Audience Atlas

Aotearoa New Zealand 2025

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Arts Council of New Zealand Toi Aotearoa

Audience Atlas Aotearoa New Zealand 2025

Contents

Audience Atlas

This is the fifth edition of *Audience Atlas Aotearoa New Zealand*. The first edition took place in 2011 followed by 2014, 2017 and 2020.

Audience Atlas Aotearoa New Zealand 2025 is based on 4,836 responses collected between 27 May to 20 June 2025, from New Zealanders aged 16 years and over. The sample was from online panel providers.

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

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

Cover image: Signature Choir with NZ Symphony Orchestra, performing at Spark Arena, 2025. Photography by Tom Grut.

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How to read this report

Report sections:

1. The culture market
This section gives a broad overview of Aotearoa New Zealand's culture market and introduces Culture Segments as a strategic tool to help action the insights presented.

2. Arts and cultural engagement
This section explores what benefits New Zealander's seek from cultural engagement, anticipated future attendance and barriers to engagement.

3. Arts and cultural spend
This section explores arts and cultural spending habits, including who is more likely to be spending and how New Zealanders anticipate that their arts spending might change in the future.

4. Support for the arts
This section explores the arts and cultural giving, joining and volunteering habits, including where most potential lies.

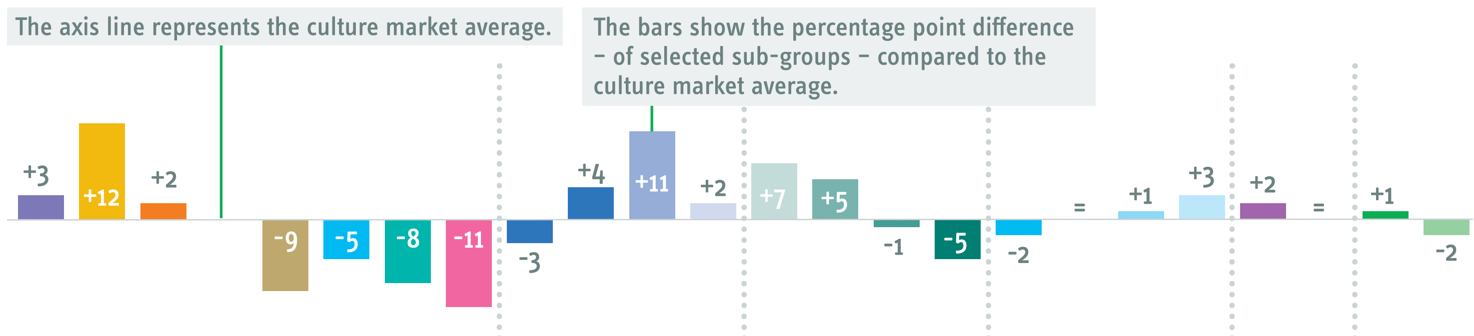
5. Reaching the market
This section explores how New Zealanders find out about arts and cultural events and places.

6. Engagement by individual artform
This section provides an in-depth summary of 11 core artforms, exploring market penetration alongside each market's Culture Segment profile. This part of the report is a rich data directory for individual organisations to pinpoint the market data most relevant to them.

Appendix 1: Provides Culture Segments pen portraits; where all eight segment clusters are brought to life using descriptive text and data.

Appendix 2: Tables exploring how the market find out about arts events or places by Culture Segment, and a metro vs regional split.

Here's how we show a lot of the data so that you can easily compare differences across sub-groups:



A fifth Audience Atlas for New Zealand

Audience Atlas is a **unique** way of **understanding** the **market** for **arts and culture**. With a robust population survey at its core, Audience Atlas sizes, profiles and segments the market and provides **insight** on how to target and **engage audiences** to ensure sector growth.

Representative of the population

This report draws on the responses of 4,836 New Zealanders. Respondents were sampled through quotas on age, gender and educational attainment to be representative of the population's demographics and population spread. Additional quotas on ethnicity were set to 'boost' responses from those identifying as Māori, Pacific peoples and Asian. The increased number of responses from these groups ensures we can report on results for these key groups with confidence. Also, to ensure that Deaf and disabled persons have a chance to take part in the research, accessible format invitations were distributed with the support of Disabled People's organisations. Any results reported as real numbers are estimates that use the weighted proportions applied to population estimates (sourced from StatsNZ).

Key terms:

Culture market: New Zealand adults aged 16 or over who have engaged with at least one arts or cultural activity in the past three years. The definition is inclusive, from attending the opera to going to the cinema.

Current market: engaged in the past 3 years.

Lapsed market: last engaged over 3 years ago.

Potential market: would consider engaging, but haven't previously.

Resistant: haven't engaged before and wouldn't consider doing so.

Artform: This study covers 11 specific artforms: craft / object art, dance, festivals, literature, live music, museums, ngā toi Māori, Pacific arts, Asian arts, theatre and visual arts. Most artforms encompass a range of sub-artforms. For example, 'dance' includes ballet, contemporary dance, contemporary and heritage Māori, Pacific and Asian dance festivals.

Culture Segments: a sector-specific, values-based segmentation framework.

Metro: the culture market resident in greater Auckland, Hamilton, Wellington, Christchurch and Dunedin.

Regional: the culture market resident of all other parts of the country outside the metro areas listed above.

Activating audiences with Culture Segments

Culture Segments is a psychographic **segmentation** system **clustering** people based on their **deep values**. These values shape a person's **attitudes**, lifestyle **choices**, and, ultimately, **cultural consumption**. Culture Segments gives the **sector** real **insight** into what **drives** the market and the **tool** to not only **predict**, but **influence** future **behaviour**. Leaning on Culture Segments, the sector can **activate audiences** by **speaking** to them in a way that truly **resonates**, building **long-lasting**, mutually beneficial **relationships**.

ESSENCE
- Discerning
- Confident
- Independent
- Arts-essential

EXPRESSION
- Community
- Nurturing
- Generous
- Committed

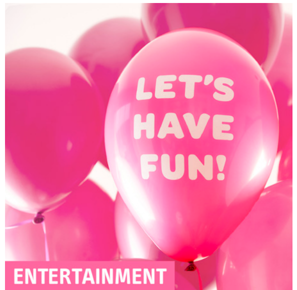
AFFIRMATION
- Self identity
- Considered
- Diligent
- Time well spent

STIMULATION
- Active
- Experimental
- Ideas
- Social

ENRICHMENT
- Tradition
- History and heritage
- Nostalgic
- Learning

RELEASE
- Busy
- Prioritising
- Ambitious
- Escape

PERSPECTIVE
- Settled
- Self-sufficient
- Focused
- Contented



ENTERTAINMENT
- Mainstream
- Popular appeal
- Leisure
- Fun

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Key findings at a glance

Annual arts spend of $3.3 billion

When adjusted for inflation, spending on the arts has declined compared to 2020, and a connection has now emerged between income and spend. In 2025, those with lower incomes were significantly less likely than average to have spent on the arts recently.

4.04 million New Zealanders have engaged with the arts in the past 3 years

In real terms, New Zealand's culture market is larger than it was five years ago. However, this is due to population growth rather than market development. The proportion of New Zealanders in the market for culture has, in fact, receded to 94% (from 96% in 2020). Current market decline was seen across all individual artforms with the exception of festivals, theatre and literature.

The 2025 Audience Atlas shows that more New Zealanders expect to reduce their arts engagement and spend over the next 12 months, than increase it. While this highlights a pressing challenge, the study also points to the opportunities and actions needed to safeguard sustainability and unlock growth. See pages 7–10 for more.

1.6 million 'missed' arts engagement opportunities

In 2025, 4 in 10 could recall a recent occasion when they had wanted to attend an arts organisation or event, but were prevented somehow. Younger, Māori, Pacific and disabled audiences were over-represented among those 'missing out', with social barriers affecting younger and Pacific audiences disproportionately.

6 in 10 seek 'deep' fulfilment

While arts-goers are often looking for Social connection, 6 in 10 seek something deeper from their engagement. Ensuring offers deliver Intellectual, Emotional or Spiritual fulfilment – alongside Social connection – is critical to successfully developing loyalty.

1.2 million potential donors to activate

Compared to 2020, recent arts donation has decreased by 23%, but opportunity remains. An estimated 1.2 million New Zealanders would consider supporting the arts financially. Younger, culturally diverse audiences show a higher propensity to donate and Expression dominates the current donor profile.

Membership and volunteering show recovery

Levels of arts membership lifted in 2025, with Expression dominant among active members and this cohort also skewing younger and more culturally diverse. Built around both personal interest and a desire for impact, volunteering also saw an uplift in 2025.

Turning insight to action

This report is deliberately **forward facing**. Rather than **dwelling** on how audiences and engagement might have **changed** compared to **previous** studies, it focuses on **where we are now** and what **must be done** to ensure **sector sustainability and growth**. The findings give a clear picture of **today's cultural landscape**: who is **engaging**, who **could** be engaging and what **drives** audiences. With this **understanding** comes an **opportunity** – and a **responsibility** – **to act**.

Prioritise culturally confident, high value segments

In 2025, New Zealand's Culture Segment profile shows a well-balanced distribution of segments. However, Essence, Expression, Stimulation and Affirmation represent 60% of the market. The value of these segments isn't just about their volume. These segments offer the sector the most return-on-investment potential and prioritising them gives the sector best chance of success[1]. Demonstrating their value in 2025, Expression, Essence and Stimulation are more likely to have spent money on the arts recently (Affirmation's results are marginally above average). They're more likely than others to anticipate increasing their arts attendance and spend, particularly Expression and Essence, and the profile of current donors also skews strongly towards Expression.

Expression seek connection with others and to feel part of something bigger than themselves.

Essence seek a sense of themselves through emotional connection, reflection and intellectual stimulation.

Stimulation want to be moved emotionally, challenged intellectually while consuming culture socially.

Affirmation want personal development and a sense of their place in the world.

1 Demographics don't define Culture Segments – all 'types' of people are found within all segment clusters. As such, narrowing focus to segments with the highest return-on-investment potential doesn't exclude certain socio-demographics.

Culture Segments

Culture Segments, used as a critical lens for data exploration in this study, provides the sector a vital tool to build enduring engagement with audiences. By understanding what people are seeking to fulfil in themselves through experiencing arts and culture, you can target them more accurately, engage them more deeply and build relationships to maximise loyalty and support. See Appendix 1: Culture Segment Pen Portraits (from page 74) for detail on each segment.

Unlock growth by winning back lapsed audiences

Lapsed audiences are numerous across artforms, particularly in theatre and visual arts. In challenging times, focusing on re-engaging the lapsed market is a prudent approach. Lapsed audiences have chosen you before, they know who you are and understand the benefits they'll get from engagement. They just need to be compelled to come again. Lapsed audiences need to be invited back with clear, specific offers and reminded of the Social, Intellectual, Emotional and Spiritual benefits you deliver, alongside how their engagement will fulfil their deep needs – connection with others for Expression, reflection for Essence, self-development for Affirmation and excitement for Stimulation.

Capitalise on 'youth' momentum with a Stimulation approach

There are a number of affirming results relating to the younger audience in 2025. Younger people are more likely than average to have recently spent on the arts, donated or have an arts membership. They are also more likely to anticipate that their arts engagement and spend will soon increase. The challenge for the sector is to support this to become a reality. While demographics don't define Culture Segments, demographic skews can be present in segment clusters and Stimulation is a case in point. Stimulation skews younger. Not only this, but things that often appeal to younger audiences – new ideas, discovery, rule-breaking and social experiences, are Stimulation aligned. A Stimulation-focused audience development approach is therefore an excellent strategy for 'youth' retention and growth.

Deliver deeper outcomes to develop loyalty

Shared social experiences might get audiences through the door, but what sustains interest and builds loyalty comes from experiences that go further. Whether it's expanding knowledge, sparking delight, or creating a sanctuary to escape and recharge. Delivering these outcomes in a well-rounded offer builds stronger connections and is key to audience development.

Future-proof participation with inclusive strategies

In 2025, a link has emerged between income and arts spending. This marks a shift from 2020, when spending patterns were more evenly distributed across income levels. This growing divide suggests that economic pressures are beginning to reshape the audience base – with lower-income New Zealanders becoming less able to participate, and higher-income audiences playing a more dominant role in sustaining ticketed arts experiences. With household budgets under strain, ticketed arts experiences are out of reach for many. To stay accessible and sustainable, organisations need to adapt. Strategies to consider include, flexible pricing, expanded free or longer-running programmes and diversifying revenue streams to reduce reliance on ticket sales. Proactive responses to shifting audience needs can support short-term engagement and long-term sustainability.

Unlock further potential of culturally diverse audiences

Culturally diverse audiences – particularly Pacific peoples – stand out in 2025, in part because this cohort is so strongly Expression (41%, compared to 23% overall). They are more likely than average to have spent on the arts, donated or volunteered recently, and they anticipate that their engagement and spend will continue to grow. Meanwhile, they are over-represented among those who recall an occasion when they wanted to participate recently, but were prevented from doing so, with concerns about 'fitting in' felt disproportionately by Pacific peoples. Unlike economic pressures, this barrier is addressable, and a warm, welcoming Expression-focused approach, where experiences prioritise connection and community, will work to alleviate this concern.

Amplify impact through collective action

There is a strong overlap in segment profiles across many artforms – particularly the consistent presence of the most culturally active Culture Segments. This means organisations are often speaking to the same audiences, even when they operate across vastly different artforms. By working together on segment-specific campaigns, joint ticketing, co-produced events and bundled experiences, the sector can reach these shared audiences more efficiently, reduce duplication and amplify impact. This approach also taps into a broader societal shift towards integrated, multi-faceted experiences. Audiences increasingly seek cultural offers that blend entertainment, education and social connection, for example, museums partnering with food festivals, to theatres working with tech startups, to galleries collaborating with wellness brands. By embracing this shift, organisations can extend reach, attract new audiences and create richer, more relevant experiences.

Re-imagining what's possible

Collaboration should extend beyond marketing tie-ins to co-created programming, cross-artform initiatives and even shared audience language. Shared segment insights from the Atlas provide a ready-made framework for designing offers and communications that resonate across multiple organisations, while still allowing for individual adaptation. Collaboration isn't just about survival – it's about re-imagining what's possible. Those who embrace it will build deeper audience connections, create more sustainable models, and strengthen the entire sector.

Audience at Torua by Movement of the Human, Aotea Square © Photo: Jinki Cambronero

The culture market

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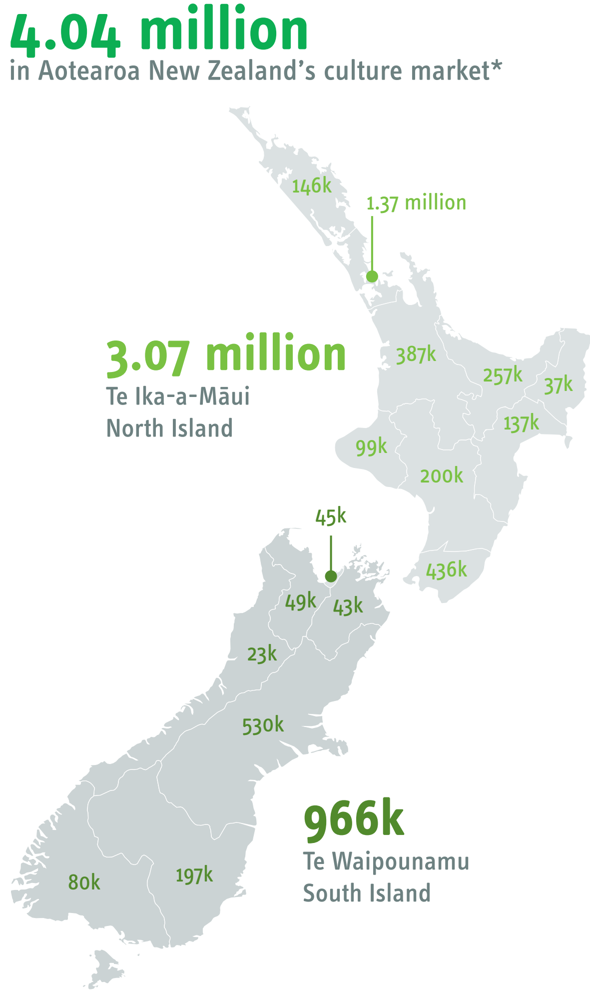
4.04m New Zealanders in culture market

Between 2020 and 2025, the culture market* **grew in real terms**. However, as the proportion of adults who had engaged with **at least one arts** or **cultural activity** in the past **three years decreased** (**94%** of New Zealanders, compared to 96% five years ago), growth didn't **keep pace** with the overall **population**. In 2025, there are just **over 4 million** New Zealand **adults** in the market for arts and culture.



*New Zealand adults aged 16 or over who have engaged with at least one arts or cultural activity in the past three years. The definition is inclusive, from attending the opera to going to a museum.

Population data is sourced from StatsNZ.

New Zealand's 2025 Culture Segment profile

Reflecting the broad and **inclusive nature** of **cultural engagement**, a **values-based view** of the market – through Culture Segments – reveals a **well-balanced mix**. However, **not all** the segments **place** the **same value** on cultural engagement.

A fifth of the market are enthusiastic Expression

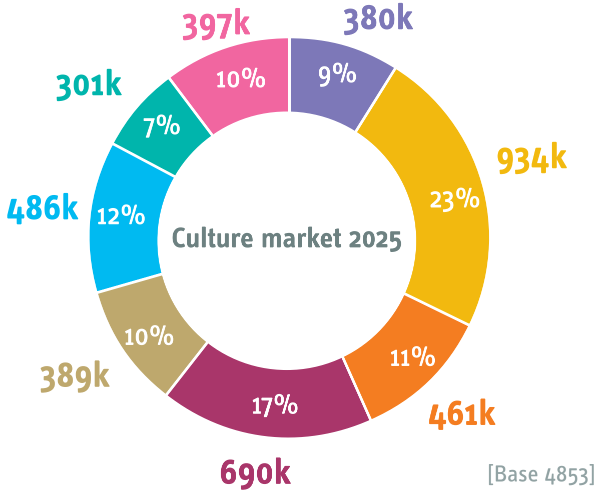
Expression is twice as prominent as most other segments, but their importance goes beyond their volume. Expression are a well-networked group who enjoy activities where they can connect and share experiences. They have a real appreciation for creative expression, and are among the most likely to engage with the arts regularly – making them central to any cultural offer and great advocates.

Affirmation follows close behind

Affirmation follows Expression in size. However, unlike Expression, Affirmation views cultural experiences as a form of self-development. While they're open and positive about attending, they're cautious decision-makers. Unlikely to attend on impulse, they look for clear value and detailed information to support their choices, meaning, that without support they can be less culturally active than their stated interest might suggest.

For a deeper dive into Culture Segments, see Appendix 1 on page 74.

Aotearoa New Zealand's Culture Segment profile as real figure estimates



Essence – 'in pursuit of self-actualisation'
Expression – 'people people'
Stimulation – 'all about the big idea'
Affirmation – 'do the right thing'
Enrichment – 'through the lens of the past'
Release – 'say they're too busy'
Perspective – 'happy in their own bubble'
Entertainment – 'looking for fun'

Discerning Essence and adventurous Stimulation are core cultural engagers

Essence are the cultural connoisseurs – seeking quality, depth and reflective experiences. Cultural engagement isn't just something they do, it's central to their identity. While not as numerous as some segments, they tend to engage more frequently, making them core audiences.

Stimulation are adventurous seekers of new and unique experiences, especially when enjoyed socially. But the experience needs to offer more than spectacle and must be underpinned by a compelling 'big idea' to hold their interest.

Though distinct, Essence and Stimulation share a tendency for independent decision-making and a willingness to stand out, marking them as influential tastemakers and leaders within the cultural landscape.

Traditional Enrichment, busy Release, Perspective and Entertainment round out the market

Together, these four segments make up close to 4 in 10 adults in the cultural market. However, they are typically less culturally active for different reasons:

- Busy Release often feels time-poor and out of the loop. When they do find time for the arts, they tend to gravitate towards 'unmissable', popular events. As going out is a rare occasion for them, they don't take as many risks in their cultural engagement.
- Enrichment are a cautious, traditional segment with established tastes. They know what they'll enjoy and are not seeking new interpretations or experimentation.
- Internally-guided Perspective have a narrow range of personal interests and have little desire to broaden them. Self-contained and unaffected by the views of others, they're difficult to activate.
- Entertainment has conventional tastes and seeks assured fun. They don't distinguish between cultural activities and other forms of entertainment, meaning arts offerings must compete on equal footing as all other leisure options.

Movement of the Human, BELLE – A Performance of Air, Auckland Arts Festival © Photo: Andi Cowan

Arts and cultural engagement

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Arts-goers seek a range of benefits

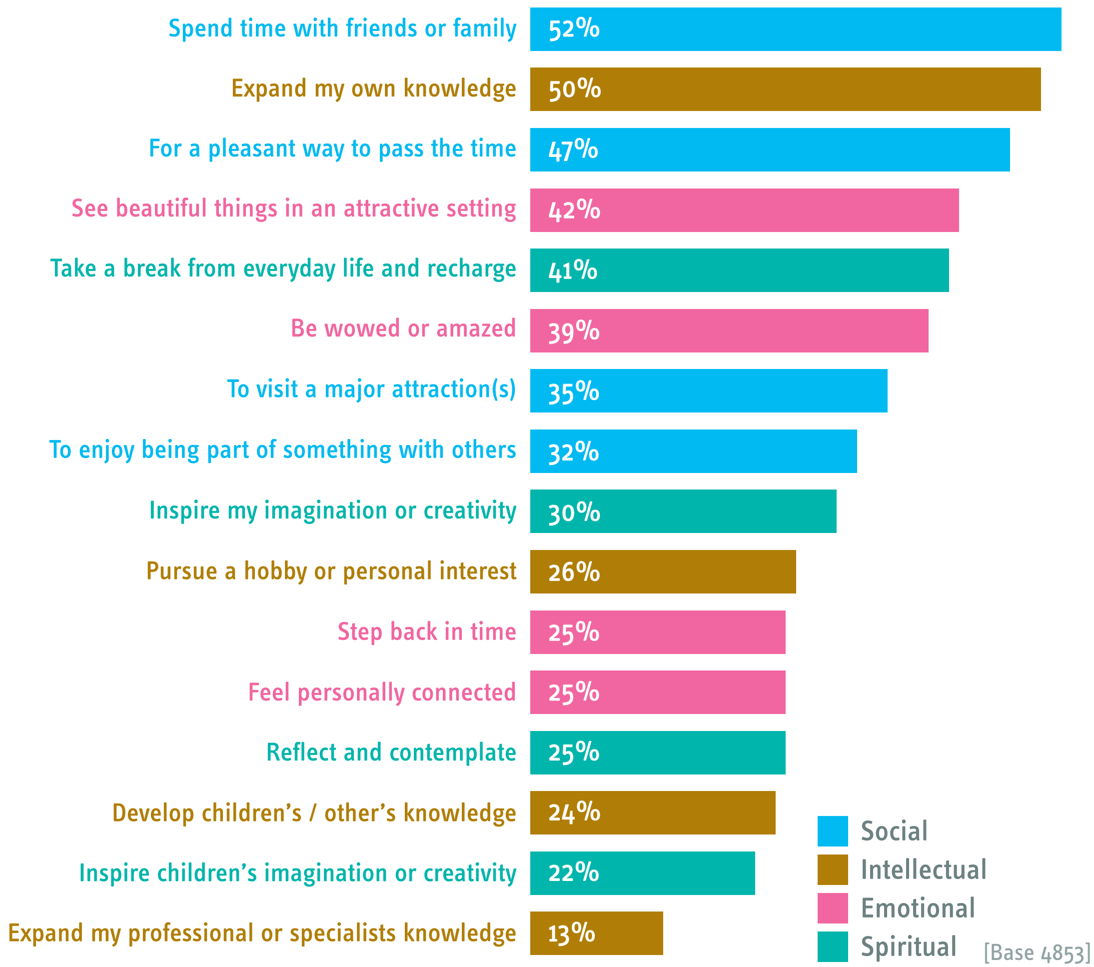
In **addition** to the deep-seated values shaping attendance,[1] New Zealanders are **seeking** a variety of **benefits** from their arts and cultural **engagement** on any given day.

Meaningful moments and opportunities to 'grow'

When asked, individuals cited a broad range of reasons for engaging with the arts (5.28 on average) the most common being a chance to spend meaningful time with others and an opportunity to learn.

1 Understood and activated through Culture Segments, see page 5.

Benefits sought from engaging with arts and culture (all motivation statements)



Fulfilling audience needs is essential

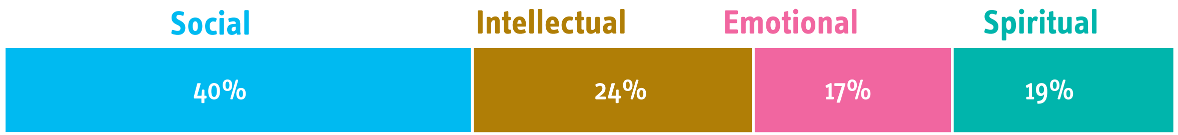
Benefits audiences seek from the arts, when grouped, reflect a set of broad human needs. These can be understood and articulated as Social, Intellectual, Emotional or Spiritual needs. Understanding these – and ensuring your offers are designed to fulfil these – is a critical element of audience development.

Social connection is important, but most seek something deeper

Taking a high-level view of the market's primary reasons for engaging (**main** motivation) shows that while Social connection is the most common driver (40%), more seek something deeper. 6 in 10 seek a main Intellectual, Emotional or Spiritual outcome from their arts engagement.

Primary benefits sought from arts and cultural engagement

Main motivation



[Base 4564]

Social Seeking fun and time with others. The cultural offer is the enabler of shared experiences and memorable moments.

Intellectual Looking to learn and grow. The audience is on a journey of discovery, building knowledge themselves or nurturing another's curiosity.

Emotional Looking to feel and connect through experiences that deeply move and uplift.

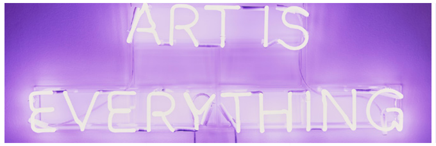
Spiritual See cultural experience as opportunities for creative stimulation, but also a means to reflect, escape or recharge. Seeking transcendence.

Delivering deeper outcomes develops loyalty

Shared social experiences might get audiences through the door, but what sustains interest – and builds loyalty – are experiences that go further, whether it's 'expanding knowledge', 'surprising and delighting' or creating a sanctuary to 'escape and recharge'. Delivering these deep rewards builds connection and creates a desire to return. 'Well-rounded' offers – combining these outcomes – are key to audience development and growth.

Outcomes sought are distinct by Culture Segment

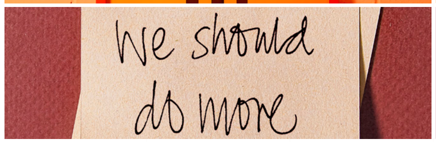
Looking at likely motivations within each Culture Segment reveals some distinct patterns and reinforces what we know about the values of each cluster:



Essence understands the benefits of cultural engagement and has the broadest range of drivers. In pursuit of 'self-actualisation', Essence are the segment most likely to have a Spiritual driver, seeking deeper meaning through 'inspiration' and 'reflection'.

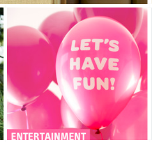
Expression are an emotionally-led and visually inspired group, and as such, 'seeing beautiful things in an attractive setting' is likely driver. Along with Essence, they are the segment most likely to seek a 'personal connection'.

Stimulation seeks a spectacle, therefore, they are more likely to want to be 'wowed or amazed', but are also all about 'big ideas' and therefore seek to 'expand knowledge', a motivation they share with Affirmation.



Affirmation looks to enhance their sense of identity within their social circle, and therefore being 'part of something with others' is a likely motivator, alongside a desire to 'learn'.

Enrichment are nostalgic traditionalists. For them, the chance 'to step back in time' resonates more than contemporary themes.



Release, Perspective and Entertainment have a narrower range of drivers and are less motivated by the Emotional and Spiritual benefits of cultural engagement.

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4 in 10 'missed' attending at least one event

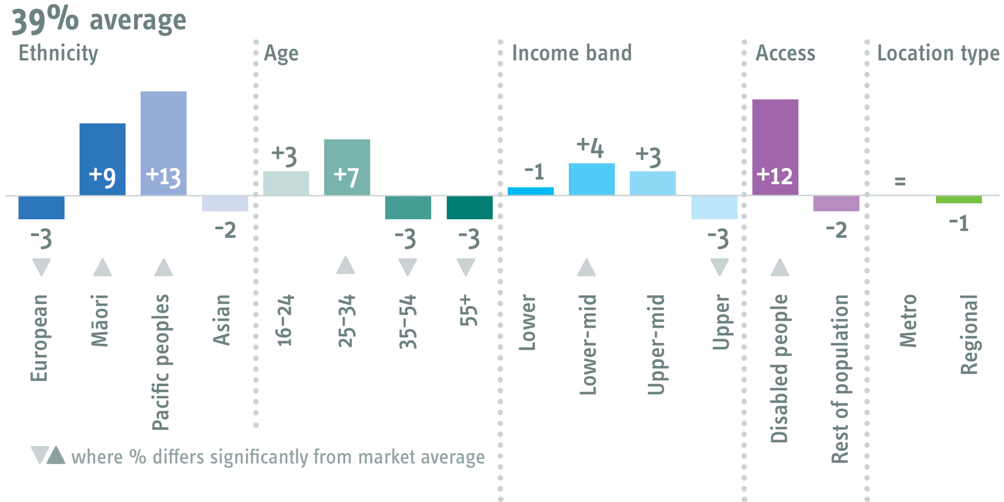
Close to 4 in 10 in the culture market could recall at least one instance in the past 12 months when they had **wanted** to **attend** a **specific** arts **organisation** or **event** but were **prevented** from doing so. This represents a **significantly** larger proportion of the market than five years ago (36% in 2020), and equates to an estimated **1.6 million** '**missed**' **opportunities** for arts engagement in 2025.[1]

Key audiences over-represented among those 'missing out'

Compared to the culture market average, younger adults, Māori and Pacific audiences and disabled people are over-represented among those recalling a recent occasion they were prevented from attending.

While not all barriers are within an organisation's control, cost emerged as a more prominent concern than in 2020 (see following page).

Prevented from attending a specific arts organisation or event (past 12 months) – %-point difference compared to culture market average



1 This figure assumes there was only one occurrence and can not account for groups meaning the number of 'lost' engagements is likely to be higher.

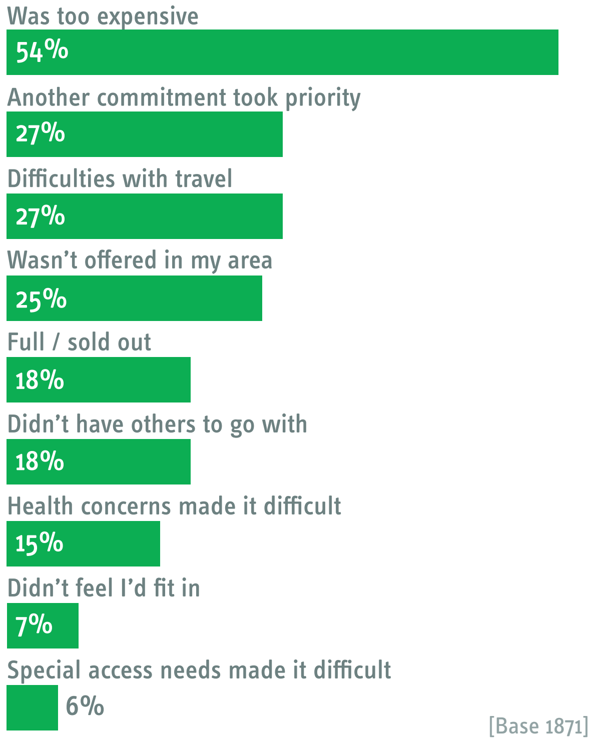
Affordability undermines engagement

More than half of those who reported being specifically prevented from engagement gave expense as the reason, a significant proportional uplift from five years ago (36% in 2020). The dominance of expense as a barrier suggests that rising living costs are now pushing even the most committed audiences away.

Social barriers affect younger and Pacific audiences disproportionately

While cost constraints are felt widely across the market, social barriers (concerns about 'fitting in') disproportionately impact younger and Pacific audiences. Unlike external economic pressures, these cultural disconnects represent addressable challenges that offer organisations opportunities to cultivate genuinely welcoming environments and foster authentic connections with and between audiences.

Reasons preventing attendance*



*what prevented attendace to a specific art or cultural event or place in the past 12 months.

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Accessibility is an issue for 1 in 10

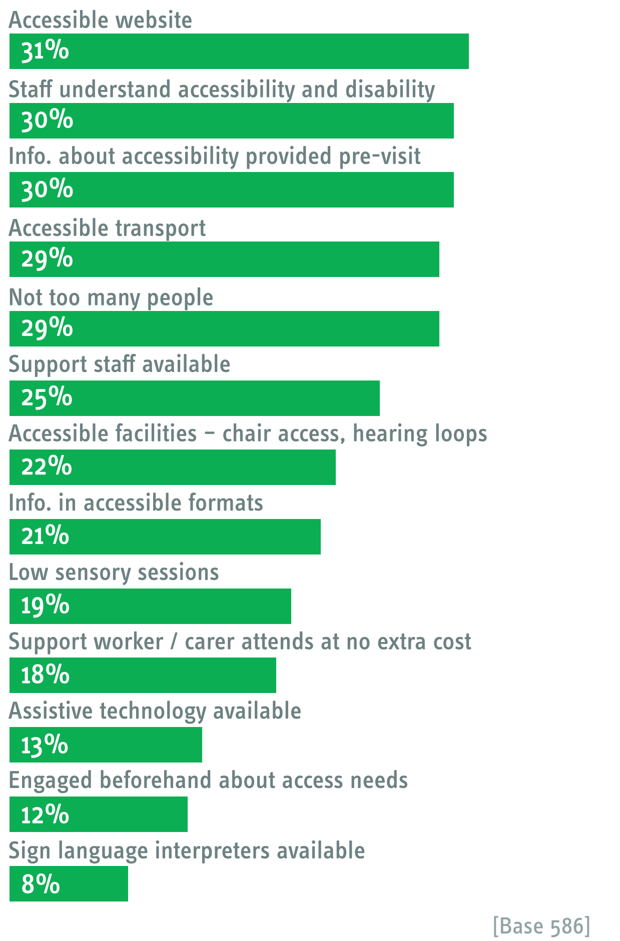
For 12% of the culture market, engagement with arts and cultural events is impacted by their experience of disability.[1]

Transport and crowd levels are key accessibility concerns

Disabled people were among the most likely to have recently been prevented from a specific arts event (see page 19). Looking at features that support access reveals that staff understanding, awareness of what is provided prior to visiting, transport and crowd levels were considerations for around 3 in 10.

However, the elements that make the arts accessible differ between those with physical or cognitive disabilities.[2] While both groups considered accessible transport and crowd levels equally important, having ‘staff who understand accessibility’, ‘pre-visit accessibility information’ or ‘accessible facilities, such as wheelchair access’ were greater priorities for the physical group. Meanwhile, ‘low sensory sessions’ were a more important consideration for the cognitive group.

What makes arts events/venues/activities accessible?



1 Threshold for Disabled people was survey participants who responded to the Washington Group Short Set questions about seeing, hearing, walking, remembering or concentrating, communicating, and self-care as having ‘a lot of difficulty’ or ‘cannot do at all’.

2 Those who identified as impacted by both a physical and cognitive difficulty were excluded from this part of the analysis.

Future engagement likely to remain stifled

While more than **half** the market **anticipate maintaining** their **current level of arts engagement** in the year ahead, and **an estimated 616k** expect to **increase participation**, overall sentiment has been **tracking down**. In 2017 and 2020, a larger proportion of the market anticipated attending more than less, but **expectations have shifted**. In 2025, **more** people **expect to reduce** their engagement over the next 12 months than increase it.

Anticipated arts and cultural engagement in next 12 months

Less disposable income stifles attendance across cohorts

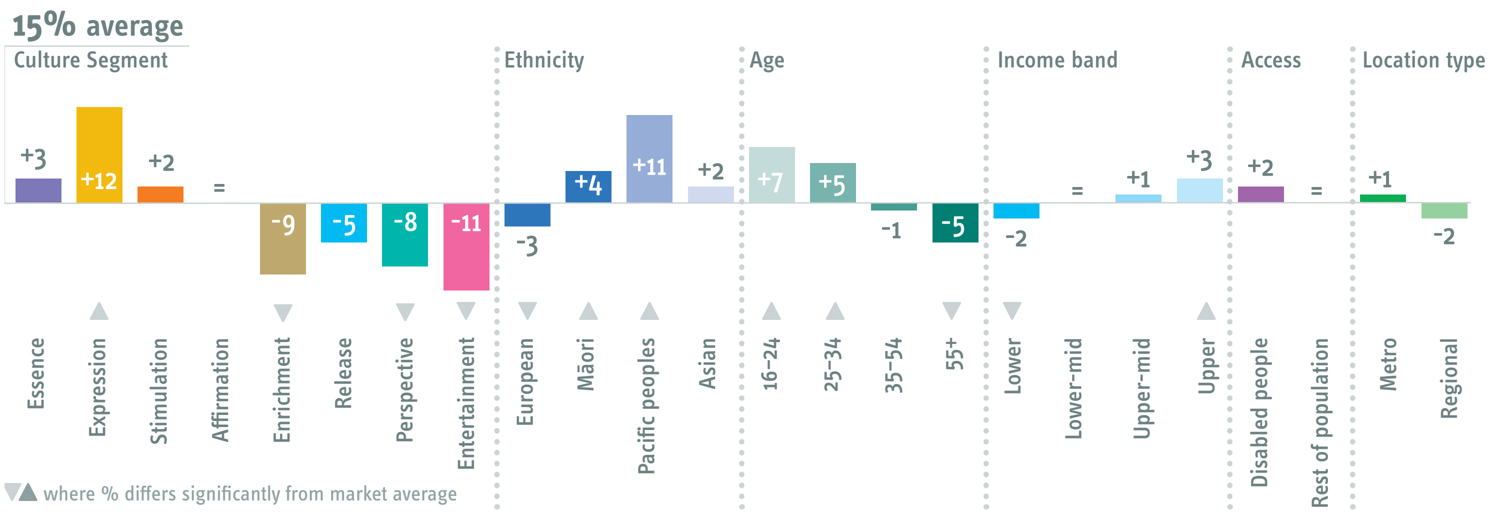
Among those who anticipate attending less in the next 12 months, two-thirds cite increased living costs as a concern. While a main consideration across the socio-demographic groups, the cost of living was less of a concern for younger adults (40% of 16–24s) compared to their older counterparts (71% of 35-44s). Younger audiences were as likely to cite 'working more' as 'increased living costs' as reasons for attending less and were nearly twice as likely as average to be planning to engage more online (11%).

What is being offered is less likely to align with the needs of older audiences

Overall, a fifth expected the things on offer wouldn't align with their interests or needs. This was a significantly more common reason given among older audiences (30% aged 55+).

All reasons for expecting to attend less in the coming 12 months	%
Increased living costs mean I've less disposable income	66%
Changes in personal circumstances (responsibilities make attendance difficult)	41%
Health / disability concerns	20%
Working more (longer hours, more shifts, second job)	21%
The sorts of things on offer don't align with my interests / needs	20%
I no longer have anyone to go with	12%
I plan to engage with more arts and cultural content online instead	6%
Base	[1039]

Likely to attend more in next 12-months – %-point difference compared to culture market average



Valuable Expression expects to do more in the coming year...

Exploring what distinguishes those who anticipate attending more, enthusiastic Expression leads the way, being significantly more likely than average to anticipate attending more in the next 12 months.

... as do younger, culturally diverse cohorts

From a demographic point of view, Māori and Pacific audiences are significantly more likely to anticipate attending more, alongside younger members of the culture market. There is also some correlation with household income. Those in the upper-income bands are more likely to anticipate doing more, and the lower end less. However, those in the lower and upper-mid bands are as likely as average. Therefore, while personal income is an associated link, other factors, such as the value derived from the arts (understood through Culture Segments), can exert more 'influence'.

Mask Carnivale Parade at Nelson Arts Festival © Photo: Melissa Banks for the Nelson Festivals Trust

Arts and cultural spend

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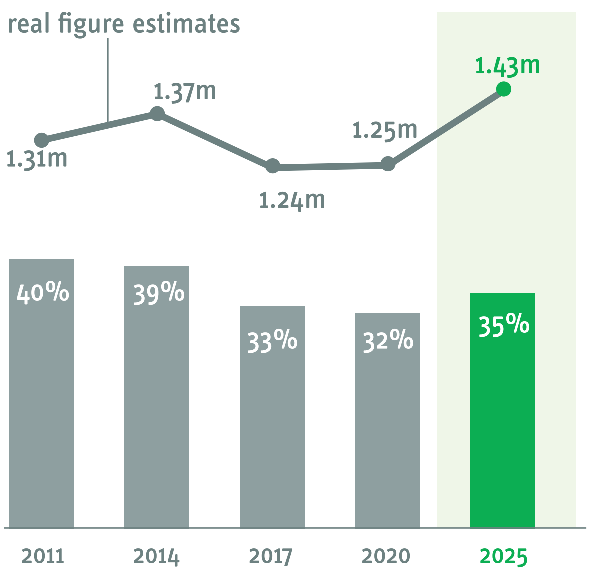
Annual arts spend an estimated $3.3 billion

In 2025, **over a third** of the culture market **spent on arts engagement** in the four weeks prior to the study. Although the **number** of people **spending** has **increased** compared to 2020, and the **average amount** spent has remained **stable**, when adjusted for inflation, spending has decreased from a four week average of $185 in 2020 to $176 this year. **Spend** on **admission** / tickets was **hit** hardest, while merchandise, food and drink remained comparatively buoyant.

Proportion of the culture market who have spent on arts and culture in the past 4-weeks



Spend of spenders

+15%

estimated increase in number of people spending on arts and cultural engagement in a given month

$176

estimated average spend of spenders on arts and culture in a given month

+9%

increase in total spend compared to 2020[1]

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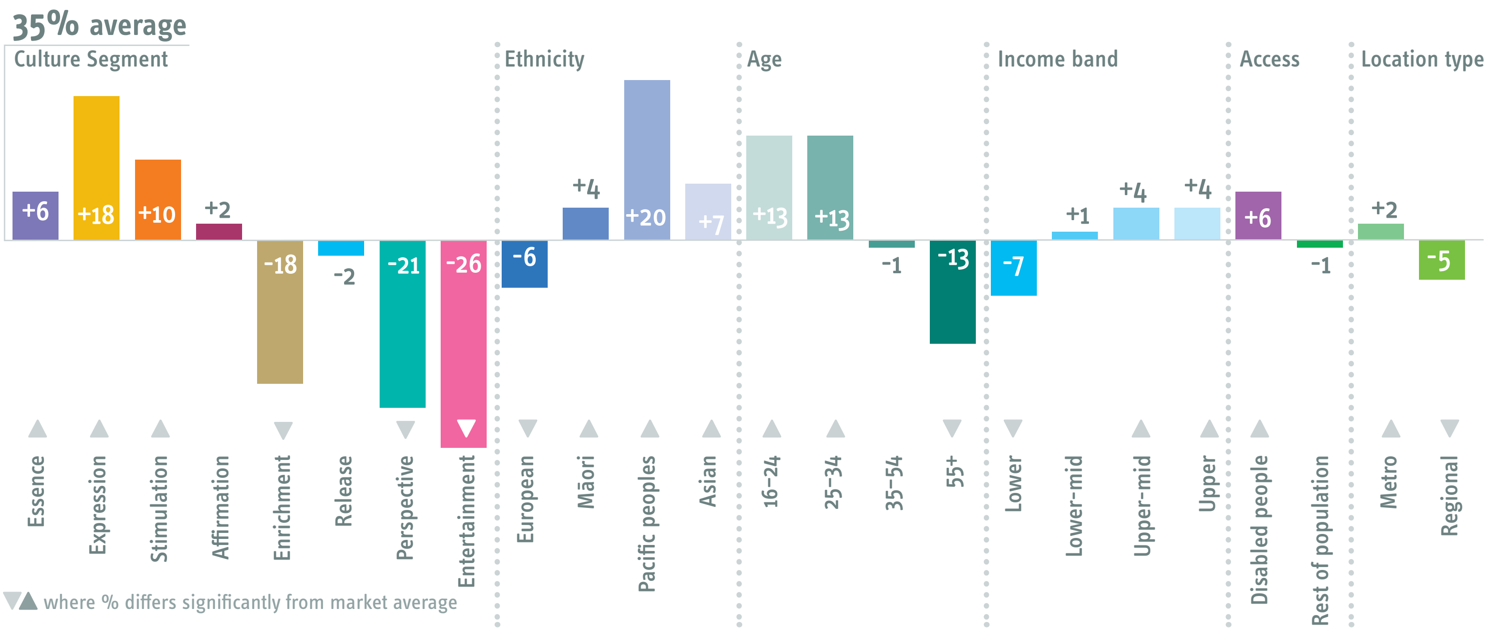
1 Adjusted for inflation

Personally spent on arts or culture in the past four weeks – %-point difference compared to culture market average



An association between income and arts spending was not present in 2020

In 2025, a link has emerged between income and arts spending. Those in the lowest income band are now significantly under-represented among recent spenders, while higher-income groups are over-represented. This marks a shift from 2020, when spending patterns were more evenly distributed across income levels. This growing divide suggests that economic pressures are beginning to reshape the audience base – with lower-income New Zealanders becoming less able to participate, and higher-income audiences playing a more dominant role in sustaining ticketed arts experiences.

Suppressed spending likely to continue

Mirroring anticipated future engagement (see page 22), a **larger proportion** of the market (21%) **anticipate spending less** than more (14%), **in the immediate future**. While this suggests arts engagement and spend is likely to remain suppressed, over **two-thirds anticipate** their **spend** will be the **same or more** in the next 12 months (67%), **an estimated 2.69 million**.

Anticipated arts and cultural engagement in next 12 months

Disposable income concerns keeping arts spending suppressed

Mirroring reasons the market gave for expecting to attend less (see page 20), increases in the cost of living is also the most common reason to expect to spend less on arts engagement (65%). Associated with this, close to 3 in 10 cited 'ticket prices' as a factor and a quarter planned to seek out more free events instead.

All reasons for expecting to spend less on the arts in the coming 12 months	%
Increased living costs mean I've less disposable income	65%
Changes in personal circumstances (responsibilities make attendance difficult)	31%
Ticket prices have increased too much	27%
I'll seek out free arts and cultural events instead of paying	24%
Getting to and from events has become too expensive	16%
Health / disability concerns	16%
Plan to attend less often	16%
Working more (longer hours, more shifts, second job)	16%
The sorts of things on offer don't align with my interests / needs	11%
I no longer have anyone to go with	11%
I'll only pay for a ticket / entry and no longer spend on extras	7%
I plan to engage with more arts and cultural content online instead	4%
Anticipate spending less base	[1022]

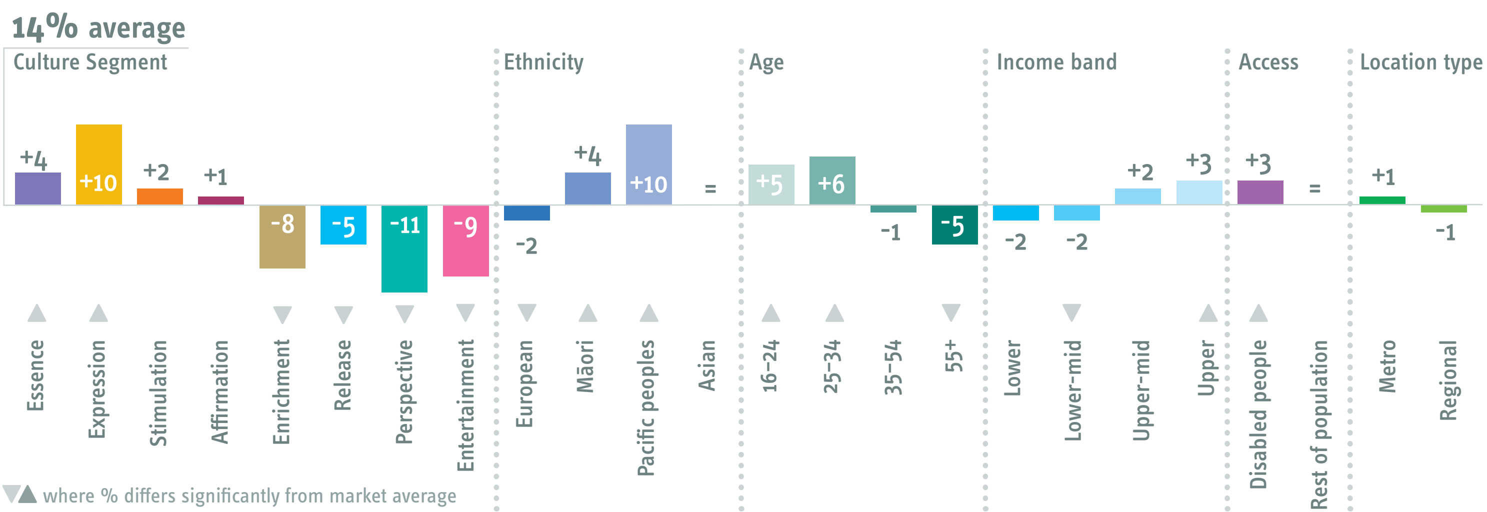
Responding to economic pressures

The current economic climate has placed pressure on household budgets, with many New Zealanders reducing their discretionary spend. For arts and cultural organisations, this means audience behaviours are shifting and ticketed experiences are out of reach for many. To maintain engagement and accessibility in this environment, organisations need to adapt their approach. Strategies to consider include; flexible pricing models that meet cost-conscious audiences where they are – such as tiered ticketing, concession discounts, or 'pay what you can' offers; expanded free programming or longer exhibition runs to encourage visitation without increasing cost to the public; diversifying revenue streams to reduce reliance on ticket sales – including growing membership programs, building corporate partnerships, or developing new sponsorship opportunities.

While no single approach fits all, being proactive and responsive to shifting audience needs can support both short-term engagement and longer-term sustainability.

creative nz
Arts Council of New Zealand Toi Aotearoa

Likely to spend in next 12-months – %-point difference compared to culture market average



Younger, culturally diverse audiences anticipated spending more

Discerning Essence and enthusiastic Expression are the segments that are the most positive about spending more on arts engagement in the coming 12-months, and the pattern across the culture market groups mirrors expected future attendance (explored on page 24).

From a demographic point of view, similar to attendance, Māori and Pacific audiences stand out as being significantly more likely than average to anticipate spending more going forward, alongside younger adults and those identifying as disabled. There is also an associated link with income.

ASB Polyfest 2025. © Photo: Ben Campbell

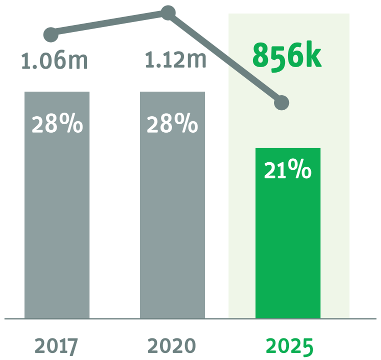
Support for the arts

morris hargreaves mcintyre

1.22 million potential donors to activate

In 2025, an estimated **856k New Zealanders** had **donated to the arts in the past three years**, which, despite culture market growth, is 261k **fewer current donors** than five years ago (down 23%). However, **opportunity remains**. 30% of the market would consider supporting an arts organisation financially, **an estimated 1.22 million potential donors** waiting to be activated.

Supported an arts or cultural organisation financially in past 3 years (current)

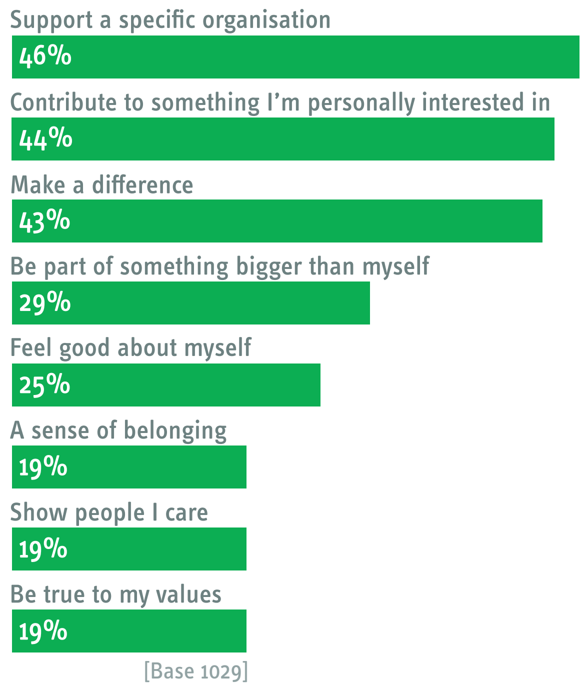


an estimated 856k
have donated in the past three years (current)

an estimated 514k
last donated three or more years ago (lapsed)

an estimated 1.22m
have never given to the sector but are open to doing so (potential)

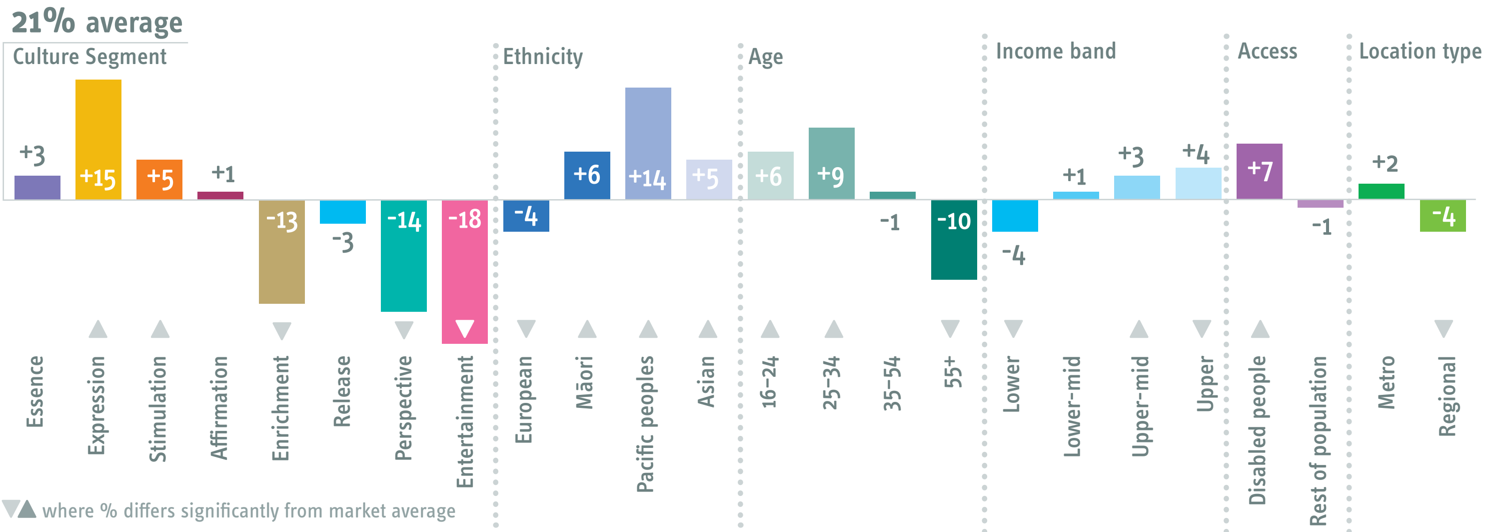
Top reasons current donors give to the arts



Connection, values and impact shape donor decisions

Donors to cultural organisations are primarily motivated by personal connection and making an impact. However, emotional and identity-based motivations also play a role, such as a desire to feel part of something bigger than themselves, staying true to personal values, or expressing care for the arts.

Current donors – %-point difference compared to culture market average



Younger, culturally diverse audiences have higher propensity to donate

In 2025, there is an association between income and donation behaviour. Outside of income levels, reflecting the same patterns for attendance and spend, current donors skew younger and more culturally diverse compared to average. Around half of all current donors were under 35, while Māori, Pacific and Asian audiences were also over-represented.

Current donor profile is strongly Expression

Contributing financially to an arts or cultural organisation requires a deep level of connection, and not all segments are equal in this respect. Enrichment, Perspective and Entertainment all have other priorities while Expression dominates the current donor profile. Expression are motivated by a desire to make a positive impact in their communities, and they seek out organisations that align with their values, often looking to contribute to smaller, local and less recognised organisations.

Reasons why the four more culturally active segments give:

EXPRESSION

... give because they want to make the world a better place for all

They want to support organisations that authentically demonstrate alignment with their values of accessibility, inclusion and diversity.

ESSENCE

... give because they believe in the value of the arts

They want to nurture 'exceptional' art in society, but it's an inwardly focused and to meet a personal need.

STIMULATION

... give to align with a personal brand

They want to support unique, new or cutting edge initiatives and are more likely to support if a campaign is quirky, fun or clever – too good to ignore!

AFFIRMATION

... give to 'do the right thing'

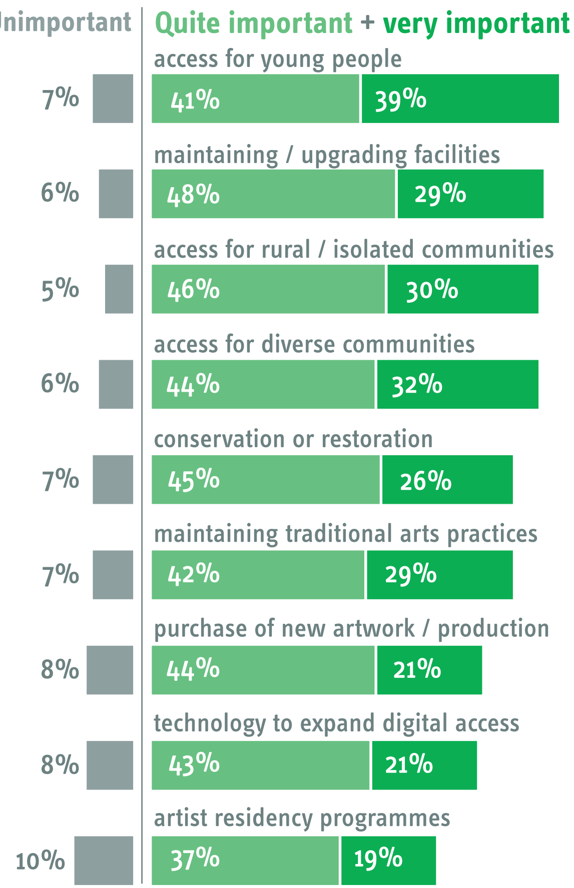
Are cautious, but they have a desire to be recognises as engaged and responsible. Giving to worthy causes is a form of self-validation.

Enabling youth access is still a leading cause to support

Among those open to giving to the arts, most view the nine tested causes as worthy of support. Consistent with previous studies, enabling children and young people to access arts and cultural experiences was considered the most important cause to support (80%). This was closely followed by helping to maintain or upgrade facilities or venues (78%) or improving access to arts and culture for rural or geographically isolated communities (76%).

Lower-ranking, though still well-supported, causes include funding the purchase of new artworks or productions (65%), investing in technology to expand digital access (64%), or funding artist residency programmes (56%).

What the market considers important cultural causes to support...

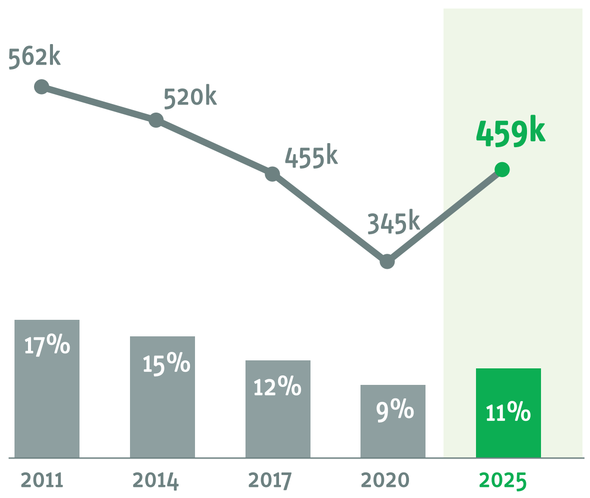


[Base 3109]

Rates of membership shows recovery

Between 2011 and 2020, the number of New Zealanders with an active arts membership or subscription fell. This trend has turned around in 2025, with **membership** levels lifting, aligning closely with 2017. **Additionally, an estimated 546k** have **seen the value** of this type of connection **before**, and a further **1.4 million** are **open** to this form of sector support.

Active member, subscriber or friend of an arts or cultural organisation



an estimated 459k

have been an arts member / subscriber in the past three years (active)

an estimated 546k

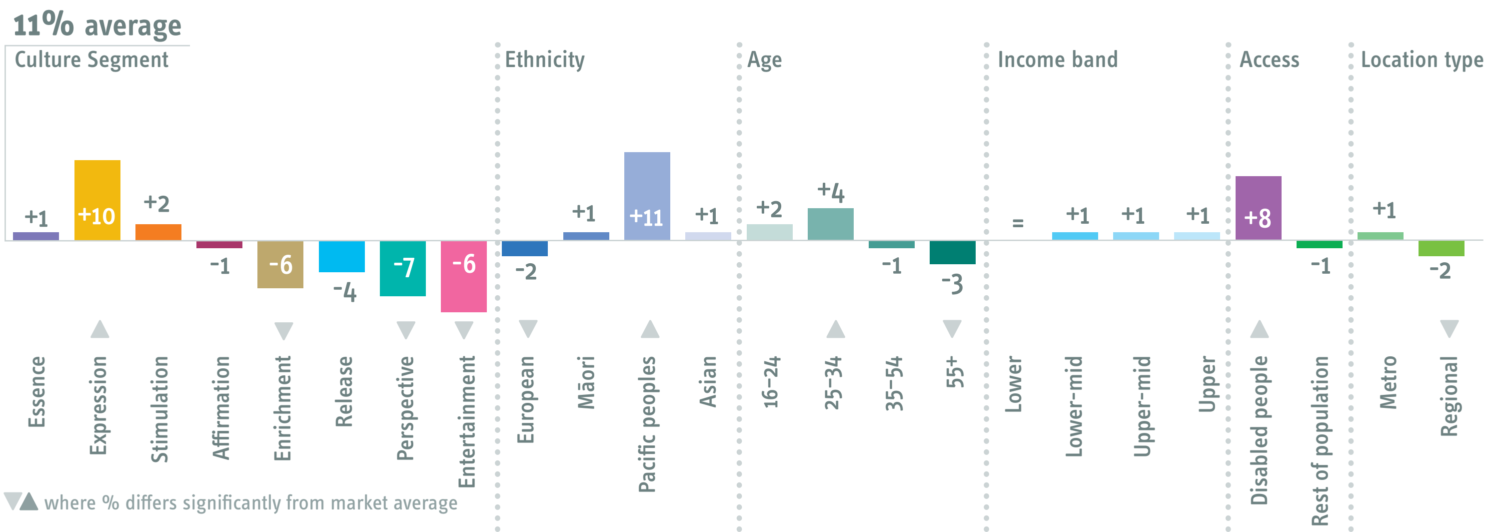
were last a member / subscriber three or more years ago (lapsed)

an estimated 1.4 million

have never been a member / subscriber but are open to doing so (potential)

NZSQ at Wānaka Festival of Colour © Photo: Deanna Gerlach

Active member / subscribers of at least on arts or cultural organisation – %-point difference compared to culture market average



Active members skew younger

While income doesn't appear to be a strong factor for arts membership, the value placed on arts does, with Expression representing over 4 in 10 active members. Compared to the culture market average, younger, Pacific and disabled audiences are all more prominent among active members.

Civically-minded Expression's values align with joining

Expression is the most altruistic segment and as such, they are significantly over-represented among active arts members or subscribers. Expression seeks community connection and views cultural organisations as an extension of their social values. They join not primarily for transactional benefits but to 'give something back' and 'belong' – to be part of a like-minded community that shares their passion for inclusivity and cultural expression. To encourage Expression's support through membership, organisations should speak to them like a friend with warm, personal communication that emphasises how they can make a difference and be part of something bigger than themselves.

Expression join to connect with a community

Expression love to join, and they do this to be part of a community, something bigger than themselves. While Expression wants to be part of the club, it's important to them that this isn't an 'exclusive' group and that everyone is welcome. They are also the most altruistic of the segments, so membership is also a way for them to give back to the community. Expression isn't known to be passive bystanders; by joining something, they are often also looking to participate actively. Opportunities to get involved through their membership offer will be important to this segment.

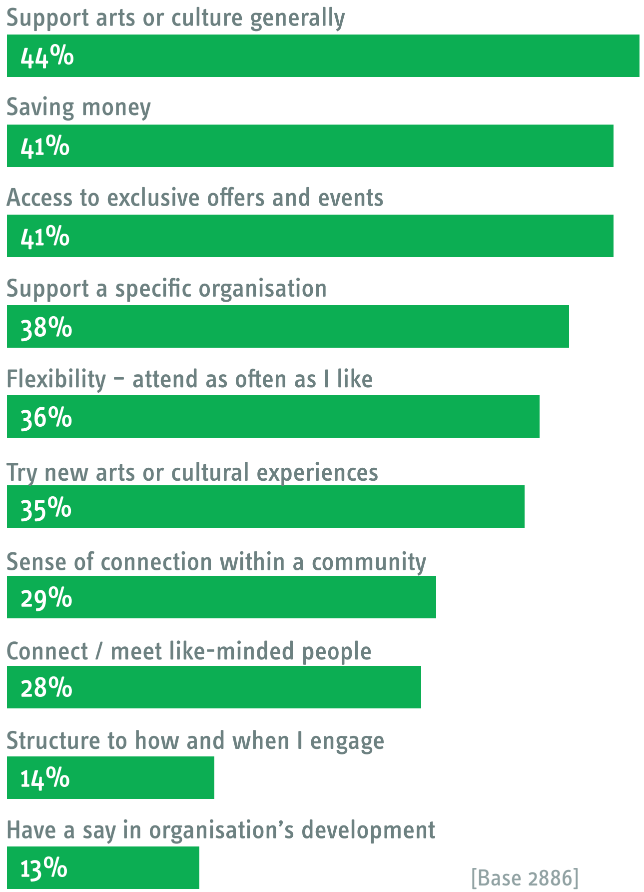
Transactional benefits open the door, but affinity inspires commitment

Those open to becoming a member or subscriber cite a range of reasons for joining, including supporting the sector as a whole, saving money and access to exclusive events.

Active members, however, tend to have a deeper understanding of the benefits of joining. They are significantly more likely than lapsed or potential members to want to join to support a specific organisation and value opportunities to connect with others.

While saving money and access to exclusive offers are also important to active members, these transactional reasons were more commonly considered as benefits by potential members. Therefore, saving money may be the hook that attracts new members, retaining them relies on building affinity and making it clear how their support makes a real difference.

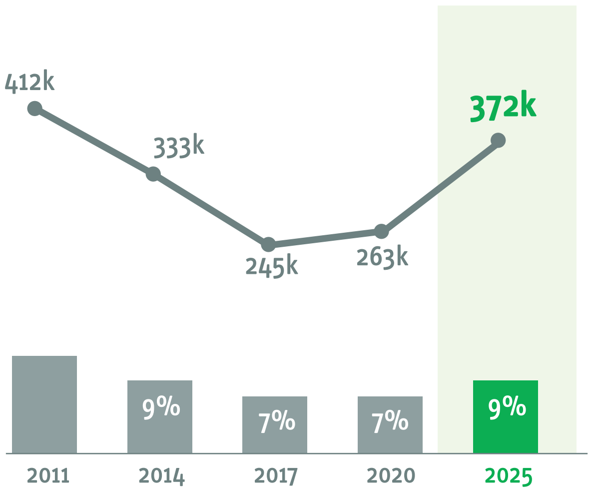
Reasons to become a member, subscriber or friend of a arts or cultural organisation



Lift in the number giving time to the sector

The **number** of New Zealanders who have **recently volunteered their time** to the sector (past 12 months) has **increased in the past five years**. In 2025, an **estimated 372k** adults have recently given their time to an arts or cultural organisation, **42% more** than five years ago.

Volunteered at an arts or cultural organisation in past 12-months (recent)



an estimated 372k

have volunteered in the past 12 months (recent)

an estimated 737k

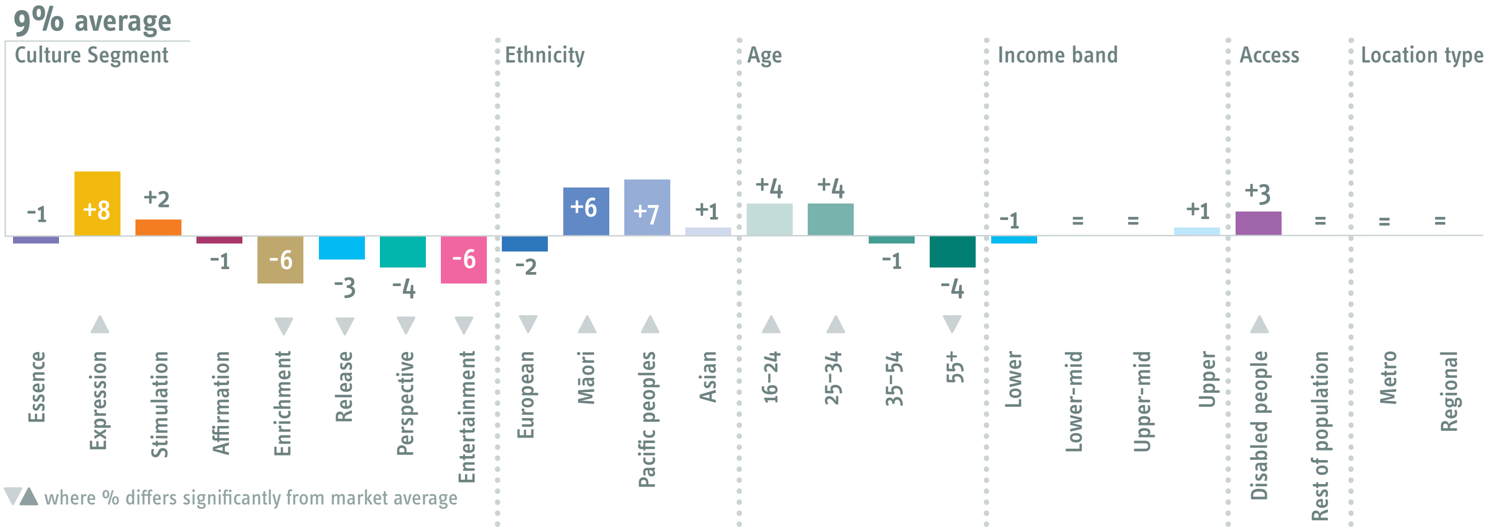
last volunteered one or more years ago (lapsed)

an estimated 1.6 million

have yet to volunteer but are open to doing so (potential)

Whangarei Fringe Festival © Photo: Kayla Ganley

Volunteered time to an arts or cultural organisation in past 12 months – %-point difference compared to culture market average



Recent volunteers are a diverse group

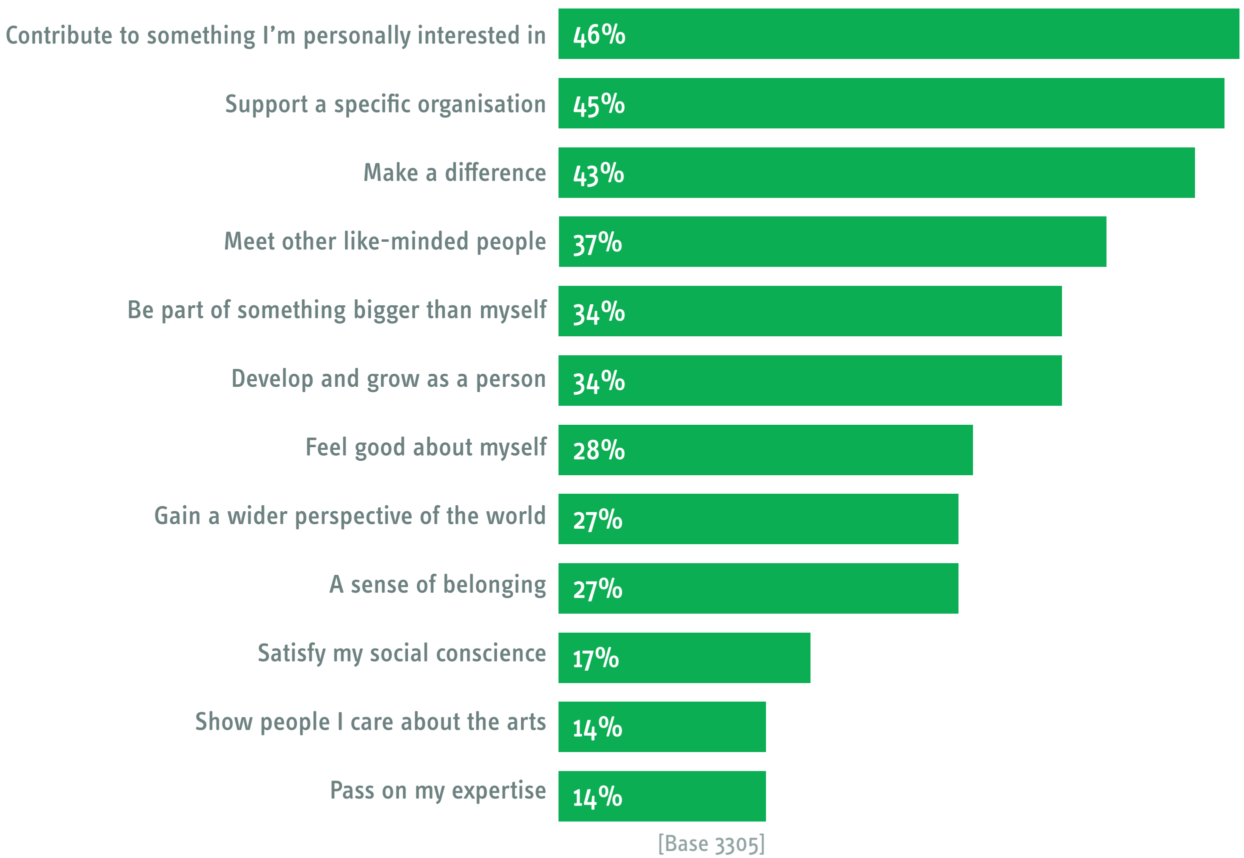
Consistent with past studies and our understanding of the segment, 40% of recent volunteers are community-minded Expression; they are also over-represented among lapsed and potential volunteers. Additionally, compared to average, younger adults are over-represented among recent volunteers, as are Māori, Pacific and disabled audiences.

Volunteering is built on personal interest and desire for impact

What motivates those open to gifting their time to the arts is primarily to support a particular organisation aligned to a personal interest and to have the opportunity to make a difference.

While overall, passing on expertise is one of the least common reasons to volunteer (14%), those who have recently done so (within the past 12 months) are significantly more likely to have this reason (26%). This group of recent volunteers is also more likely to see the wider personal benefits of supporting the arts in this way, being more likely than lapsed or potential volunteers to do so, for a sense of belonging (32%).

Top reasons to volunteer time in support of an arts or cultural organisation



Objectspace, A story of design and making in Aotearoa intsallation view © Photo: Jinki Cambronero.

Reaching the market

morris hargreaves mcintyre

Dip in social media use to find out what's on

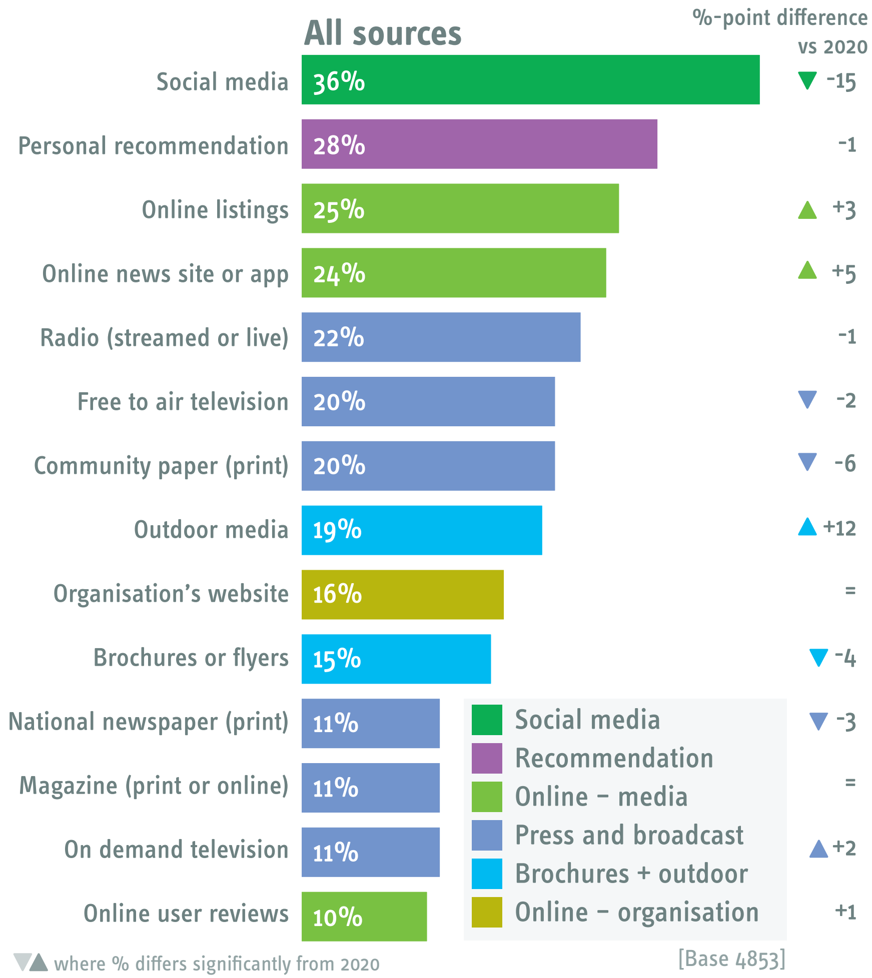
Compared to five years ago, information **sources** the market have recently used to **find out about arts events**[1] have **shifted**.

Online listings, news sites and outdoor more prominent

Reflective of the ever-shifting patterns of media consumption, while the culture market is more likely to consult social media (36%) than any other single source, it doesn't have the dominance it once had.[2] There was also a shift away from traditional channels like free to air TV, and print. Instead, a quarter had used an online listing or online news site and a fifth referred to outdoor media, all significant proportional uplifts compared to 2020. Meanwhile, a personal recommendation remains an important way for the market to learn about upcoming arts and cultural events (28%, unchanged from 2020).

See the following page for individual social media channels consulted.

Top information sources to find out about arts events or places



1 Question: In the past 12 months, which of the following have you used to find out about arts or cultural events or places?

2 Due to fast paced changes in the way the market consumes media, the social media category was asked in a slightly different way. In 2020 around half had used a social media channel in the 12 months prior to find out about arts events or organisations.

Younger people are less engaged with legacy media

While social media is the most common way to have found out about what's on in the arts space, it is younger audiences pulling up the average. Conversely, younger audiences are less likely to have consulted legacy media formats such as free to air television or print newspapers, and it's the 55+ cohort who are more likely to engage with these. Notably, a local / community newspaper is the most cited information source for this age group (34%).

Top information sources used to find out about arts events and organisations – past 12 months

	Culture market average	Age band				Metro vs regional	
		16–24	25–34	35–54	55+	Metro	Regional
Social media	36%	▲ 42%	▲ 46%	▲ 40%	▼ 23%	37%	34%
Personal recommendation	28%	30%	27%	▼ 25%	▲ 31%	28%	28%
Online listings	25%	▼ 21%	24%	▲ 29%	▼ 22%	26%	21%
Online news site or app	24%	25%	24%	24%	24%	26%	20%
Radio (streamed or live)	22%	21%	▼ 19%	20%	▲ 25%	23%	19%
Free to air television	20%	▼ 12%	▼ 14%	▼ 18%	▲ 31%	20%	21%
Community paper (print)	20%	▼ 9%	▼ 13%	▼ 15%	▲ 34%	▼ 18%	▲ 24%
Outdoor media	19%	22%	▲ 22%	17%	17%	20%	▼ 16%
An organisation's website	16%	▼ 11%	14%	15%	▲ 19%	16%	14%
Brochures or flyers	15%	▼ 12%	14%	▼ 13%	▲ 20%	16%	14%
National newspaper (print)	11%	▼ 8%	9%	▼ 7%	▲ 18%	11%	11%
Magazine (print or online)	11%	9%	9%	▼ 8%	▲ 15%	11%	10%
On demand television	11%	10%	10%	9%	12%	11%	11%
Online user review	10%	8%	14%	9%	▼ 7%	10%	9%
Base	[4836]	[633]	[1044]	[1571]	[1588]	[3237]	[1599]

▲ % significantly higher than average

▼ % significantly lower than average

TikTok has cemented its utility for young people

Overall, those discovering what's going on in the cultural space via social media are most likely to have done so using Facebook. However, when looking at channel by age, Facebook's influence is significantly lower among younger adults, but near universal among those aged 55+.

Meanwhile, younger adults, particularly 16–24s, are more likely to be using Instagram or TikTok than their older counterparts.

Top social media platform used

36% of the culture market find out about arts events and organisations via social media

	Culture market average	Age band				Metro vs regional	
		16–24	25–34	35–54	55+	Metro	Regional
Facebook	84%	▼ 65%	81%	▲ 89%	▲ 94%	82%	▲ 88%
Instagram	58%	▲ 76%	▲ 67%	57%	▼ 37%	▲ 62%	▼ 49%
YouTube	44%	47%	43%	41%	47%	46%	39%
TikTok	32%	▲ 58%	▲ 39%	▼ 24%	▼ 14%	34%	▼ 27%
Spotify	19%	▲ 30%	17%	17%	19%	20%	18%
LinkedIn	13%	▼ 7%	10%	▲ 17%	15%	15%	▼ 9%
Snapchat	13%	▲ 25%	15%	▼ 10%	▼ 5%	12%	15%
Reddit	10%	10%	▲ 14%	10%	▼ 6%	12%	▼ 6%
X / Twitter	10%	9%	12%	9%	10%	11%	7%
TripAdvisor	10%	▼ 5% ▼	8%	10%	▲ 17%	11%	▼ 9%
Social media user base	[1757]	[277]	[489]	[632]	[358]	[1243]	[514]

▲ % significantly higher than average

▼ % significantly lower than average

A preference for planning ahead

Describing their typical behaviour for purchasing tickets, on average, the market is more than twice as likely to book 'as soon as tickets go on sale' or 'about a month before', than in the week leading up to an event (50% and 21%, respectively). While overall half 'plan ahead', younger audiences are generally more likely to book later.

A sizeable proportion of the market (28%) doesn't feel they have a typical purchasing pattern for cultural engagement, indicating that many don't follow a consistent approach. This is particularly notable among the 55+ cohort.

When do you typically purchase tickets for arts and cultural events and places

	Culture market average	Age band				Metro vs regional	
		16–24	25–34	35–54	55+	Metro	Regional
As soon as tickets go on sale	24%	26%	26%	24%	22%	25%	23%
About a month before	26%	26%	▲ 30%	25%	▼ 23%	26%	24%
In the 7 days before	13%	▲ 16%	▲ 17%	12%	▼ 9%	13%	11%
The day before	3%	▲ 6%	3%	3%	▼ 2%	3%	3%
The day of	6%	4%	5%	6%	7%	5%	7%
Unsure / don't know	28%	▼ 21%	▼ 19%	30%	▲ 37%	27%	32%
Base	[1757]	[663]	[1063]	[1589]	[1539]	[3333]	[1521]

▲ % significantly higher than average

▼ % significantly lower than average

Engagement by individual artform

Diggeress Rangituatahi Te Kanawa, Korowai 1981 © Creative New Zealand's collection

morris hargreaves mcintyre

Active engagement, broad but shrinking

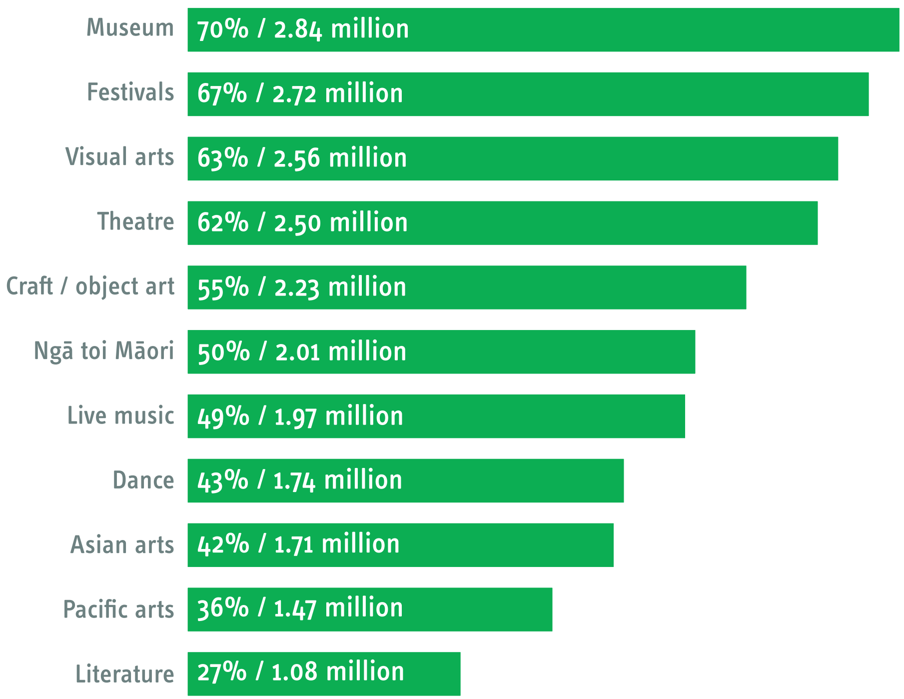
New Zealanders are **active** across a **range** of artforms, with over **half engaging** with **6 out of** the **11 core artforms** in the **past three years**. However, between 2020 and 2025, the **current market share declined** for all but festivals, theatre and literature. **Live music** recorded the **sharpest drop**, from 67% in 2020 to 49%. It wasn't limited to performing arts – **craft** and **visual arts** also saw their **current markets recede**.

Half the market have engaged with ngā toi Māori recently

The current market share for ngā toi Māori and live music are similar, with around 2 million New Zealand adults having engaged with these in the last 3 years. Around 4 in 10 are in the current market for Asian Arts and a third for Pacific Arts, both with an active market similar in size to dance. However, the current market for all these artforms are smaller than five years ago.

Meanwhile, just over a million had engaged with a literature event in the last 3 years, giving it the smallest current market of all artforms tested, but the only artform to experience real growth.

Current artform markets engaged in past three years – % and real figure estimates

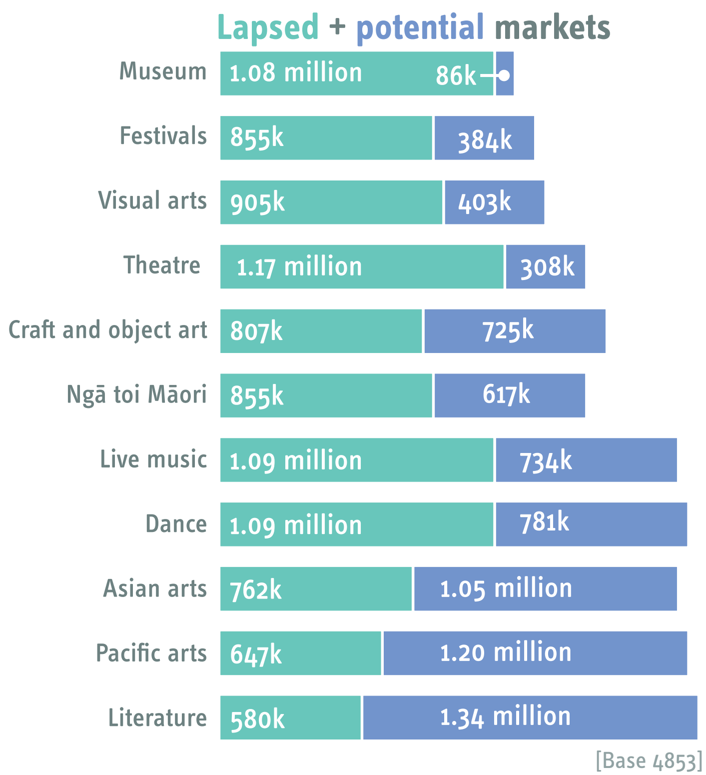


[Base 4853]

Focus on re-engaging lapsed audiences

Persuading new audiences to visit or attend for the first time is a worthy pursuit. However, in challenging times, a focus on re-engaging lapsed audiences is arguably more prudent. Lapsed audiences have chosen you before. They know who you are and have (some) understanding of what they will 'get' from their engagement with you (the benefits). These audiences need to be compelled to engage again. They need to be reminded that they should prioritise your organisation and of the Social, Intellectual, Emotional and Spiritual benefits you offer, alongside how their engagement will fulfil their deep beliefs about culture.

Lapsed + potential artform markets – % and real figure estimates



Large lapsed markets, particularly in performing arts

There are sizable lapsed markets for the more mainstream artforms – notably, more than a million New Zealanders who have lapsed in their museum visitation and engagement with performing arts (theatre, live music and dance). These sizable lapsed markets have chosen these artforms before, however, to activate their return, they need to understand what makes a particular offer unique and what specific benefits attendance will provide.

3.76 million in the craft / object art market

In 2025, an estimated 3.76 million New Zealanders report having **attended a craft / object art exhibition before**, **or would consider** doing so if they haven't previously.

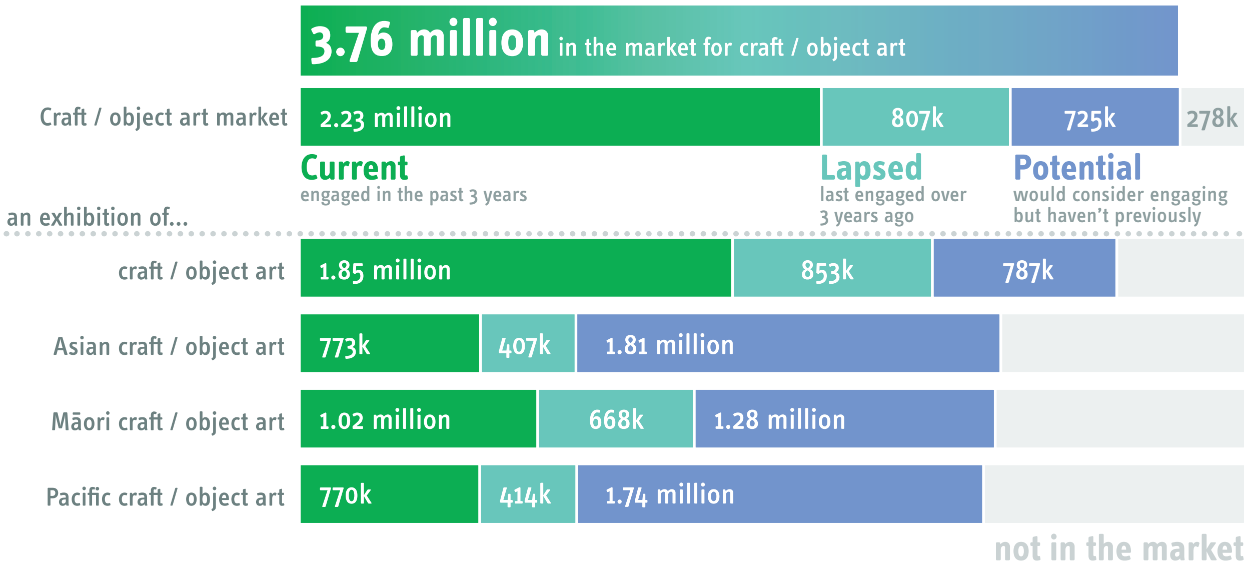
Current craft / object art market skews older

Similar to all current artform markets, the current market for craft / object art has the markers of a more 'engaged' audience. Where this market differs is in its age profile, which skews older than most other artforms.

Larger current market for Māori craft than Asian or Pacific

Most recent engagement has occurred around non-culturally specific craft / object art exhibitions, but there is still sizable potential here, with an estimated 853k New Zealanders lapsed in their engagement. Past attendance of, and market attitudes towards attending Asian or Pacific craft / object art exhibitions are similar, while Māori craft enjoys a larger current market compared to these others.

Market for craft / object art – and its sub-artforms – as real figure estimates



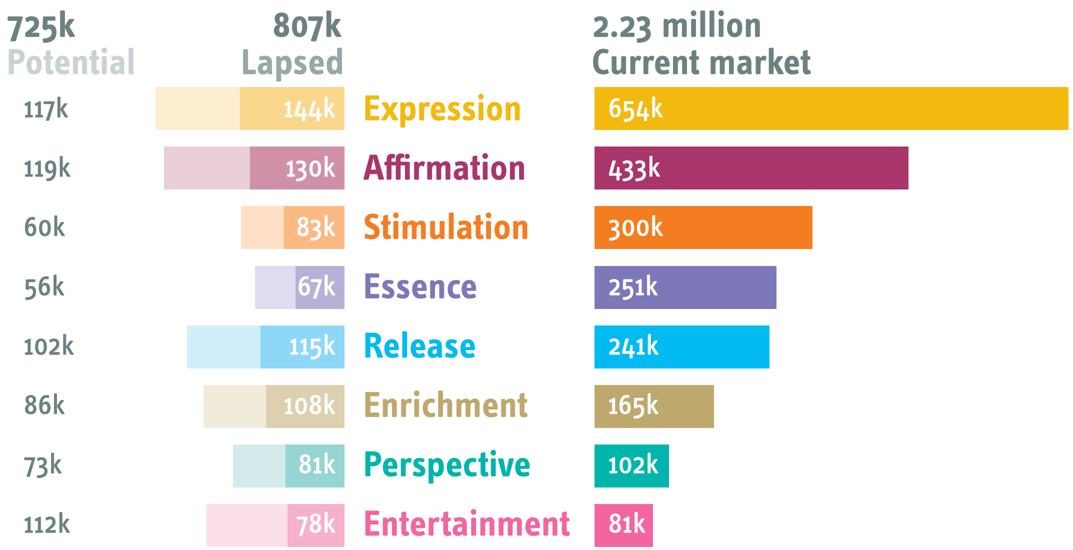
Creativity connects Expression with craft and object art

Enthusiastic Expression is central to any cultural offer, and craft / object art holds particular alignment. Craft / object art's current market is 29% (an estimated 654k) Expression with a further 144k having lapsed in their engagement. Expression's alignment with craft / object art comes from their innate desire to support others' creativity, often providing the context to meet and connect with makers. Ensuring these chances are present for this segment will keep them engaged and activate them to return.

Craft / object art is a comfortable gateway into the arts for Affirmation

Affirmation is also well represented in the craft / object art market and while Expression are activated by personal creativity and connection, for Affirmation – a typically less culturally confident segment – the approachable nature of craft /object art can serve as a comfortable gateway into the arts. Highlighting the comfort of this artform will keep this segment engaged.

Craft and object art market – Culture Segment break down as real figure estimates



3.61 million in market for dance

While **dance currently reaches fewer** New Zealanders **than most other artforms** (1.74 million), it **offers** much opportunity for growth. In addition to the **sizable potential** audience – 781k New Zealanders who haven't engaged yet but would consider this, dance has one of the **largest lapsed** markets needing reactivation.

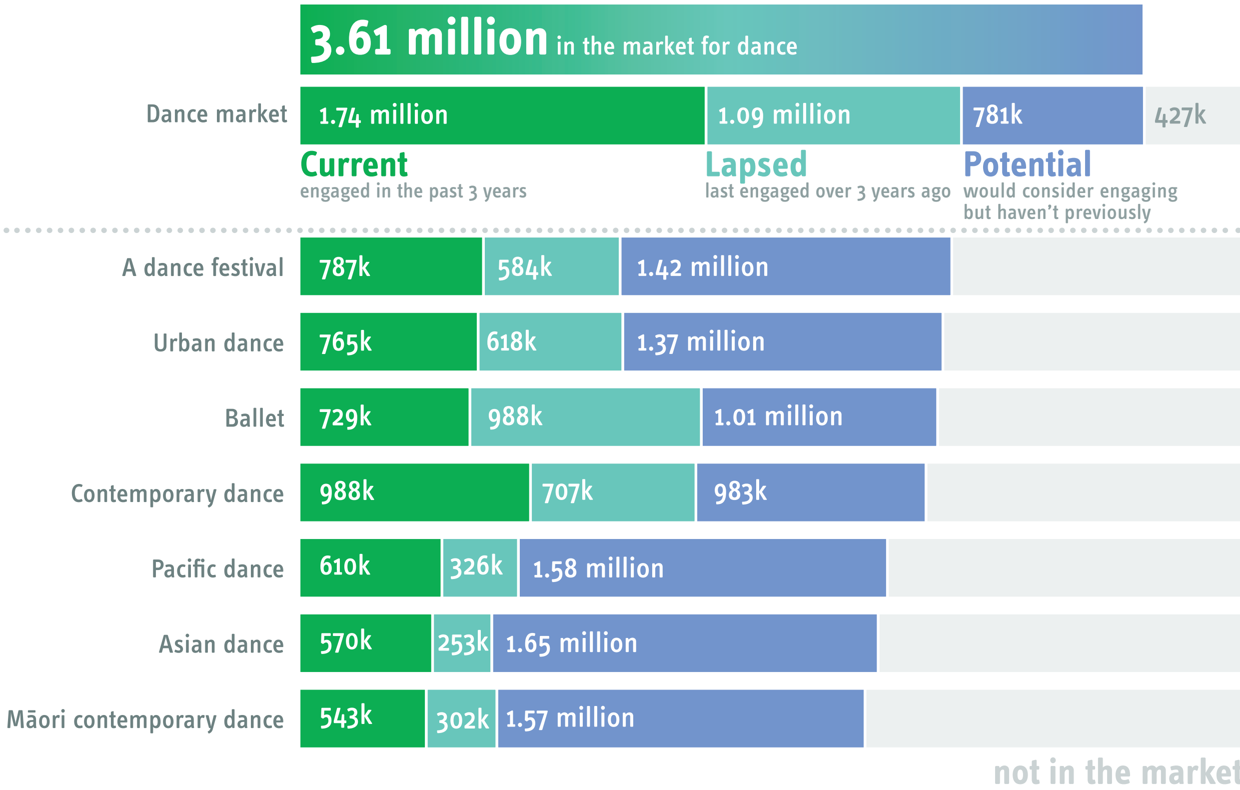
A diverse and female-skewed dance market

The current market for dance is one of the most ethnically diverse current markets, and along with ngā toi Māori, it has the strongest female skew. Those who've attended dance recently are more likely to live in households with children, and those identifying as disabled are also over-represented here.

A large lapsed market for ballet

While the overall size of the ballet and contemporary dance markets is similar, contemporary dance enjoys a larger current market, whereas more have lapsed in their engagement with ballet. Culturally specific dance markets are the smallest across the group, but hold sizable potential.

Market for dance – and its sub-artforms – as real figure estimates



Dance connects Expression with art as it's being created

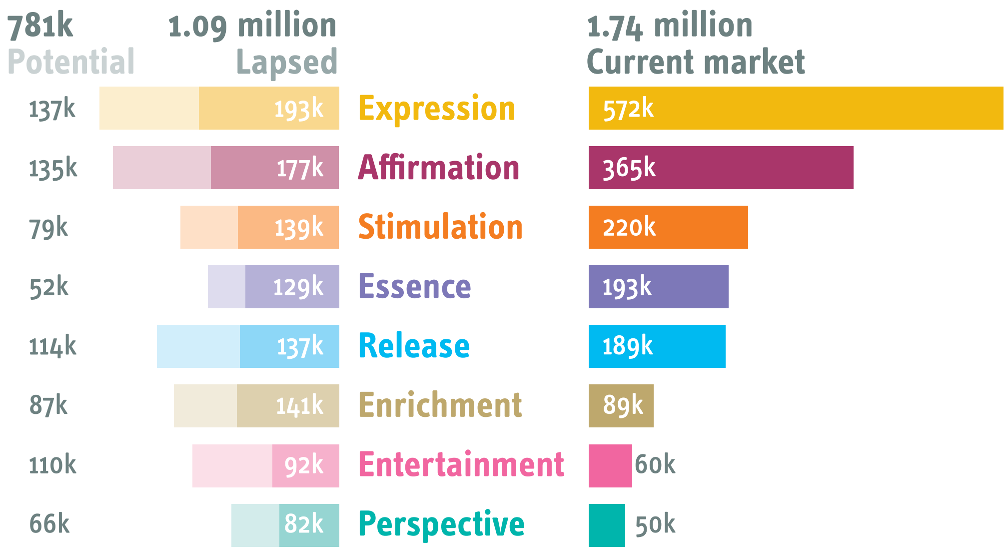
Expression is particularly prominent in the current market for dance – only the current markets for literature and Pacific arts have a higher proportion. As an emotionally-driven segment, dance offers Expression in-the-moment experiences, a vibrant blend of originality and emotional depth, allowing them to experience culture as it is being 'created'. Retain Expression and entice them back by showcasing the emotional depth of these in-moment experiences.

Secondary focus on the other active segments

In addition to Expression and Essence, Affirmation are more prominent in dance's current market than the market overall. However, Affirmation has the larger current market (an estimated 365k) than Essence. Stimulation, Essence, and Release are comparable in terms of current market size. While there is a healthy number of Release across the three market groups, they're typically harder to activate.

Traditional Enrichment, self-contained Perspective and straight-forward Entertainment represent less than 1 in 10 of dance's current market and are more likely than other segments to be resistant to the artform.

Dance market – Culture Segment break down as real figure estimates



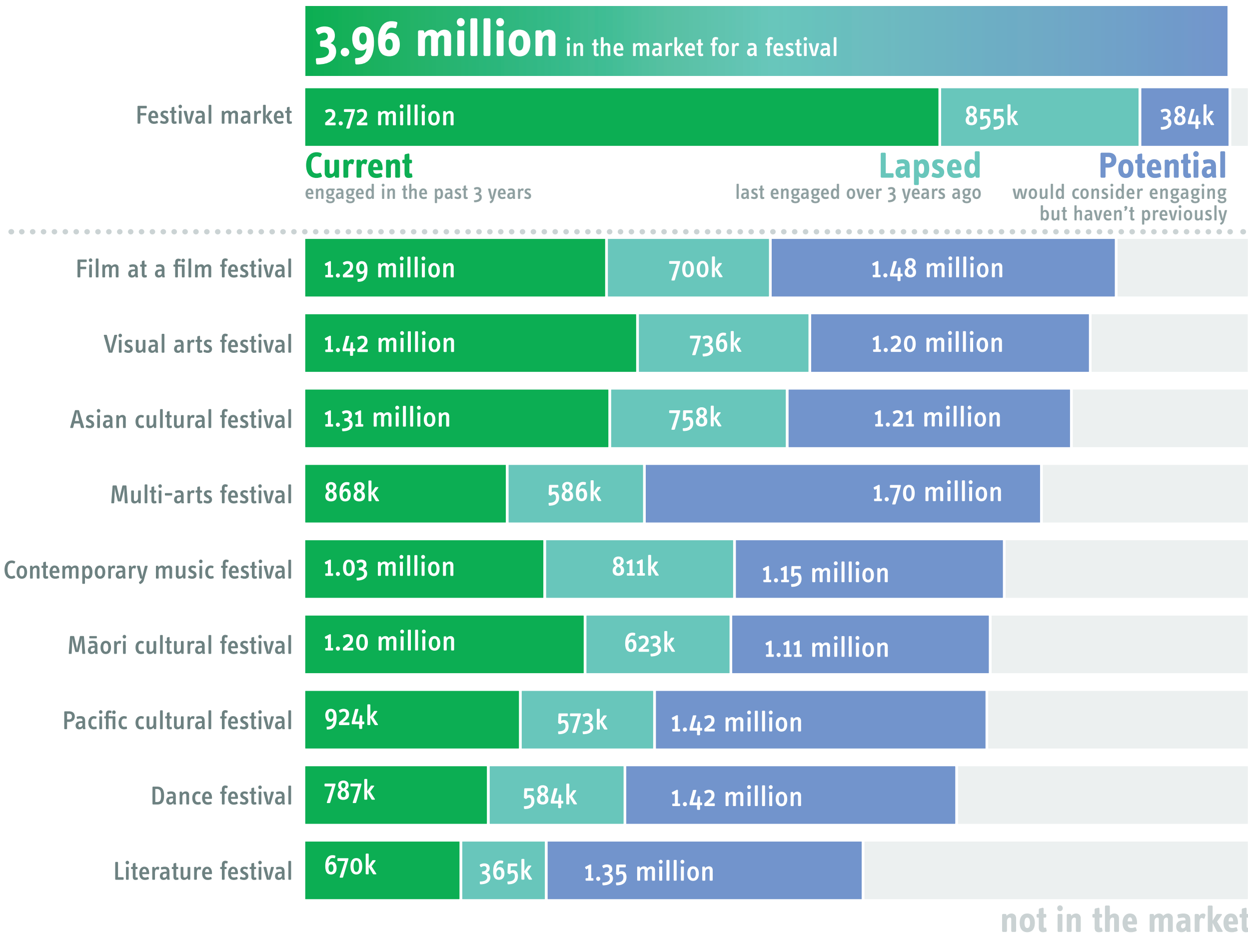
3.96 million in the market for festivals

As a rich and **broad category** encompassing a diverse range of genres, **festivals** are a **relatively mainstream pursuit**, with an estimated **3.96 million** New Zealanders in the market for this activity.

Current market draws from upper income brackets

There is little to distinguish festivals' current market from others. However, recent festival-goers are more likely to be drawn from upper income brackets than recent engagers with other artforms. Film and visual arts festivals have particularly active markets, closely followed by Asian cultural festivals. A festival is the most prominent way that the market is currently engaging with Asian arts.

Market for a festival – and its sub-artforms – as real figure estimates



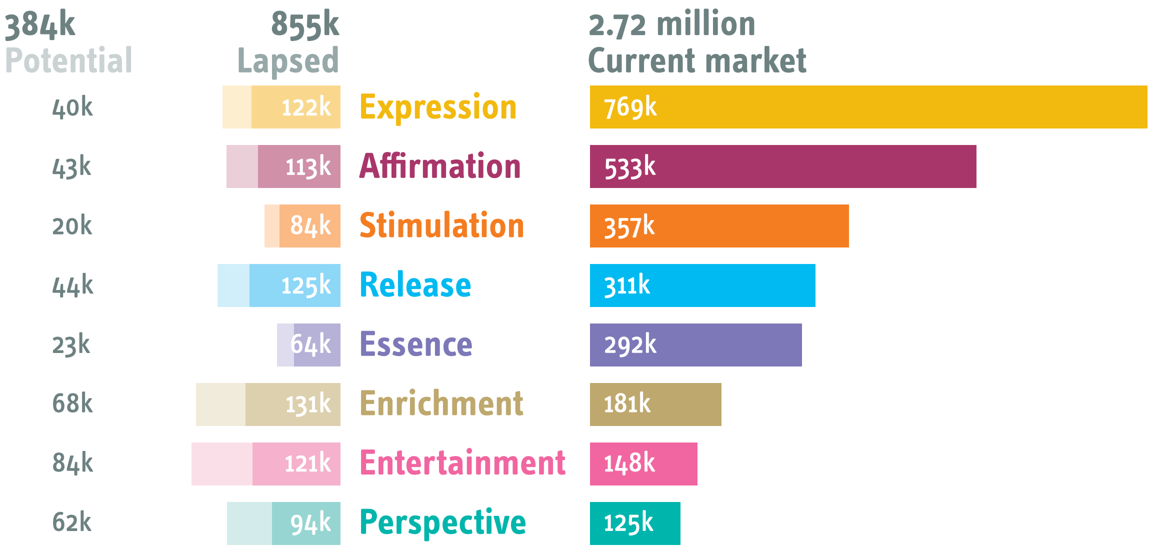
Expression are looking for connection and Stimulation an unusual mash-up

Expression are community-minded, seeking shared experiences that align with their values. Festivals provide the perfect environment for this – immersive, diverse and vibrant events where people can connect, celebrate and express themselves. This is reflected in the number of Expression in the current market, and these known Expression activators should remain at the forefront of festival programming. Chasing unique experiences, Stimulation is also well represented in festivals' current market, although not as numerous, with the one-off nature of these events, the opportunity to experience things in a different way and do so socially, the key drivers to continue bringing to light.

Support Affirmation and don't forget Essence or Release

A festival can offer Affirmation the opportunity to 'experiment safely'. To retain the sizable current Affirmation market and bring back those who've lapsed, festivals need to ensure that Affirmation don't feel out of their depth. While less numerous than some other segments, Essence shouldn't be forgotten. Festivals with substance and intellectual rigour align well with their needs. While Release can be more difficult to activate than some other segments, festivals positioned as the 'one thing to prioritise' offering a guaranteed good time will strike a chord with this cohort.

Festivals market – Culture Segment break down as real figure estimates



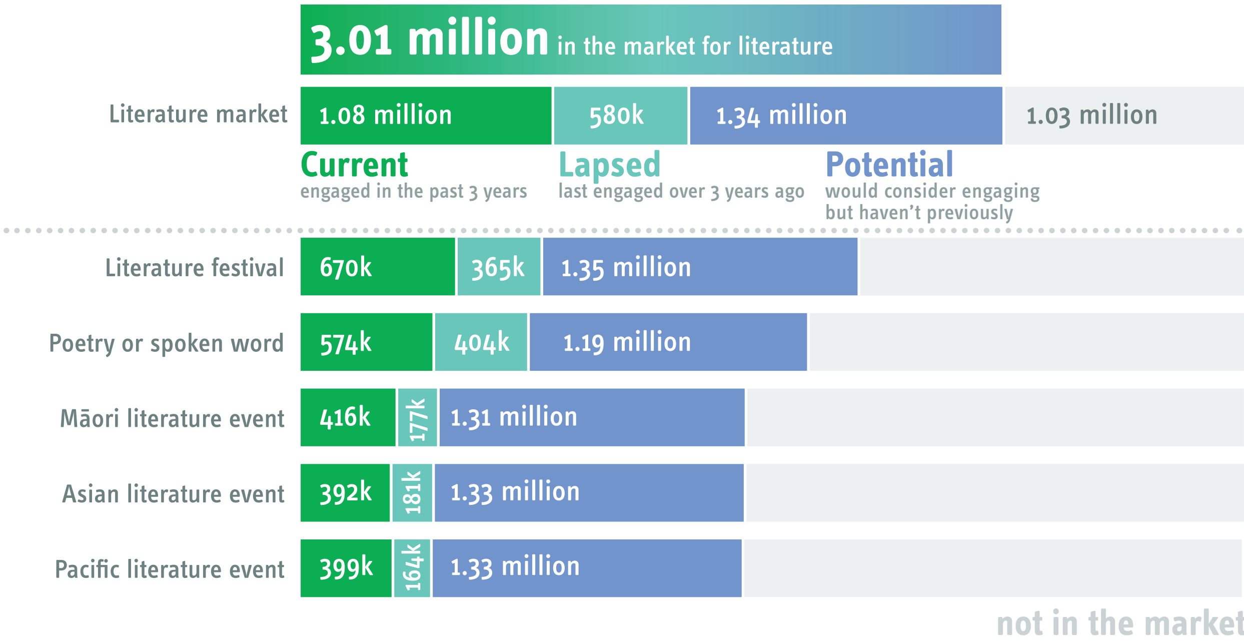
3.01 million in the market for literature

Of the 11 core artforms, **literature's market** is the **smallest**, with an estimated **3.01 million** New Zealanders having **attended a literature event before** or interested in doing so. However, its **current market share** has **developed** since 2020, the only artform to experience real growth, albeit from a smaller base.

A small but mighty current literature market

While the current market for literature is comparatively small, it is more unique than others in several ways. Recent literature event attendees are an active group. They've engaged with a wider variety of artforms than others and are the artform cohort most likely to have donated to the arts in the last 3 years. In addition, the current literature market is more likely than other current markets to anticipate doing more over the next 12 months. Along with Pacific arts, the current market for literature has the youngest age profile of the 11 artforms, is one of the most ethnically diverse, and has a larger proportion of disabled people in the mix.

Market for literature – and its sub-artforms – as real figure estimates



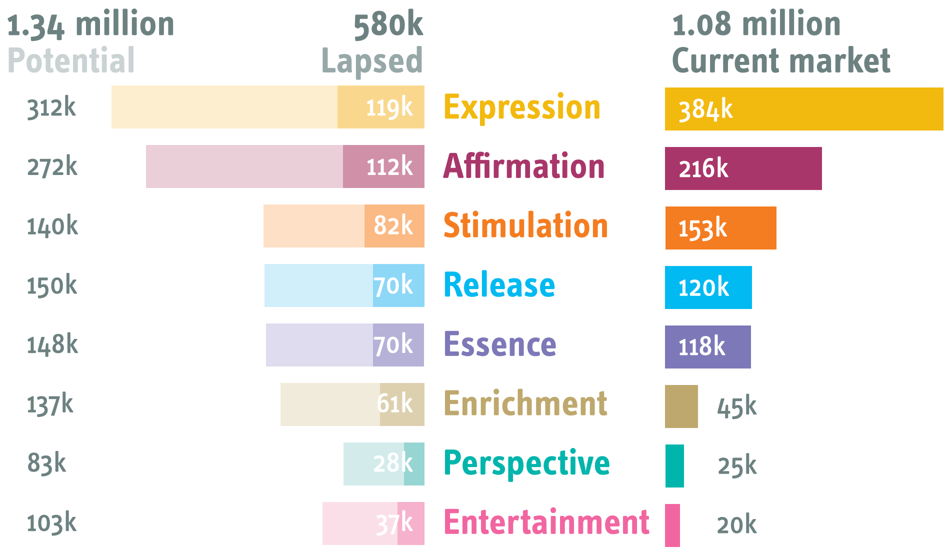
Conversation and communal experiences align Expression with literature events

More than 8 in 10 in the current literature market are drawn from the four most culturally active segments, with the prominence of Expression in this current market (36%) is only matched in Pacific arts. Literature events are likely to deliver connection, creativity and meaningful conversation – all in a communal setting – precisely the mix that Expression are looking for. Continue to activate this segment by a focus on these elements.

Differentiate offers for Essence, Stimulation and Affirmation

Looking beyond the importance of enthusiastic Expression, literature events have scope for differentiation by segment. Essence will be activated by intimate literary event settings, and to hear directly from leaders and experts. Meanwhile, Stimulation will be drawn to edgier events offering challenging perspectives. Affirmation is looking for self-improvement and to 'do the right thing', so promote learning outcomes to pique their interest and ensure they have all the information to plan.

Literature market – Culture Segment break down as real figure estimates



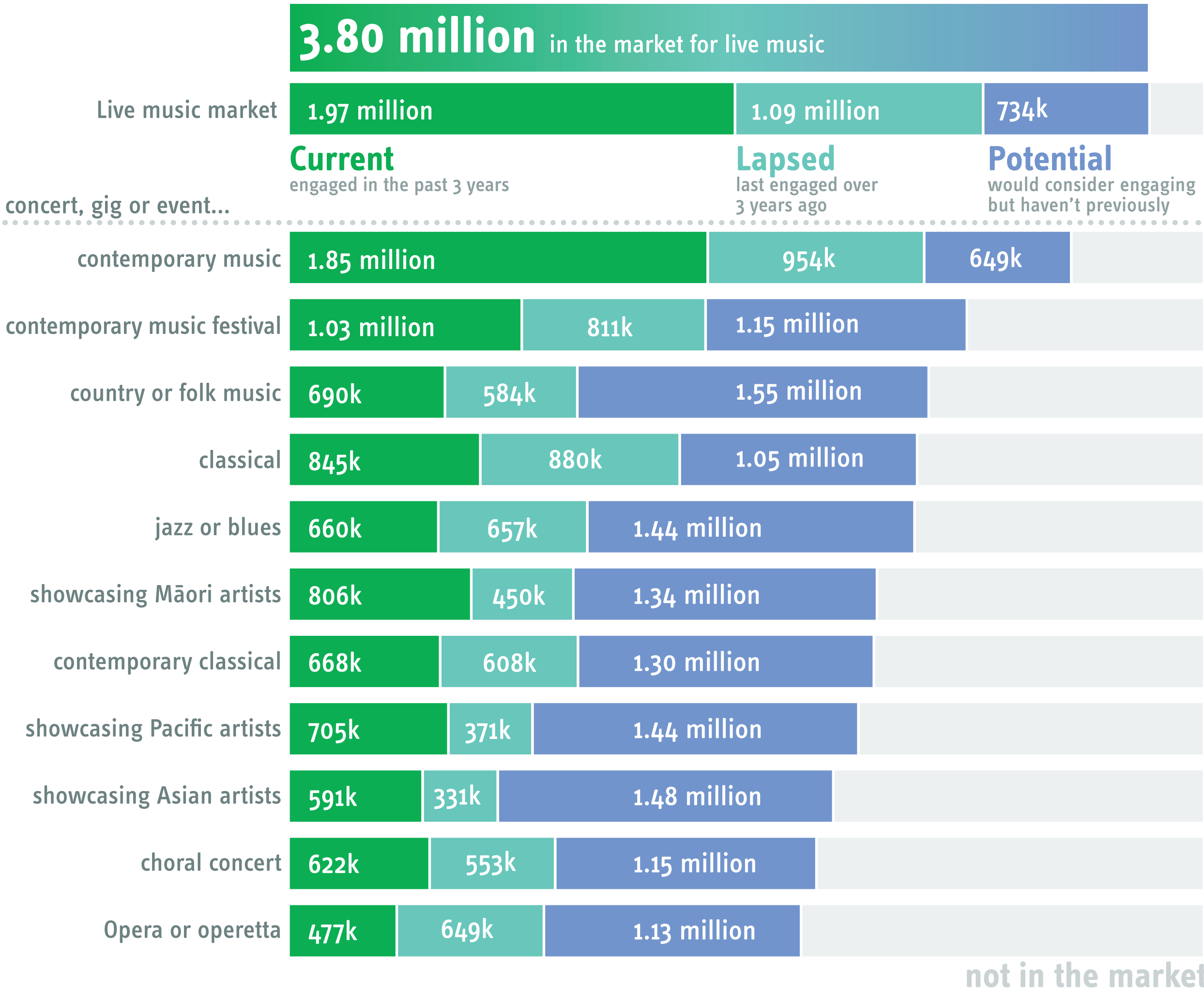
3.8 million in the market for live music

Live music is something **most** New Zealanders **are open to**. However, this is most likely to be **contemporary music**, the other **sub-artforms** have a **smaller** current market **share** and more resistance.

Recent concert goers are higher income earners

Those who have been to a live music event in the last 3 years are the least likely of all current artform markets to live in a household with children, and while the proportion of disabled people in this cohort matches the market average, it is lower than most other current markets. Additionally, the current live music market draws more heavily on higher income earners than most other artforms.

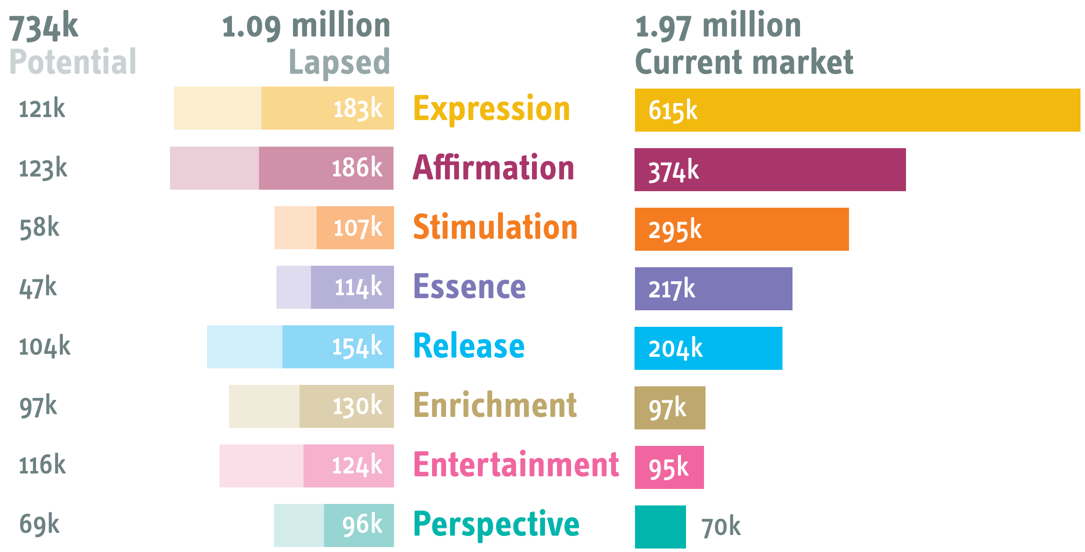
Market for live music – and its sub-artforms – as real figure estimates



High-energy, social and sensory music events align with Stimulation

Expression is again dominant in live music's current market but Stimulation is also over-represented. While enthusiastic Expression is always in the mix, live music's variation and continual development make it attractive to Stimulation, particularly if an event provides the opportunity for social cultural consumption. Stimulation crave high-energy, sensory-rich experiences that feel exciting and new. They're motivated by novelty, variety and the thrill of the moment, so the dynamic atmosphere and immediate emotional hit of a live gig are the elements likely to activate them.

Live music market – Culture Segment break down as real figure estimates



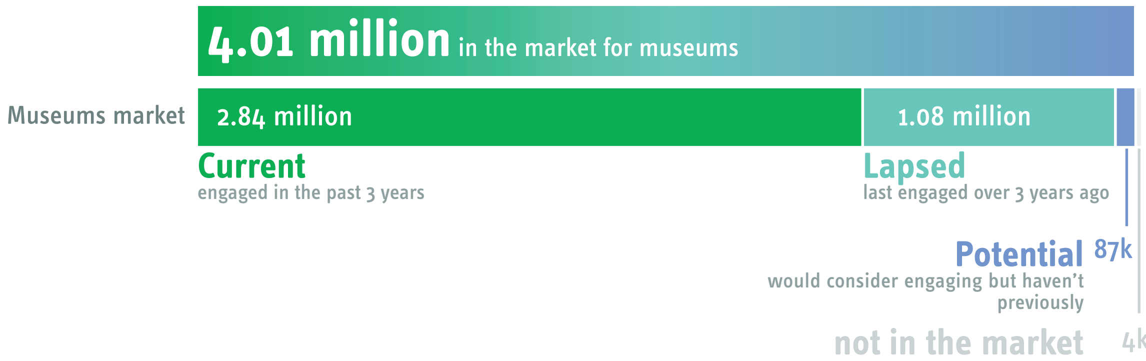
4.01 million in the market for museums

Museums are a relatively mainstream pursuit, with **near-universal appeal** and in 2025 an estimated **2.84 million** New Zealanders report having **visited** a museum in the **past three years**. With such a large proportion of the market having attended recently, the current market **profile doesn't differ** much from average. However, the proportion identifying as **disabled** people is the lowest of the 11 artforms.

A sizable lapsed market for museums to activate

More than a million New Zealand adults have been to a museum before, but not in the last three years – a sizable lapsed market needing a reason to return. This cohort has chosen to visit a museum before, but to activate their return they need to understand what makes a particular offer unique and what specific benefits it will deliver them.

Market for museums – and its sub-artforms – as real figure estimates



Retain Expression with human stories and communal experiences

Expression values cultural experiences where they can engage emotionally with human stories, history and creativity, and where ideas can be explored in a social or communal context, a key reason for their museum alignment. Museums that foster dialogue, invite participation and reflect diverse perspectives will fulfil Expression needs best.

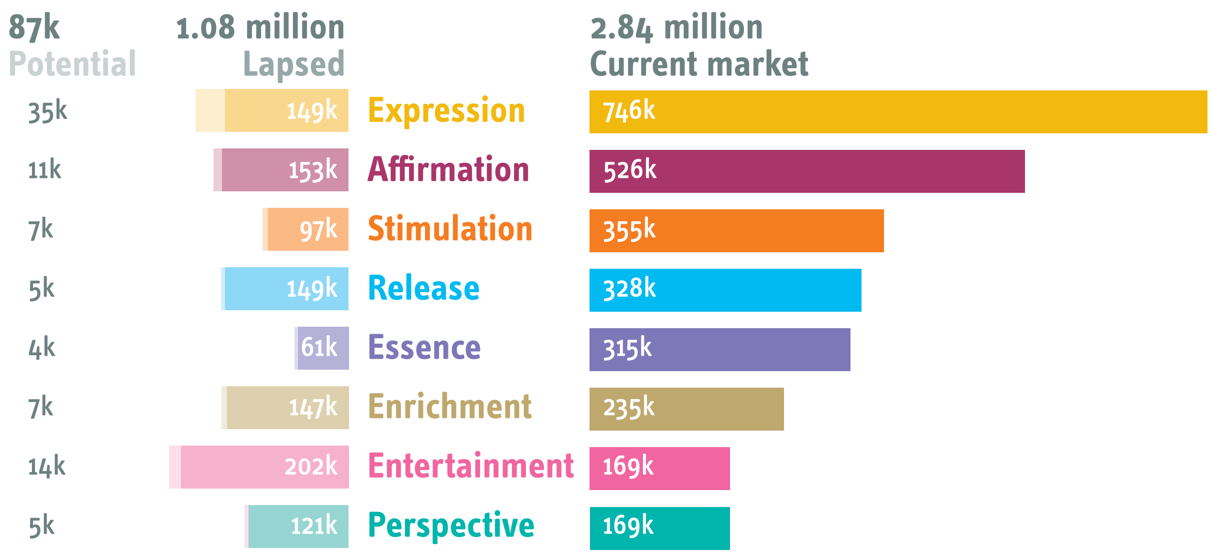
Remind Affirmation that you offer fun learning for all

Affirmation seeks reassurance, familiarity and a sense of belonging, which museums offer through trusted narratives, recognisable collections and accessible interpretation. Museums providing structured learning experiences, relatable storytelling and comfort align best with Affirmation needs.

Reactivate a range of segments by focusing on what matters

While most return-on-investment will come from a focus on the most culturally active segments, emphasising learning could convince Enrichment to re-engage. A deep dive into specialised topics may activate Perspective, and highlighting 'fun' could expand your appeal to Entertainment.

Museums market – Culture Segment break down as real figure estimates



3.48 million in the market for ngā toi Māori

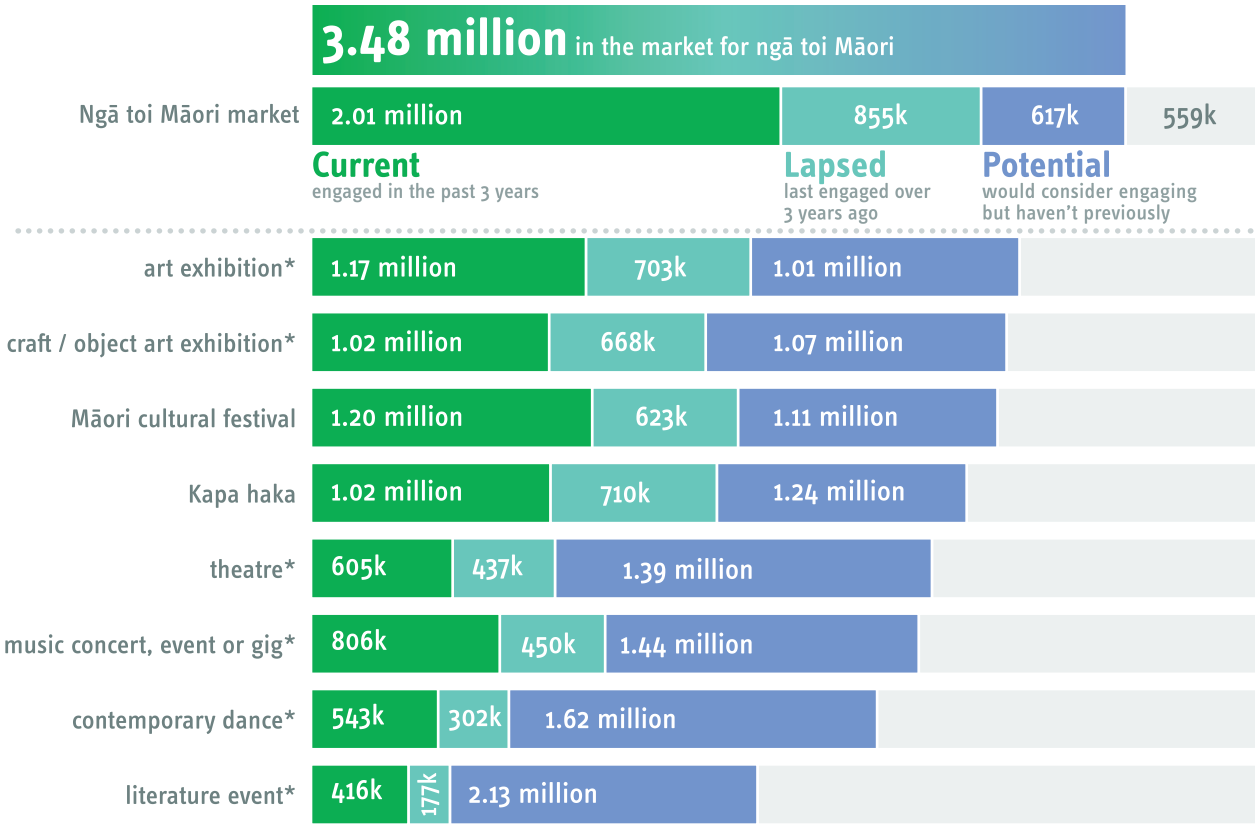
Half the market, an estimated 2.01 million New Zealand adults, have **engaged** with ngā toi Māori **in the past three years**. An estimated **1.47 million more** have engaged before but not recently, or **would consider** attending something of this nature, but have yet to do so.

A young, diverse current market

Ngā toi Māori encompasses a rich variety of creative expression, from art and craft exhibitions to kapa haka, theatre, music, dance, and literature.

The current market is diverse, younger than average, and has one of the strongest female skews of the 11 core artforms. Māori and Pacific audiences are particularly well represented, and there is also a higher proportion of disabled people compared to the culture market overall.

Market for ngā toi Māori – and its sub-artforms – as real figure estimates



*events showcasing Māori artists / performers, stories or production team

Expression aligns with ngā toi Māori authenticity

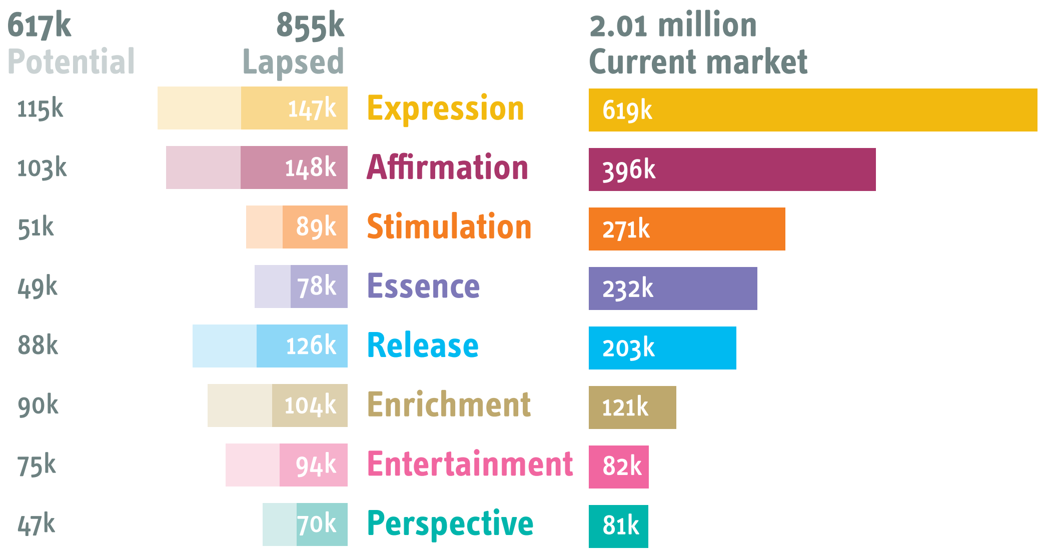
Expression is the most numerous segment in the current market, drawn to the authenticity, narrative depth, and cultural richness that ngā toi Māori offers. They value diverse voices and shared experiences, making them naturally receptive to Māori-led creativity.

Affirmation are looking to expand their cultural knowledge

Affirmation is also prominent across current, lapsed, and potential ngā toi Māori markets, motivated by self-improvement and openness to new perspectives, but requiring reassurance and confidence to try something new. Essence audiences see ngā toi Māori as an essential cultural experience, with deep personal and cultural alignment.

Activating and retaining these audiences means celebrating authenticity, facilitating emotional and communal connection, and clearly communicating the benefits of engagement – whether those benefits are creative inspiration, cultural pride, or meaningful learning.

Ngā toi Māori market – Culture Segment break down as real figure estimates



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3.32 million in the market for Pacific arts

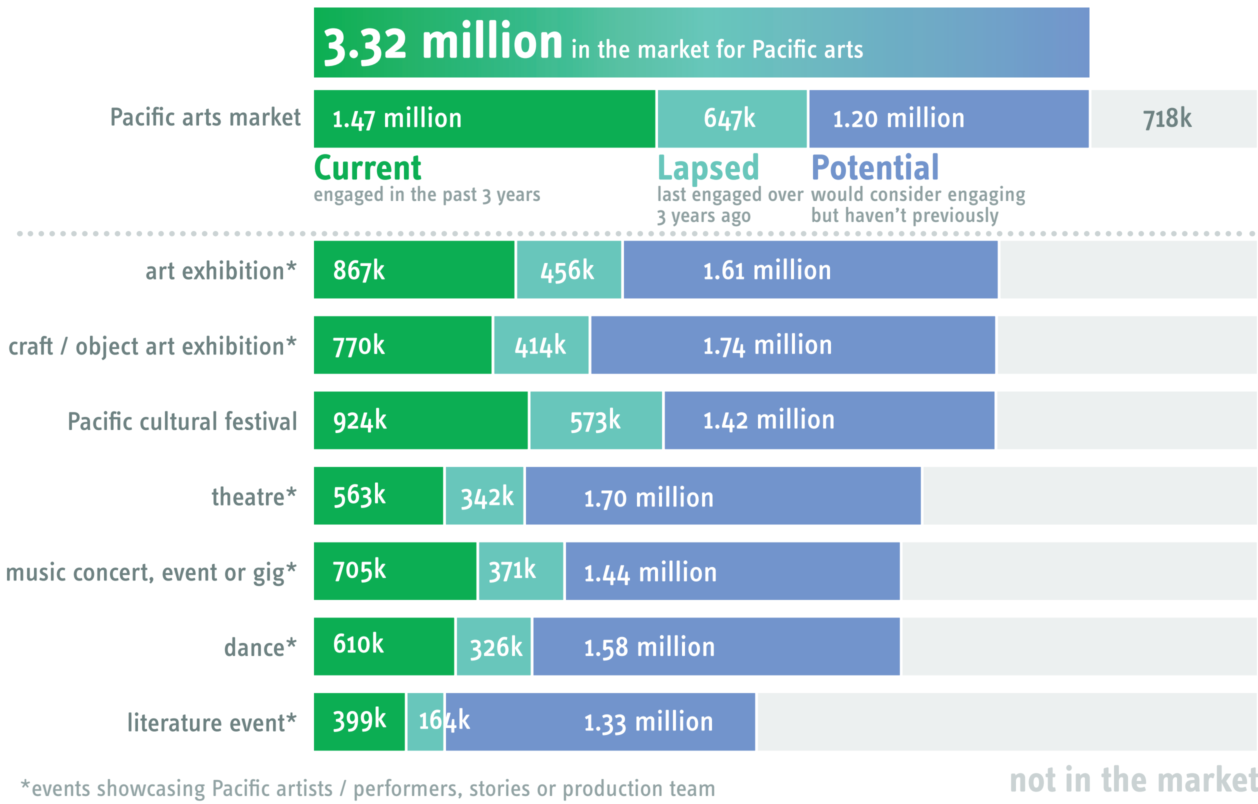
While **only literature has a smaller overall market** than **Pacific arts** in 2025, there is sizable **opportunity** for growth, with **most** New Zealanders **open to engaging**.

Current market skews towards Māori and Pacific audiences

Pacific arts has one of the youngest and most ethnically diverse current markets, strongly skewing towards Māori and Pacific audiences. It is also more likely than average to include family households and disabled people.

In terms of sub-artform engagement, Pacific cultural festivals have the largest current market.

Market for Pacific arts – and its sub-artforms – as real figure estimates



*events showcasing Pacific artists / performers, stories or production team

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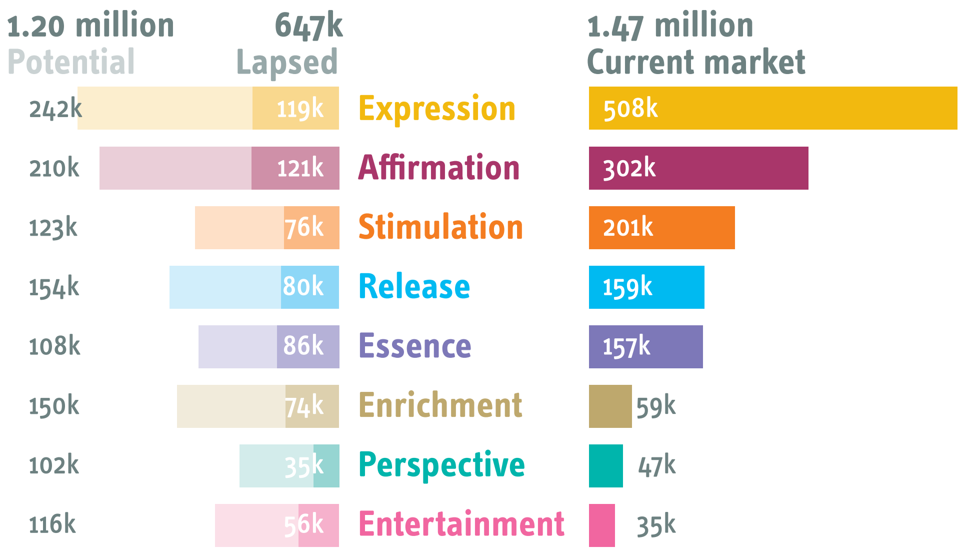
Arts Council of New Zealand Toi Aotearoa

Connection between creativity and community draws Expression to Pacific arts

Expression represents over a third of the Pacific arts' current market and is the most numerous segment across the lapsed and potential markets. Expression's prominence will be associated with its dominance among Pacific audiences (41%), alongside the values this segment holds. Expression is a segment that values creativity as a way of connecting with others and sees cultural engagement as something communal rather than solitary. Expression doesn't just value the personal enjoyment associated with engagement, but the connections it fosters between people, generations, and communities.

Pacific arts market – Culture Segment break down as real figure estimates



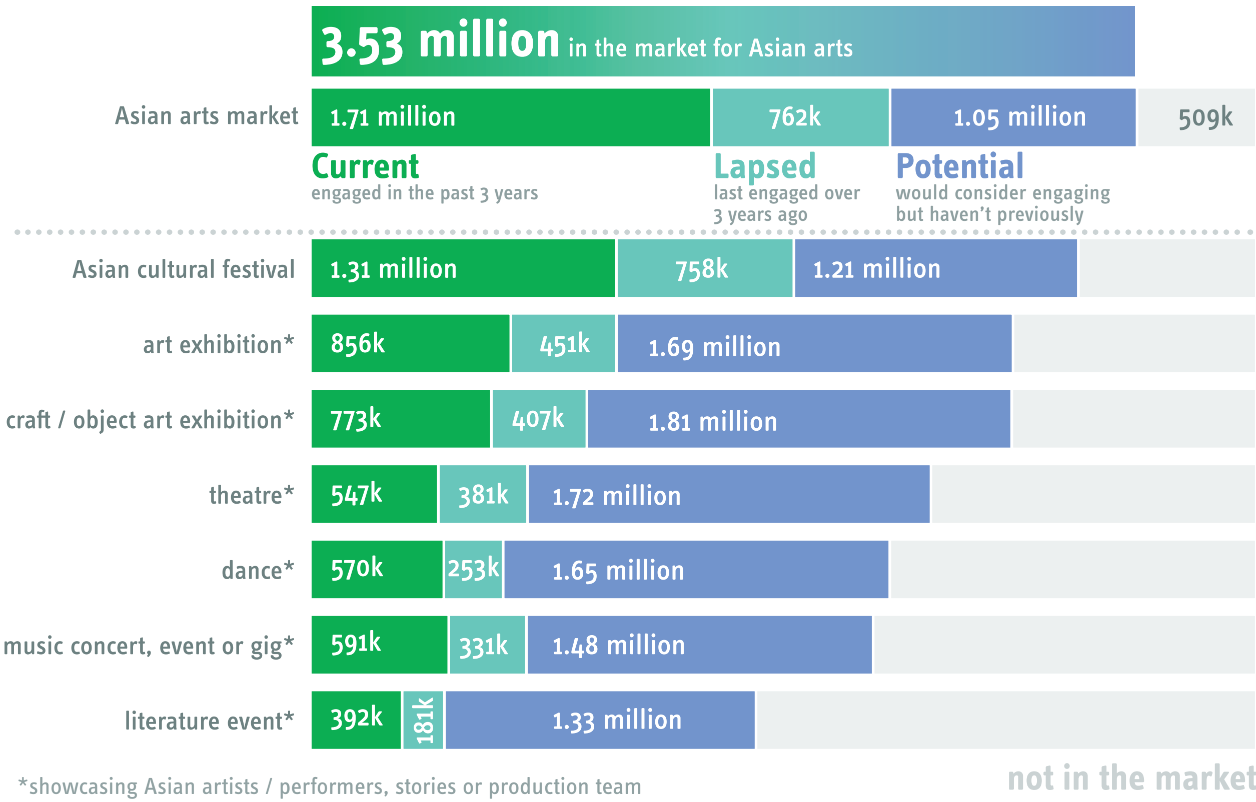
3.53 million in the market for Asian arts

An **estimated 1.71 million** New Zealanders have **engaged** with an **Asian arts** event or activity in the **past three years**, and there are **more to reactivate** or **persuade** – an estimated 1.82 million in the lapsed or potential markets.

Festivals are an entry point into Asian arts and culture

Current Asian arts audiences are young, diverse and more likely to live in family households than most other artform engagers. Current engagement is spread across a range of sub-artforms, with festivals being the most common entry point. The market profile suggests both breadth of interest and strong potential for growth, especially by converting lapsed and potential audiences.

Market for Asian arts – and its sub-artforms – as real figure estimates



*showcasing Asian artists / performers, stories or production team

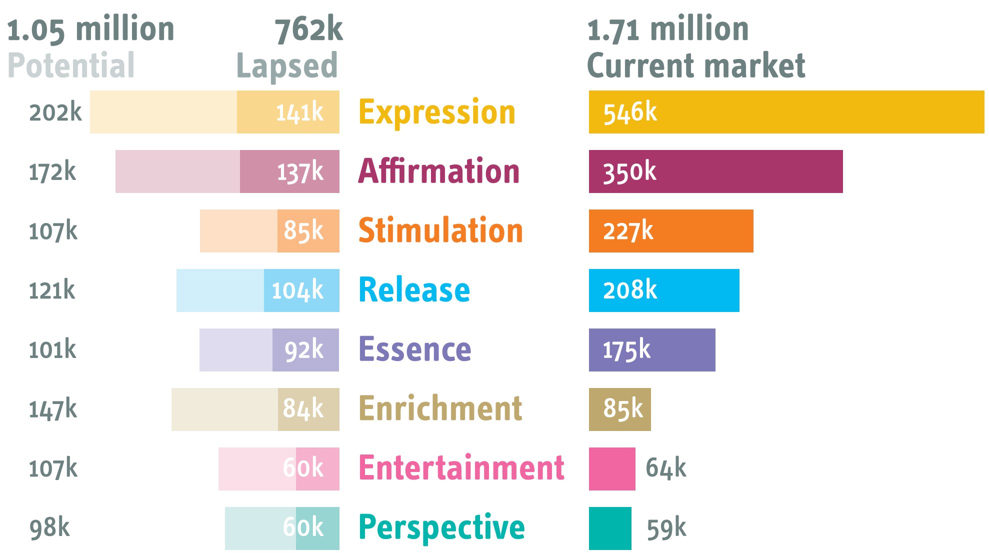
Stimulation seek out the vibrancy and variety often inherent in Asian arts events

Expression, Affirmation and Stimulation are all over-represented in the current market for Asian Arts. Expression brings eclectic tastes and openness to diverse perspectives. Affirmation seeks personal growth and learning, and responds to well-signposted, accessible entry points like Asian arts festivals. Meanwhile, adventerous Stimulation is drawn to the vibrancy, variety and risk-taking.

Prioritise culturally active segments to drive growth

Retention and growth can be driven by presenting Asian arts as a dynamic, contemporary expression of culture while also honouring tradition. Social, participatory formats will appeal across these key segments, while playful or unusual creative approaches will help activate Stimulation.

Asian arts market – Culture Segment break down as real figure estimates



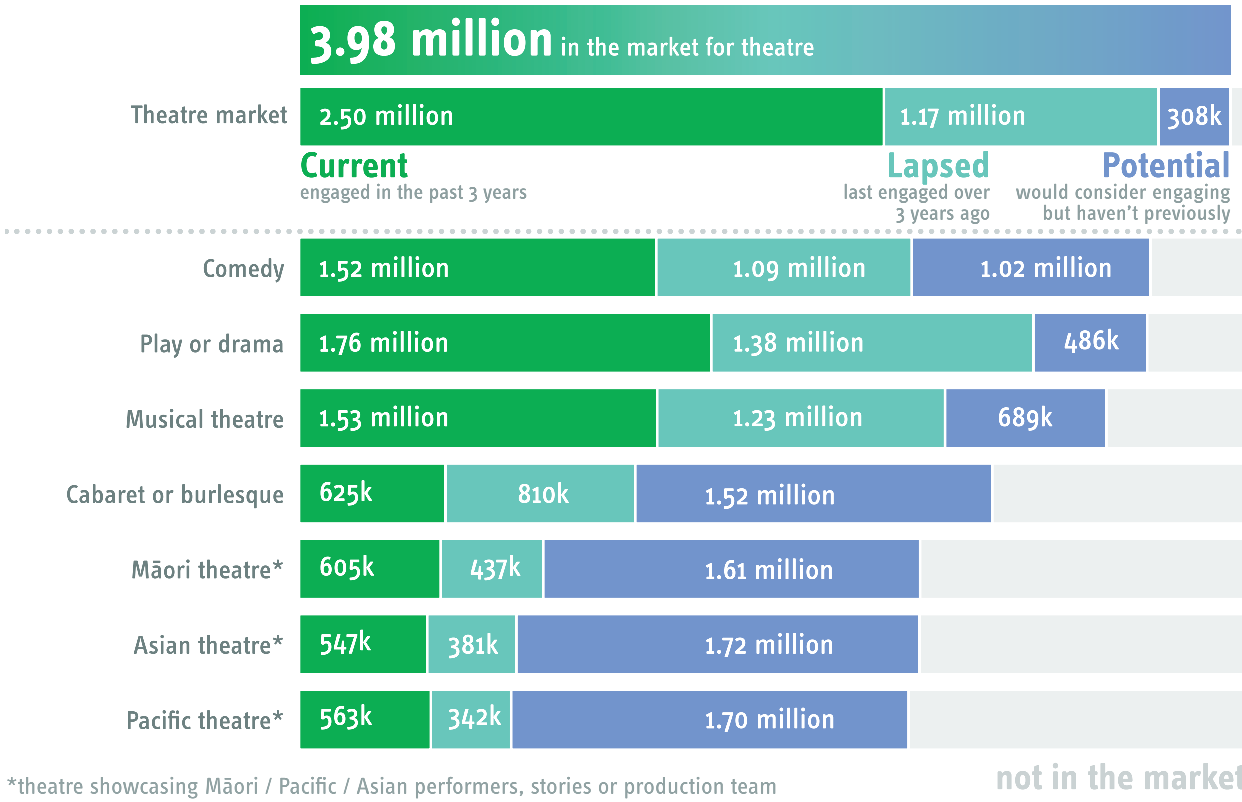
3.98 million in the market for theatre

Theatre enjoys a sizable market overall, with an estimated 3.67 million adults having engaged at some point in the past. However, **like** with **other performing arts**, there is a **propensity** for the market to have been before, but not for more than three years. Of the 11 core artforms, theatre has the **largest lapsed market**.

Theatre is attracting an older, more affluent audience

The current theatre market skews older, less ethnically diverse, and more affluent than average. While mainstream formats like plays, musicals and comedy have the largest market share, there is strong potential to grow engagement with theatre showcasing Māori, Pacific or Asian performers, stories or production teams.

Market for theatre – and its sub-artforms – as real figure estimates



*theatre showcasing Māori / Pacific / Asian performers, stories or production team

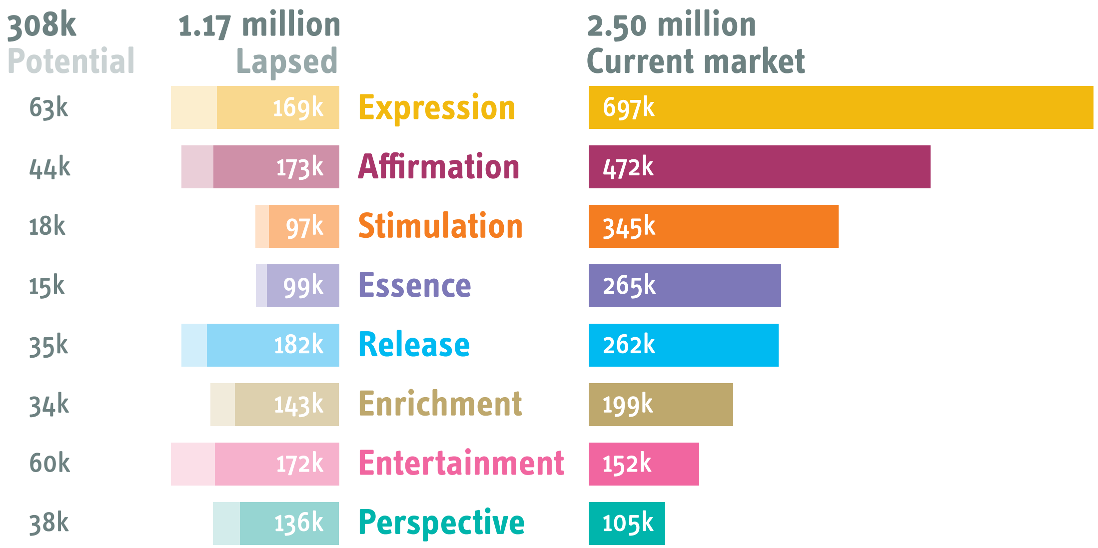
Different segments seek different theatre experiences...

Expression, Affirmation, and Stimulation are the core segments in the current theatre market. Expression is drawn to personal narratives, empathic character journeys and the sense of belonging in an audience community, while Affirmation values easy-to-enjoy, positive experiences that feel familiar and accessible. Stimulation seeks intrigue, spectacle, and visual flair, relishing moments of surprise. Essence, while smaller in number, responds to literary quality and historical or critical context.

... so differentiate offers to resonate

The diversity of theatre genres means that companies have the opportunity to develop and position a range of offers targeting distinct segment needs. Expression seeks personal narrative and empathises deeply with characters; they enjoy connecting with performers and playwrights and, above all, want to be part of an audience community. Stimulation seeks real drama through intrigue, spectacle and surprise and appreciates the visual presentation of the work. Essence is more literary and able to place each work in a critical and historical context, and Affirmation wants something easy to enjoy.

Theatre market – Culture Segment break down as real figure estimates



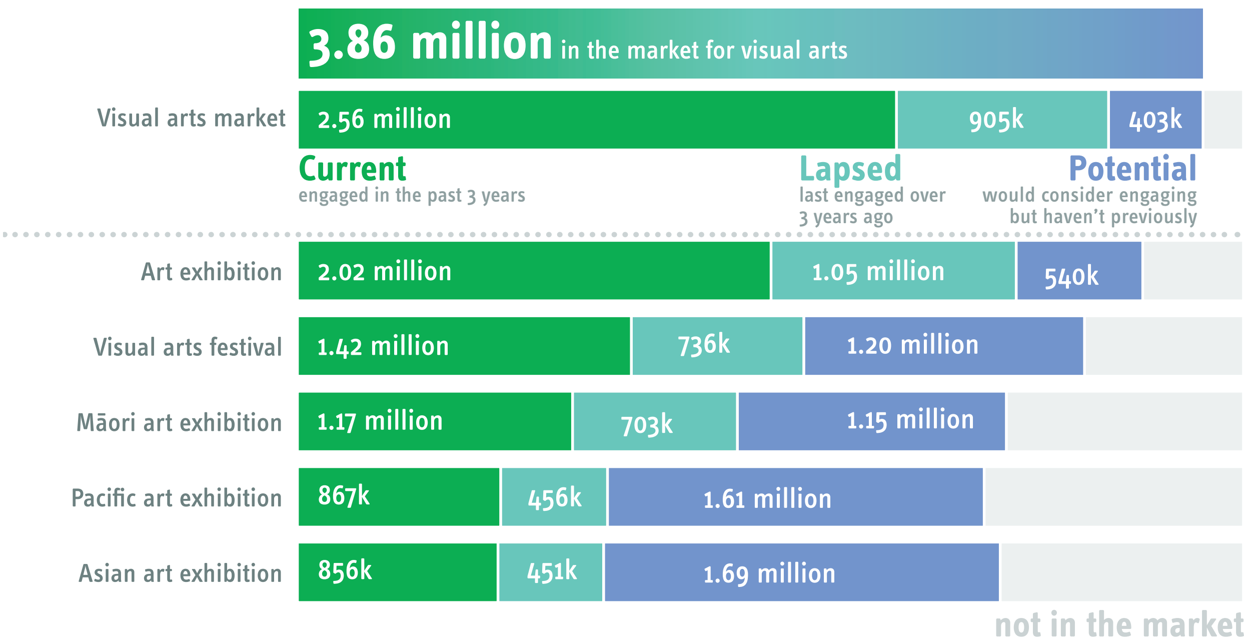
3.86 million in the market for visual arts

The **visual arts** have near **universal appeal**, with one of the **largest** artform markets. An estimated 3.46 million New Zealanders have been to a visual art exhibition before, although for many (**905k, lapsed**) this hasn't been in the last 3 years.

Introduce audiences to new artforms

While mainstream art exhibitions attract the most engagement, there is significant scope to grow audiences for Māori, Pacific, and Asian exhibitions by leveraging the interest of those already active in the market.

Market for visual arts – and its sub-artforms – as real figure estimates

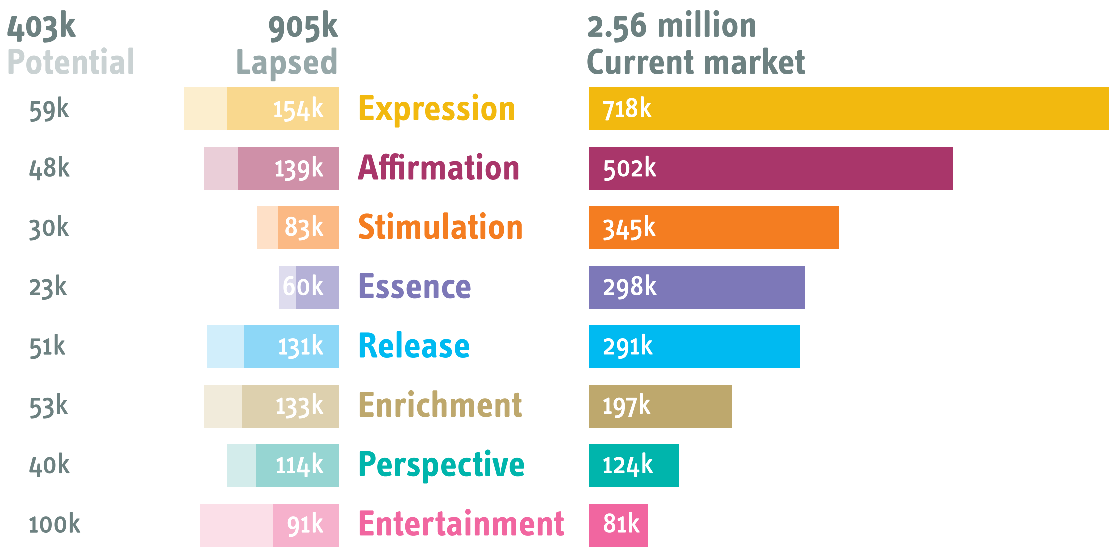


Expression, Stimulation and Essence are over represented in the current market

Expression, Stimulation and Essence are the most active visual arts goers, with other segments like Enrichment and Release, relatively open to this artform. Expression sees visual arts as a way to connect with different perspectives and cultures while, Essence treats galleries as spaces for reflection and spiritual enrichment. Stimulation seeks fresh perspectives and bold ideas, responding best to innovation and spectacle when backed by substance.

In terms of volume, Affirmation are more numerous than all but Expression. However, as a more cautious and less confident segment, they are more likely to be drawn to arts offers that feel relatable and accessible.

Visual arts market – Culture Segment break down as real figure estimates



Appendix

Appendix 1: Culture Segment pen portraits

Getting to the heart of why people engage

Culture Segments is defined by people's attitudes and uses deep, sophisticated, meaningful insight into audiences and potential audiences for arts and culture. The system is values-based. The segments have distinct mindsets, motivations and approaches to culture – so you can craft messages that will resonate, targeting them more accurately and effectively. Rather than just describing a person, for example, in demographic terms, Culture Segments is a tool you can use to influence engagement.

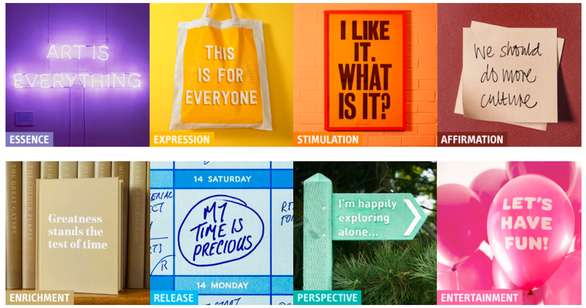
Using Culture Segments to understand how and why you connect with current audiences helps understand routes to reaching others. It includes current attenders and those you've yet to reach and considers everyone in the culture market, across all demographics and behaviours.

A system designed for practical application

Culture Segments helps put audiences at the heart of the conversation. It provides a common language for different departments to think about audiences holistically – from marketing through to curating and front-of-house. It therefore drives effective audience development and reduces silo working.

Culture Segments is easily adopted: use these pen portraits as a daily ready-reckoner to always have your priority audiences in mind, tag your database records affordably, brief your media buyer, optimise your copy. Through embedding the system, you can analyse your brand relationships, survey and profile your audience, identify opportunities in the wider market, identify membership potential, optimise benefits to their needs, grow altruism, understand spending habits and potential, test interpretation and increase engagement, review your digital impacts, increase retail income and more.

Culture Segments



The following pages are detailed pen portraits for each of the eight Culture Segments. These provide key information to help you really get to know each segment, and use the system for strategic audience development activity.

Discover your segment here:
mhminsight.com/segmentme

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Essence are in pursuit of self actualisation

Who are they?

Attitudes and priorities

- exploration
- learning • arts and culture
- peak experiences

As **core cultural attenders** Essence considers the arts **essential** to their very being. They’re **independent**, **discerning** and **confident**. As **cultural connoisseurs**, **high-quality** is their primary concern.

380k
adults in Aotearoa New Zealand

Essence is the segment most likely to say...

‘I’ll be the judge of that’

... and least likely to say...

‘What would you recommend?’

How do you reach them?

As arts and culture is at the very heart of what they do, they're highly proactive in keeping themselves up to date about cultural events. That being said, this doesn't mean they turn to marketing for recommendations on what to choose. They almost make a virtue out of not being influenced. They might even quite enjoy not liking something everybody else likes.

Key messages:

The programming team has credentials

It's seriously high quality

It has depth, substance and intellectual rigour

Not mainstream entertainment

How do you build relationships?

Essence aren't natural joiners in that they don't feel a need to be communally engaged. If they do join a membership program, they will do so to access the benefits the program offers, such as priority booking or early seat selection. It may be because of this, that Essence are more likely than average to be an active member of a cultural organisation.

13% (11%)
are an active member / subscriber or friend of an arts or cultural organisation

18% (16%)
have donated money to an arts or cultural organisation in the past 3 years

Essence is one of the segments most likely to have ever donated, reflecting the importance of arts and culture in their lives.

41% (36%)
find out what's on via social media

Of those who do...

Facebook	Instagram	YouTube	TikTok	Spotify
84%	64%	40%	29%	13%

Entice them with:

Quality and sophistication

Acknowledgment of their discerning taste

Opportunities for development and challenge

Culture market average is shown in brackets

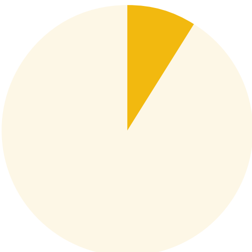
Expression seeking community + connection

Who are they?

Attitudes and priorities

- living life to the full
- community and family
- arts, crafts, culture, creativity • nature

Creative **Expression** see culture as a way of **broadening horizons** and expressing themselves. They are **community-minded** and like to be sure everyone can enjoy the benefits of arts and culture. They are the **'people people'**.



934k
adults in Aotearoa New Zealand

Expression is the segment most likely to say...

'Art is for everyone'

... and least likely to say...

'What's in it for me?'

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How do you reach them?

Expression appreciates seeing lots of different potential access points because it allows many people to engage and shows an organisation to be open. It makes them very happy to see everybody together being part of something. Marketing needs to actively demonstrate a desire to welcome the widest possible audience.

Key messages:

It will be immersive, emotional escapism

Everyone will enjoy a shared experience

It will be something to discuss

You'll appreciate the artistic expression – and maybe have the opportunity to express yourself

How do you build relationships?

Rather than joining for tangible benefits, Expression see membership as a way to support an organisation they love, so will respond best to messages about how their membership is helping the organisation. They'll be even more willing to join if there are social events where they can meet like-minded people.

Expression are natural networkers, and along with Essence are the segment most likely to be a member of an arts, culture or heritage organisation.

21% (11%)
are an active member / subscriber or friend of an arts or cultural organisation

28% (16%)
have donated money to an arts or cultural organisation in the past 3 years

Expression is naturally hard-wired to support arts organisations and are the segment most likely to have donated in the past.

43% (36%)
find out what's on via social media

Of those who do...

82% Facebook
65% Instagram
55% YouTube
43% TikTok
24% Spotify

Entice them with:

Human stories

Opportunities to join in

Chances to meet like-minded people

Culture market average is shown in brackets

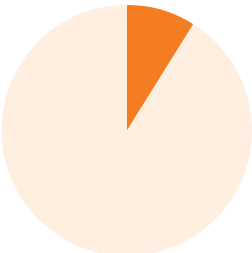
Stimulation are all about ‘big ideas’

Who are they?

Attitudes and priorities

- enjoying life
- going out • taking risks
- contemporary culture
- live music • food and drink

Stimulation are **highly active** and love new experiences. They’re after the **big ideas** and out of the ordinary experiences. They like to make their own discoveries and want to be **ahead of the curve**. They are the **innovators**.



461k
adults in Aotearoa New Zealand

Stimulation is the segment most likely to say...

‘What’s the big idea’

... and least likely to say...

‘Are you sure it’s safe?’

creative nz Arts Council of New Zealand Toi Aotearoa

How do you reach them?

Highly visual with a preference for short, punchy content, Stimulation want to be the first to make discoveries about arts and culture. Marketing needs to highlight the hook or the twist; the thing that makes it incredible and different and alters their view. But no spoilers please – don't give too much away. Intrigue them and spark their interest, but the 'reveal' should happen during the experience itself.

Stimulation enjoy marketing as an artform in its own right. If it's clever, or beautiful, or visual, or tech-y, or gadget-y, they'll rave about it and share it with friends. But if it misses the mark or seems behind the times, they'll also share it with everyone – but not in a good way.

Key messages:

New, unusual, different

Like nothing you've seen before

Best kept secret – see it before everyone catches on

It offers new perspectives and shows you're in the know

How do you build relationships?

While Stimulation are as likely as average to be an active member of a cultural organisation, loyalty does not come naturally to this segment. Membership that doubles as a pass into new and extraordinary experiences may increase the loyalty of an otherwise promiscuous segment.

Stimulation are as likely as average to have volunteered for arts organisations but significantly more likely to have donated in the past.

13% (11%)
are an active member / subscriber or friend of an arts or cultural organisation

18% (16%)
have donated money to an arts or cultural organisation in the past 3 years

Stimulation is one of the segments most likely to have donated in the past three years. Only Expression are more likely to be a current donor.

41% (36%)
find out what's on via social media

Of those who do...

87%	58%	39%	33%	24%
Facebook	Instagram	YouTube	TikTok	Spotify

Entice them with:

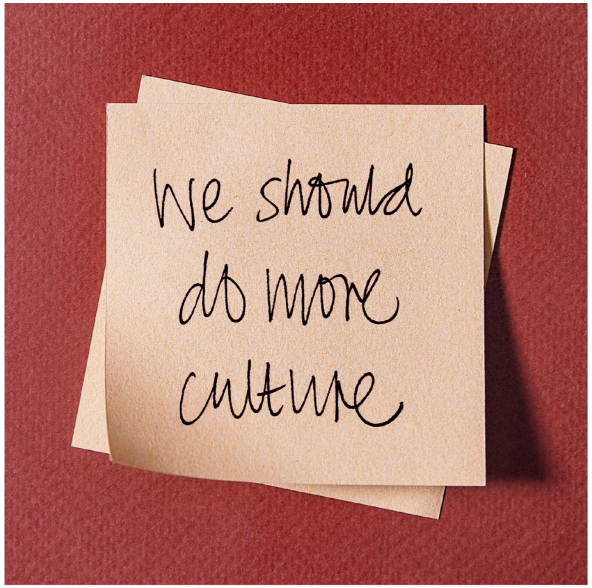
Events with a quirky hook or theme

Promoting social elements

Highlighting the unexpected or new perspectives

Culture market average is shown in brackets

Conscientious Affirmation do the right thing



Who are they?

Attitudes and priorities

• personal development • doing the right thing • good value • learning and enjoyment

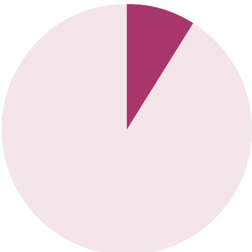
Affirmation believes that **culture** is an important and **worthwhile activity**, and makes their lives better. They make considered, **measured choices** and are adventurous in the arts but need **assurance** they've done the right thing. **Nothing happens by accident**.

Affirmation is the segment most likely to say...

'It's on my bucket list'

... and least likely to say...

'C'mon – let's just take a punt!'



690k
adults in Aotearoa New Zealand

How do you reach them?

Affirmation makes very well-researched decisions. Ultimately, they look for reinforcement that they're choosing the right thing. To do that, they need full and comprehensive details. They need plenty of endorsement and supporting evidence that a show or event is worth their time. Word-of-mouth from a trusted friend would be the ultimate. However, online user reviews, such as TripAdvisor or similar sources, will assure Affirmation that it will be worth their time.

Key messages:

It will be worth your while – good value for money

It has good reviews

You'll get something out of it

It is modern and relevant (but not 'out there')

How do you build relationships?

Membership may provide Affirmation with the opportunity to get even more value. They will initially join to gain personal benefits, but as a segment looking for ways to feel good about themselves, a membership fosters a sense of affiliation and helps them feel they are personally helping organisations they care about.

11% (11%)

are an active member / subscriber or friend of an arts or cultural organisation

16% (16%)

have donated money to an arts or cultural organisation in the past 3 years

Affirmation is as open as the market average to making a one-off donation.

42% (36%)

find out what's on via social media

Of those who do...

85%	58%	43%	31%	21%
Facebook	Instagram	YouTube	TikTok	Spotify

Entice them with:

Wraparound offers to plan their whole experience

Early notice for events

Opportunities to learn and grow

Culture market average is shown in brackets

creative nz Arts Council of New Zealand Toi Aotearoa

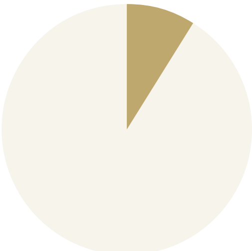
Enrichment – though the lens of the past

Who are they?

Attitudes and priorities

- understanding the past
- home life • lifelong learning
- arts & craft

Enrichment tend to be lovers of history with a **respect for the past**. They have **established tastes** and tend to veer to arts and culture that have stood the test of time and command respect. **Seeing the present through the lens of the past**



389k
adults in Aotearoa New Zealand

Enrichment is the segment most likely to say...

‘It’s stood the test of time’

... and least likely to say...

‘So much better than the original’

How do you reach them?

Enrichment is inherently suspicious of gimmicks or anything that appears to be flimsy, lightweight or capricious. They don't like the idea that marketing will trick them or manipulate them into buying something. Instead, they look for plain English information that supports the quality of the product. This segment are also keen planners and will want thorough information to plan their experience.

Key messages:

There are familiar or classic themes or features

It offers good value for money

It will evoke a sense of nostalgia

It will be well done and enjoyable

How do you build relationships?

Enrichment are not natural supporters and tend to be less likely to have donated or volunteered in the past or be willing to do so.

Enrichment are not looking to broaden their horizons and will remain loyal to the organisations that feel most relevant to them. Membership is a route to closer engagement by providing increased value – either monetary or through additional, rewarding expert opinion and information.

5% (11%)
are an active member / subscriber or friend of an arts or cultural organisation

7% (16%)
have donated money to an arts or cultural organisation in the past 3 years

Enrichment is one of the segments least likely to have made donation to an arts or cultural organisation and only and Entertainment are less open to doing so.

28% (36%)
find out what's on via social media

Of those who do...

89%	39%	34%	16%	15%
Facebook	Instagram	YouTube	TikTok	Spotify

Entice them with:

Nostalgia

Highlighting the traditional and established

Providing good value for money

Culture market average is shown in brackets

Busy Release seek escape from stress

Who are they?

Attitudes and priorities

- work • home and family
- relaxation
- juggling commitments

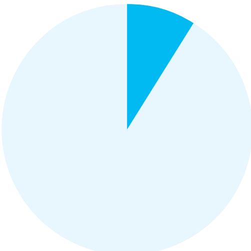
The Release segment is looking for **escape from the stresses** of everyday life. For some, these conflicts may be a reality, but often, being in the Release segment is more a **state of mind**. They **'always feel too busy'**.

Release is the segment most likely to say...

'We should do this more often'

... and least likely to say...

'Don't worry so much – there's plenty of time'



486k
adults in Aotearoa New Zealand

How do you reach them?

For Release, organisations should imagine they have one shot at capturing their attention. Provide all the necessary information on a silver platter, with multiple reasons to go and a hard stop call to action. They want to do things but may have been putting it off for months, so if it is only happening this week, make sure they know.

Key messages:

It will be relaxing

If you do only one thing this month, it should be this

The venue has everything you need

It will tick all the boxes for a fun time out

How do you build relationships?

Release tend not to be forthcoming in support for arts and cultural institutions and are unlikely to find time to make the most of cost-saving benefits of membership. For Release, it's more about efficient transactions than becoming a close ally to the cause.

Release may not be the first port of call to build a supporter base, however, schemes that reward return at the same time as providing concierge-style services could help keep you top of mind and decrease the perceived obstacles of planning and arranging a visit.

7% (11%)

are an active member / subscriber or friend of an arts or cultural organisation

14% (16%)

have donated money to an arts or cultural organisation in the past 3 years

Release is one of the segments least likely to have made donation to an arts or cultural organisation.

29% (36%)

find out what's on via social media

Of those who do...

77%	58%	40%	27%	13%
Facebook	Instagram	YouTube	TikTok	Spotify

Entice them with:

Packaging experiences on a plate – easy to consume

Endorsements through well-recognised brands

Special offers and discounts

Culture market average is shown in brackets

creative nz
Arts Council of New Zealand Toi Aotearoa

Perspective are happy in their bubble

Who are they?

Attitudes and priorities

- reading • learning
- personal space
- the outdoors

Perspective is **very focused** on a **limited number** of interests and has a low appetite for expanding this repertoire. They're highly **self-sufficient** and are driven by their desire to learn about their key interests.

301k
adults in Aotearoa New Zealand

Perspective is the segment most likely to say...

'Really, I'm fine doing my own thing'

... and least likely to say...

'Let's go out and do something totally different'

creative nz
Arts Council of New Zealand Toi Aotearoa

How do you reach them?

When it comes to marketing, Perspective are the one segment that have no fear of missing out. All the other segments think there's probably something happening somewhere that they've not heard of. Perspective think they've already found it, so they're not looking.

Key messages:

It will be personally rewarding

It's nice to do something special occasionally

It will be interesting, engaging and spark your imagination

It will help you dive deeper into your interests

How do you build relationships?

Perspective tends to be self-centred and not ultimately interested in having a relationship with you. Remote is fine. They are interested in what artists do, but they don't feel a need to meet them.

Perspective are not especially interested in developing a relationship with arts organisations, and only Entertainment are less likely to be an active member of an arts, cultural or heritage organisation, to have volunteered or donated to the arts in the past three years.

4% (11%)
are an active member / subscriber or friend of an arts or cultural organisation

8% (16%)
have donated money to an arts or cultural organisation in the past 3 years

Perspective is one of the segments least likely to have ever made a donation to an arts or cultural organisation and among the least open to doing so.

24% (36%)
find out what's on via social media

Of those who do...

89%	46%	40%	25%	16%
Facebook	Instagram	YouTube	TikTok	Spotify

Entice them with:

Respect for their individuality and encourage exploration

Tapping into existing interests

Culture market average is shown in brackets

creative nz
Arts Council of New Zealand Toi Aotearoa

Fun loving Entertainment

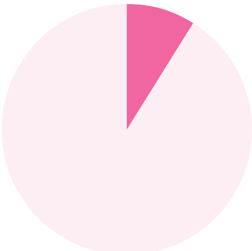
Who are they?

Attitudes and priorities

- home and pub • celebrity
- sports • thrill and spectacle
- close to home

Entertainment tends to see arts and culture as very much on the **periphery of their lives**. Leisure time is **for fun**, and this segment is looking for **entertainment** and escapism.

Enjoys mainstream entertainment



397k
adults in Aotearoa New Zealand

Entertainment is the segment most likely to say...

'Go on – entertain me'

... and least likely to say...

'Let's find something new – with plenty of food for thought'

How do you reach them?

Entertainment prefers to stick with the tried and tested, and they view popularity and celebrity casting an endorsement of quality. Therefore, they only try things which have established popular currency and have little interest in engaging with what could be considered specialist or niche.

Key messages:

It's popular

There's a celebrity in it

It will be fun and enjoyable for everyone

It's a great night out and an 'easy sell' to others

How do you build relationships?

Entertainment are not natural supporters and have comparatively low propensity to donate or volunteer.

Entertainment very rarely invest in a supportive way, and therefore should not be targeted for membership. They don't see culture as contributing to the community or society at large. Benefits-driven transactional membership schemes aren't going to work either – purely because they wouldn't make much use of it so it's unlikely to feel relevant or worth it.

2% (11%)
are an active member / subscriber or friend of an arts or cultural organisation

4% (16%)
have donated money to an arts or cultural organisation in the past 3 years

Entertainment is the segment least likely to have ever made donation to an arts or cultural organisation and the least open to doing so.

25% (36%)
find out what's on via social media

Of those who do...

Facebook	Instagram	YouTube	TikTok	Spotify
85%	56%	34%	17%	16%

Key focuses:

Mainstream through TV, sports and celebrity

One-off, must-see events

Promoting escapism and excitement

Culture market average is shown in brackets

Appendix 2: Media tables

Information sources used to find out about arts and cultural events or places in past 12 months

	Culture market Average	Cuture Segment								Location	
		Essence	Expression	Stimulation	Affirmation	Enrichment	Release	Perspective	Entertainment	Metro	Regional
Online											
Social media*	36%	▲ 41%	▲ 43%	▲ 41%	▲ 42%	▼ 28%	▼ 29%	▼ 24%	▼ 25%	37%	34%
Online listings	25%	▲ 35%	▲ 30%	29%	▲ 30%	▼ 17%	22%	▼ 13%	▼ 10%	26%	21%
Online news site or app	24%	26%	▲ 30%	▲ 29%	▲ 28%	▼ 17%	▼ 20%	▼ 12%	▼ 18%	26%	20%
Organisation's website	16%	▲ 21%	▲ 18%	▲ 20%	▲ 19%	13%	▼ 9%	▼ 8%	▼ 8%	16%	14%
Online user reviews	10%	10%	▲ 15%	11%	12%	▼ 6%	▼ 5%	▼ 3%	▼ 5%	10%	9%
Podcasts	8%	7%	▲ 14%	9%	8%	▼ 4%	6%	▼ 1%	▼ 4%	9%	▼ 6%
Organisation's enews	7%	9%	▲ 10%	10%	9%	▼ 3%	6%	▼ 3%	▼ 4%	8%	6%
Blog	4%	4%	▲ 8%	5%	3%	▼ 2%	4%	▼ 2%	▼ 1%	▲ 5%	▼ 2%
Base	[4853]	[457]	[1123]	[554]	[829]	[468]	[584]	[362]	[477]	[3333]	[1521]

*See page 93 for individual social channels.

▲ % significantly higher than average

▼ % significantly lower than average

creative nz Arts Council of New Zealand Toi Aotearoa

▲ % significantly higher than average

▼ % significantly lower than average

Information sources used to find out about arts and cultural events or places in past 12 months

	Culture market Average	Cuture Segment								Location	
		Essence	Expression	Stimulation	Affirmation	Enrichment	Release	Perspective	Entertainment	Metro	Regional
Press and broadcast											
Radio (streamed or live)	22%	▲ 27%	▲ 25%	▲ 27%	22%	20%	▼ 16%	▼ 14%	▼ 16%	23%	▼ 19%
Free to air television	20%	▼ 17%	▲ 24%	24%	23%	22%	▼ 13%	16%	17%	20%	21%
Community paper (print)	20%	▲ 27%	▲ 24%	19%	21%	20%	▼ 15%	15%	▼ 12%	▼ 18%	▲ 24%
National paper (print)	11%	11%	▲ 15%	14%	11%	11%	▼ 7%	5%	7%	11%	11%
Magazine (print or online)	11%	13%	▲ 15%	13%	12%	9%	▼ 8%	5%	3%	11%	10%
On demand television	11%	9%	▲ 15%	12%	10%	11%	▼ 8%	8%	7%	11%	11%
Outdoor media and flyers											
Outdoor media	19%	▲ 26%	▲ 23%	▲ 23%	21%	16%	▼ 13%	▼ 11%	▼ 10%	20%	▼ 16%
Brochures or flyers	15%	▲ 19%	▲ 20%	17%	▲ 19%	▼ 11%	▼ 11%	▼ 7%	▼ 7%	16%	14%
Recommendation from someone ...											
... I know	28%	39%	30%	31%	▲ 32%	28%	▼ 22%	▼ 18%	▼ 17%	28%	28%
... in professional capacity	7%	8%	▲ 12%	7%	7%	6%	7%	▼ 3%	▼ 3%	7%	7%
A streaming platform	6%	5%	▲ 10%	7%	6%	▼ 2%	5%	▼ 1%	▼ 2%	6%	5%
Base	[4853]	[457]	[1123]	[554]	[829]	[468]	[584]	[362]	[477]	[3333]	[1521]

Top social media channels used to find out about arts and cultural events or places in past 12 months – by those who use this source

	Culture market Average	Cuture Segment								Location	
		Essence	Expression	Stimulation	Affirmation	Enrichment	Release	Perspective	Entertainment	Metro	Regional
Social media	36%	▲ 41%	▲ 43%	▲ 41%	▲ 42%	▼ 28%	▼ 29%	▼ 24%	▼ 25%	37%	34%
Facebook	84%	84%	▲ 82%	87%	85%	89%	▼ 77%	89%	85%	82%	▲ 88%
Instagram	58%	64%	▲ 65%	58%	58%	▼ 39%	58%	▼ 46%	56%	▲ 62%	▼ 49%
YouTube	44%	40%	▲ 55%	39%	43%	▼ 34%	40%	40%	▼ 34%	46%	39%
TikTok	32%	29%	▲ 43%	33%	31%	▼ 16%	27%	25%	▼ 17%	34%	▼ 27%
Spotify	19%	▼ 13%	▲ 24%	24%	21%	15%	▼ 13%	16%	16%	20%	18%
LinkedIn	13%	11%	▲ 18%	11%	16%	11%	▼ 7%	▼ 6%	11%	15%	▼ 9%
Snapchat	13%	12%	16%	13%	13%	▼ 5%	12%	12%	12%	12%	15%
TripAdvisor	10%	8%	▲ 15%	12%	8%	11%	▼ 4%	5%	▼ 5%	11%	9%
Reddit	10%	13%	12%	10%	11%	▼ 5%	7%	8%	7%	12%	▼ 6%
X / Twitter	10%	▼ 5%	▲ 17%	▼ 5%	11%	▼ 6%	7%	9%	7%	11%	▼ 7%
Pinterest	9%	11%	▲ 16%	6%	7%	▼ 5%	9%	▼ 4%	▼ 4%	10%	8%
Social media base	[1757]	[187]	[484]	[230]	[348]	[133]	[169]	[86*]	[120]	[1243]	[514]

*due to limitations of the Perspective sample, results should be interpreted as indicative only. Sample size has been taken into consideration for significance testing.

▲ % significantly higher than average

▼ % significantly lower than average

Research parameters

This study was carried out for Creative New Zealand by Morris Hargreaves McIntyre. It was commissioned in April 2025.

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

Date of fieldwork: 27 May to 20 June 2025.

Data collection method Respondents were recruited by PureProfile and Research Clever. In order to qualify, respondents had to be aged 16 or over and live in Aotearoa New Zealand. Responses were collected online.

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

Sample size 4,836 (nationally). Initial regional sampling was based on the 2023 Census. There were additional national boosts for Māori, Pacific peoples and Asian. Any imbalance was corrected post-collection, with weighting methods applied to match the demographic breakdown of the population.

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

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

The data for the **national culture market** has a confidence interval (margin of error) of **+/-1.41%** at 50% (ie, where the result is 50%, the actual result may fall between 48.59% and 51.41%).

Results based on sub-groups Where results are based on sub-groups of respondents, this is clearly indicated in the body of the report.

Key sub-groups

Māori audiences sample size 1073. The data for **Māori** has a confidence interval (margin of error) of **+/-4.25%** at 50% (i.e., where the result is 50%, the actual result may fall between 45.75% and 54.25%).

Pacific audiences sample size 492. The data for **Pacific people** has a confidence interval (margin of error) of **+/-4.39%** at 50% (i.e., where the result is 50%, the actual result may fall between 45.61% and 54.39%).

Asian audiences sample size 729. The data for **Asian** has a confidence interval (margin of error) of **+/-3.62%** at 50% (i.e., where the result is 50%, the actual result may fall between 46.38% and 53.62%).

Disabled peoples audiences sample size 626. The data for **disabled people** has a confidence interval (margin of error) of **+/-3.92%** at 50% (i.e., where the result is 50%, the actual result may fall between 46.08% and 53.92%).[1]

1 Confidence interval is an approximate only and based on available data from StatsNZ. www.stats.govt.nz/information-releases/disability-statistics-2023/

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

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

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

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