

Asian audiences and the market for Asian Arts

Audience Atlas Aotearoa
New Zealand 2025



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, providing insight into how to target and engage audiences to ensure sector growth.

Representative of the population

Audience Atlas Aotearoa New Zealand 2025 is the fifth edition of the Atlas study. The first took place in 2011, followed by 2014, 2017 and 2020. The full study represents the responses of 4,836 New Zealanders, 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 Asian, Māori or Pacific peoples. The increased number of responses from these groups ensures we can report on results for key audiences with confidence. Additionally, to ensure that Deaf and disabled persons have a chance to take part in the research, invitations were sent to disabled person support groups.

Any results reported as real numbers are estimates that use weighted proportions applied to population estimates (sourced from StatsNZ). Refer to the research parameters at the end of this report for more detailed information on sampling, methodology and confidence intervals.

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 a dance performance to going to a museum.

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 artforms categories. For example, 'dance' includes ballet, contemporary dance, contemporary and heritage Māori, Pacific and Asian dance festivals.

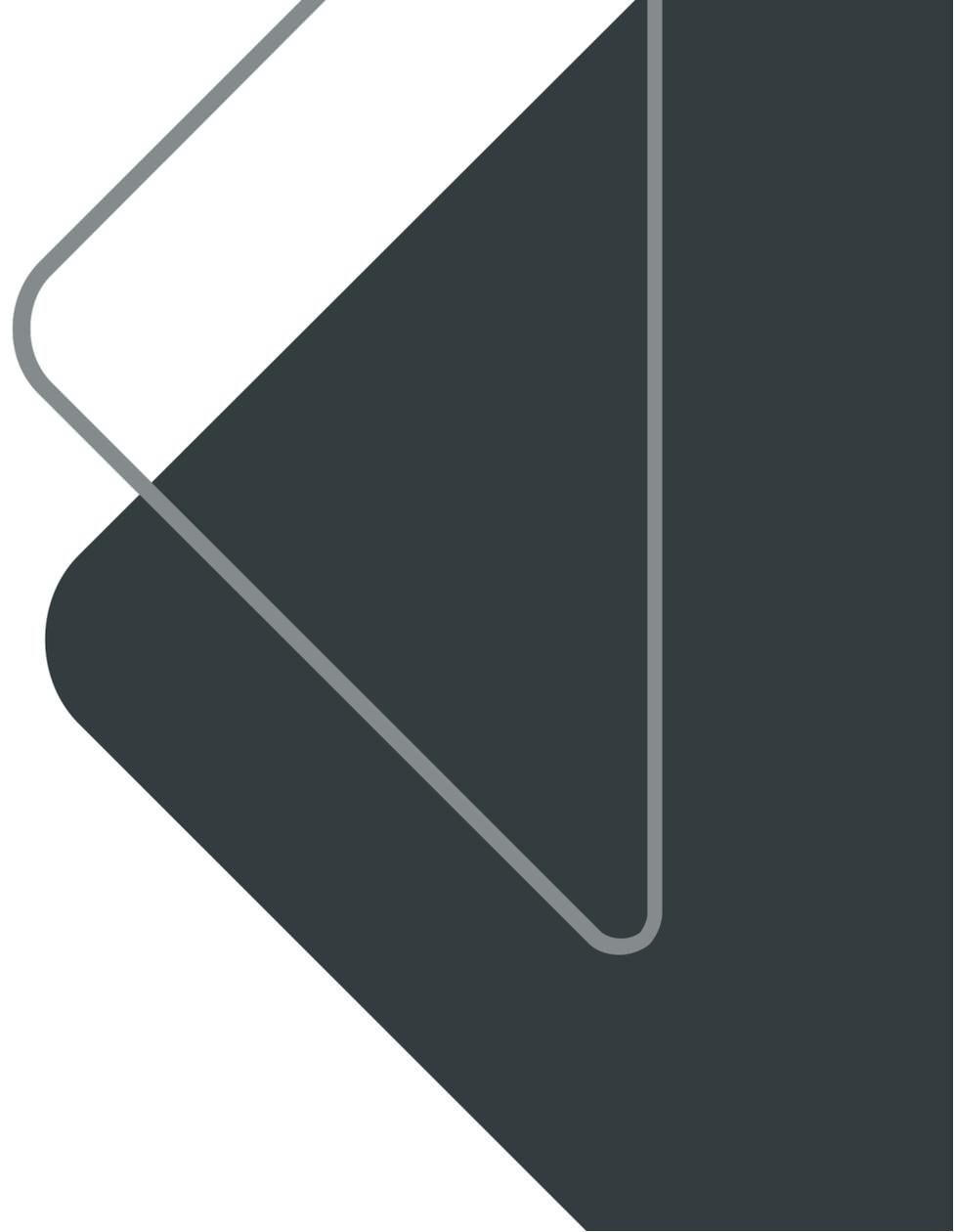
Culture Segments: a sector-specific, values-based segmentation framework.

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.

Understanding the culture market

Asian audiences 2025



619k adults in the culture market identify as Asian

4.04 million

Estimated number of adults in Aotearoa New Zealand in the market for arts and culture (the culture market)

619k

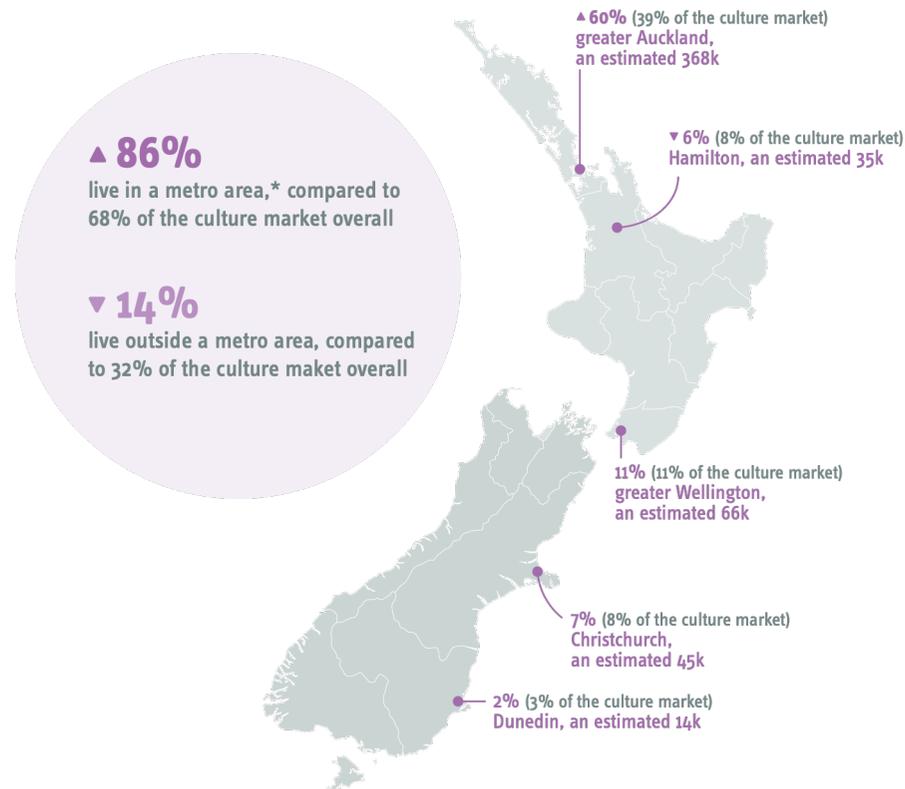
Estimated number of adults in the culture market who identify as Asian

Asian audiences: respondents who identified as having an Asian ethnicity were included in this analysis. We note that this is an expansive group representing a diverse range of cultural identities. The resulting analyses offers a broad indicative overview of this group.

Culture market: defined as adults aged 16 or over who've engaged with at least one arts or cultural activity within the past three years. The overall definition is inclusive; from attending a dance performance to going to a museum.

▲▼ where % differs significantly from the culture market average

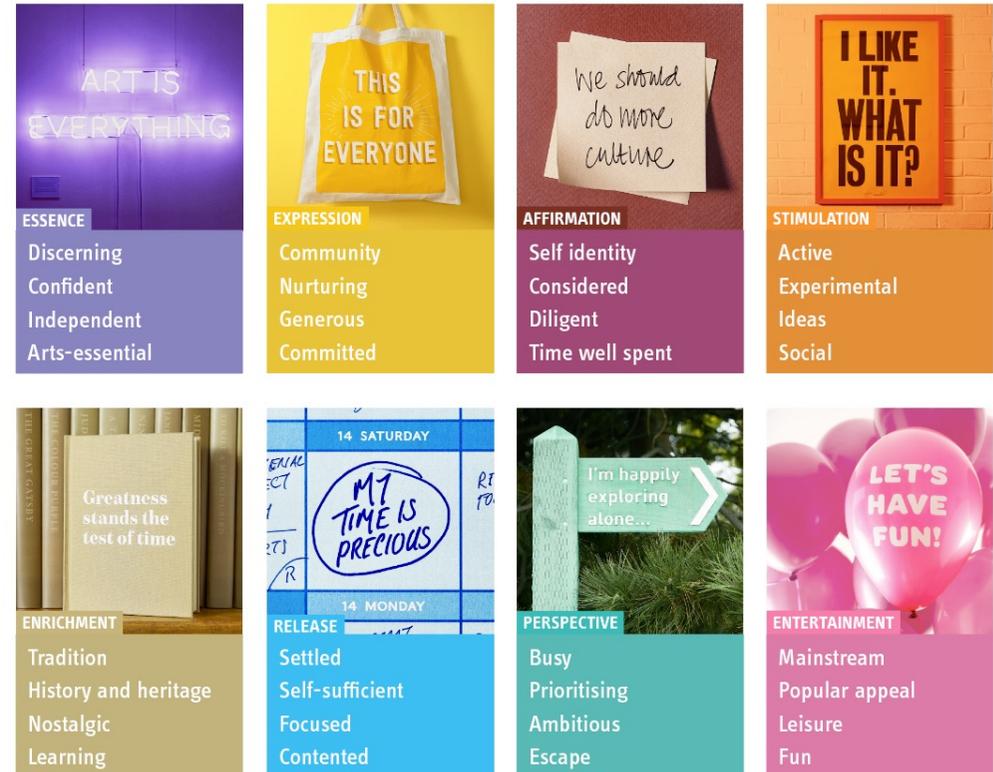
*greater Auckland, Hamilton, greater Wellington, Christchurch or Dunedin



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.



Culture Segment profile of Asian audiences in Aotearoa

Centring around deep-seated human values, the mindsets of Culture Segments are universal. That being said, other factors can have an influence within different demographic cohorts, and the manifestation of this is some subtle variance in the Culture Segment profile for Asian audiences compared to the market overall.

Asian audiences are strongly Expression and Affirmation

Compared to the culture market overall, there are significantly higher proportions of Expression (29%) and Affirmation (23%) among Asian audiences. Conversely, Essence (6%), Stimulation (9%), Perspective (4%) and Entertainment (5%) are all less common.

Discover your segment here:

<https://mhminsight.com/segmentme>

Culture Segment pen portraits: for a deeper dive into Culture Segments, see Appendix 1 in the full [Audience Atlas Aotearoa 2025](#) report where there's a comprehensive summary of each of the eight segments, including how to reach them through marketing communications.

		Culture market	Asian audiences
Essence	'in pursuit of self-actualisation'	9%	▼ 6%
Expression	'people people'	23%	▲ 29%
Stimulation	'all about the big idea'	11%	▼ 9%
Affirmation	'do the right thing'	17%	▲ 23%
Enrichment	'through the lens of the past'	10%	9%
Release	'say they're too busy'	12%	15%
Perspective	'happy in their own bubble'	7%	▼ 4%
Entertainment	'looking for fun'	10%	▼ 5%
	Base	[4853]	[768]

▼▲ % for Asian audiences differs significantly from the culture market average



3 in 10 are community-minded Expression...

Not only is Expression the most common segment among Asian audiences and the culture market generally, enthusiastic Expression is one of the segments most likely to regularly engage with arts and culture.

... and close to a quarter are conscientious Affirmation

Like Expression, Affirmation are over-represented among Asian audiences. This is a segment committed to personal growth. They recognise cultural engagement as a 'worthwhile' activity offering opportunities for self-improvement. However, they lack the confidence of other segments and are cautious decision makers.



Essence and Stimulation less common among Asian audiences

Essence and Stimulation are key members of the culture market, but less common among Asian audiences than in the market generally. Though distinct, Essence and Stimulation share a tendency for independent decision-making and a willingness to stand out. Discerning Essence are confident cultural connoisseurs, seeking peak experiences and deeper meaning from their cultural engagement. Meanwhile, adventurous Stimulation is defined by their desire for the discovery of new and out-of-the-ordinary experiences that can be enjoyed socially. But this must be underpinned by a compelling 'big idea' to hold their interest.



Enrichment and Release are as common among Asian audiences as in the wider market

Asian audiences are as likely to be Enrichment or Release as the culture market average. Traditional Enrichment have established tastes, limited interest in new interpretations, or staying up-to-date. Meanwhile, busy Release are a segment who often feels unable to prioritise cultural engagement over other commitments.

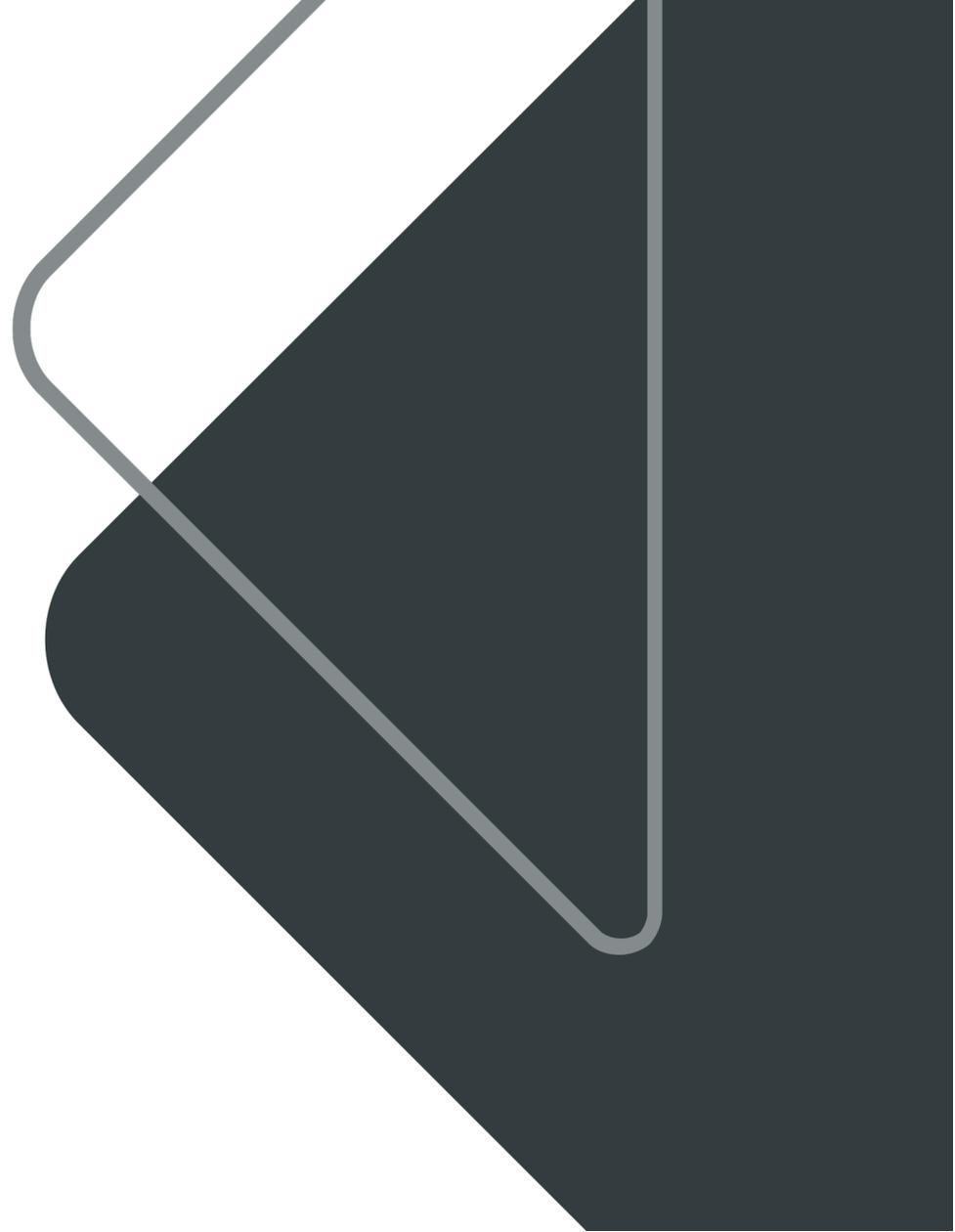


Less than 1 in 10 are Perspective or Entertainment

The remaining 9% of Asian audiences are made up of self-contained Perspective or conventional Entertainment. Perspective have specific personal interests and little desire to broaden them. They're unaffected by the views of others, making them difficult to activate. Meanwhile, 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.

Arts and cultural engagement

Asian audiences 2025

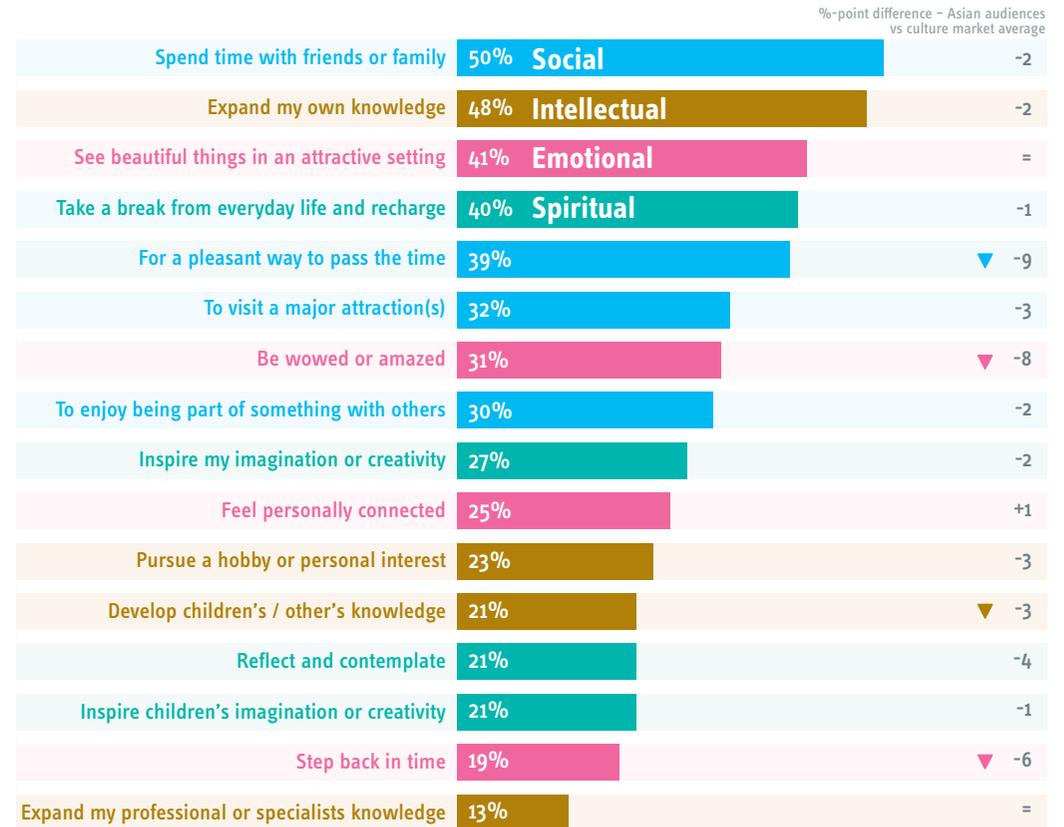


Motivations to engage are more focused

In addition to the values shaping attendance – understood and activated through Culture Segments – Asian audiences seek a variety of benefits from their cultural engagement on any given day.

Overall, what motivates Asian audiences is similar to the wider market. However, when asked to select specific drivers, Asian audiences chose fewer on average, suggesting a more focused set of priorities. As with the wider market, ‘spending time with others’ or ‘expand knowledge’ are the most prominent drivers. In contrast, Asian audiences are less likely than average to say they were motivated by ‘a pleasant way to pass the time’, to be ‘wowed’ or ‘step back in time’.

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



▼▲ % for Asian audiences differs significantly from the culture market average

[768]

6 in 10 seek mainly ‘deep’ rewards from their arts engagement

Taking a macro view of Asian audiences’ primary reason for engaging (**main** motivation) shows that, while seeking Social connection is most common, more seek something deeper. 6 in 10 seek a main Intellectual, Emotional or Spiritual benefit from their arts engagement. This aligns with the wider market, highlighting that social experiences act as a catalyst and an entry point for deeper engagement across different audience groups.

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

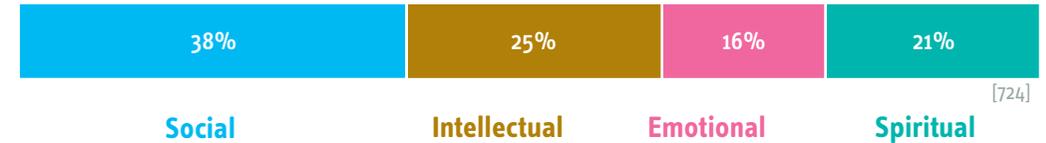
Intellectual: Looking to learn and grow. The audience is on a journey of discovery, building knowledge themselves or nurturing another’s curiosity

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.

Primary benefits sought from arts and cultural engagement

Main motivation – Asian audiences



Main motivation – culture market average



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Over a third ‘missed’ attending at least one recent arts event

36% / 223k

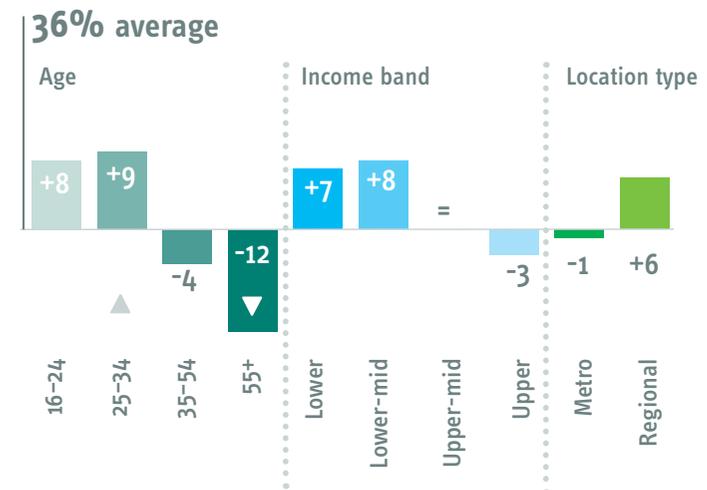
of Asian audiences can recall at least one occasion¹ in the past 12 months when they had wanted to attend a specific arts organisation or event but were prevented from doing so. This is comparable to the market overall (39%).

Younger people over-represented among those ‘missing out’

Mirroring the pattern among the wider market, among Asian audiences, it is the younger cohort who are more likely than their older counterparts to recall a specific occasion when they were prevented from attending an arts event. Similarly, the pattern across the income bands also broadly reflects the wider market.

¹ Assuming that there was only one occurrence and does not account for groups, so the estimated number is likely to be higher.

Prevented from attending a specific arts organisation or event (past 12 months) – %-point difference - Asian audiences



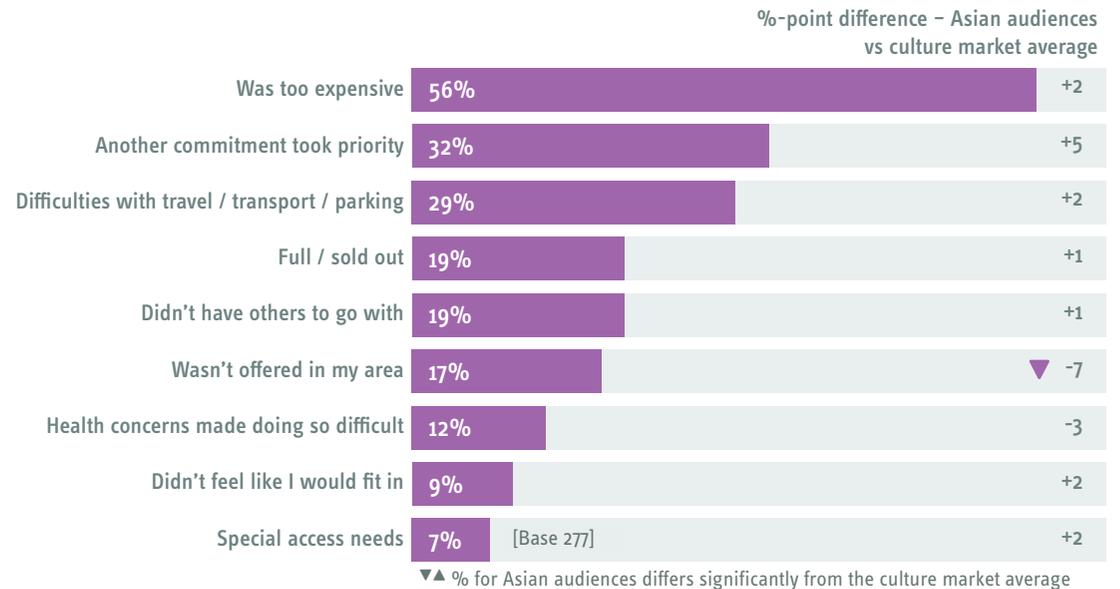
▼▲ % for differs significantly from the Asian audiences' average

Asian audiences mirror culture market in affordability concerns

Among those who had been prevented from attending a specific arts event in the past 12 months, cost was the universal barrier, cited at similar levels by Asian audiences (56%) as the wider market (54%).

Differences emerged around availability, 17% of Asian audiences said an event was ‘not on offer in their area’, compared with 25% of the wider market. This is unsurprising, given that Asian audiences are more concentrated in the metro areas.¹ In line with this, a quarter of regional-based Asian audiences also identified limited local provision as a barrier to attendance,² matching the national average.

Top reasons preventing attendance at a specific arts organisation or event in past 12 months



¹ See page 4 for definition.

² Due to limited sample of the regional cohort percentages for this sub-group should be interpreted as indicative only.

Asian audiences mirror wider sentiment on future attendance

Exploring how Asian audiences perceive their current level of arts attendance compared to expectations for the next 12 months reveals a mixed picture. While over half expect their attendance to match current levels (47%) or are uncertain (9%), more anticipate doing less (27%) than attending more (18%).

Sentiment among Asian audiences broadly mirrors that of the wider market, but they are significantly more likely to expect to do less. This suggests that while future engagement is likely to remain constrained overall, Asian audiences may tend towards lower activity than the wider market.

Anticipated arts and cultural engagement in next 12 months

I'm likely to attend...



Reasons for expecting to attend less	Culture market	Asian audiences
Increased living costs means / less disposable income	66%	64%
Changes in personal circumstances / responsibilities	41%	44%
Working more	21%	28%
Health / disability concerns	20%	13%
Things on offer don't align with my interests / needs	20%	16%
I no longer have anyone to go with	12%	13%
There will be less on offer	8%	11%
Been disappointed by recent arts and cultural events	8%	8%
I plan to engage with more arts content online	6%	9%

Base

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▼▲ % for Asian audiences differs significantly from the culture market average

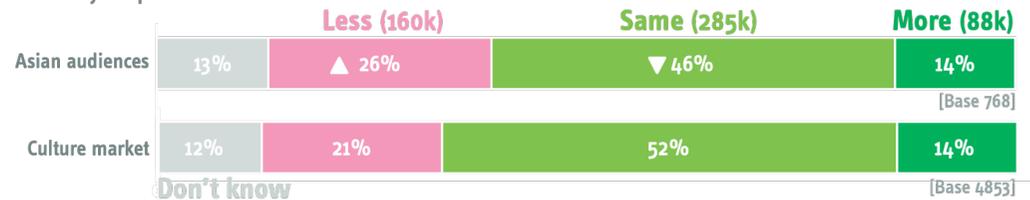
A quarter of Asian audiences expect to spend less

Building on anticipated future attendance (see previous page), expectations around spend follow a similar pattern. A larger proportion of Asian audiences anticipate spending less (26%) than more (14%) on arts engagement over the next 12 months. As with attendance, sentiment broadly mirrors that of the wider market, but Asian audiences are significantly more likely to expect to spend less.

The most common reason given is increases in cost-of-living – the same factor that underpins reduced attendance – pointing to broader financial pressures as a key constraint on future cultural engagement for both Asian audiences and the wider market overall.

Anticipated arts and cultural engagement in next 12 months

I'm likely to spend...



Top reasons for expecting to spend less	Culture market	Asian audiences
Increased living costs means / less disposable income	65%	64%
Changes in personal circumstances / responsibilities	31%	32%
Ticket prices have increased too much	27%	21%
I'll seek free arts and cultural events instead of paying	24%	25%
Getting to and from events has become too expensive	16%	12%
Health / disability concerns	16%	12%
I plan to attend less often	16%	21%
Working more	16%	20%
Things on offer don't align with my interests / needs	11%	8%

Base

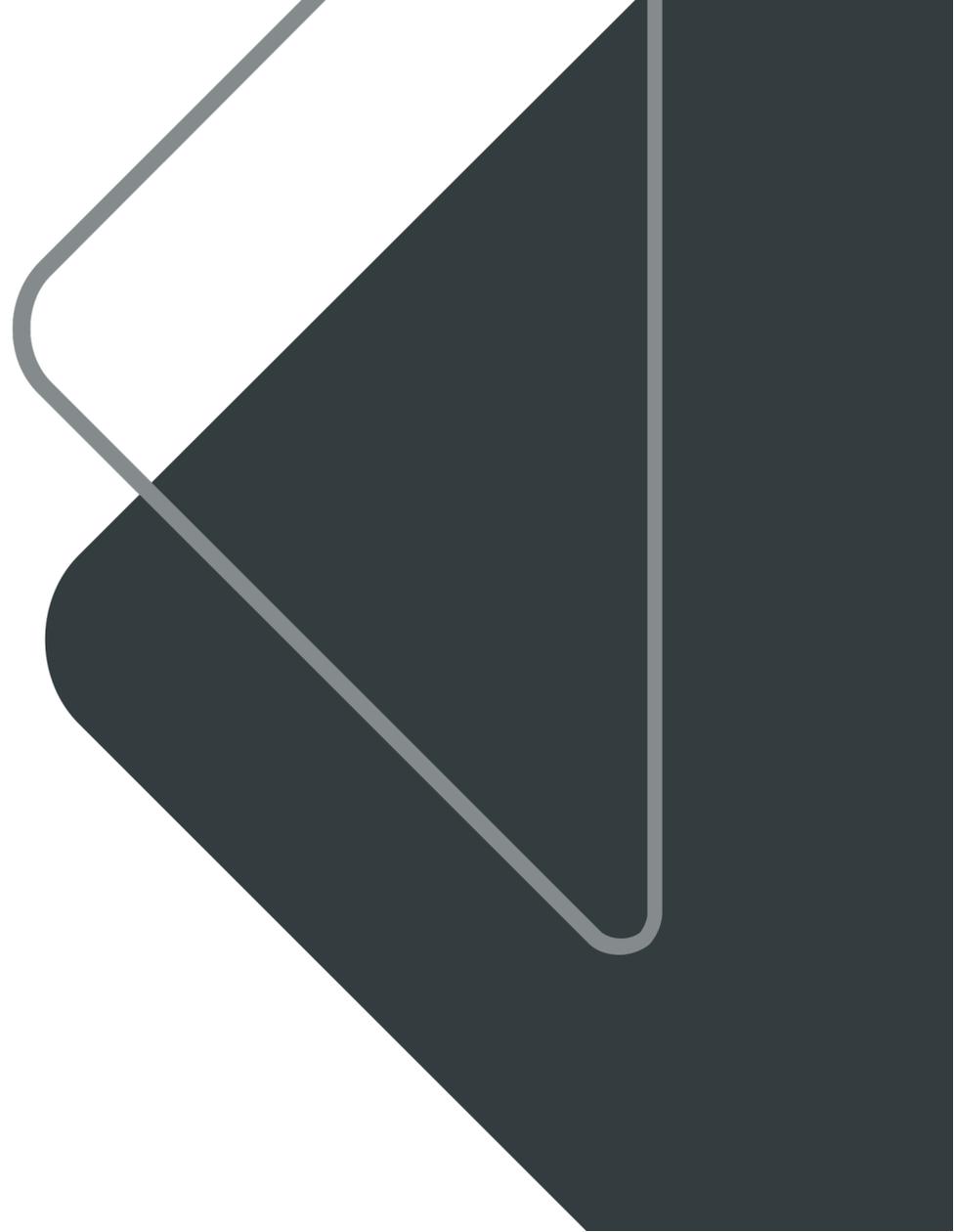
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▼▲ % for Asian audiences differs significantly from the culture market average

Artform engagement

Asian audiences



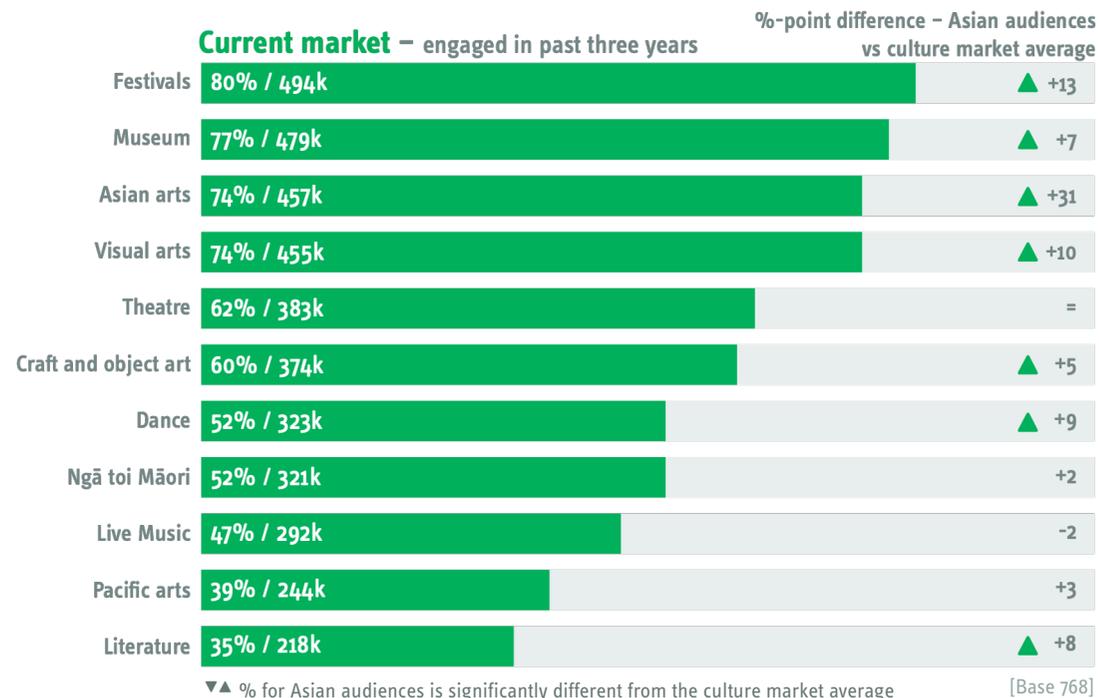
Asian audiences more active across 7 of the 11 core artforms

Compared to the wider market, Asian audiences are more active in 7 of the 11 core artforms, being significantly more likely to have engaged in the past three years.

Alongside being more active in relatively mainstream areas such as festivals, visual arts and museums they are more likely to be engaging with Asian arts (74%, compared to 42% overall).

In addition, Asian audiences are significantly more likely to be in the current market for dance, literature and craft / object art than the wider market.

Current artform markets – % and real figure estimates for Asian audiences



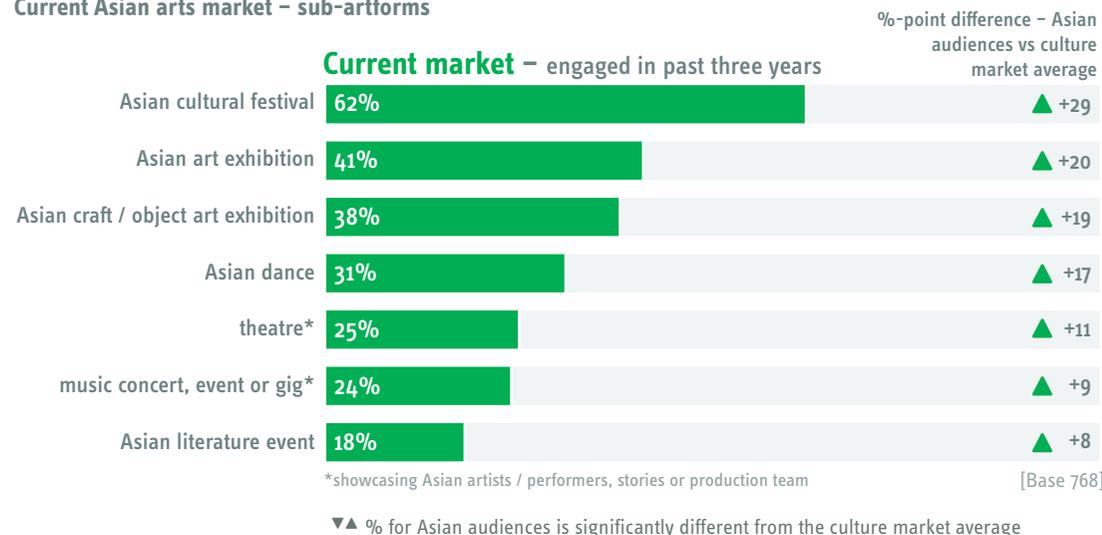
Asian cultural festivals lead engagement

Asian arts is a relatively mainstream pursuit for Asian audiences, 74% have engaged in the past three years (current market). While engagement is spread across the sub-artform categories that make up Asian arts, it is Asian cultural festivals that enjoy a larger share of the current market (62%).

Within the data set there is little to distinguish Asian audiences in the current market for an Asian cultural festival from the broader cohort. However, they are typically younger, live in family households and are strongly Expression.

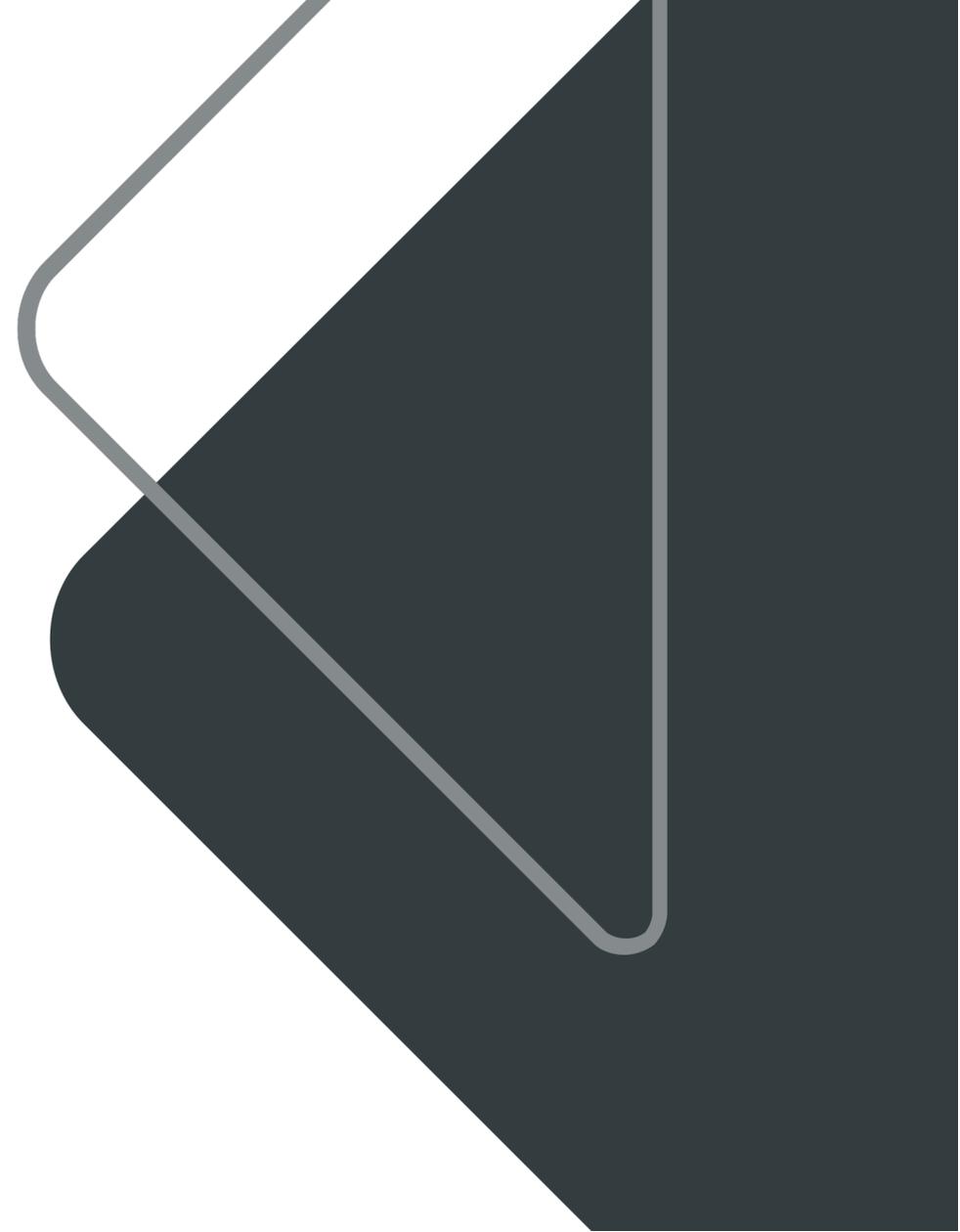
Meanwhile, around 4 in 10 Asian audiences are active in the Asian art and craft / object art exhibition markets, and the three performing arts categories sit towards the lower end, but above literature (18%).

Current Asian arts market – sub-artforms



Engagement with Asian Arts

The culture market overall



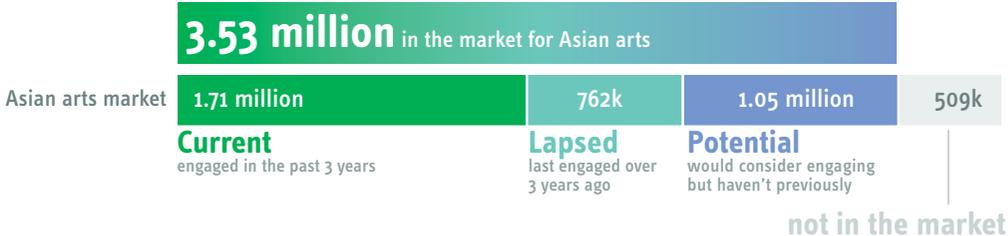
3.53 million New Zealanders in the market for Asian arts

Most of the culture market (87%) has either engaged with Asian arts in the past or is open to doing so in the future, equating to an estimated 3.53 million adults. Despite population growth, the size of this market has remained largely unchanged from 2020.

In 2025, 42% of the culture market have engaged with Asian arts in the past three years, a significantly lower proportion than in 2020 when it was closer to half.

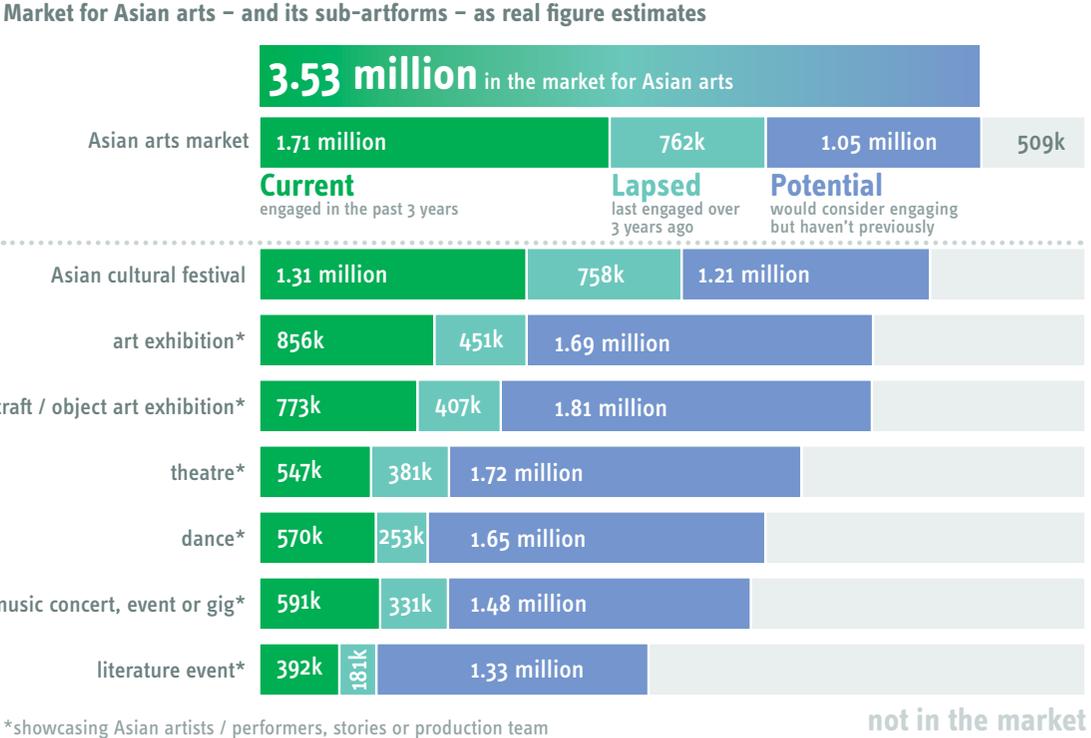
While the active market hasn't developed, sizable potential remains. In real terms, an estimated 1.05 million would consider engaging but haven't done so previously (potential market), a figure not far off the current market size (an estimated 1.71 million).

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



Cultural festivals the entry point to Asian arts engagement

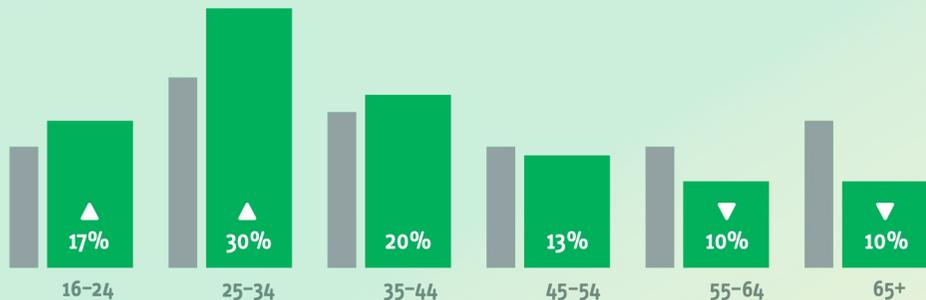
Across the sub-artform categories within Asian arts, cultural festivals stand out as the most common form of engagement. In 2025, 32% of the culture market (an estimated 1.31 million adults) had attended an Asian cultural festival in the past three years, with a potential market of a similar size, indicating capacity for growth. While cultural festivals aren't necessarily a pathway into other artforms, their broad appeal means they play a central role in overall Asian arts engagement. For most other sub-categories, the potential market is more than twice the size of the active market, highlighting a sizable untapped opportunity.



Current market for Asian arts

42% or an estimated 1.71 million adults

Age profile



Ethnic identity

▲ 14% (14%) Māori

▲ 9% (7%) Pacific peoples

▲ 27% (15%) Asian

▼ 48% (62%) European

Location

▲ 77% (68%) metro

▼ 23% (32%) regional



▲ 41% (35%) children in the household



12% (12%) Disabled peoples

[Base 2100]

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▲▼ where % is significantly different from the culture market average.
The culture market average is represented as either a grey bar or a % in bracket

Current market for Asian arts

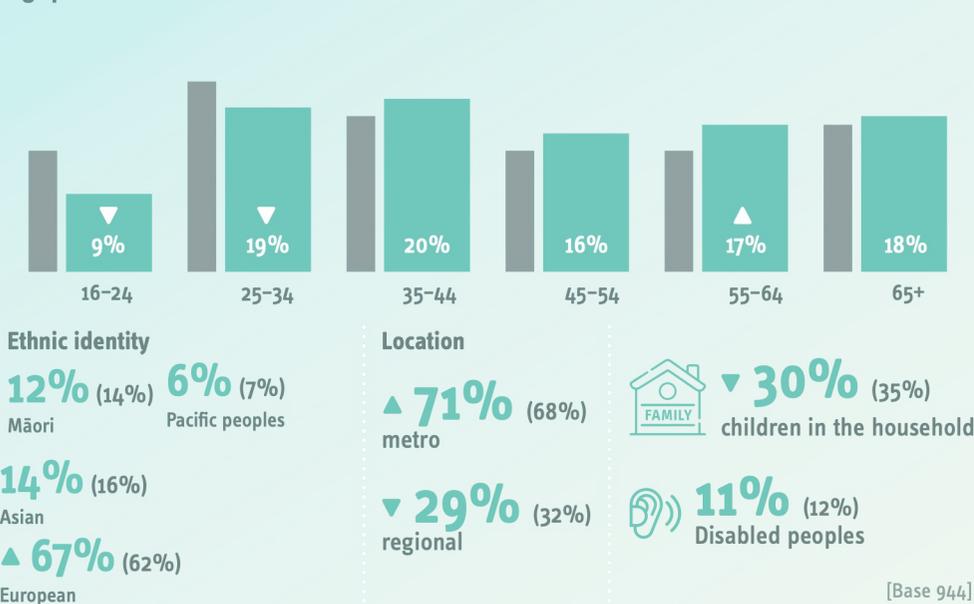
Compared to the culture market overall, those having engaged with Asian arts in the past three years are younger, more diverse and urban dwelling:

- Close to half are aged under 35 (47%, compared to 36% overall), while a fifth are aged 55+ (20%, compared to 32% overall).
- Pacific (9%) and Asian (27%) audiences are more prominent.
- More likely to live in family households (41%).
- Close to 8 in 10 live in metro areas (77%).
- Expression (32%), Affirmation (20%) and Stimulation (13%) are all over-represented.

Lapsed market for Asian arts

19%, an estimated 762k adults

Age profile



▲▼ where % is significantly different from the culture market average.
 The culture market average is represented as either a grey bar or a % in bracket

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Lapsed market for Asian arts

Compared to the culture market overall, those having engaged with Asian arts before, but not for more than three years are older, less diverse and less likely to live in households with children:

- 28% are aged under 35, compared to 36% overall, while 36% are aged 55+, compared to 32% overall.
- European audiences are over-represented in the lapsed market, whereas Māori, Pacific and Asian audiences are in line with the cultural market average.
- Less likely to live in family households (30%).
- Over 7 in 10 live in metro areas (71%).
- Expression (19%) is under-represented compared to the wider market (23%), while Essence is over-represented.

Potential market for Asian arts

26%, an estimated 1.05m adults

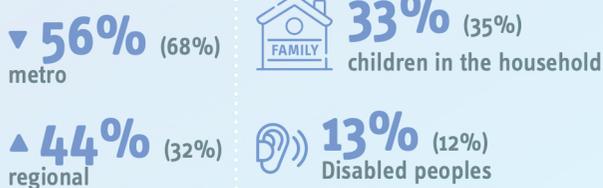
Age profile



Ethnic identity



Location



[Base 1325]

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▲▼ where % is significantly different from the culture market average.
The culture market average is represented as either a grey bar or a % in bracket

Potential market for Asian arts

Compared to the culture market overall, those who would consider engaging with Asian arts, but haven't previously, are older and more likely to live outside a metro area:

- Close to 4 in 10 are aged 55+ (39%, compared to 32% in the wider market).
- Māori and European audiences are more prominent.
- Less likely to live in family households.
- Close to 6 in 10 live in a metro area and over 4 in 10 regionally.
- The less culturally active Enrichment (14%) and Perspective (9%) segments are significantly over-represented. However, their prominence is due to the absence of the more active Expression segment rather than larger numbers of the less active segments. See real figure estimates explored on the following page.

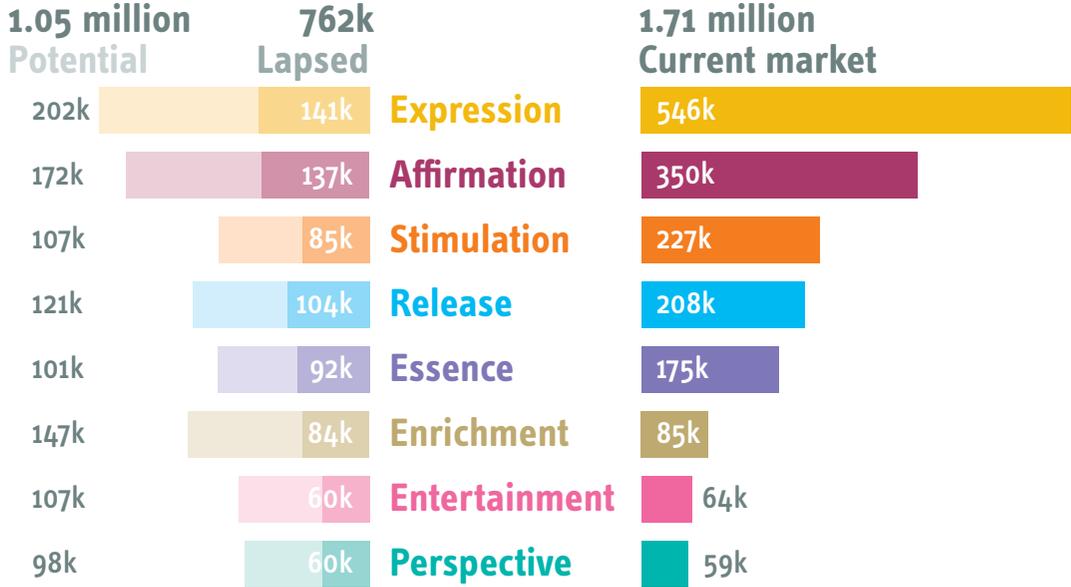
Prioritise culturally active segments to drive growth

Expression (32%), Affirmation (20%) and Stimulation (13%) are all over-represented in the current market for Asian arts. Enthusiastic Expression brings eclectic tastes and openness to diverse perspectives, while conscientious Affirmation seeks personal growth and learning, and responds to well-signposted, accessible entry points, such as festivals. Adventurous Stimulation is drawn to vibrancy, variety and risk-taking.

Key segments seek out community, vibrancy and variety

Retention and growth can be driven by meeting the needs of key segments (Expression, Affirmation and Stimulation). 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



Research parameters

This study was carried out for Creative New Zealand by MHM. 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 procedure: 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. Some organisations opted to boost the sample in certain regions; 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 StatsNZ. 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% (i.e., 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.

The unweighted sample size for **Asian audiences** is n=729. Confidence intervals (margins of error) are calculated using the unweighted base. For the Asian audience, the margin of error is **+/-3.62%** at 50% (i.e., where a result is 50%, the actual result may fall between 46.38% and 53.62%).

All percentages presented in this report are calculated using weighted data to reflect the population's demographic profile of the population. Bases shown in tables refer to the weighted base.

The background is a dark grey-blue color. On the left side, there are several overlapping, semi-transparent geometric shapes, including a large triangle pointing right and a trapezoid. On the right side, there are similar overlapping shapes, including a large trapezoid and a triangle pointing left. In the center, the company name is displayed in white text with small colored triangles to the left of each line.

morris
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