicate that the model does have significant explanatory power, identifying important predictors of attendance.

Overall, the logistic regression model provided a good fit and significantly improved prediction accuracy compared to the null alternative.

CONSTRAINING FACTORS

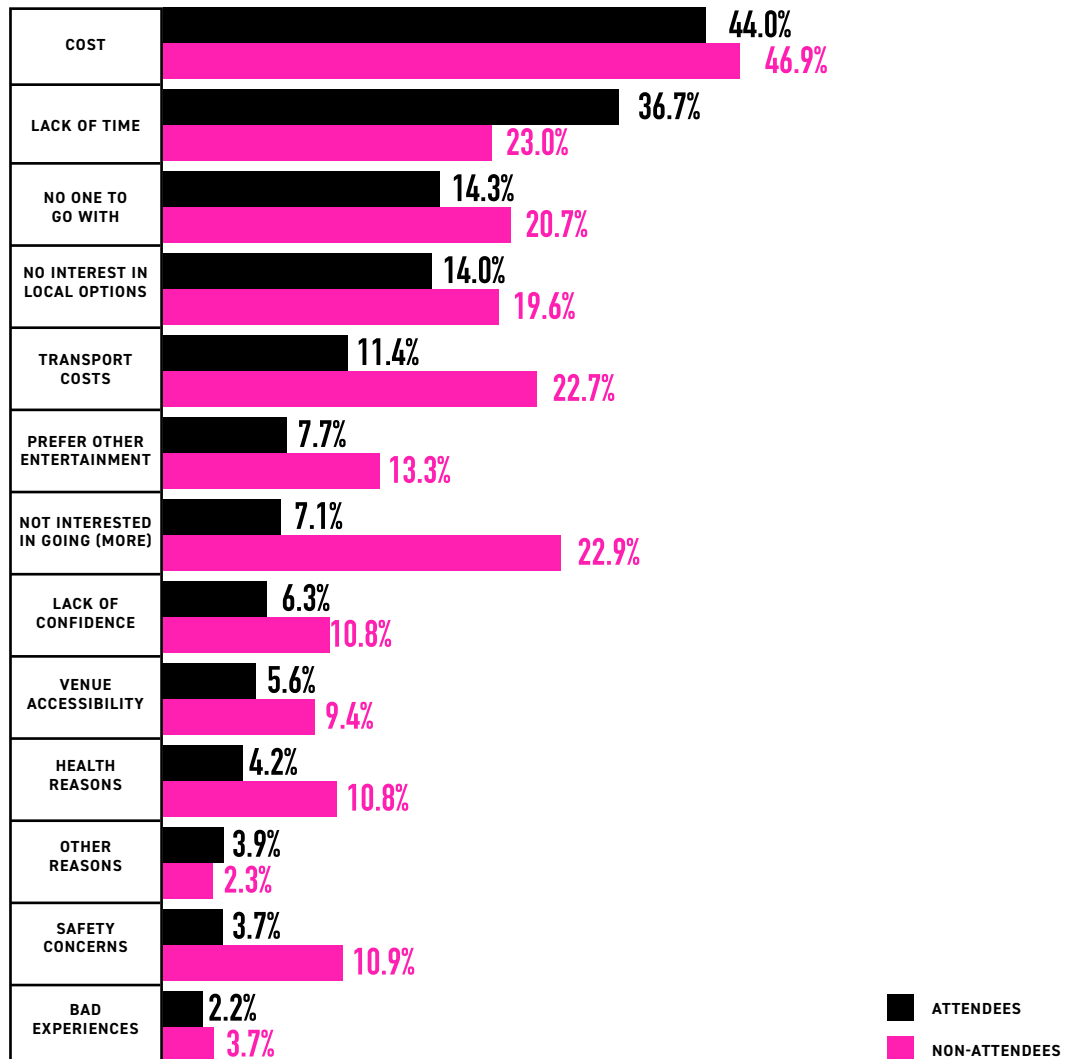
All Aotearoa residents were asked the following question in both the Public and Attendance Surveys.

¹³The term “more” was only displayed to attendees.

What stops you attending more¹³ live performances?

Attendees reported an average of 1.6 barriers to attending more live performances, compared to an average of 2.2 barriers reported by non-attendees from the list of fourteen options presented to them. These options are as shown in the figure below.

Figure 8: Barriers to attending (more) live performances for Aotearoa residents



The top five barriers to attending more live performances for attendees were:

1. Cost of attending events that interest or are suited to you — 44.0%
2. Lack of time due to other commitments — 36.7%
3. No one else to go with — 14.3%

4. Not interested in the other live performance options in my area — 14.0%
5. Transport costs such as running a car or public transport fees — 11.4%

The top five barriers to attending live performances for non-attendees were:

1. Cost of attending events that interest or are suited to you — 46.9%
2. Lack of time due to other commitments — 23.0%
3. Not interested in attending — 22.9%
4. Transport costs such as running a car or public transport fees — 22.7%
5. No one else to go with — 20.7%

Attendees were 1.6 times more likely than non-attendees to report a lack of time as a barrier to attending (more) live performances.

Non-attendees were 3.2 times more likely to report being uninterested in attending (more), 2.9 times more likely to report safety concerns, and 2.5 times more likely to report health reasons as barriers to attending (more) live performances.

In total, 47.4% of attendees and 54.6% of non-attendees identified either 'Cost of attending events that interest or are suited to you' or 'Transport costs such as running a car or public transport fees' as barriers to attendance.

Of those Aotearoa residents who reported cost as a barrier, the following notable factors were observed:

- **Gender:** Women were 70.4% more likely than men to report cost as a barrier (Wald = 266.780, $p < .001$).
- **Household income:** People in the top 20% of household income were 17.0% more likely than people in the lowest 20% of household income to report cost as a barrier (Wald = 183.913, $p < .001$).
- **Age:** For every year younger a person was, they were 1.1% more likely to report cost as a barrier (Wald = 129.985, $p < .001$).
- **Disability:** Disabled people were 31.7% more likely than others to report cost as a barrier (Wald = 39.747, $p < .001$).
- **Carer:** Carers were 12.7% more likely than others to report cost as a barrier (Wald = 11.480, $p = .001$).

- **Location:** People living in cities of 100,000 or more were 7.6% more likely than people in communities of less than 10,000 to report cost as a barrier (Wald = 7.208, $p = .007$).

Of those Aotearoa residents who reported time as a barrier:

- **Hours worked:** For every extra hour a person worked, they were 1.6% more likely to report time as a barrier (Wald = 232.569, $p < .001$).
- **Education:** People with higher levels of education were 20.5% more likely than others to report time as a barrier (Wald = 149.242, $p < .001$).
- **Age:** For every year younger a person was, they were 1.1% more likely to report time as a barrier (Wald = 104.307, $p < .001$).
- **Household income:** People in the top 20% of household income were 11.8% more likely than people in the lowest 20% of household income to report time as a barrier (Wald = 79.492, $p < .001$).
- **Carer:** Carers were 27.3% more likely than others to report time as a barrier (Wald = 43.970, $p < .001$).
- **Gender:** Men were 16.5% more likely than women to report cost as a barrier (Wald = 19.637, $p < .001$).
- **Disability:** Disabled people were 18.8% less likely than others to report time as a barrier (Wald = 13.130, $p < .001$).

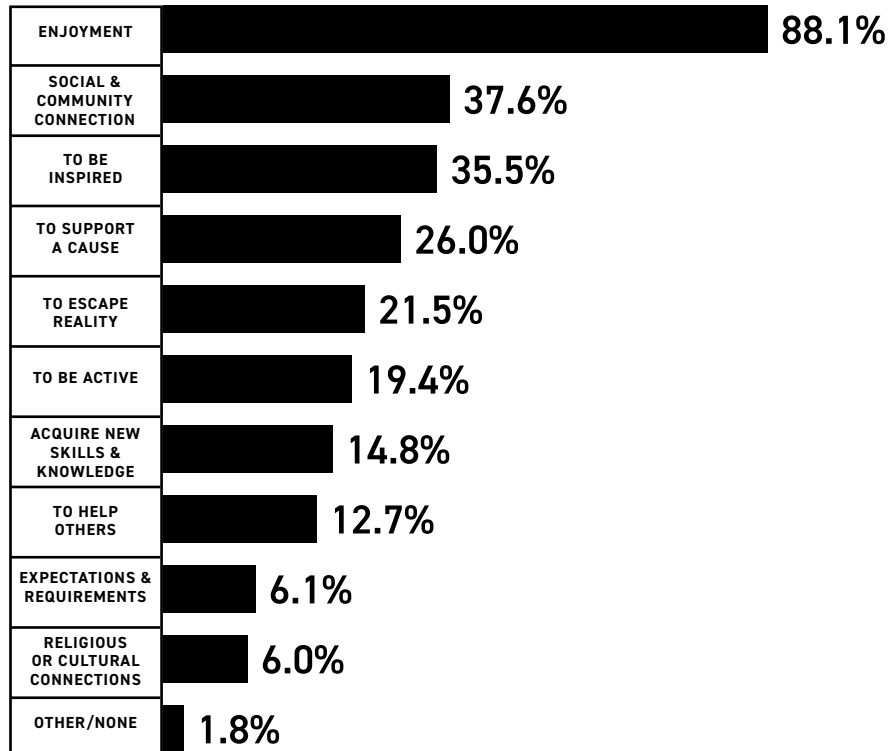
For the 18.7% of all Aotearoa residents who reported that they had no one else to attend with:

- **Age:** Every year younger a person was, they were 2.7% more likely to report having no one else to attend with (Wald = 342.536, $p < .001$).
- **Disability:** Disabled people were 56.0% more likely than others to report having no one else to attend with (Wald = 65.472, $p < .001$).
- **Carer:** Carers were 44.0% less likely than others to report having no one else to attend with (Wald = 49.330, $p < .001$).
- **Gender:** Men were 33.7% more likely than women to report having no one else to attend with (Wald = 40.469, $p < .001$).

MOTIVATIONS

In both the Public and Attendance Surveys, we asked respondents about their motives for attending live performances. They were provided with a list of ten options, plus an 'Other' category, and were able to select multiple reasons. On average, respondents selected 2.7 motives each. The motives are as follows.

Figure 9: Attendees' motives for attending live performances



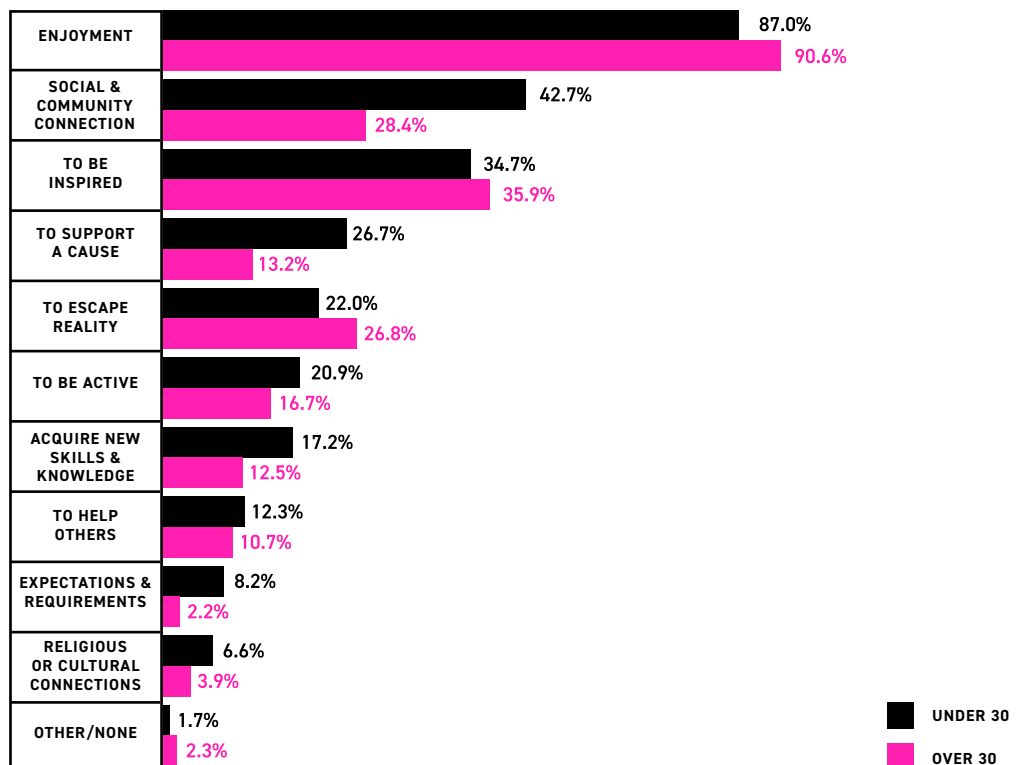
When comparing the experiences of different age cohorts, people under 30 who attended live performances (n = 4,202) were twice as likely than attendees over the age of 55 (n = 4,203) to be motivated by escaping reality. In the below table, thresholds of 'Under 30' and 'Over 55' have been created to highlight the distinction between 'younger' and 'older' people.

People under 30 were also 3.5 times more likely to be attending because they were expected or required to, and 1.5 times more likely to attend for social or community connection.

Interestingly, attendees over 55 were 21.5% more likely than those under 30 to attend in support of a cause.

No significant differences in motives were observed between genders.

Figure 10: Attendees motives for attending live performances by age cohort



As indicated by the above table, ‘for enjoyment’ is by far the most common motivation for people attending live performances. Younger respondents were more likely to report social and community connection as a motivation than older respondents, and slightly more likely to attend from a sense of expectation or requirement than older respondents.

BARRIERS TO ATTENDANCE

In addition to understanding attendance patterns and motivations for attending, we also sought to understand how barriers to attendance were experienced and reported by respondents. All respondents were asked the following question in both the Public and Attendance Surveys.

Do any of the following make it harder for you to attend or enjoy live performances?

- *Your age*
- *Your gender*
- *Your sexuality*
- *Your location*
- *Your income*
- *Your employer*
- *Your ethnicity*
- *Your disability*
- *Your family circumstances*
- *None of the above*

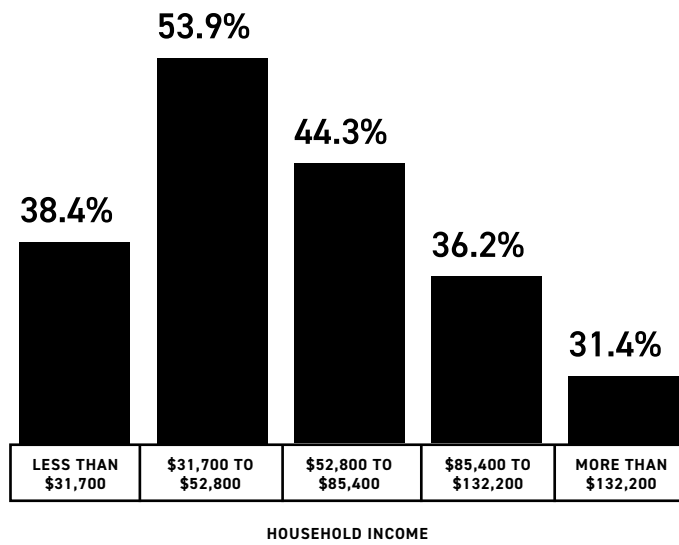
A total of 55.3% of people who attended a live performance in the last twelve months (attendees) reported that none of the demographic factors listed made it harder for them to attend or enjoy live performances. Approximately one in three non-attendees (35.4%) said the same thing. Factors that were reported as barriers to attendance are provided below.

INCOME

The most significant constraint on attendance was income. In total, 37.4% of attendees and 42.2% of non-attendees reported in the Public Survey that their income made it harder for them to attend or enjoy live performances.

Interestingly, although self-reported household income was a significant predictor of perceiving income as a constraint on attendance (Exp(B) = .823), Wald = 58.655, $p < .001$), the relationship was not linear.

Figure 11: Percentage of Aotearoa residents who reported their income as a constraint on their live performance attendance



Controlling for other factors, the most significant predictor of income as a constraint was gender. Women were approximately 93.6% more likely than men to report finding it harder to attend live performances due to their income (Exp(B) = 1.833, Wald = 98.473, $p < .001$).

Age was also a relevant factor, with every decreasing year of age accounting for a 1.0% increase in the likelihood that they identified income as a constraint (Exp(B) = 0.990, Wald = 26.190, $p < .001$).

The binary logistic regression model used explained between 5.5% (Cox & Snell R Square) and 7.4% (Nagelkerke R Square) of the variance in perceived constraint of income.

It was previously noted that age was predictive of live performance attendance, with each additional year of age decreasing the likelihood of attending (yes/no) by approximately 1.7%.

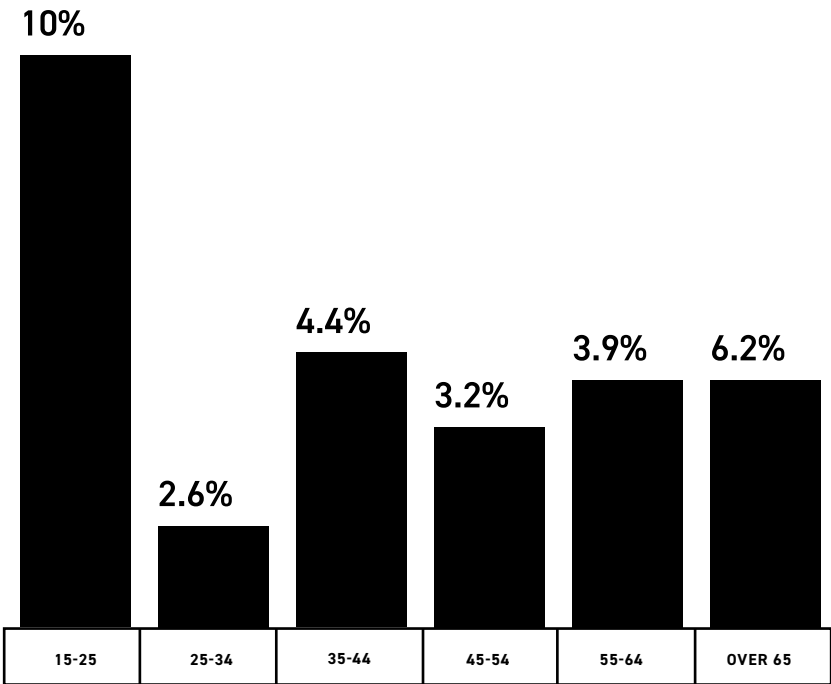
AGE

It was previously noted that age was predictive of live performance attendance, with each additional year of age decreasing the likelihood of attending (yes/no) by approximately 1.7%.

A total of 4.6% of attendees reported that their age made it harder for them to attend or enjoy live performances. In contrast, nearly twice as many non-attendees (8.4%) reported their age was a barrier.

Among all Aotearoa residents, the following age-specific trends were observed.

Figure 12: Percentage of Aotearoa residents who reported age as a constraint on their live performance attendance



A very small proportion of the population reported their gender, sexuality, or ethnicity as a constraint on their attendance. This is shown in the following table.

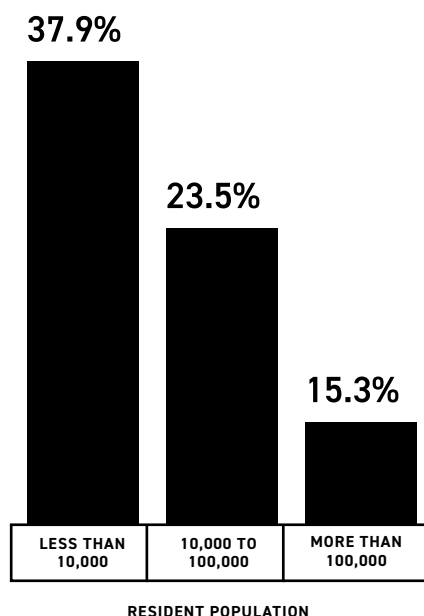
Table 9: Percentage of Aotearoa residents who reported their gender, sexual or ethnic identity as a constraint on their live performance attendance

	ATTENDEES	NON-ATTENDEES
Gender	2.1%	2.9%
Sexuality	1.5%	1.4%
Ethnicity	0.8%	1.2%

Similarly, 4.6% of attendees and 3.7% of non-attendees in paid work declared their employer made it harder for them to attend or enjoy live performances.

Among all Aotearoa residents, the following location-specific trends were observed in the Public Survey. Controlling for other demographic factors, individuals in communities of less than 10,000 were twice as likely to find it harder to attend or enjoy live performances than those living in cities of more than 100,000 (Exp(B) = 1.980, Wald = 235.637, p < .001).

Figure 13: Percentage of Aotearoa residents who reported their location as a constraint on their live performance attendance



Disabled people were also 44.1% more likely than others to report their location as a barrier to attending live performances (Exp(B) = 1.441, Wald = 20.897, $p < .001$), as were 34.1% of people with higher levels of educational attainment (Exp(B) = 1.341, Wald = 67.653, $p < .001$).

Every year of additional age also correlated with a 1.0% increase in perceiving location as a constraint on attendance (Exp(B) = .990, Wald = 20.830, $p < .001$), and every additional hour of work was associated with a 0.6% increase (Exp(B) = 1.006, Wald = 6.792, $p = .009$).

The binary logistic regression model used explained between 6.8% (Cox & Snell R Square) and 10.4% (Nagelkerke R Square) of the variance in the perceived constraint of location.

DISABILITY

In understanding disability as a barrier to access, 15.0% of attendees and 32.4% of non-attendees reported that their disability made it harder for them to attend or enjoy live performances. Such findings are consistent with the extant, albeit limited, research into the lived experiences of d/Deaf and disabled audiences in Aotearoa. Quantitative data from Creative New Zealand shows that disabled audiences experience a range of access barriers in events contexts and have significantly lower attendance at performing arts events (Creative New Zealand, 2021). These access barriers are discussed more fulsomely with deference to lived experience in the Rōpū Whānau findings (p.68-69).

For people with caring duties at home, 23.9% of attendees and 29.2% of non-attendees reported that their family circumstances made it harder for them to attend or enjoy live performances.

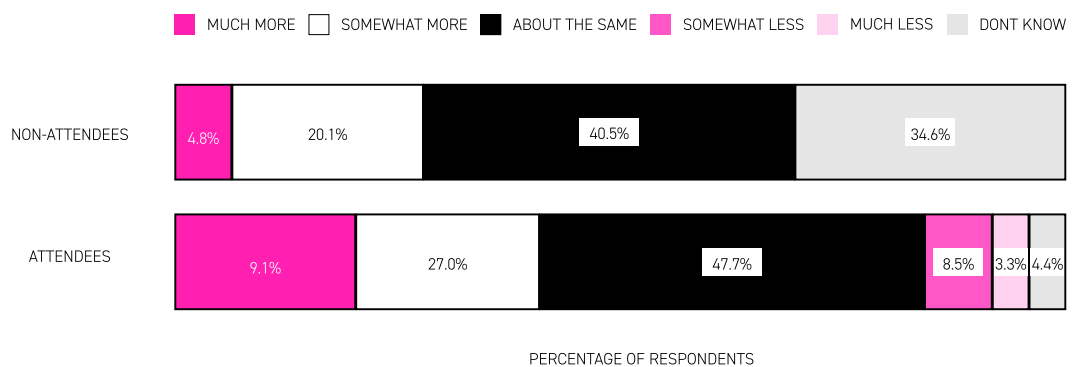
AUDIENCE SENTIMENT AND GROWTH

To get a sense of audience sentiment, respondents to the Public Survey and Attendance Survey were asked the following question.

In the next twelve months, how often do you think you will go to live performances in Aotearoa?

- Much more
- Somewhat more
- About the same
- Somewhat less
- Much less
- Don't know

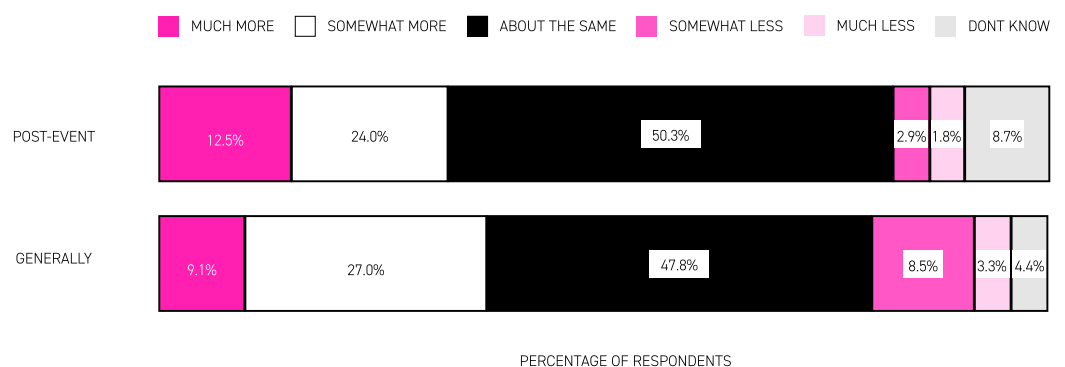
Figure 14: Intent to attend live performances in the next twelve months (recent attendees v others)



In total, 36.0% of attendees, and 24.9% of non-attendees, expressed an intention to attend (somewhat or much) more live performances in the next twelve months. Attendees were 3.1 times more likely to intend more attendance at live performances, as opposed to less, in the next twelve months.

Interestingly, there was little distinction between the responses of attendees surveyed immediately before and after the performances and the general public who were surveyed later. This consistency suggests that even in the immediate performance period, attendees provided rational responses, lending validity to the findings from both survey methods.

Figure 15: Intent of recent attendees to attend live performances in the next twelve months (post-event and generally)



Excluding those who answered 'don't know', and treating the scale from much more to much less as linear, the future intent to attend live performances was analysed using linear regression. Notable findings from this analysis are as follows:

- **Attendance frequency:** Past attendance frequency was a significant positive predictor of future intent. Individuals who attended more performances in the past were 11.8% more likely to intend to attend more performances in the future (Standardised Coefficient Beta = .118, $t = 5.861$, $p < .001$).
- **Social attendance:** The number of people that an individual typically attended with was also a positive predictor. Individuals who usually attended with more people were 10.8% more likely to intend to attend more performances (Standardised Coefficient Beta = .108, $t = 5.226$, $p < .001$).
- **Age:** Older age was negatively associated with future intent to attend live performances. Older participants were less likely to intend to attend (Standardised Coefficient Beta = $-.108$, $t = -4.909$, $p < .001$).
- **Ethnicity (Māori / Pasifika):** Māori/Pasifika ethnicity positively influenced the intent to attend future performances. Individuals who identified as Māori / Pasifika were 11.1% more likely to intend to attend more events (Standardised Coefficient Beta = .111, $t = 4.240$, $p < .001$).
- **Ethnicity (NZ European/Pākehā):** Identifying as NZ European/Pākehā was positively associated with future intent to attend live performances compared to other ethnic backgrounds. NZ Europeans/Pākehā were 5.2% more likely to intend to attend more performances (Standardised Coefficient Beta = .052, $t = 2.045$, $p = .041$).
- **Work hours:** The more hours worked per week were negatively associated with the intent to attend future performances. Individuals working more hours were less likely to intend to attend (Standardised Coefficient Beta = $-.076$, $t = -3.347$, $p < .001$).
- **Education:** Educational attainment was a significant predictor of future intent to attend live performances. Higher education levels were associated with an increased likelihood of intending to attend. Specifically, individuals with higher education levels were 7.0% more likely to intend to attend more performances (Standardised Coefficient Beta = .070, $t = 3.291$, $p = .001$).

The influence of gender, location, household income, disability status, and carer status on future intent to attend live performances was minimal, and not statistically significant.

The model explained approximately 6.8% of the variability in future intent to attend live performances ($R^2 = .068$). While the R-square value indicates a modest explanatory power, the significant predictors provide valuable insights into the factors influencing future attendance intentions.

AUDIENCE EXPERIENCES OF LIVE PERFORMANCE



To engage with audience experiences of live performance, we conducted whakawhiti kōrero with a series of small groups using Rōpū Whānau methodology. Rōpū Whānau (Wilson, 2013; Wilson, 2022) — literally familial groups — comprised groups of between 4–14 people. They were invited through personal and professional networks as members of key audiences across the motu (Tāmaki Makaurau/Auckland, Tāmaki ki te Tonga/South Auckland, Whakatāne, Te Whanganui-a-Tara/Wellington (3), Wainuiomata (2), and Ōtautahi/Christchurch (3)).

This section takes a deliberately reflective approach, drawing from the voices of various team members to provide an overview of each of the Rōpū Whānau that took place across Aotearoa over the course of this project. This multiplicity of voices is in keeping with the kaupapa of this method. These reflections provide qualitative descriptions of audience experiences attending live performance in Aotearoa, many of which speak to observations about audience behaviour and sentiment described above. While each group's discussions were unique, similar themes emerged across the Rōpū Whānau; particularly in terms of motivation for, and barriers to, attending live performance.

Motivating factors for attending live performance included:

- **Affirmation of identity:** live performance was seen by some participants as a space where they could see their cultural knowledge, identity, and traditions being upheld and celebrated.
- **Forging relationships and affirming connections:** live performance was observed as an opportunity to catch up with friends, affirm social connections, and meet new people. Some saw live performance as an important aspect in their personal relationships, where attendance offered an enjoyable experience to share with a partner or spouse.
- **Enlivening public space:** live performance invigorates public spaces and draws people into city or regional centres, enlivening these areas as sites of community.
- **Family activity and whanaungatanga:** live performance gave parents an opportunity to take their children to see and engage with cultural activities and events, and in this way live performance became a space of inter-generational meaning-making. Whānau were particularly motivated by 'family-friendly' events with affordable pricing, in accessible locales, that understood the needs of tamariki as an audience distinct from those of adults.

Conversely, barriers to attendance included:

- **Cost:** cost was a major factor that impacted attendance across the rōpū. For many whānau the cost of attending a live event was not just the ticket or entry price but the associated spending on food, transport or childcare (if needed). For this reason, many did not prioritise live events in their household spending, or were very selective about events they did attend.
- **Safety:** some participants noted that live performance was frequently a space where they did not feel safe, due to factors such as negative crowd behaviour or excessive alcohol consumption. For parents this often meant they were worried about the safety of their children attending events without supervision, or would not allow their children to attend events alone.
- **Accessibility:** live performance was experienced by d/Deaf and disabled participants as a site that comprised many significant barriers to access, ranging from physical barriers through to a lack of understanding or manaaki for people with access needs.
- **Public transport:** lack of reliable and/or affordable public transport was a major factor for many participants, who noted this played a major role in their decision of whether they would attend an event.
- **Competing entertainment:** live performance was frequently discussed as in competition with content from streaming services, which some participants regarded as a more accessible or affordable way to engage with arts and culture. However, many noted that the online experience was not a comparable substitute for being connected to people through a live space.

Finally, an interesting concern amongst the rōpū were the sustainability of performers' careers, particularly for those who were also practitioners, who felt that Aotearoa did not necessarily have the same culture of support for artists that they had witnessed in other contexts. Some participants expressed frustration with the lack of support for live performance in Aotearoa, which they felt paled compared to the rest of the world in terms of government investment and civic participation.

These themes, as well as the motivating factors and barriers to attendance, are discussed in the proceeding section as they emerged alongside the distinct kōrero of each Rōpū Whānau. Each of the eleven Rōpū Whānau are described, organised by geographic location, noting the key themes that emerged from the rōpū, as well as the context that shaped the kōrero. Each discussion of the individual Rōpū Whānau here begins with a vignette from the kōrero, to uphold the mana of the participating whānau as research partners, without whom the research could not take place.

To assist readers unfamiliar with reo Māori and Gagana Samoa a glossary of common terms used has been provided.

GLOSSARY OF TERMS TE REO MĀORI/GAGANA SAMOA TO ENGLISH

Gagana Samoa	Samoan language
hauora	wellbeing, health
himene	hymn-like song
kai	food
kaihaka	performer/exponent of haka
kaihuawaere	discussion facilitator/coordinator
kapa haka	a limited definition — Māori performing arts
karanga	formal calling, summoning
karakia	a limited definition — ritual chant, more recently identified as ‘prayer’
kaumātua	elderly men, to grow old (singular, kaumatua)
kaupapa	purpose, topic, subject, agenda
koha	gift without expectation
kōhine	adolescent female
kōrero	talks, speak, speech
kotahitanga	a limited definition — unity, oneness
kuia	elderly woman, grandmother
manaakitanga	a limited definition — respectful kindness, generosity, hospitality
mahi	produced or accomplished work, operation, activity
mihi	acknowledgement
motu	country, island — here referring to the islands of Aotearoa

noa	free from restriction
Pākehā	New Zealander, generally of European/ British whakapapa
pānui	announcement, notice
pakiwaitara	chit-chat type narrative, can be referred to as a personal reflection
pēpi	baby, in infancy
porowhita	circle, round or a wheel or ring
poto	short
pūrākau	a limited definition — historical stories
rangatahi	younger generation, to be young
rohe	region or district
rōpū	group, conglomerate
siva	dance (Samoan)
taiohi	pre-adolescent
taki	opening speech
takoha	duty of giving, gesture
tāngata	people (singular, tangata)
tauawhi	embrace, support one another
tauirā	both student and exemplar (+ -tanga, the state of being apprentice or teacher)
Te Pētihana	The Māori language petition, presented to the government in 1972, 50 years celebrated in 2022
Te reo Māori	‘Māori’ language
tīmata	commence, kick off or start

wāhine	women (singular, wahine)
waiata tautoko	a song commonly sung to support/close a formal speech
wairua	a limited definition — spirit
whaikōrero	formal speech/es
whaikaha	to have strength, but has recently been aligned with disabled people
whakaahua	image, picture, illustration
whakamārama	explanation, to give understanding
whakamutunga	closing, ending, conclusion
whakanoa	to remove sacredness or tapu
whakapapa	genealogical relationships
whakatakohanga	activating obligations or responsibilities
whakatauiti	short moment to settle
whakatūwhera	open up
whakawātea	exit, clearing, removal
whakawhanaungatanga	interconnecting or forming relationships with each other
whanaunga	relation
whanaungatanga	building or forging relationships
whānau	a limited definition — family
wharepaku	small room, toilet

"I looked at her, and she was crying and crying, and then I wanted to cry because that [moment in the concert] is such a strong memory for [my 11-year-old daughter]... for life."

SAFETY

Hosted at an Auckland marae associated with a tertiary education provider. Coordinated by a staff member, former colleague of author. 3 hours. Mattresses; comfy vibes. Afters: Vietnamese kai, in a restaurant in walkable distance.

Primarily, this rōpū — two thirds of whom are parents — were highly concerned with safety, and not being able to be confident of their child's welfare. This meant they either prevented their children from attending gigs with groups of friends or committed to joining them. There was meaningful discussion about how whānau can attend affordable gigs together, enjoying these as a group rather than leaving children/youth unsupervised. There was a mention of the lengths young people must go through to ensure their physical safety, and that of their group at festivals; an effort they might not pursue again. However, an ample kōrero around safety procedures utilising technologies materialised, as one rangatahi (youth, in this case 18–25) reflected on her recent attendance at a large festival, whereby they used a buddy-type system and technologies that showed where their festival buddies were located, and how much battery-life they had on their smartphone.

JADED

The young people, all of whom are budding musicians, were generally beyond only being able to access stadium type concerts and such, and instead tended to seek out muted or underground performances, away from social media hype.

SELECTIVITY

The whole whānau spoke to the recent need to be more selective in what live performances they attend. This was largely due to cost, but also opportunity for social connection. They actively consider which events they or their friends want to attend, and it appears that pressure to be part of a gigging crowd has, for many, worn off.

ANXIOUS ABOUT HARM

Threats to safety, whether it be in the form of sexual harassment, drugs, alcohol, and poor behaviour were of concern when aspects of hauora were brought forward. However, a positive underlined was the availability of no-questions-asked drug testing. Although these whānau hadn't used these services, they articulated the importance of their presence.

“It’s... like a piece of history... if you don’t have a photo and can’t find the video, then that’s it; all you have is the memory.”

CULTURAL EVENTS

Hosted at an Air BnB in Manukau City. Coordinated by a mutual long-time friend of all respondents. 2 hours. Couches and comfy seats. Afters: Café kai, within walking distance.

This whānau brought forth their own backgrounds in cultural performance which directly translated into their preferences for cultural events such as Polyfest, Fiafia nights, and kids cultural performances. As this rōpū are also university students, there was a meaningful kōrero about the appreciation of cultural performances that are cost-effective (lots of performances and variety), affordable, family-oriented, and something they could experience cultural pride in amongst themselves. This extended to the ability to access foods and merchandise only available at such events.

AS A COMMUNITY

The discussions these whanaunga had about hauora were positive in relation to the live performances attended. This was primarily because the target audiences at all but one event were families and many whanaunga attended with small children. MCs and stage facilitators are key to tying performances together and maintaining the audience’s interest between schools entering/exiting the stages. Polyfest costs \$5 for an all-day event, and the Pasifika Festival is free, and therefore at these events — where live cultural performances are the central component — supporting one’s family or the broader context of celebrating Polynesianness is the main purpose. This was also the case in terms of Te Pētihana, where the community celebrated 50 years of a journey to where te reo Māori sits in Aotearoa today. Te Pētihana was commemorated on the forecourt of The Beehive by thousands of attendees who sang Hirini Melbourne’s Ngā Iwi e in the spirit of kotahitanga.

PRESSURES

Following on from the kōrero about Polyfest was a consensus about the stress of cultural performances, and associated pressures on tamariki performers. A significant discussion around the politics of school-aged performances ensued, most importantly in relation to representing the entire community, which can be a heavy burden.

FESTIVAL VIP; AN EXPENSIVE JUMP FOR SAFETY

VIP access isn’t seen as overly affordable, and there was kōrero around measures of keeping kōhine/wāhine (young women/women) safe in the non-VIP environment particularly when alcohol is a factor. One whanaunga spoke to an experience at a festival, where very young wāhine were in situations where their personal integrity was compromised, and many bystanders either recorded it or simply ignored it. Indeed, while the jump in price means an increase in safety, if VIP is unaffordable for those who need safety, these audience members will continue to be at risk particularly as the current drinking culture climate does not seem to be easing.

"It's that energy you feel in the atmosphere. That's what I go for. I wanna be there, and experience what everyone else is experiencing."

Hosted at Te Whānga a Toi, Whakatāne Public Library. Coordinated by a whanaunga of all respondents. 3 hours. Meeting room vibes. Afters: Pub grub kai, within walking distance.

FESTIVALS

Whānau who attended festivals remember the atmosphere, but very little about the music; festivals were considered a 'rite-of-passage' mainly for Aucklanders but also represented significant risks. One had a drink spiked and spent a good proportion of their night at the St Johns tent; at another, a whanaunga referred to being at a festival where there was an attendee who went missing and was later found deceased. None of the festival attendee whanaunga could remember highlights of a performer or performance of note. Although festivals are considered important rituals for rangatahi, the potential risks to safety are the most unwelcome downside. Some festival locations are beautiful, but not walkable if issues arise. Although some technologies/apps are useful at festivals, the ruralness of such locations mean there are often challenges with reception and/or being able to provide sufficient power supply for phones.

KAPA HAKA IS A PREFERRED EVENT

Kapa haka was preferred by the whānau in this rohe for several reasons; big families can all go together and it's affordable (\$5 for the day), with predictable scheduling. It is culturally affirming, the local economy gets boosted, there is merchandise and kai available all day long; but what is most interesting is the response to no drugs or alcohol, no swearing, lots of positive affirmations, MCing predominantly in te reo, and where everyone respects the rules of performances (no leaving or walking around during the performances, umbrellas down, no seating that obscures the people behind). This whānau praised the thoughtfulness at all levels of live kapa haka present in the prioritisation of kuia/kaumātua, who pay a gold coin koha, are collected from the carpark by golfcarts, are driven to the VIP area where they are served kai and drinks all day, then returned to their cars. There are also areas out of the sun, provided for tāngata whaikaha and young parents to tend to pēpi (babies).

PERFORMANCES OUTSIDE THE BOX

Whānau spoke of live performances as part of sports fixtures, but not the sport proper. For example, a few spoke of live kapa haka performance prior to a finals basketball game which in turn lifted the anticipation of the crowd, but also marked the occasion as hosted in Aotearoa. Another mentioned the MCing and facilitation of karaoke-type audience singing at a major international darts event which took place in between games as a means of ensuring the atmosphere retained its energy.

Family tickets were an intrinsic part of both events, and being able to enjoy such performances and events together seems to be fundamental across the regions.

REGIONS CAN BE OVERLOOKED

Live performances in regions, such as Whakatāne, are often done on smaller scales. The need for inter-regional travel from small towns and districts to attend concerts, festivals or other forms of live performance means people from the regions who do attend also pay more. This was certainly the case in this whānau, as only two whanaunga spoke about attending local live performances, both of which were kapa haka.

WAINUIOMATA 1

"I looked around and there [were] so many people from Wainui, I was kind of thinking, 'oh my gosh', I feel like I'm in Wainui! I get quite paranoid when I go to concerts, but yeah I felt safe because I was surrounded by my family."

LOOKING OUT OF WELLINGTON

Although based in a creative city, a good proportion of these whanaunga spoke of frequently moving outside of the region to explore events not staged or offered in Wellington; a yoga/wellbeing-slash-music event in the Wairarapa, One Love, concerts in other regions (Manawatū and Taranaki), other countries, kapa haka (Te Mana Kuratahi), and the like. It isn't unusual for them to travel and stay outside the rohe for performances for the whole duration, which can be up to 4 days.

CRITIQUES OF VENUE SUITABILITY

Those who attended local live performances were critical of venues around Wellington, both in terms of not being able to house the event and accessibility/inclusion challenges.

Some of the critiques were in relation to safety; particularly indoor spaces where tamariki were permitted. Some of these were enclosed spaces and there was a reported "relaxed" approach to security, and very little monitoring of smoking or vaping. Others were more concerned with whaikaha and kuia/kaumātua not being able to navigate stairs. Te Whanganui-a-Tara 3 (p.83) covers some of the concerns for accessibility in more detail.

Hosted at the private home of coordinator; a whanaunga of all respondents. 3 hours. Couches and comfy seats vibes. Afters: Barbecue by hosts, onsite. Risks of festivals

ACCESS

One whanaunga was on a council panel exploring access to arts and events, and a long kōrero in relation to ensuring there were no exclusions ensued. The prevalence of having whānau with access needs relating to physical mobility meant this was discussed with some concern, particularly in terms of live performances where many venues automatically exclude these whānau. There was an important conversation about wheelchair users or whānau with mobility needs finding it challenging to access events such as festivals, which often run for an extended amount of time, in tricky locations (far distances to stages, hilly areas) and the ability to access amenities (especially toilets) is limited. The costs associated with the physical and financial pressures on these communities follows in Te Whanganui-a-Tara 3 whānau. (p.83)

POCKETS TO BREATHE AT SMALLER MORE INTIMATE FESTIVALS

More than half of the rōpū reported looking to attend something 'different'; most of them articulated a desire to explore experiences, rather than a specific musical genre. For example, a festival in the Wairarapa region was based rurally and focused on chill vibes with bean bags supplied, yet had lots of pockets where attendees could unplug from the crowd but remain part of the wider event, including yoga and meditation. Commentary from Oktoberfest emerged where, amongst other components, live Bavarian music built the ambience of each 'tent'. Although alcohol is present, attitudes and behaviours around the presence of children and safety mechanisms circulating them are a welcome part of the environment. This was noted as less common in Aotearoa.

WAINUIOMATA 2

"I can't really describe it in words. When I said to do a dance for [my birthday], I thought they'd do some sort of... hip-hop. But when they did the siva... it was just, I can't explain it."

CRUISING TOGETHER

A quarter of this whānau were eligible for the pension, although all of them remain employed. The extra income contributed to their ability to attend theatre, and particularly musicals. Some travel as far as Australia to see stage musicals, even if some of them are repeat experiences. One whanaunga spoke of how on a cruise to the Mediterranean, she attended a number of live dance performances and musicals that she never would have attended if she weren't on the cruise. Dance, musical theatre, and tribute performances were some of the highlights, performed to such high production values that it was better than going to the cinema.

Hosted at the private home of coordinator. Coordinated by a whanaunga of all respondents. 2.5 hours. Couches and comfy seats vibes. Afters: Malaysian takeaways as kai, onsite.

CULTURAL PERFORMANCES CARRY MEANING

This was a diverse whānau who spoke to various live performances that benefited from the integration of meaningful cultural elements such as karakia whakatūwhera (opening incantation), karanga (traditional calling), whaikōrero (formal speech/es), and waiata tautoko (support waiata). It was felt that integrating such cultural components in meaningful ways meant there was an element of distinctiveness and that the event was only shown this way, in this place. Whanaunga who attended kapa haka regularly spoke of the importance of being part of the culture and community and of all attendees adhering to the very strict rules, as there is a wider investment in the experience.

UNEXPECTED CULTURAL PERFORMANCES

One whanaunga spoke about her 60th birthday, where she expected their rangatahi to perform a hip-hop dance during the speeches; instead, they prepared a siva that the women — including an incredibly shy sister — had secretly practiced for a month. At this event, the boys performed their school haka which she claimed was an honour, because it was in that moment, in one place and at one time, for her. Most meaningful was that some performers did not attend that school, so a touching aspect of these moments was that practices had gone on for weeks without her knowledge, in aid of marking her milestone with this important performance. Such haka are incomparable tributes.

BORROWING PRODUCTION VALUES

A good portion of the whānau attend a community sport awards event every year, where live music and cultural performances are a strong component to its appeal, and ongoing growth and evolution as a premier ceremony.

The production of the awards night was described by a former All Black in the whānau as 'way better than the Halbergs'. It was discussed in some length that the success of the event is primarily because of the lead organiser being attuned to musical theatre, being Polynesian and a servant of the community, and he borrows meaningfully from all his communities, and intersperses them with the conventional live events.

FESTIVALS AND AFFORDABILITY

A concern of one of the rangatahi in the room revisited a previous kōrero about festivals and the complexity of general admission versus VIP, where waiting in lines for food and toilets for over an hour had discouraged them from future general admission entry, and they have a view to purchase VIP tickets next time. This whanaunga is prepared to pay far more to have access to decent, clean, quick entry toilets, and priority food and drink, because waiting in lines for such extended time tends to be the exhausting part of the festival and had the potential to ruin the occasion.

“The calibre of music is [...] just insane musicians. And they have, like, next to nothing. It’s just... so much a part of the [Latino] culture... all these, little two-year-olds salsa dancing... young, 17-year-olds dancing with, like, grandma... and there was not a weak link in the band”

Hosted afterhours in a university kitchen/eating/caf . Coordinated by a fellow practicing musician. 2 hours. Couches and comfy seats. Durings: Grazing platter, eating.

MEETING AND PROFFERING SUPPORT

This group valued live performance as a social hub and space to regularly connect with friends, particularly where this isn’t as feasible as when they were younger. In this regard, they valued smaller, casual or intimate performance environments; where socialising can take place but there is still an expectation that the audience will be attentive to the performers. This whānau valued supporting performers both by being at the performance and letting them know their work is appreciated through interaction/connection between performer and audience.

COMMUNITY BUILDING

Participants expressed a nuanced view on live performance as community building and considered the role of community in live performance. Live performance was seen to build community, but the group also observed that in practice this feeling of community might be driven by a small number of people shouldering an unsustainable workload. The group also observed that building community through live performance requires enabling contribution/facilitating audience and performers to feel able to contribute. Finally, they noted the importance of succession planning and collective ownership to facilitate longer-term activity.

INNOVATION OVER ORGANISATION

The group valued novel programming over infrastructure or the performance environment and were more likely to attend venue-based live performance. Associated with this, they valued live performance as cultural expression that is emblematic of what is distinct about Aotearoa, and live performances that presented under-represented performers and works.

VALUE OF INFRASTRUCTURE

Participants highlighted the value of curation that encourages attending something new. Either because the venue/promoter normally programs something audience knows they’ll enjoy, or regularly attracts audiences/performers they know they’ll enjoy interacting with. Participants distinguished this from community building, but noted this curation helped establish and deliver on expectations about the environment and audience behaviour.

Because of this, participants recognised the importance of venues as key infrastructure that absorbed some of the financial risk for programming new/ untested performers.

POOR BEHAVIOUR

Negative audience behaviour — and in particular excessive alcohol consumption — was seen as a barrier or disincentive to attendance. Associated with this, the group suggested larger audiences can feel unsafe and are a disincentive/barrier to attending live performance. Multi-day/big outdoor music festivals were seen as not as enjoyable/an environment that isn't conducive to enjoying watching live performance, and were instead thought about more as social engagement with performance as background. These type of festival events are seen as more enjoyable when they're multi- generational and accessible to families, as this creates a better environment and helps to regulate audience behaviour.

TO ATTEND OR NOT ATTEND?

Participants conceived of their live performance spend as inclusive of associated spending and noted the need to balance, for example, ticket price and alcohol spend — and that being unable to accommodate this broader spend can act as a barrier/disincentive to attending live performance. The group recognised that ticket spend is easily eclipsed by food/alcohol/transportation costs but is still a barrier. Participants noted that this ticket-price barrier to attending venue — based live music performances is typically quite low (\$10-20). Music festivals and larger live music events were seen as quite expensive, requiring a good lineup to warrant going.

BUILDING AUDIENCE AND PAYING MUSICIANS

Participants suggested that the size of the local sector and relatively small population of Aotearoa meant performers can have difficulty building momentum or a local audience; and that this impacts longer term viability and career pathways for performers. They suggested audiences are less willing to risk seeing something they won't like, even for relatively small financial outlay. Participants suggested this was associated with cost-of-living pressures, and audiences wanting to know they'll have a good time if they are spending money to go out.

In this context, the group valued the idea of subsidising/supporting live performance infrastructure through public funding, recognising some types of performance are unlikely to build an audience absent this given local population size.

Participants engaged in a substantial discussion of cultural expectations around 'valuing live performance' not being associated with paying for live performance, especially for grassroots/local performers. This was contrasted with participants' experiences overseas where paying a cover charge to drink at a bar hosting live performance, and expectations to tip performers, was routine.

PERFORMING FOR CULTURE OR FOR PAY

The group valued performers being paid because they felt it validated and 'sustained' the performer's practice, but also recognised the money many performers can expect is not enough to live off. This was contrasted again with participants' experiences overseas and in different cultural contexts, where performers of very high calibre perform for free because their work is valued/validated through community participation and place-making. Participants explained they valued live performance in these contexts for being in public space, entwined with daily life, and normalised as something everyone does. They expressed a desire for live performance in Aotearoa to function more like this, but were unsure how this could happen.

TE WHANGANUI-A-TARA – WELLINGTON 2

"I saw [Savage Colonizer] and thought it was incredible. And then told [my partner] that he had to go and there was a one ticket left in the season... he managed to get it and then we both got to have the experience, but... didn't get to have them together... because we don't tend to get babysitters, like one of us will go or the other will go. And then it's a bit sad."

CONNECTIONS

This group noted that live performance was a way of forging relationships and maintaining connections with other people and had a positive impact on their wellbeing and life satisfaction. They appreciated live performance's ability to break up routine, stepping outside of their own experience of the world, and to feel connection with a wider community. They also valued audience interaction and physically being present, noting that online is not a substitute for being in the room or with other people. Interestingly they also noted that their tastes in live performance didn't always translate into home watching or listening habits, and vice versa.

Hosted afterhours in a suburban school staffroom. 2 hours. Coordinated by a parent at the school of all respondents. Tables, chairs, teacher staffroom vibes. Afters: Indian takeaways onsite.

PARENTAL/RELATIONSHIP CONSIDERATIONS

For this group, attending live performance tended to happen with other people, even if this was just their kids. They explained that live performance was a way to build new relationships and deepen existing ones. Participants noted that this was different from attending as a younger person, insofar as they may have been more likely to attend on their own and meet strangers. Attending with others — particularly other adults — also facilitates trying new things or breaking out of routine, and can provide motivation or otherwise enable attending without kids. Participants also explained that they value attending live performance as a point of connection within a long-term relationship, so want to attend with their partners and can feel sad or guilty when this is not possible. More generally they explained that balancing the needs of partners and children is a barrier to live performance attendance.

HAUORA/WELLBEING

Participants also valued live performance attendance as beneficial for mental and physical wellbeing. They highlighted that they felt being able to do this more regularly would lead to general life improvement and satisfaction. Live performance attendance was described as a need, not a 'want' or 'nice to have', that is negotiated within the competing needs of family, parent or carer responsibilities. In this context the presence of grandparents or other family members who could look after younger kids was identified as enabling attendance.

LOGISTICS OF ATTENDING WITH YOUNG CHILDREN

Attending live performance as a parent of (particularly younger) children can be logistically complex, and this typically resulted in a period of not being able to regularly attend live performance to prioritise parenting responsibilities. Participants noted that live performance attendance was not sustainable in the same way as before kids. Participants described having a different post-kids risk appetite, particularly around awareness of environment, other people's behaviour, substance use, type of participation (no mosh pits) and caring responsibilities for other people.

Attending live performance with children was seen as a barrier to engaging in spontaneous exploration of performance venues/just dropping in to see what's on, as they may not enjoy the environment or may not feel welcome. Attending live performance with children means being driven by their needs. The potential for children to be overwhelmed by crowds, environment or content was a barrier to access and may also mean having to abandon plans midway through a performance.

Consequently, participants valued live performances that allowed for or recognised kids' needs and behaviours as different to adult audiences. Having kids be able to move, eat, make noise, and not feel like they are being disruptive were all seen as enabling attendance.

They also valued live performances in public spaces that are easy to access; requiring minimal travel; at a time that makes attending as a family feasible, and at a price point which enables multiple tickets and associated expenses such as meals and transport. Participants noted that early, and shorter, performances are better than late evenings, and that they valued multi-generational audiences or performance spaces and community events.

COSTS

As with other groups, participants in this rōpū whānau conceived of live performance spend including dinner/transport/other costs where live performance is the central activity that motivates other spending. Price sensitivity seems higher for this group, with \$35 tickets considered quite expensive for a family event due to need to buy multiple tickets. \$10–15 per person was seen as more affordable. Associated with this, families may be less likely to take a risk on a more expensive live performance ticket if they're taking kids.

TRAVELLING OUTSIDE OF THE ROHE

Travelling to another city to attend live performance is a significant investment. Participants noted that seeing international performers usually requires travel and is a major barrier to attendance. Participants noted they may do this without their family but must be very confident it will be an enjoyable experience — that the venue and production will be good quality — before committing to a ticket spend over \$100, along with travel costs and logistics required to facilitate time away from caring responsibilities.

TE WHANGANUI-A-TARA — WELLINGTON 3

"I'll try and stay in one place where there's light... getting from the green room to the stage... [or] maybe I need to go to the wharepaku, it's just a nightmare to even think of going through a dark bar. [Unnamed bar] is pretty bad...I've walked into [things there] quite a bit."

VENUES

The whānau in this rōpū were in whaikaha and d/Deaf and disabled communities and experienced a range of access needs. Despite being in the city considered the creative arts hub of Aotearoa, there was a plethora of local venue examples considered challenging; some respondents made the decision to rule a performance in or out based on the venue. Stair access, light, sound, parking, whether there were tickets seated together for folks with access needs, meant there were a plethora of venue challenges throughout Wellington.

Hosted afterhours in a university meeting room. Coordinated by another researcher on the team. 2 hours. Tables, chairs, and big screens. Afters: Thai takeout. Connections with community

This whānau noted it was also incredibly tricky, if the decision was made to attend in one of the many venues, to navigate around a dark theatre if someone needed to go to the toilets. There is a need for these whānau to plot an exit and navigate themselves to the amenities prior to attending a kaupapa at these centres; therefore, these audiences would benefit from having priority seating, access to floor plans, and pre-recorded venue walk-through videos available on the venue's website.

TIMEOUT SPACES

There was a decent kōrero about the desire for 'timeout spaces' at events amongst this whānau, who often find it necessary to 'tap out' for a short amount of time. In some cases, this was a challenge due to 'if you leave, you're out' type processes, whereas these whanaunga may require fresh air to reset themselves from social anxieties associated with being in close/closed-in proximity with lots of people. This was also the case across several audiences explored in this study. Most importantly, the whānau suggested proffering tap in/tap out situations would ensure whānau whaikaha had breathing spaces for brief moments.

"IT JUST COSTS US MORE"

This whānau noted everything for d/Deaf and disabled communities simply costs more, often double the costs outlaid by a non-disabled audience, because there is often a need to purchase two — or increasingly so, more than two — of everything, for themselves and a companion. These costs include transport, food, and consistent manaakitanga for the person/s who has agreed to attend with them, which is often done as a favour. These costs have obvious financial impacts on this community, who are often already fiscally challenged.

COMPANION TICKET ARRANGEMENTS

Following on from the increased costs, a kōrero materialised in consideration of whānau who have access needs, who require a companion to attend events to navigate low or no light and to provide tauawhi (embrace, support). It may be useful to offer reduced price companion tickets, as the disabled person is often making the purchase on behalf of their companion, as they're often not able to attend without them.

TREATED DIFFERENTLY

An interesting kōrero around the 'internalised ableism' and the noticeably different treatment by venue staff took place. The discussion spoke to where we've landed in terms of whether there is comfortability, or even pride, attached to being tāngata whaikaha at live performance audiences, while some spoke to feeling they had not quite settled in to a safe space in this conversation just yet. Importantly though, some whānau articulated feelings of terror in relation to the possibility of not being able to navigate themselves if an emergency was to happen, or if they suddenly needed to go to the bathroom. Exhaustion from being terrified by what might happen can worsen anxiety, and sometimes prevents these whānau from attending.

“It’s the beauty of a ‘right as you were’ in that moment, in that theatre, with those people and those actors, and it’s one time only... and that’s it, you’re having that experience, and even if you go again, it’s different.”

Hosted afterhours in a university teaching/eating/kitchen room. 2 hours. Coordinated by a staff member, frequent theatre/performance attender. Classroom/kitchen vibes. Afters: Yum Cha in a nearby block of shops.

DWINDLING AUDIENCES

As this rōpū was coordinated by a person who attends and performs theatre regularly and works in costume and makeup, the group consisted of likeminded folk; a decent kōrero was devoted to the reduction of audience sizes, likely in response to the pervasiveness of screens, and a change in audience culture, particularly since COVID-19. The discussion about the noticeable reduction in theatre audiences was a cause to feel nervous about their preferred art losing what little funding theatre receives. However, it was also argued that this could possibly be a consequence of aiming their decision-making around ‘the blue rinse brigade’ because of their disposable income, most important in a bums-on-seats environment. It could be then, that an identified lack of diversity and lessening interest in theatre audiences is in large part a result of selecting safe/comfortable productions to suit.

FEARS OF LOSING DRAMA EDUCATION

Two drama teachers (one current, one former) articulated concerns that drama education was potentially at risk in the context of cuts to the creative arts in schools, which would have direct consequences on society, particularly as drama/theatre education facilitates teamwork, creative solution finding, confidence, and presentation, considered soft skills. With less and less value placed on drama and the creative arts in secondary education in favour of literacy and numeracy, theatre is seen to be under threat; discussions about the pressure on dance are similarly explored in Ōtautahi 2. (pg.86)

EVERY PERFORMANCE IS A ONCE IN A LIFETIME PERFORMANCE

Whether it is planned by the cast or not, every theatre performance is different. The whānau spoke strongly to being present for all iterations, including errors, but also the simple importance of simply being present in the context of a society that is more and more interested in watching from home. It was suggested that returning popularity to live theatre performance could be accomplished by providing more access at schools and tertiary providers, by ensuring free or gold coin matinée performances become available.

CHANGES IN ETIQUETTE

Following on from identifying the reduction in audience numbers, another concern was a noticeable change in theatre decorum, which affects whether the performance is enjoyed and can be concentrated on, or not.

That noone dresses for the occasion anymore is also considered a change in theatre audience culture. A noticeable change in theatre culture post-COVID-19 means behaviours have diminished, in some cases markedly. This manifests in elements such as attire, phone etiquette, whether dinner and drinks before and after is affordable, through to heckling cultures. One such kōrero was in relation to attendees pre-loading on alcohol prior to performance, deliberately disturbing performers midway through an act, and behaving poorly. As an audience, some are willing to intervene, while others try not to involve themselves by confronting such conduct. Such situations have forced several theatre audience members out of attending, and for many performances, it remains only those who know someone in the cast or who are members or associates of the wider theatres who regularly turn out.

ŌTAUTAHI – CHRISTCHURCH 2

“You can see how hard they work, like the physicality... the sweat dripping off them. And they’re breathing hard. For us. And you can see all of that”

AN AUDIENCE OF DANCERS

Dancers and self-described dance mums formed this whānau, and a common observation was that the dance audience in Christchurch is predominantly the same people. Anecdotally, they observed 80% of dance audiences were dancers, former dancers and their families. It was suggested that the audience is composed this way as a matter of each performance being a front for a ‘networking event’, where those who attend are under some pressure to show up and be seen to be part of the dance community. Live dance performances, at least in Christchurch, are considered opportunities to be in the room when someone with creative funding is present, and thus it is advantageous to be a dancer beside the person who has the power to give the next chance. It is also a known element to have critique ready to discuss, should an opportunity arise. For some, dance recitals create pressure and require giving energy, rather than relaxing and absorbing/enjoying the performance.

INNOVATION

In relation to suggesting how we might champion dance audiences in the future, funding was the main discussion. This led to a deep kōrero about potential innovations in dance, some of which are emerging overseas and could be welcomed into Aotearoa. These include various interpretive performances by Matthew Bourne, who re-characterised Swan Lake and The Nutcracker by challenging the gender norms.

Hosted afterhours in a university teaching/eating/kitchen room. 2 hours. Coordinated by a staff member, frequent theatre/performance attender. Classroom/kitchen vibes. Afters: Yum Cha in a nearby block of shops.

Opportunities to take well-known stories and to either localise or adapt them to a contemporary context are considered a way forward, as is the interpretation of Māori and Pasifika elements into dance works, as Takirua Productions have done most recently in the production of Hatupatu and Kurangaituku. The whānau discussed the importance of te reo and pūrākau o te ao Māori as a distinguishing mechanism, however there is a fear that this may sever the main, paying audience in Christchurch who are predominantly middle-class Pākehā. Conversely, by doing so, new audiences may emerge.

COMPETITION VS JOUISSANCE

Three quarters of this rōpū were dancers or former dancers, and for those who are no longer competing and now either dance professionally, or form part of the audience, there was a real sense of relief that the pressure was off, in that they are able to simply enjoy the performance, or just do the dance. Nonetheless, proffering critique straight after a performance appears to be a mainstay of the dance audience, maintaining a kind of dance as an academic exercise attitude.

LACK OF PROMOTION

Another critical kōrero was about the lack of marketing of dance performances in Christchurch, which many felt was due to simply a lack of promotion budget. Generally, plugs are made on Facebook and Instagram, and it appears on the feeds of the existing dance audience. The whānau spoke of falling out of the dance cluster and consequently, out of the line of advertisement. In respect to growing the audience, this is an obstacle.

KAPA HAKA

The whānau engaged in relatively deep discussion about how important dance is for taiohi (adolescent) and rangatahi particularly for those who have social anxiety, and particularly kapa haka as it builds a sense of belonging to a community equally for Māori and non-Māori. The connection that learning and performing kapa haka for children is thought to be hauora (wellbeing) inducing. However, building a community and taking the opportunity to socialise as parents of school-aged kaihaka (haka performer) tends to be an unintended but appreciated benefit.

CLOSED REHEARSALS IN CHILDREN'S PERFORMANCES

A recent move to audiences not being able to attend rehearsals, particularly parents, builds a sense of exclusiveness and ensures a sense of secrecy by disallowing cameras and social media posting.

“The music school that was part of the university set up baby grand pianos, all around the city, and these really talented young people played the piano and people just walked around the city and sat and listened... I particularly loved [that the] children just loved it [they’d] sit crossed legged and listen to this gorgeous classical music all around.”

COMMUNITY AND ONGOING SOCIALISATION

Hosted afterhours in a private residence of co-ordinator’s whānau. 2.5 hours. Coordinated by another researcher on the project. Loungeroom vibes. Durings: grazing table; Afters: Indian takeaways, onsite.

Participants articulated the value of attending live performance in terms of making and maintaining social connections; providing a structure to their lives; and building community and culture. In relation to these last two points, participants valued live performance’s capacity for enlivening public life and contributing to a sense of ‘liveliness’ in public space. As part of this, they valued live performance being accessible to the wider community, and for venues to foster community engagement through low barriers to access. Associated with this, participants valued introducing other people to live performance — particularly younger generations — and that this further facilitated social/family connections and creating memories or meaning.

Participants particularly valued free or community events for the ability to facilitate these connections and introduce/induct new audiences whilst building an awareness of cultural context, or heritage and participation. Participants highlighted the role of performing arts education from an early age in establishing the possibility of live performance attendance, and participation, as a rewarding activity. As part of this they expressed a desire to see government funding distributed to enable live performance to be a more regular part of public life. Participants drew comparisons with other parts of the world where they felt population size/history/cultural norms means live performance can be cheaper and is always well-attended.

POTENTIAL COMPETITION FROM LIVE STREAMING

Alternative forms of entertainment, especially video streaming, were highlighted as competition for attending live performance as they could be enjoyed from home. Despite this, experiencing live performance with other people was seen as important and livestreaming of events was not seen a substitute for being there (although was a viable substitute for not being able to be there, as was the case during COVID-19 lockdowns).

BARRIERS

Physical comfort, and the ability to see and hear what’s going on without interruption or distraction, was considered very important by this group, and the absence of these factors was considered a barrier to attendance.

Similarly, positive audience behaviour and consideration for others' comfort could encourage attendance, while negative experiences or expectations were a disincentive. They particularly noted that stadium shows are often uncomfortable, and the environment isn't conducive to enjoying the performance. By comparison participants highly valued the opportunities for social connection and intimacy provided by smaller venues.

Transport and associated costs were also identified as a barrier to attending live performance. A lack of public transport options and clustering of performance venues in a CBD, or other locations where parking or transport were difficult, was seen as exacerbating this.

MORE FINANCIALLY COMFORTABLE

As with other groups, participants conceived of their spending on live performance as inclusive of transport, accommodation, food and other associated costs; noting these were 'essential' to attending live performance. Available money and cost of living pressures were therefore seen as a barrier to live performance and participants in the group explained they considered their total spend when planning to attend an event.

Notions of affordability were different to other groups and varied by performance context. \$20 a ticket was considered 'cheap' for a theatre performance, and \$80-100 'standard' but not 'cheap'. Conversely, \$20 a ticket was seen as expensive for a community outdoor festival.

This difference in perceived value was associated with assumed producer costs. For example, classical music tickets of \$100 were considered appropriate, recognising the relative cost of labour and staging. Interestingly \$120/130 for opera was considered hugely expensive, where \$200 for a multi-stage multi-day theatre or comedy festival was considered reasonable value.

LACK OF DIVERSITY OR SAFE LIVE PERFORMANCE OPTIONS

Participants articulated a tension between a desire to see new and unfamiliar performance works, and programming decisions on the part of producers that participants saw as often safe or without risk; driven by a perceived conservatism on the part of a 'typical' audience; and a result of a relatively small population. At the same time, participants noted they were likely to spend less on unfamiliar or new works as there was a higher risk they wouldn't enjoy the performance.

LIMITED ADVERTISEMENT

Aside from cost, participants noted difficulty finding out about what was on/visibility of events a barrier to attendance; stating they often found out about events after they've happened.

PRODUCER EXPERIENCES, MOTIVATIONS, AND CONSTRAINTS



“There’s a moment right before the audience comes in, where everything is ready and everything’s just buzzing potential. And it’s my favorite moment of any time, where you’ve got this project or this piece that you’ve been working on for a year, two years. And it’s this moment where it’s yours. But you’re about to give it to everybody else.”

To further our understanding of the value of live performance in Aotearoa, as well as how risks and opportunities in the sector are experienced by workers, interviews were conducted with 31 participants. The participants were broadly identified as producers of live performance from the key categories of music, theatre, comedy, dance, and festivals; as well as larger Arts organisations that covered several categories.

Our interview participants are represented through the following general categories:

- Managers and CEOs of small and mid-size performing arts organisations
- Managers and CEOs of large, internationally-touring performing arts organisations
- Marketing and outreach coordinators of performing arts organisations
- Owners and managers of small to medium venues
- Directors and producers of mid-size to large arts festivals
- Managers and CEOs of mid-size to large events and functions centres

Many of our interviewees were performance practitioners themselves in addition to the professional, managerial, or production roles they undertook within the sector. As noted in the methods section, whilst the diversity of participants was also factored into the process for inviting individuals to take part in an interview, data on interviewee demographics was not recorded in deference to the relative smallness of the live performance sector workforce, where this may have compromised interviewee privacy.

Individual interviews took place over several months across the first half of 2024, where interviewees were invited to contribute to an open-ended conversation that used key questions as guiding points. An anonymised transcript was generated from the interviews, and these underwent thematic and descriptive analysis, the results of which are summarised below.

KEY FINDINGS FROM PRODUCER INTERVIEWS

Our analysis of the interviews identifies the following key themes that contribute to an understanding of the value of live performance; and the risks and opportunities faced by the live performance sector in Aotearoa:

BACKGROUND AND PATHWAYS INTO THE SECTOR

- Live performance sector workers report a variety of pathways into the workforce. These range from beginning in a volunteer capacity; practitioners who made 'sideways' steps into professional and managerial roles; or interning or undertaking training and development within arts organisations overseas.
- Despite the high pressures and demands of their work, live performance producers gained a strong sense of purpose and satisfaction from their jobs, and strongly believed in the benefits and value of the arts.

ORGANISATIONAL STRUCTURE AND CHARACTERISTICS

- Live performance organisations report a variety of organisational structures and governance models. Larger organisations are commonly registered as charitable trusts with a volunteer board, while smaller organisations were often set up as limited liability companies.
- All the organisations interviewed reported undertaking some form of activity in addition to live performance to supplement or promote their core operations. Many are concerned that as pressures grow, they may need to constrain community engagement activities to focus on primary operations.

RISKS AND CONSTRAINTS

- Financial security is by far the most common concern for live performance producers. Producers noted that more funding, and more equitable distribution of funds, would make their operations significantly easier.
- Further stress factors include property, regulatory compliance, high density residential developments in urban environments, and burnout and attrition within the workforce.

COSTS, BENEFITS, AND TRENDS

- All interviewees stressed the wide-ranging benefits of live performance for Aotearoa. They spoke to the sense of community and identity that is fostered through attending live performances, the role live performance plays in supporting artists, and how live performance contributes to local and national economies.

- The cost-of-living crisis, natural disasters, and COVID-19 are having lingering impacts on the sector, where producers noted production costs have risen dramatically, and audience attendance is down. These financial pressures were also impacting traditional sources of revenue like corporate sponsorship and philanthropic giving.

OUTLOOK

- Outlook for sector workers is mixed, with many noting a lack of financial security, changing audience profiles, economic pressures, and the professional demands of a high stress industry created a challenging vision for their future operations.
- Despite this anxiety, interviewees identified a range of key opportunities and areas for growth for the Aotearoa live performance sector, emphasizing a need for greater collaboration and diversification of their activities to support sustainability and better reflect the cultural identity of Aotearoa.

These interviews emphasised the significant value of live performance to the national identity of Aotearoa, communities, and civic wellbeing, yet also made clear the tangible risks facing the sustainability and longevity of the sector. These themes are discussed below in further detail and are supported by direct quotes from our interviewees. The kōrero of these sector workers reiterates the need for long-term support for the performance sector that recognises the value that such activity generates for Aotearoa.

BACKGROUND AND PATHWAYS INTO THE SECTOR

The live performance producers we interviewed had varying pathways into the sector, which they recognised often relies on existing networks and high levels of commitment. Many of the interviewees came to work in the live performance sector through their own creative practice, where studying tertiary-level arts or creative practice had involved internships or opportunities to engage with arts organisations or develop career pathways. Some of those who had studied as practitioners and performers noted the difficulty of making a career as a creative practitioner in Aotearoa, wherein the combined pressures of barriers to access, tightly networked communities, and high competition for a small number of jobs had led to them taking up professional, production, and managerial roles within arts organisations.

EMPLOYMENT PATHWAYS

"I started organising all-ages shows for my band at community halls, learning on the fly, and and met with other people that were doing Then we ended up joining forces and organised more and more shows together and got some council funding too. I never knew at the time that it could be a job or a career."

Many noted that developing careers in the arts in Aotearoa often comprised an array of informal pathways: turning up to live shows and becoming known in the community, volunteering, and interning were all mentioned as tactics that had shaped early career experiences. Several interviewees had undertaken arts training in Aotearoa, then moved overseas to pursue what they saw as a wider range of opportunities. Many of these interviewees noted that they had honed their managerial skills in overseas contexts such as Australia, the United Kingdom, and North America, before returning to Aotearoa during the COVID-19 pandemic. Some felt this was a future risk for the Aotearoa live performance sector, where continued divestment from the sector and a reduction in local pathways could result in new and emerging creative leaders leaving the country to pursue overseas opportunities.

PASSION, PURPOSE, AND MOTIVATIONS

"it's been a bit of a labour of love, but it's turned into a pretty iconic place to play."

Despite these challenges, there was a strong sense of job satisfaction and purpose amongst the producers we interviewed. When interviewees were asked what motivated them to continue working in the sector, they universally spoke to a passion for the work they were doing, and for the performing arts more generally. Interviewees spoke about working in an exciting space that changes often, finding creative solutions for challenges, and gaining great personal satisfaction from their jobs. Many interviewees noted they could probably earn more money in another sector, but that the sense of value and purpose they gained from their jobs could not be replicated elsewhere. Many saw the arts as a major aspect of their identity and an intrinsic part of civic and community identity, where they felt personally valued for the skillsets they bring to their work, as well as the capacity of the arts to make others feel happy and fulfilled.

Motivations for continuing to work in the sector further encompassed the benefits the arts bring to communities and cities, where producers saw live performance as offering options and opportunities for artists and communities to come together, as well as activating sites and spaces within cities and urban environments. Interviewees also spoke of the value they saw in taking performance works to regional and underserved centres, working with and mentoring young people, and engaging communities through initiatives like all-ages shows, school visits, or workshops.

ORGANISATIONAL STRUCTURE AND CHARACTERISTICS

Responses to how live performance organisations are structured were highly varied. Many larger organisations with national and international scope are characterised by a Board of Trustees acting in a governance capacity alongside a managerial, operational structure consisting of a CEO or general manager, supported by a range of director roles in areas such as artistic development, marketing, and community outreach. Many of our interviewees spoke to the ways these organisations have undergone a significant amount of organisational structural development over the past decade, where there has been a concerted effort to refine board structures, create more sustainable and transparent financial and reporting processes, and reduce reliance on volunteer labour.

While charitable trusts governed by boards are a common model for theatre, dance, and classical music organisations, some interviewees noted that going through the process to become a charitable trust was too difficult for them, and they preferred to stay as a company effectively operating as a 'not for profit'. Most music venues are currently operating as limited liability companies, curtailing their ability to receive public funding; some organisations further noted they had moved to a model whereby part of their operations fall under a charitable trust, and part under a limited liability company. Staff structures similarly varied across respondents, where some organisations had a stable staff body or full-time, permanent professional roles, where, in the case of some larger organisations, this staff body was employed in addition to a core group of full-time performers. Several organisations, mostly festivals and touring theatre companies, work on a 'ballooning' staff structure, whereby they have a core, small base of staff, and grow significantly larger for small periods of the year with the appointment of fixed-term or part-time roles such as regional coordinators or community organisers.

VOLUNTEERING

"Too many, as far as I'm concerned. We would very much like those to be permanently paid positions."

Volunteering plays a varied role across organisations, with several moving away from a reliance on volunteer labour towards ensuring all contributors are paid for their time, despite constrained budgets. Nevertheless, many still rely on volunteers to varying degrees, where the most common situations involving volunteers, as reported by interviewees, included board members, fundraising initiatives, and one-off event staffers. Theatre emerged as a particularly volunteer-heavy domain, where volunteers often played a large part in front of house activities such as ushers or bar staff. Organisations that did use volunteers noted that they often tried to provide some form of training and development activity as part of these roles, that could potentially lead to employment pathways.

Commercial and independent operators were much less likely to use volunteers, noting the time involved in training and development; paid internship roles, where organisers had the capacity to host interns and facilitate training, were nonetheless regarded positively.

Many said they wished they could pay their staff more, and that budget constraints often meant they and their staff were working more than their paid allocation and effectively volunteering their time.

PROGRAMMING AND STRATEGY

“The cool thing is that you have to work in such diverse communities. You can’t be just making a performance for yourself. You have to be thinking, how do I make work with this community?”

For larger organisations with national and international scope, programming of performances was often the responsibility of a full-time artistic or creative director in collaboration with senior leadership and with the board’s approval. Many of these organisations were working to a strategic vision that underscored the direction of their programming and their identity as an organisation; several organisations in this category also noted they were developing their future strategy to further expand and diversify their programming both in light of financial pressures and touring constraints, but also to better reflect a changing audience profile and appetite for local, modern, and/or experimental work, in addition to ‘heritage’ or ‘traditional’ work. Many nonetheless noted there was a fine balance between what would attract a large audience and hence turn a profit, and what they wanted to program to meet their artistic vision.

Programming was subject to a number of approaches in smaller organisations. Theatres and festivals, for example, often put out calls for submissions, and decisions were made collectively by staff. Theatres also noted they would deliberately hold spots in their programming to allow for organic, spur of the moment works. Comedy venues had relatively established patterns and consistency, which meant their programming and marketing often focused on the delivery of themed ‘Nights’ — Fresh Night, or Pro Night, etc. Music venues were slightly more varied, with some looking to be more strategic about their programming throughout the year, but also being mindful of audience appetite and trying to diversify their audiences with a range of offerings, for example balancing touring acts with local DJ nights. Regional music venues were particularly invested in ensuring local acts were always on the bill in some capacity, but noted they were facing difficulty in locking in touring acts, and this was becoming significantly harder. Nearly all interviewees spoke about what they saw as a responsibility to program works that respond to community needs and tell diverse stories; to understand their audiences and represent them within their performance spaces.

OUTREACH AND ENGAGEMENT

“Because it’s a community space, there’s a relationship between community activity and performance activity. The whole basis of it has been about who needs the space. That’s what builds the audience.”

This desire for engagement with audiences as a community heavily informed the wider operations the organisations undertook beyond live performance. All organisations interviewed were involved in ‘other activities’ to promote, support, or supplement their live performance work. The proportion of non-live activity varied between organisations, with some noting this constituted up to 60% of their total company operations, while others estimated their non-live activities were closer to 10–20% of operations.

Larger organisations often had more capacity for wide-reaching, non-performance activities with national scope – such activities often consisted of offering classes, running workshops, school visits, venue or workroom tours, and supporting and/or partnering with community-based diversity and inclusion initiatives. For smaller venues and organisations, this support was often in the form of providing spaces for community initiatives or using events to fundraise for local groups.

In addition to these community-engaged outreach activities, organisations also frequently undertook other types of work that supported their financial operations, as well as receiving donations from corporate sponsorships and philanthropy. For some orchestras and musical ensembles, this entailed operating in a ‘for hire’ capacity for private events or commercial recordings. For performance venues, operators noted they frequently made their spaces available as a venue-for-hire for private and public events, noting they needed to ‘diversify to survive’. Some rented smaller spaces to other businesses/ organisations or provided recording studios and rehearsal rooms for hire to practitioners (often at heavily subsidised rates). Many smaller venues remained open as bars when performances were not taking place. Though other operations were often crucial to financial performance or community engagement, organisations often commented that these other activities need to be targeted and carefully considered. As pressures grow, many noted they may need to curtail these other activities to focus on primary operations.

RISKS AND CONSTRAINTS

“Money, of course would, would definitely make it easier. I don’t think we would divert away from what we’re doing. But we might be able to do it with less worry. I don’t think anybody, realistically wants to make lots of money out of it, but just being able to have some safety would be great.”

Financial security is by far the most common concern for live performance producers. Producers across the full scope of live performance noted that core funding would make their operations significantly easier, where they felt there was increasing competition year on year for an unchanging, or shrinking, pool of funding administered through bodies such as Creative New Zealand. Interviewees also noted that audiences increasingly demanded more from live performance experiences, that producers were attempting to deliver greater outcomes with the same or less funding. Inflation was also noted as a risk, with producers facing shrinking profit margins. A common sentiment amongst producers is that everything is costing significantly more — many noted ticketing fees, production, and touring costs were the highest they have ever been — but this doesn’t equate to audiences being willing to pay more.

However, it wasn’t just that ‘more’ funding is required: rather, several interviewees commented on how resources could be better allocated, and systems changed to provide more certainty over funding. The short, cyclical nature of funding often meant that organisations couldn’t plan for more than twelve months in advance due to uncertainty over whether they would be funding recipients in future.

FUNDING AND EQUITY

“What we really need is government support for infrastructure for places and communities, because without places, communities can’t really thrive.”

A common perception amongst interviewees was that the distribution of funding for live performance in Aotearoa is inequitable. There was a view amongst many interviewees that ‘the same people’ get the most significant amounts of funding each year. Further to this was a sense that less funding is being channeled towards ‘grass roots’ organisations, where funding is constrained and allocated without the understanding that such spaces act as a ladder for artists, staffers, and producers to grow their careers; and that small places working within communities have a huge impact for less funding. Such constraints on smaller organisations were similarly raised by those operating private businesses, such as music and comedy venues, who noted that being unable to access public funding often meant they were reliant on alcohol sales as a primary source of income. And that this actively constrained the types of events they were able to offer and the audience profiles that followed accordingly.

OPERATIONAL AND REGULATORY RISKS

Further to these funding constraints, costs of operation and the regulatory environments were widespread concerns for the live performance sector. Physical holdings of property, or leases therein were a major risk to sustainability. Organisations saw great benefits in owning a space, or leasing from council or like-minded individuals, with many noting they were simply unable to accommodate the costs of purchasing property, or did not have the long-term financial security to do so. As a result, many rented or leased their spaces, and producers noted their rents were increasing significantly; and that their security in their spaces was heavily dependent on good relationships with landlords. The sustainability of operating from such spaces was often complicated by factors such as noise control regulations, a lack of proximity to public transport, the accessibility of the space for audiences with access needs, and development approvals for high density residential buildings, all of which producers identified as risks to the future of live performance operations in built-up urban environments.

BURNOUT AND ATTRITION

“It’s a very real challenge and drain for our family. Not being able to take a break. We can’t afford to pay someone to do what we do. Our greatest risk is and always has been just us burning out.”

These long-term stress factors also contributed to anxieties around the sustainability of the live performance sector, as well as burnout for folks working within this space. Attrition and succession planning were mentioned by interviewees as a risk factor across the sector; with many noting that despite the sense of personal satisfaction, the conditions of working in the sector can be extremely demanding, and people were leaving or thinking about leaving. This attrition was attributed to a number of factors including the difficulty of constantly justifying their existence, volunteers no longer having capacity, people moving overseas because they can’t get work in Aotearoa, and a lack of opportunities for performers.

Several interviewees noted their concern that there was a lack of valuing or respect for the arts at the level of local and national government, and that this would have a continued destructive impact for the sector: comedy respondents specifically noted that the re-structuring of the television and media sector, which provides significant employment opportunities for comedians, was having a negative impact on local career trajectories. As a result, many found succession planning extremely difficult or near impossible, and this was widely felt as a concern across the sector.

COSTS, BENEFITS, AND TRENDS

Given the above risk factors, all interviewees stressed the importance of recognising the wide-ranging benefits of live performance for Aotearoa. All interviewees spoke to the sense of community and identity that is fostered through attending live performances, where live performance offers places for audiences to go to be with other like-minded people and provides space and time for communities to share their stories in creative and engaging ways; and gives opportunities to see quality works of great cultural significance, to feel something exciting, and to contribute to something 'good for' society. There was a widespread agreement across interviewees that participation in live performance as both audiences and performers has significant wellbeing value, where live performance was able to offer safe spaces for young people and marginalised or underserved communities, and improved social wellbeing and mental health across communities.

THE CREATIVE IDENTITY OF AOTEAROA

“Early on, people really had a desire to see contemporary New Zealand stories, and now people are saying we want to see local people performing. We want to see local stories, we want to see local events, we want to see our communities and performance.”

Our interviewees also recognised the significant role live performance has to play in supporting the creative identity of Aotearoa, as well as the benefits the live performance sector provides directly to local and national economies. Live performance supported local artists through facilitating spaces for the development of new and diverse work, encouraging artists to take risks and experiment with new forms. Enabling local performers to interact with international artists. Ensuring that they feel valued, able to be paid and in employment. And to create peer groups and communities. Live performance organisations emphasised how they supported artists to form their own communities and support networks, and played direct roles for career progression through advocating for local artists to be supported acts for international touring artists and performers. Producers also spoke to the benefits live performance brings to cities and the cost-benefit of live performance to local communities, where their activity invigorates city spaces and supports spending at local businesses that extends far beyond the event itself.

TRENDS AND AUDIENCE BEHAVIOUR

While producers emphasised the value of live performance for audiences, they also readily acknowledged changing trends in audience behaviours that impacted their ability to deliver on these benefits. Almost everybody interviewed stressed that audiences were buying tickets extremely late, and across-the-board ticket sales were generally down. Presales were declining; sometimes causing tours to be cancelled.

Interviewees attributed this to a combination of lingering COVID-19 effects wherein audiences are not in the habit of going to live events, and experienced an increased nervousness about crowds; as well as the wider ongoing impacts of the cost of living crisis where people were simply priced out of attending, or not prioritising live performance in their spending habits. Some producers spoke to an increasing sense that they were constantly in competition with digital streaming platforms to capture audience attention and investment.

Audiences who do have money, interviewees noted, were more likely to be older, with some organisations in classical sectors noting their audience profile skewed towards this demographic. This demographic was similarly noted as most likely to be subscription holders and philanthropic supporters of the organisation, with younger audiences less likely to have the disposable income to support organisations in this way. However, it was also observed that the cost-of-living crisis meant philanthropic givers were becoming more selective in their donations, and that being reliant on an aging population for philanthropic donations was not a sustainable model of operation.

As a result, many organisations noted they were looking for ways to build long-term, meaningful connections with communities to sustain audience-producer relationships into the future.

All interviewees spoke to what they saw as a need to be sensitive to their audience and how much they can afford or are willing to pay. Many felt audiences seem to be willing to invest in big performances at arenas, but then don't want to attend smaller gigs. Organisations then emphasised their awareness of the need to make it easy for people to attend, whilst balancing this with the costs of their operation and delivery. Interviewees discussed their desire to support work in which diverse audiences would be able to see their own stories reflected and celebrated, and thus feel welcome in live performance spaces, with many larger organisations noting a desire to diversify their audiences beyond what they saw as a core group constituted by an older, Pākehā demographic. There was a fine balancing act, producers noted, between putting on traditional or European 'heritage' work that is often in high demand by audiences of ballet, opera, and classical music, and providing spaces for more experimental, modern work from a diverse array of creatives.

GROWTH, OPPORTUNITIES, AND OUTLOOK

“When you’re in an organisation that has always celebrated a European art form, what does it mean to be in New Zealand? Why does everything have to be exclusively what happened in Europe 200 years ago?”

Interviewees identified a range of key opportunities and areas for growth for the live performance sector in Aotearoa. Many spoke to a desire for greater collaboration within and between live performance types to respond to the challenges of funding and resourcing, and in doing so potentially diversifying their audiences and operations. Here there was a genuine desire to share spaces, shows, and audiences, and increase accessibility to the sector for a wide range of performers and audiences.

Collaboration would also proffer greater opportunities for knowledge transfer and mentorship for sector workers, where many spoke to a sense they were ‘making it up’ as they went along and wanted to learn from experienced leaders in the live sector. A significant number of producers saw a key opportunity for live performance types to carve out an identity for the sector that responds to its cultural situatedness in Aotearoa, prioritising work by Māori and Pacific creators as well as giving much greater visibility for local content, and decreasing the reliance on Western European ‘traditional’ works as core revenue for their organisation.

GROWTH AREAS

“Everything at that grassroots level is where I see the government can give the biggest support, because if we can get those people performing, then that all feeds back into each other and that will help our ecosystem”.

A number of core focus areas for growth emerged from interviews with live performance producers. Interviewees saw increasing access for young and diverse audiences as a key growth area that would safeguard the sustainability of the sector, as well as encouraging the diversification of their offerings. This desire for diversity was also articulated in the context of workforces, where interviewees spoke to a need to create a diverse workforce that can respond to challenges facing the sector, engage meaningfully with audiences across Aotearoa, and create the stories organisations want to support (see Hoard & Wilson, 2020 for a report into gender diversity in the Aotearoa music industry). This development of the workforce was a priority area for many organisations, who spoke of a desire to change operational models in ways that would better support accessible programming and investment in artist careers, as well as being able to support artists towards professional development opportunities and facilitating more pathways into the industry.

Other suggested growth areas included support for small and grassroots venues as dynamic and adaptive spaces that offer significant return on investment, to supporting artists to produce works at greater scale, a return to large-scale international touring and the ability to collaborate internationally. Several interviewees saw an opportunity for live performance organisations to continue to contribute to the development of liveable cities and the vitalisation of regional centres as the population of Aotearoa grows, and cities experience changing identities in the wake of job losses; population shifts; and recovery from natural disasters.

Many producers were curious about the potential of harnessing digital platforms to enable new forms of collaboration and audience engagement. Some also saw this as a necessary investment to respond to the ecologically unsustainable nature of large-scale live performance, and the ongoing realities of climate change.

OUTLOOK FOR THE FUTURE

“I think it’s putting a mirror up to who we are and who New Zealanders are, and our politics, and our culture, and our society.”

When interviewees were asked about their outlook for the sector, many noted their anxiety around the future sustainability of the Aotearoa live performance sector. Uncertainty shapes outlooks for the sector, with many noting a lack of financial security, changing audiences’ profiles, economic pressures, and the professional demands of a high stress industry created a challenging vision for their future operations. There was a widespread sense that things will continue to be difficult and mixed feelings about future outlook. Nevertheless, producers were passionate about the role of the Aotearoa creative industries into the future. Live performance, they assert, is a key place to tell stories about Aotearoa and our changing identity. For communities to see themselves on stage and to be seen in the cultural landscape of Aotearoa. To engage communities and build solidarity. And to support wellbeing and a sense of belonging. These factors, our interviewees emphasised, are irreplaceable, and must be upheld and protected to safeguard the cultural and creative identity of Aotearoa locally and internationally.

THE VALUE OF LIVE PERFORMANCE IN AOTEAROA



The analysis conducted for this project has enabled, for the first time, a comprehensive measurement of this value and its significance. Live performance provides significant return on investment; actively benefits local economies; is a job-creating sector; and is of significant social and cultural importance. Such evidence can thus be confidently used by sector producers to articulate the value of their activities, and for governments to make decisions about investment in live performance.

Live performances contribute significantly to society beyond their immediate entertainment value. They are a source of social, cultural, and economic capital that enriches communities across the country. Traditional methods of quantifying the value of live performances, such as those explored in the literature review, often fall short as they primarily focus on direct economic impacts such as ticket sales and immediate spending. As this report observes, these traditional approaches are limited; they fail to capture the wider societal impacts of live performances, such as enhanced cultural identity, community cohesion, or individual wellbeing.

This report has taken as its central tool a cost benefit analysis in order to better understand the value of live performance in Aotearoa. Cost benefit analysis, which has become the international standard for evaluating policy choices, offers a more comprehensive approach to assessing the value of live performances. Originating from private sector practices, cost benefit analysis evaluates the overall advantages and disadvantages of an activity, including its wider economic and social impacts.

In the context of live performances, cost benefit analysis considers more than just the direct economic transactions; it also evaluates the positive and negative impacts on the performers, audiences, and the communities in which performances take place. This involves looking at the value of cultural expression, boosts in economic output, and the impacts on attendees, which are, in the main, benefits. On the flip side, it also considers the direct and opportunity costs incurred by all stakeholders — what they could otherwise have achieved with their time and resources spent on live performances.

This section of the report estimates the value of live performances in Aotearoa over a twelve-month period. It does not compare the value of live performances to something else directly; rather, it aims to provide a thorough understanding of their net impact in market terms.

For accuracy, this analysis must be rigorous. To that end, it integrates several well-established methodologies to determine the unique input costs and outcomes of live performances: financial analysis to gauge the scale of the sector, revealed and stated preferences to evaluate direct and opportunity costs, input-output analysis for economic impacts, econometric methods to quantify the impact of sector volunteers, and hedonic pricing to estimate the wellbeing benefits returned to individuals participating in live performances.

Importantly, a conservative position is adopted, by tending (in the presence of uncertainty) to overestimate costs, and underestimate benefits.

The ultimate objective is to provide a comprehensive, reliable, and defensible estimate of the value created by live performances in Aotearoa, establishing an evidence base for investment, and laying a platform for future research.

This approach allows for a more nuanced understanding of the role live performances plays in the cultural and economic landscape of Aotearoa. By considering both tangible and intangible benefits, alongside the full spectrum of costs, this analysis aims to capture the true value of live performances to Aotearoa.

SOCIAL AND ECONOMIC BENEFITS
OF LIVE PERFORMANCE

The value of live performance to Aotearoa across the entire community is the sum of the social and economic benefits enabled. This analysis values these benefits at \$17.3 billion in the twelve months ending June 30, 2024.

This amount is significantly greater than previous estimates based only on financial or economic impact, yet it is likely to be an underestimation given the limitations of the available data and forensic techniques.

Table 10: The costs, benefits and value of live performance in NZ for the year ending 30 June 2024

COSTS (\$ MILLION)			
		Sub-totals	Totals
Direct costs			
Consumer costs	\$2,331.3		
Producer subsidies	\$2,373.0		
Government subsidies	<u>\$75.5</u>	\$4,779.8	
Opportunity costs			
Volunteers' time	\$489.7		
Production costs	<u>\$221.8</u>	<u>\$711.5</u>	\$5,491.3
BENEFITS (\$ MILLION)			
Economic impacts			
Producers' surplus	\$2,964.4		
Employment (wages)	\$5,419.5		
Taxes	<u>\$209.0</u>	\$8,592.9	
Social impacts			
Volunteer labour	\$1,248.9		
Wellbeing	<u>\$7,460.0</u>	<u>\$8,708.9</u>	<u>\$17,301.8</u>
Social return on investment			\$11,810.5
Benefit: cost ratio	3.2 : 1		

By contrasting the net value of live performance in Aotearoa with the cost of inputs, for every dollar invested by the community, \$3.20 is returned (the benefit-to-cost ratio).

The net (or social) return on investment — the difference between benefits and economic and social costs — is \$11.8 billion.

Because the external benefits of live performance significantly outweigh the social costs involved, this leads to what economists would term an efficient outcome. In other words, there is a substantial economic, social, and cultural ‘profit’ in live performance.

Other findings of interest about the costs and benefits of live performance in Aotearoa are summarised below.

Table 11: Key findings about the costs and benefits of live performance in Aotearoa

	AOTEAROA
Average consumer expenditure per event	\$210.05
Volunteer hours donated to live performance	26.4 million
The contribution of live performance expenditure to Gross Domestic Product (GDP)	1.4%
Full-time equivalent (FTE) jobs created in all sectors by expenditure on live performance	60,500
The increase in individual wellbeing attributable to live performance attendance	+7.6%
Non-attendees’ attribution of community wellbeing to the impact of live performance	58.3%

COSTS

Live performances in Aotearoa, including those offered free of charge, incur costs. These costs include not only monetary outlay but also the value of donated time and resources. For instance, as the producer interviews demonstrate, free performance might involve volunteers contributing their time, individuals or organisations donating resources, and local councils providing venues at low or no cost to the organisers. Additionally, such performances often stimulate related economic activity, such as attendee spending on food and drinks.

This analysis examines the financial and economic costs associated with enabling live performances in Aotearoa for the twelve months ending 30 June 2024. We find that direct investments in live performances in that period totaled \$4.8 billion. This figure brings together the unique financial contributions of individuals, producers, and the government.

In addition to these direct investments, potential economic benefits were foregone when resources were allocated to live performances instead of alternative uses. The opportunity costs associated with investments of time and capital in live performances amounted to \$711.5 million.

Combining the direct and opportunity costs reveals that the total economic cost of live performances in Aotearoa for the twelve months ending 30 June 2024 reached \$5.5 billion.

These findings provide a quantitative measure of the resources allocated to the live performance sector in Aotearoa, offering insight into the scale of economic activity associated with this important cultural industry.

DIRECT COSTS

The live performance sector in Aotearoa operates within a complex financial framework, balancing various revenue sources to maintain its viability and accessibility.

In the twelve months ending 30 June 2024, consumer spending on live performances in Aotearoa reached \$2.3 billion. This figure includes direct ticket sales, in-venue purchases, and associated expenditures such as travel and accommodation. While substantial, this consumer contribution represents only a portion of the sector's total financial requirements.

The industry relies heavily on additional funding to remain operational and accessible. Producer subsidies, which include philanthropic donations, fundraising and other sources of revenue, matched consumer spending at \$2.4 billion. This significant contribution highlights the gap between ticket prices and actual production costs.

Government grants and subsidies provided an additional \$75.5 million to the sector. Although this represents a smaller proportion of the overall funding, it plays an important role in supporting the industry's sustainability and cultural objectives.

The aggregate cost of producing live performances in Aotearoa for the twelve months ending 30 June 2024 totaled \$4.8 billion.

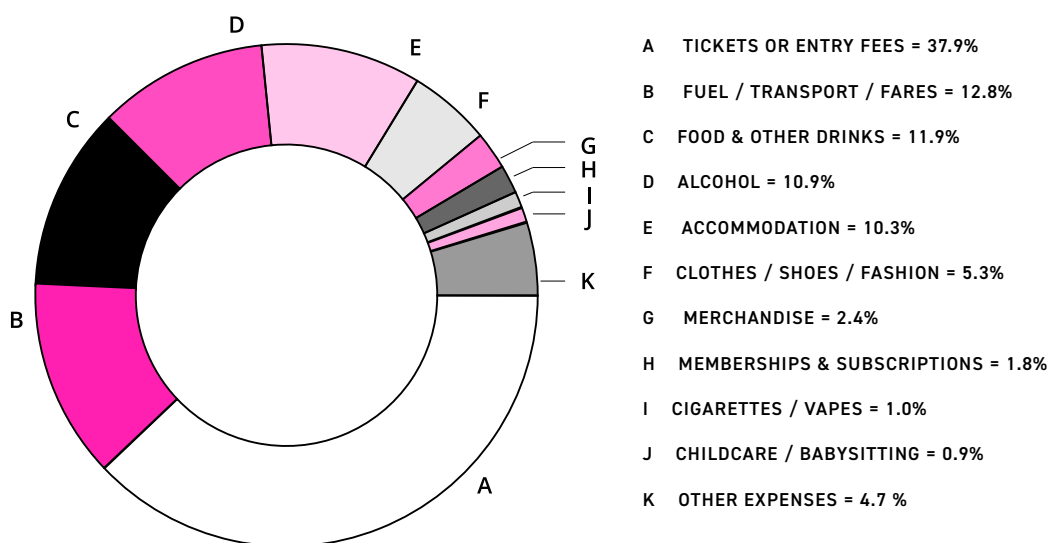
CONSUMER COSTS

The consumption of live performance motivates a variety of related purchases across multiple discrete economic sectors. In this study, our satellite account brings together a number of these, including:

- Tickets or entry fees
- Alcohol
- Food & other drinks
- Cigarettes/vapes
- Merchandise
- Fuel/transport/fares
- Accommodation
- Clothes/shoes/fashion
- Memberships & subscriptions
- Childcare/babysitting
- Other expenses

Consumers of live performances reported spending an average of \$210 across these categories per event they attended. This estimate is derived from the Attendance Survey, which is considered the most reliable source due to the immediacy bias of respondents and the larger sample size. The Attendance Survey's estimate is also more conservative than higher figures reported in the Public Survey. With an average attendance frequency of 4.9 visits per year among the 2.3 million attendees identified earlier in this report, individuals collectively spent a total of \$2.3 billion on live performances in Aotearoa in the twelve months ending 30 June 2024.

Figure 16: Average expenditure at live performances by expenditure category (percentage breakdown)



The number of responses to the Attendance Survey also allowed us to explore variation in spending patterns across different types of performance as well as regional/urban audiences, international/local performers and ticketed/free events. Variations in the proportional breakdown of audience spending across these different categories were tested to examine, for example, whether audiences spending patterns varied dramatically between comedy and theatre, or between regional and urban audiences. To assess this a Chi-square goodness-of-fit test was conducted for each category against the overall average.

Interestingly, the results suggest that audience spending patterns do not differ significantly between types of performance or between urban and regional audiences. For these categories any observed differences are likely due to random chance.

Audience spending patterns did vary significantly between events with an international or local performer and between ticketed and free events.

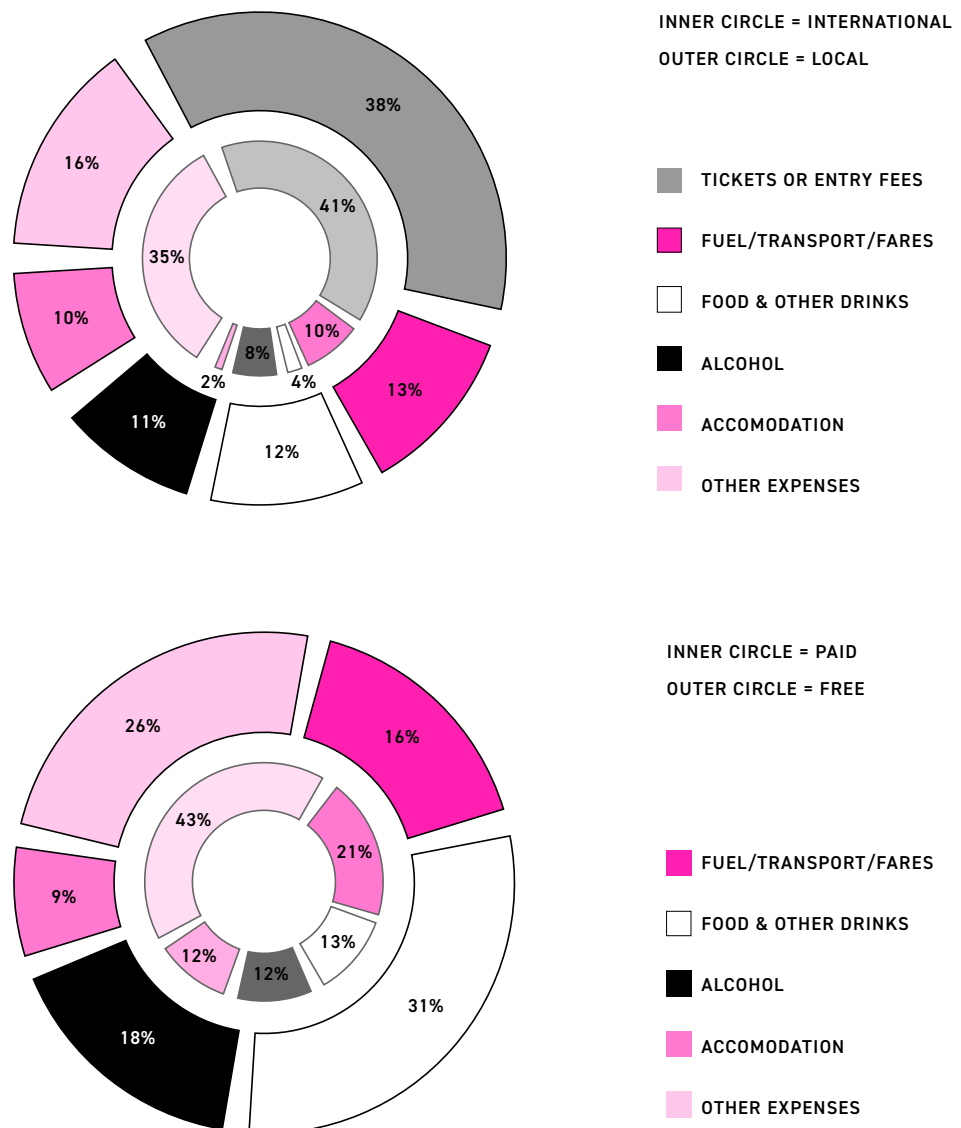
Audiences attending events with international headline acts spent proportionally more on tickets, clothes and merchandise, and less on alcohol, accommodation and transport costs, than audiences for events with local headline performers.

Audiences for free/non-ticketed events spent proportionally more on food and alcohol and less on accommodation, transport and other expenses than audiences for ticketed events. Of note, respondents who paid to attend a live performance were slightly less likely to identify cost as a barrier (41.7%) than those who did not pay to attend a performance (45.2%). The Pearson Chi-Square test (value = 6.256, $p = 0.012$) indicates a statistically significant association between paying to attend a live performance and identifying cost as a barrier.

Throughout the Attendance Survey period, we collected data from a number of Festival events across Aotearoa.

Surveyed events included free community street events, large ticketed music festivals featuring international acts, multi-genre arts festivals (free and ticketed), multi-day camping events, and festivals with events occurring over a number of days and nights. Given this variance in activity, and a relatively low number of respondents at paid festival events (n=583) we have chosen not to examine 'Festivals' as a discrete subset of live performance in this report. However, festival attendance and spending was captured by the Public Survey and Attendance Survey respectively and so festival activity is represented in our cost benefit-analysis of the live performance sector.

Figure 17: Average expenditure on international/local and ticketed/free by category (percentage breakdown)



The amount individuals spent on their live performance attendance was analysed using linear regression analysis, which was suitable given the continuous nature of the dependent variable. This analysis considered various demographic and socio-economic factors to understand their influence on spending patterns.

These factors are noted as follows:

1. **Household income:** Higher household income was associated with a 15.9% increase in total expenses (Standardised Coefficient Beta = .159, $t = 7.688$, $p < .001$).
2. **Age:** Older age (55+) was associated with a 14.8% decrease in total expenses, indicating that younger individuals spent more overall (Standardised Coefficient Beta = -.148, $t = -7.403$, $p < .001$).

Controlling for other factors, younger individuals (<30) were more likely than older persons to spend on the following:

- Fashion (+17.1%)
- Cigarettes and vapes (+13.6%)
- Accommodation (+9.3%)
- Other food and drinks (+8.7%)
- Merchandise (+8.6%)
- Alcohol (+8.5%)
- Travel (+7.1%)
- Tickets (+6.8%)

3. **Location:** The further someone lived from a major city, the more they spent, with an 8.2% increase in total expenses associated with greater distance from major cities (Standardised Coefficient Beta = .082, $t = 4.314$, $p < .001$).

Controlling for other factors, the further someone lived from a major city, the more likely they were to spend on the following:

- Accommodation (+13.6%)
- Travel (+12.8%)
- Other food and drinks (+4.7%)

4. **Carer Status:** Carers spent about 7.4% more overall compared to non-carers (Standardised Coefficient Beta = .074, $t = 3.841$, $p < .001$).
5. **Hours worked:** More hours worked per week were associated with a 4.9% increase in total expenses (Standardised Coefficient Beta = .049, $t = 2.309$, $p = .021$).

The influence of gender, disability, and education on total expenses was minimal, and not statistically significant.

The R-square value indicates that the model explained about 11.1% of the variability in total expenses. While the model captures a modest portion of the variance, these predictors offer valuable insights into spending behaviour, though other, unmeasured factors likely contribute to the remaining variability.

PRODUCER SUBSIDIES

An exhaustive analysis of registered charities was conducted to better understand the supply side of the live performance sector in Aotearoa. The New Zealand Charities Register was polled using 50 predetermined keywords. These keywords were carefully selected for their potential to appear in the names of organisations involved in enabling or producing live performances relevant to this study.

The initial keyword search yielded 2,445 charity returns. These returns then underwent a thorough review process to refine the sample. The key criterion for inclusion was that these organisations explicitly mentioned live performance in their statement of purpose or on their website. Organisations primarily focused on appreciation, education, sharing, or the studio recording of performances without a live production element were not included in the final selection. As a result, a sample of 743 unique organisations were identified that were directly involved in producing or facilitating live performances in Aotearoa.

We next examined these organisations' most recent financial reports, all of which were dated no earlier than the financial year ending June 2022. These reports provided consistently formatted information on revenue, expenditure, and the composition of both paid and volunteer workforces. From this data, we were able to extrapolate how these producers subsidised their production costs above and beyond the revenue generated from sales, which included the tickets, food and beverages, merchandise, memberships, and subscription sales identified above.

Excluding government subsidies (detailed in the following section), the producers supplemented their revenue through several key sources. Firstly, donations, fundraising, and similar revenue streams contributed a substantial \$1.8 billion. Interest, dividends, and other investment income added a further \$100.4 million, and other forms of revenue accounted for \$194.3 million.

Notably, 41.3% of the producers reported a net loss in their most recent financial reports. This indicates that a significant portion of these producers had to rely on their cash or other reserves to the tune of \$238.1 million to finance their operations for that year.

Altogether, it is estimated that producers directly sourced and contributed \$2.4 billion to subsidise the costs of live performance production in Aotearoa in the twelve months ending 30 June 2024.

GOVERNMENT SUBSIDIES

The New Zealand National Accounts Input-Output Tables provide valuable insights into the subsidies received by various industry sectors in Aotearoa. According to the data, the Heritage and Artistic Activities sector (which includes subcategories such as Performing Arts Operation and Creative Artists, Musicians, Writers and Performers) benefits from subsidies that enlarge the industry's output by 3.6%.

The presence of this subsidy means that the other components of output, such as operating surpluses, employee compensation, and taxes, can be higher in proportion to what they would be without the subsidy.

To situate this within the broader landscape of industry support, this level of support places the sector in the equal eighth position out of 109 industry sectors. The most heavily subsidised sector in Aotearoa is Rail Transport, with subsidies reducing their costs by 21.6%.

Analysis of Te Tai Ōhanga The Treasury Budget Papers for the Minister for Arts, Culture and Heritage reveals that 10.3% of Departmental output expenses went directly to

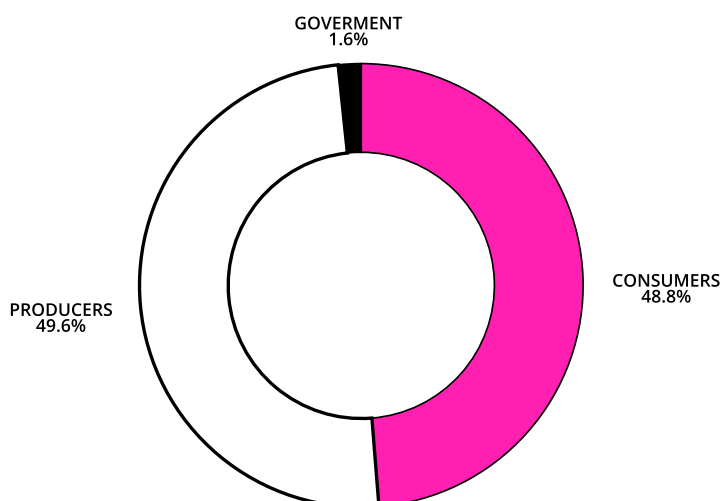
Providing opportunities for New Zealand audiences to experience high-quality live symphonic music, ballet and kapa haka performances; supporting the growth of the contemporary music industry; and encouraging participation in and appreciation of these art forms in New Zealand. (Te Tai Ōhanga The Treasury, 2023).

To allow for contributions from other tiers of government, we conservatively assume in this report that no more than 25% of the subsidies given to the Heritage and Artistic Activities sector were enjoyed by the live performance industry.

As such, while \$2.4 billion in live performance production costs were subsidised by producers, it is estimated that, in the twelve months ending 30 June 2024, another \$75.5 million came from governmental sources.

Therefore, it is important to note that while the sector does receive notable government support in absolute terms, this does not necessarily indicate a state of welfare dependency. Moreover, government funding for the Arts has experienced a steady decline proportional to GDP over the last decade, and Aotearoa has a smaller proportion of expenditure against comparable small, advanced economies (Toi Mai, 2023: p18). The data then suggests a more nuanced picture, where public funding is complemented by significant private and community-based financial support.

Figure 18: Sources of funding for live performance in Aotearoa



OPPORTUNITY COSTS

To fully understand the economic impact of the live performance industry in Aotearoa, it is essential to consider the opportunity costs associated with the resources allocated to the sector. Opportunity costs are calculated by estimating the potential financial returns that the human and capital resources directed to live performance could generate if allocated to other endeavours. This approach provides a clearer understanding of the economic trade-offs involved, helping to quantify what is being sacrificed when these valuable resources are used to support live performances, rather than other potentially profitable activities.

To start with, the live performance sector relies heavily on volunteer labour, which represents a significant form of subsidy. To assess the opportunity cost of volunteers' time, this analysis makes a hypothetical assumption that no volunteering takes place in live performance production. In this scenario, all volunteer labour currently directed towards live performance would be redirected to other productive activities.

Similarly, the analysis considers the potential alternative uses of the financial resources contributed by producers, consumers, and the government. By examining what value might be achieved from their alternate investment of the **\$4.8 billion** in expenditure (cited above), we can better understand the opportunities forgone by directing these resources to live performance.

The findings of this report reveal that the total indirect cost of live performance production, being the sum of opportunity costs, amounts to **\$711.5 million**. This figure comprises **\$489.7 million** in opportunity costs associated with volunteers' time, and **\$221.8 million** in opportunity costs related to investments in live performance.

It is important to note that the inclusion of opportunity costs in this analysis serves to rebut the presumption of substitutability that is often associated with cultural activities. While it might be argued that resources allocated to live performances could simply be redirected to other forms of entertainment or leisure activities with similar benefits, this view overlooks the unique value proposition of live performances.

By quantifying the opportunity costs, we demonstrate that stakeholders are willing to forego significant alternative opportunities, suggesting that live performances offer distinct benefits not easily substituted by other activities. This willingness to incur opportunity costs implies that live performances generate value beyond mere entertainment, potentially including cultural enrichment, community cohesion, and artistic expression that are not readily replaceable by alternative uses of these resources.

VOLUNTEERS' LABOUR

The live performance sector in Aotearoa relies significantly on volunteer contributions. Based on the producer sample, it is estimated that 410,000 volunteers contributed to the production of live performances in the twelve months ending 30 June 2024. On average, each volunteer gave 64.1 hours of their time, resulting in a total of 26.4 million volunteer hours for the fiscal year.

We offer these results with the caution that many producers (see the section Producer Experiences, Motivations and Constraints) (pg. 90) spoke of a concern about an over-reliance on volunteer labour, and the need for volunteers to receive other forms of compensation for their time, such as skills development and training opportunities. While volunteers ostensibly donate their time, and in many cases derive personal value from this, this time represents a valuable resource that could potentially be directed to other uses. This concept is known as the opportunity cost of the volunteer's time. To calculate this opportunity cost accurately, this analysis considers several factors.

The starting point for the calculation is the average hourly earnings (including both ordinary time and overtime) of Aotearoa workers as of 30 June 2024. This average is then adjusted to account for taxation, which the worker does not directly enjoy. A 35% effective tax rate is applied to cover all forms of direct and indirect taxation. The resulting hourly rate is further discounted to reflect the composition of the Aotearoa workforce, taking into account full-time, part-time, and non-participating individuals.

The analysis then employs a straightforward leisure/work trade-off model to value the opportunity cost of volunteer hours. This model assumes that the opportunity cost of a volunteer hour is equivalent to the income that could be earned by working an additional hour. It is important to note that this approach is based on a flexible labour market model that assumes the availability of additional work opportunities.

Applying this methodology to the volunteer hours contributed to the live production sector yields an opportunity cost of **\$489.7 million**. This is a monetary estimate of the potential earnings that volunteers forfeited by dedicating their time to unpaid work in the live performance industry.

PRODUCTION COSTS

A similar assumption is made about the opportunity cost of purchases made by consumers, producers, and government in support of live performances.

If these purchases were withheld (in a hypothetical scenario where the community places no value on live performance), then their financial resources could be redirected toward long-term investment opportunities, considered here to be the next best alternative use.

The metric used for evaluating what that profit might be (the long-term investment opportunity cost) is the 10-year Aotearoa government bond rate, which stood at 4.6% on 30 June, 2024. Using this rate as a benchmark, an estimate of the economic cost of the resources allocated to live performance can be made.

Therefore, in the twelve months ending 30 June 2024 the gross opportunity cost — that is, the potential value of gains missed out on by individuals and organisations due to their \$4.8 billion direct investment in live performance — is estimated to be **\$221.8 million**.

BENEFITS

Live performances in Aotearoa generate a wide array of benefits that encompass both economic and social dimensions, creating value for individuals, communities, and the nation as a whole. From boosting local economies, through increased spending, to enhancing personal wellbeing and social cohesion, the positive impacts of live performances are far-reaching.

The following analysis examines the economic and social benefits associated with live performances in Aotearoa for the twelve months ending 30 June 2024. We find that the total economic benefits of live performances in that period amounted to **\$8.6 billion**. This figure brings together producers' surplus, wages generated across various sectors, and tax revenue.

In addition to these economic benefits, as both the Rōpū Whānau and producer interviews show, live performances contribute significantly to social wellbeing. The value of volunteer labour and the sustained wellbeing benefits enjoyed by attendees are conservatively estimated at **\$8.7 billion** for the twelve months ending 30 June 2024.

Combining the economic and social benefits reveals that the total value

generated by live performances in Aotearoa for the twelve months ending 30 June 2024 reached at least **\$17.3 billion**.

These findings, discussed in detail in the proceeding sections, provide for the first time a comprehensive measure of the value created by the live performance sector in Aotearoa, quantifying its substantial contribution to the nation's economy and social fabric.

ECONOMIC IMPACTS

When consumers purchase tickets to a live performance, such as a concert or theatre show, they set off a chain reaction throughout the economy. The input-output methodology allows us to trace this impact through various interconnected sectors.

First, consider the direct impact on the performance venue itself. Ticket and associated sales generate revenue for the venue, which in turn pays for performers, staff, and various operational costs. However, the effects extend far beyond the venue.

Input-output analysis reveals how the live performance industry connects to numerous other sectors. For instance, attendees might use transportation services to reach the venue, boosting the transportation sector. They may dine at nearby restaurants before or after the show, benefiting the food service industry. Hotels might see increased bookings from out-of-town visitors attending performances. Technical equipment suppliers, marketing agencies, and merchandise producers all receive a share of the economic activity generated by the live performance.

The methodology also captures indirect effects. For example, as the venue purchases services from cleaning companies or invests in new sound equipment, those suppliers, in turn, increase their own economic activity. This creates a multiplier effect, where the initial consumer spending on live performance tickets ripples outward, stimulating economic activity in seemingly unrelated sectors.

Input-output analysis also quantifies induced effects. As workers in the live performance industry and its connected sectors receive wages, they spend this income on goods and services across the broader economy. This induced spending further amplifies the economic impact of the original consumer, producer, and government expenditure on live performances.

In this analysis, we use the New Zealand National Accounts Input-Output Tables for the year ending March 2020 to determine several key economic benefits. We calculate the total output generated across all affected industries as a result of consumer spending on live performances. This allows us to estimate the gross value added (GVA) to the economy, representing the additional value created through the production of goods and services stimulated by this spending. We can also determine from this the profit accruing to producers throughout the supply chain.

Importantly, input-output analysis provides insights into employment effects. We can estimate both the number of full-time equivalent (FTE) jobs supported by consumer spending on live performances, and the total wages paid to these workers across various sectors. Finally, the methodology enables us to calculate the tax revenue generated for the government, including income taxes, sales taxes, and other forms of taxation resulting from the economic activity initiated by live performance consumption.

In this analysis, we estimate the net economic benefits of live performance in Aotearoa to be worth **\$8.6 billion**. This is the sum of producers' surplus (\$3.0 billion), wages (\$5.4 billion), and taxes (\$209.0 million).

PRODUCERS' SURPLUS

The term 'producers' surplus' refers to the economic benefits that producers gain from selling their goods or services in the market. This benefit is calculated as the difference between the price a producer receives, and the minimum price they would be willing to accept for it. This surplus can be alternatively described, albeit not perfectly, as net profit.

In Aotearoa, businesses receive a net commercial benefit linked to the sales of goods or services that are either intermediate or final products consumed in the course of live performance.

Employing New Zealand National Accounts Input-Output Tables, it is found that the live performance-related expenditure of \$4.8 billion increases the overall output in the economy of Aotearoa by \$10.8 billion. This calculation includes the production of intermediate goods, and accounts for imports worth \$1.0 billion.¹⁴

The Gross Value Added (GVA) by live performance to the economy is \$5.7 billion, which equates to 1.4% of the nation's Gross Domestic Product of \$410 billion.

Considering that material inputs and existing infrastructure are already accounted for, when the cost of labour and taxes is subtracted from this GVA, a theoretical producers' surplus of **\$3.0 billion** is revealed.

This surplus is a fair return on investment for providers of capital and is assumed to offset the opportunity cost of using land or buildings for other purposes. It is important to clarify that this surplus to producers is distributed among all firms in Aotearoa that contribute intermediate or final goods and/or services consumed by live performance activities, not just those directly involved in live performance production. It does not include revenue or surpluses enjoyed by offshore producers.

¹⁴ Imports include outflows of revenue to overseas artists and producers staging live performances in New Zealand.

EMPLOYMENT

The input-output model further reveals that live performance-motivated expenditure in Aotearoa generated 60,500 full-time equivalent (FTE) jobs across all sectors of the economy in the twelve months ending 30 June 2024. Of these:

- 25,000 jobs were directly created in the live performance sector
- Another 12,000 jobs were directly created in other sectors
- 13,000 jobs were indirectly created in industries that supply goods and services to the sectors impacted by live performances, and
- 10,500 jobs were created by the spending of income earned by workers in both the direct and indirect jobs.

Interestingly, for every job directly created in the live performance industry, an additional 0.65 jobs are created when including both the supply chain and the broader economy.

The model quantifies the wage benefits generated by these jobs as being worth **\$5.4 billion**. This figure directly benefits households, augmenting their disposable income and, consequently, their purchasing power.

This also means an equivalent welfare cost is avoided by the government. As more people become employed thanks to the ripple effects of live performance expenditure, fewer people rely on unemployment benefits or other forms of social assistance. This results in an equivalent saving for the government, which can reallocate these saved funds to other critical sectors like healthcare, or they can choose to reinvest in live performance.

TAXES

The input-output model also shows that in Aotearoa live performance-related expenditure of \$4.8 billion generates **\$209.0 million** in tax revenue for the government.

It is important to note that the tax revenue generated is not necessarily proportional to the investment made by each tier of government in the live performance sector. Different levels of government — central and local — may contribute different amounts to support live performance but may benefit differently from the generated tax revenue.

Ultimately, though, the tax returns of \$209.0 million are 2.8 times greater than the estimated government subsidies of \$75.5 million. Therefore, supporting live performance is a financially sound decision for governments, producing returns that far outweigh the initial outlay.

SOCIAL IMPACTS

The impact of live performances extend well beyond their economic contributions, bringing together a range of social benefits that enrich individuals and communities. While the economic effects of live performances are significant and quantifiable, the social impacts are equally important, though often more subtle and challenging to directly measure.

As the qualitative aspects of this research have shown, live performances act as gathering points for social cohesion, personal growth, and cultural enrichment. They create spaces where people come together, share experiences, and build connections. These social interactions contribute positively to the fabric of communities, encouraging a sense of belonging and shared identity. Live performances also offer avenues for cultural expression and appreciation, allowing diverse voices to be heard and understood.

The social impacts of live performance attendance appear in various forms, from boosting individual wellbeing to strengthening community bonds. These effects spread through society, influencing personal satisfaction, mental health, civic engagement, and social capital. In the following discussion, we very conservatively estimate the value of these contributions to be worth **\$8.7 billion**.

This is the sum of the cost of replacing the labour of volunteers (\$1.2 billion) and the sustained wellbeing benefits enjoyed by attendees (\$7.5 billion).

VOLUNTEER LABOUR

Analysis of the producer data revealed that 410,000 volunteers contributed to the production of live performances in the twelve months ending 30 June 2024. On average, each volunteer gave 64.1 hours of their time, resulting in a total of 23.3 million volunteer hours for the fiscal year. The replacement cost of that labour is the expense that beneficiaries would incur if they had to hire paid professionals to do the same work. Nonetheless, we note the desire of live performance producers to shift away from this reliance on volunteer labour.

Because volunteers bring a diverse set of skills and professional experience to their roles, adding specialised value to the services they provide, volunteer labour cannot be simply substituted with minimum wage workers. It is more accurate to use median wage data to account for the varying levels of expertise and skill sets they offer.

In addition to the median wage, there are several other costs associated with employment that need to be taken into account. These include the administrative and capital overheads that would be incurred for each working hour, as well as the minimum requirements of the KiwiSaver and Accident Compensation Corporation (ACC) levies. To allow for these, an additional 13.6% has been added to the median wage data for each age group.

This approach assumes that the value of the activities provided by each volunteer is equivalent to the value of their direct employment.

This is not a perfect accounting of the value of the services provided by volunteers, but it is more reliable than approaches that price volunteer labour at the minimum wage. Improving the replacement cost method is encouraged as a direction for future research.

On these terms, the cost to the live performance sector of replacing volunteer labour is estimated to be **\$1.2 billion**.

WELLBEING BENEFITS

Individual benefits stand apart from economic and other social benefits, in that they are directly enjoyed by the attendees themselves. The concept of 'wellbeing' serves as an umbrella term to capture the range of emotional, psychological, and even physical benefits that come from attending live performances.

These benefits of live performance attendance have been documented in international research (WHO, 2019). When individuals engage in cultural activities like live performances, they often report higher levels of happiness, life satisfaction, and a sense of enrichment. This enhanced well-being is not just a nebulous feeling; it can have real-world implications. There is a well-established body of international research in this area, where increased happiness and lower stress levels can lead to better physical health, which in turn could result in fewer medical expenses and a longer, more fulfilling life (c.f. Goel et.al., 2018; See & Yen, 2018).

Additionally, as demonstrated by the Rōpū Whānau, attending live performances often provides opportunities for social interaction and cultural exposure, contributing to an individual's personal development and social connectivity. These benefits to the individual, while perhaps less tangible than commercial or civic gains, are nonetheless real and quantifiable.

In the Public Survey, all respondents were asked the following question, taken directly from the Stats NZ General Social Survey (2021).

We're now going to ask you a very general question about your life as a whole these days. This includes all areas of your life.

On a scale from 0-10, where zero is completely dissatisfied, and ten is completely satisfied, how do you feel about your life as a whole?

Self-rated life satisfaction scales like this are regarded as reliable measures of wellbeing for several reasons. Foremost, they are straightforward to administer, offering broad accessibility. They also capture the nuanced, subjective experiences crucial for a holistic understanding of wellbeing.

Importantly, they have been found to correlate well with other objective and subjective indicators, such as income and health status, and demonstrate good test-retest reliability. They are also adaptable to diverse cultural settings.

For those reasons, life satisfaction scales are utilised by a wide range of interested parties, including academic researchers, government bodies, healthcare providers, economists, corporations, and international organisations like the World Bank and the United Nations. Their widespread use across multiple sectors attests to their reliability and versatility in measuring wellbeing.

Controlling for age, location, gender, ethnicity, education, household income, hours worked, disability, and carer status, in the Public Survey sample of over 5,000 Aotearoa residents, it was found that attendance at live performances was associated with a 7.6% increase in life satisfaction, our proxy for wellbeing.

Whereas only 8.5% of the overall variance in wellbeing could be explained by the model, there was a less than one in 1,000 chance that the relationship observed was due to random error (Standardised Coefficient Beta = .066, $t = 4.529$, $p < .001$).

Among those who attended live performances in the last twelve months (and controlling for the same demographic variables), the following effects were also observed.

1. **Social attendance:** The number of people that a person typically attended a live performance with was a significant positive predictor of wellbeing. Individuals who usually attended with more people were 12.7% more likely to report a higher wellbeing score (Standardised Coefficient Beta = .127, $t = 6.383$, $p < .001$).
2. **Attendance frequency:** Attendance frequency was also a positive predictor of wellbeing. Individuals who attended more performances were 7.2% more likely to report a higher wellbeing score (Standardised Coefficient Beta = .072, $t = 3.714$, $p < .001$).

Interestingly, the influence of the volume of expenditure at live performances was minimal and not statistically significant.

Finally, it is worth noting that when surveyed immediately pre and post-event in the Attendance Survey, respondents reported an average life satisfaction score that was another 10.5% higher than the life satisfaction score given by attendees in the Public Survey.

This finding is significant because it supports the theory that the positive effects of live performance attendance on wellbeing change over time. It confirms that there is an immediate “high” or boost to wellbeing that occurs at the time of attending a performance.

Yet while this heightened sense of satisfaction may decrease over time, it does not disappear completely. The +7.6% margin found amongst attendees in the Public Survey likely represents a longer-term, sustained boost to wellbeing that persists even after the immediate effects have faded.

In essence, our research indicates that attending live performances not only provides an immediate boost to life satisfaction, but also contributes to a lasting improvement in overall wellbeing.

VALUING WELLBEING

When we consider responses between attendees and non-attendees of live performances, a difference of 0.48 points on the 0-10 wellbeing scale was observed.

The Te Tai Ōhanga The Treasury CBAX Model (December 2023) values a one-point change in life satisfaction on the following scale at low, midpoint, and high estimates.

Table 12: NZ Treasury CBAX Model — Impacts Database (extract)

SUBJECTIVE WELLBEING	VALUE ADJUSTED TO 2024
WELLBY: one point change in life satisfaction (0-10 scale) — low	\$6,713.55
WELLBY: one point change in life satisfaction (0-10 scale) — midpoint	\$15,878.28
WELLBY: one point change in life satisfaction (0-10 scale) — high	\$25,405.25

Applying these values to the 2.3 million live performance attendees in Aotearoa in 2024, the low- and high-range estimates suggest that the true wellbeing value of attendance ranges between **\$7.5 billion and \$28.2 billion**.

In the interests of conservatism and alignment with other lower-range estimates previously published (Allan, Grimes, & Kerr 2013), the socio-economic benefit to individuals of live performance attendance is estimated here to be **\$7.5 billion**.

IMPORTANT NOTE

Expressions of value such as this only measure satisfaction and should not be confused with attendees' willingness to pay more. In this instance, increasing prices would result in a real loss for attendees. This is because the dividends enjoyed by attendees would be converted into producers' profit for no net gain to them as consumers, increasing the real and opportunity costs of entry, and forcing some attendees out.

A more efficient community gain can be realised by converting non-attendees into attendees, and incentivising those who are under-attending to attend more. Deliberately exploiting the currently high levels of attendee wellbeing — by either increasing prices or withdrawing subsidies — is likely to be counterproductive.

NON-USE VALUE

In economics, non-use value refers to the value that people assign to a good, service, or resource, even if they do not use it. This concept is often used in environmental economics to explain why people might place a value on preserving natural habitats, endangered species, or cultural heritage, even if they never actually engage with these resources.

Non-use value is explained in various ways in academic literature, but largely centres around the following three ideas that are contextualised here for live performance.

- **Existence value:** The value people derive from knowing that live performance exists, even if they never use it.
- **Bequest value:** The value people place on preserving live performance for future generations to enjoy.
- **Option value:** The value people place on preserving the option to attend live performances in the future, even if they are not attending today.

To better understand the non-use value of live performance attendance, Public Survey respondents were asked the following question.

Quality of life is the degree to which you feel healthy, comfortable and able to participate in or enjoy life's events.

It is determined by lots of things, including our:

- *Physical health*
- *Psychological health*
- *Financial wealth*
- *Level of independence*
- *Social relationships*
- *Environment*
- *Spiritual, religious or personal beliefs.*

Attending live performances and events can impact many of these domains.

As a percentage, how much do you think live performances and events in the community impact the quality of life of all of us?

Given the findings already revealed in this report, it is unsurprising to see a significant difference in the average reported scores between attendees and non-attendees. What stands out, however, is that non-attendees attribute 58.3% of their communal quality of life to the impact of live performance.

This perception, even if exaggerated, shows the very high non-use value that non-attendees place on live performance in Aotearoa.

AREAS FOR FUTURE RESEARCH



It is outside of our scope to make recommendations or endorse specific strategies. Over the course of this research, we have identified several key areas in need of further research. These directions for future research are outlined below.

TAXONOMY OF LIVE PERFORMANCE

Work needs to be done to develop a robust taxonomy of live performance to enable consistent measurement across government and industry. As noted in this report, the scope of what may constitute 'live performance' has been highly varied across previous government and industry analyses. Developing a robust taxonomy will better enable consistent and comparable measurements of value and impact.

ACCESSIBILITY

d/Deaf and disabled audiences are significantly less likely to attend live performances, and their experiences when attending are often shaped by a lack of care and understanding. Access needs are not being comprehensively met by contemporary live performance infrastructure. There is a need for greater, sustained research into the lived experiences of d/Deaf and disabled audiences and performers to better support a more accessible, equitable, and inclusive live performance culture in Aotearoa.

GENDER DIVERSE FOLK

As noted in the methods section, gender diverse folk represented a very small sample of respondents, and thus this grouping was too small to generate statistically significant insights. We recognise the shortcomings of this reporting on gender and urge further research into the experiences of gender diverse audiences and performers.

REGIONAL AUDIENCES

Geographic location significantly influences attendance, with individuals in smaller communities less likely to attend events. Producer interviews and Rōpū Whānau similarly noted distance and lack of available local events were issues facing the audience. Further research into the experiences of regional audiences in Aotearoa is needed to better understand the challenges and opportunities facing live performance operations in these contexts.

YOUNG AUDIENCES

Whilst overall trends indicate that as people get older their likelihood of attendance decreases, young people were more likely to express that their age was a barrier to attendance. The relative dearth of all-ages shows, or the need for parental supervision, impacts the attendee experience of people under 18. The flow-on impacts of this require further investigation.

COST OF LIVING CRISIS

The qualitative data collected for this project frequently referred to a cost-of-living crisis constraining spending on live performance, and that audiences are increasingly particular about events they attend. Further to this, producers noted that production costs are the highest they've ever been and that their operations were being constrained accordingly. The ongoing effects of this on the sector should be explored.

CLIMATE CHANGE AND SUSTAINABILITY

Some producers expressed a deep concern about the ongoing environmental impacts of live performance. Largescale touring organisations were aware of their carbon footprint and seeking alternatives to better mitigate this. Research is needed to better understand how live performance in Aotearoa is contributing to climate change and the impacts and adaptations the sector should consider going forward.

CREATIVE CAREERS

The sustainability of the creative workforce in Aotearoa is a key area for future research, to better attend to the risk factors that impact the longevity of careers in the sector.

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