Disabled peoples audiences

Audience Atlas Aotearoa New Zealand 2025

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Movement of the Human, BELLE – A Performance of Air, Auckland Arts Festival 2025. © Photographer: Andi Cowan

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 People's Organisations.

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.

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Understanding the culture market

Disabled peoples audiences 2025

487k adults in the culture market identify as disabled

4.04 million

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

487k

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

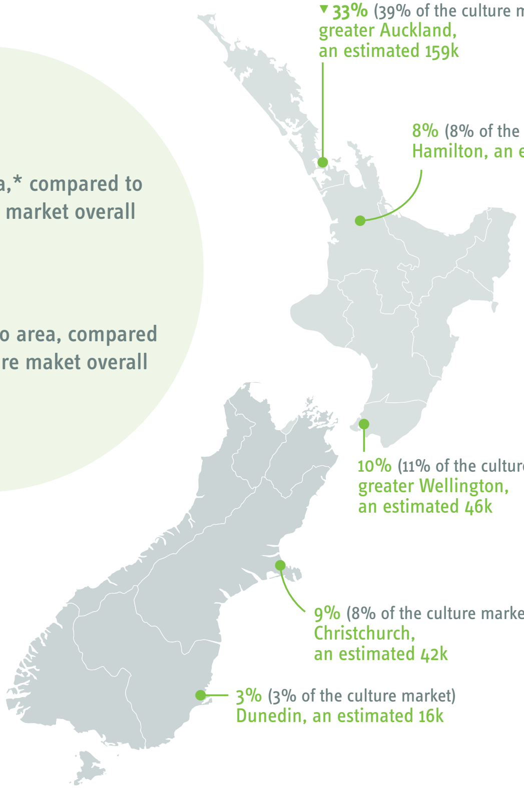
Disabled peoples audiences: includes those in the culture market who identified as 'having a lot of difficulty' or 'cannot do at all' in response to one or more areas covered by the Washington Group Short Set questions – seeing, hearing, walking, remembering or concentrating, communicating or self-care. People are not counted as disabled if they 'sometimes have difficulty'. The definition encompasses a diverse range of experiences, and the resulting analysis provides an indicative overview, rather than a detailed examination of specific conditions or access needs.

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

▼ 62%
live in a metro area,* compared to 69% of the culture market overall

▲ 38%
live outside a metro area, compared to 31% of the culture maket overall



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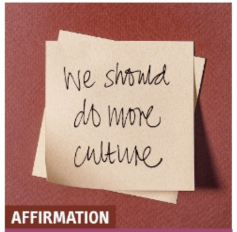
Activating audiences with Culture Segments

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.

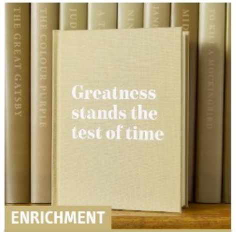
ESSENCE
Discerning
Confident
Independent
Arts-essential

EXPRESSION
Community
Nurturing
Generous
Committed



AFFIRMATION
Self identity
Considered
Diligent
Time well spent

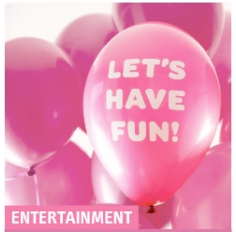
STIMULATION
Active
Experimental
Ideas
Social



ENRICHMENT
Tradition
History and heritage
Nostalgic
Learning

RELEASE
Settled
Self-sufficient
Focused
Contented

PERSPECTIVE
Busy
Prioritising
Ambitious
Escape



ENTERTAINMENT
Mainstream
Popular appeal
Leisure
Fun

Culture Segment profile of disabled audiences

The Culture Segments profile for disabled peoples audiences closely mirrors that of the wider culture market. This alignment reflects the universality of the framework, because Culture Segments are grounded in deep-seated human values, we would not expect a fundamentally different value-based profile.

Among disabled audiences, Expression (22%), Affirmation (18%) and Release (17%) are each represented in broadly comparable proportions. Although compared to the wider market, Release is notably more prominent.

		Culture market	Disabled audiences
Essence	'in pursuit of self-actualisation'	9%	9%
Expression	'people people'	23%	22%
Stimulation	'all about the big idea'	11%	10%
Affirmation	'do the right thing'	17%	18%
Enrichment	'through the lens of the past'	10%	10%
Release	'say they're too busy'	12%	▲ 17%
Perspective	'happy in their own bubble'	7%	7%
Entertainment	'looking for fun'	10%	7%
	Base	[4853]	[586]

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

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.

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Comparable representation from Expression and Affirmation

Connection-seeking Expression (22%) and conscientious Affirmation (18%) are as common among disabled audiences as the wider market. Enthusiastic Expression values others' creativity and artistic skill, and are drawn to experiences where they can connect, share and feel part of something with others. Meanwhile, Affirmation views cultural experiences as a form of self-development. They're open and positive about attending yet tend to be cautious decision-makers who seek clear value and detailed information before committing. Without this support, they can be less culturally active than their stated interest suggests.

Release are over-represented

Release is more prominent among disabled audiences (17%, compared to 12% overall). This segment often feels under pressure from competing demands, a facet of the Release mindset that may resonate with the additional complexity some disabled peoples can experience in daily life.

Feeling that opportunities for leisure can be limited, Release audiences need cultural experiences to be 'easy', enjoyable and offer a stress-free chance to unwind and escape everyday pressures.

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Confident Essence and Stimulation are as common among disabled audiences as in the wider market

Essence, the cultural connoisseurs (9%) and adventurous Stimulation (10%) are as common among disabled audiences as in the wider market.

Stimulation is characterised by their desire for new and unique experiences, particularly those that explore ‘big ideas’. Essence, meanwhile, are discerning, reflective, and drawn to cultural experiences that offer quality and depth. While distinct, both segments share a confidence and independence, showing a willingness to stand apart. This positions them as potential tastemakers and leaders within the cultural landscape.

A quarter are Enrichment, Perspective or Entertainment

The remaining disabled audiences are made up of three less culturally active segments.

- Traditional Enrichment (10%) are cautious with established tastes and limited interest in new interpretations or staying up-to-date.
- Perspective (7%) tends to be focused on a set of specific personal needs. Being self-contained and unaffected by the views of others, they can be difficult to activate.
- Fun-loving Entertainment (7%) has conventional tastes and doesn’t distinguish between cultural activities and other forms of entertainment, meaning arts offerings must compete on equal footing as all other leisure options.

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Arts and cultural engagement

Disabled peoples audiences 2025

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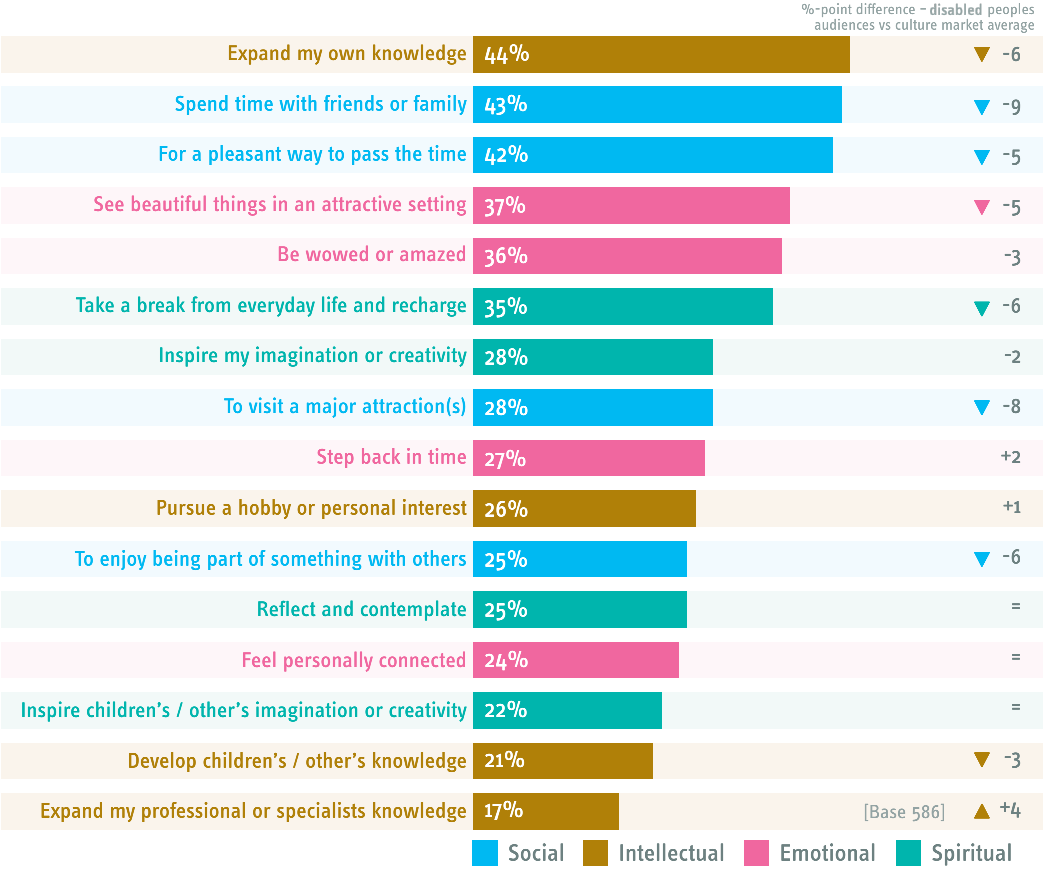
Motivations mirror the wider market but appear less 'casual'

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

While disabled audiences share broadly similar motivations to the wider market, with 'expanding knowledge' (44%) and Social reasons being most common, they cite many drivers at significantly lower levels. Notably, disabled audiences appear less likely to engage for 'casual' Social reasons, such as 'spending time with others', simply 'passing the time' or 'visiting an attraction'. This pattern suggests that, for some, cultural engagement may be less spontaneous and more deliberate, shaped by the additional planning or effort required to make it possible.

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



▼▲ % differs significantly from the culture market average

Two-thirds primarily seek a ‘deep’ reward from arts engagement

Exploring disabled audiences’ **main** motivations for engaging with the arts shows that, while Social connection is the most common reason, two-thirds are primarily motivated by an Intellectual, Emotional or Spiritual driver – a significantly higher proportion than in the wider market (60%). While Social experiences can act as a catalyst or entry point for deeper engagement across all audience groups, disabled audiences are more likely than average to seek meaning, resonance or transformation.

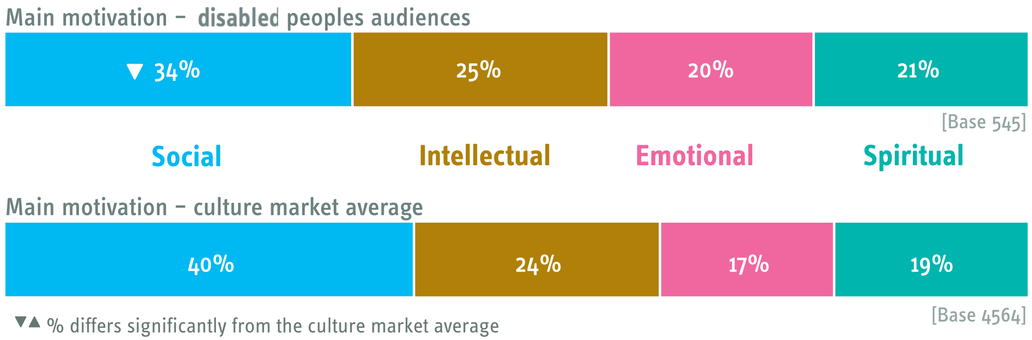
Social: Seeking fun and time with others. The offer is the enabler of shared experiences and memorable moments

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



Half recalled being prevented from attending a recent arts event

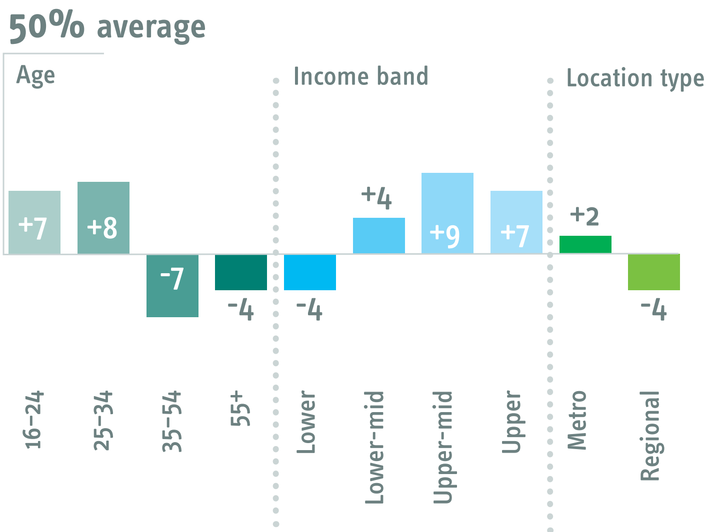
▲50% / 245k

of disabled peoples can recall at least one occasion[1] in the past 12 months when they had wanted to attend a specific arts organisation or event but were prevented from doing so.

Compared to the wider market (39%), disabled audiences are significantly more likely to recall an occasion they had been prevented from attending a specific arts event (50%).

Mirroring the pattern in the wider market, among disabled audiences, it was the younger cohort who were more likely than their older counterparts to recall a specific occasion when they were prevented from attending an arts event.

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



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

▼▲ % for differs significantly from the disabled peoples audiences' average

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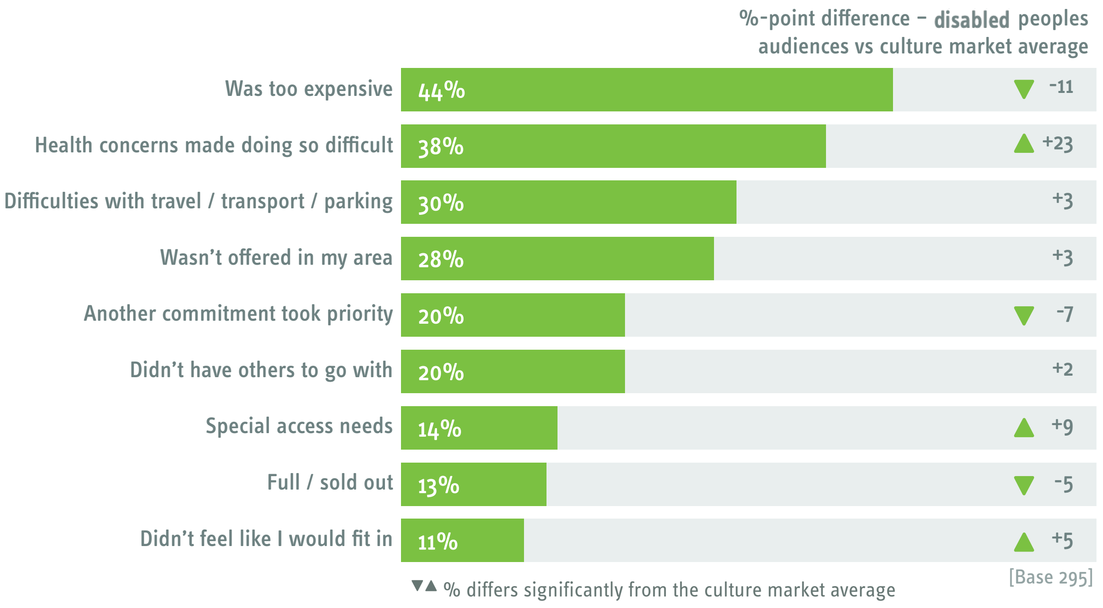
Social barriers disproportionately affect disabled audiences

Cost was the primary reason cited by those unable to attend a specific arts event; however, it is less prominent among disabled audiences (44%) than in the wider market (54%). Conversely, ‘health concerns’, ‘access needs’, or social barriers – concerns about ‘fitting in’ – disproportionately impact disabled audiences.

Unlike external economic pressures, access and comfort represent addressable challenges for arts organisations and an opportunity to cultivate welcoming environments which foster authentic connections with and between audiences.

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

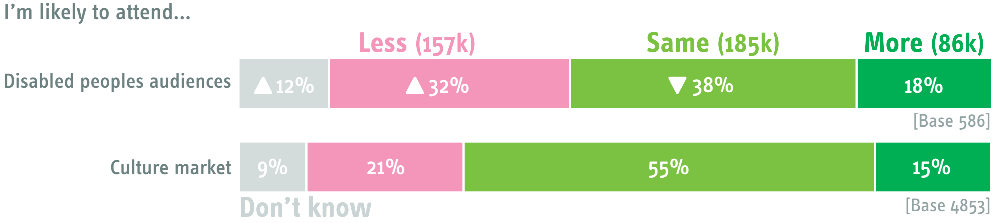


‘Subdued’ expectations of future arts attendance

Exploring how disabled audiences perceive their current level of arts attendance compared to expectations for the next 12 months reveals that, as a group, a third anticipate future attendance to be lower than current levels (32%) – close to twice the proportion who expect to do more (18%).

While cost-of-living pressures affect everyone, compared to the wider market, disabled audiences are more likely to cite health-related considerations or disappointment with recent experiences as reasons for attending less. This suggests that attendance is not primarily about finances, but about confidence and conditions. Experiences need to feel welcoming and safe, and the value and enjoyment of the experience should match the effort and risk of attending.

Anticipated arts and cultural engagement in next 12 months – disabled peoples audiences



Reasons for expecting to attend less	Culture market	Disabled audiences
Increased living costs means / less disposable income	66%	▼ 56%
Changes in personal circumstances / responsibilities	41%	36%
Working more	21%	22%
Health / disability concerns	20%	▲ 45%
Things on offer don’t align with my interests / needs	20%	17%
I no longer have anyone to go with	12%	17%
There will be less on offer	8%	12%
Been disappointed by recent arts and cultural events	8%	▲ 14%
I plan to engage with more arts content online	6%	9%
Base (likely to attend less)	[1039]	[188]

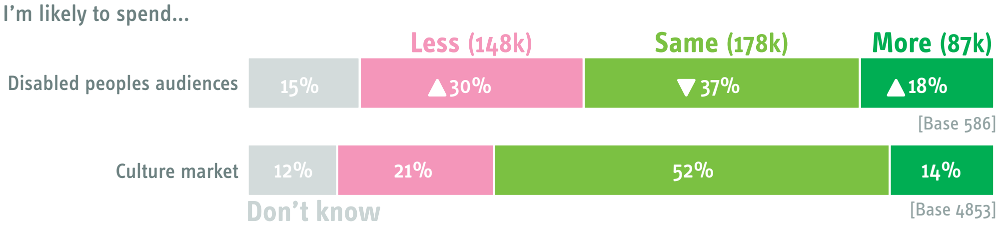
▼▲ % differs significantly from the culture market average

Spending expectations mirror attendance patterns

Building on anticipated future attendance (see previous page), expectations around spend follow a similar pattern. A larger proportion of disabled audiences anticipate spending less (30%) than more (18%) on arts engagement over the next 12 months. Although half expect their arts spending to be maintained (37%), or they 'don't know' (15%).

Unlike with attendance, the reasons given for spending less are more aligned with the wider market. While increased cost-of-living (58%) points to broader financial pressures as a key constraint on arts spending, for disabled audiences, there are other barriers to overcome for arts experiences to be accessible in the first place (also see the following page).

Anticipated arts and cultural engagement in next 12 months – disabled peoples audiences



Top reasons for expecting to spend less	Culture market	Disabled audiences
Increased living costs means / less disposable income	65%	58%
Changes in personal circumstances / responsibilities	31%	31%
Ticket prices have increased too much	27%	24%
I'll seek free arts and cultural events instead of paying	24%	19%
Getting to and from events has become too expensive	16%	18%
Health / disability concerns	16%	▲ 44%
I plan to attend less often	16%	15%
Working more	16%	19%
Things on offer don't align with my interests / needs	11%	11%
Base (likely to spend less)	[4853]	[178]

▼▲ % differs significantly from the culture market average

Accessibility, as much about people as design features

Exploring what disabled audiences consider makes an arts activity accessible shows that clear information, knowledgeable staff and a comfortable environment are valued just as much as physical design features.

Those identifying with a cognitive disability only place emphasis on clarity and calm predictability, including access to accessible information and quiet spaces or low sensory spaces. For those identifying as having a physical disability only, confidence and ease of movement are key, underpinned by navigable venues, suitable facilities and staff who are equipped to assist. Together, these findings highlight that accessibility is created not only through infrastructure but through trust, understanding and the confidence that participation will be smooth, dignified, and welcoming from start to finish.

What makes an arts activity accessible – top reasons	Disabled audiences average	Disabled audiences split by broad grouping*		
		Cognitive + physical	Cognitive only	Physical only
The website is accessible	31%	28%	28%	33%
Staff understand accessibility and disability	30%	27%	20%	35%
Information available about accessibility before I arrive	30%	25%	23%	35%
I can get accessible transport	29%	29%	30%	29%
Not too many people there	29%	29%	28%	29%
Support staff available	25%	26%	22%	25%
Accessible facilities – wheelchair access, hearing loops etc	22%	20%	13%	27%
Information in accessible formats	21%	13%	24%	24%
Quiet spaces or low sensory sessions	19%	25%	26%	13%
Can take a support worker or carer at no extra cost	18%	19%	14%	19%
Assistive technology available	13%	14%	13%	12%
Venue/presenter engages me beforehand about access needs	12%	17%	5%	11%
Base	[586]	[147]	[111]	[328]

1 2 3 4 5

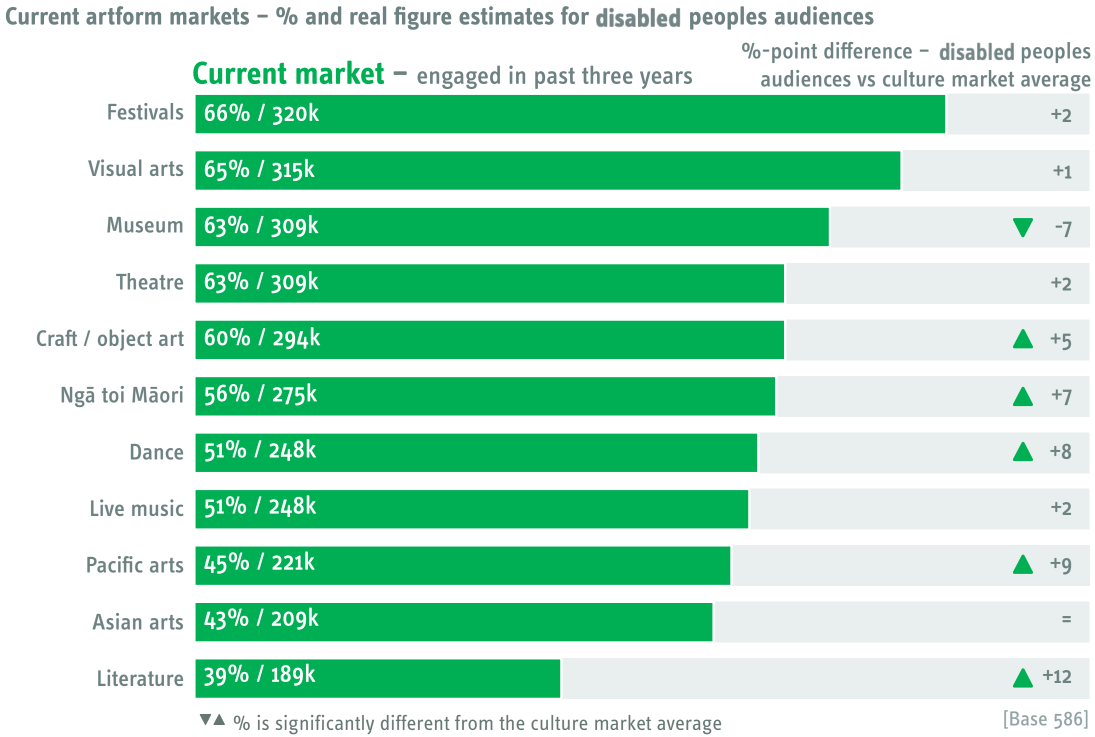
Top 5 most cited elements

*See page 04 for definition.

Disabled audiences more active across 5 of the 11 core artforms

Highlighting that disabled peoples audiences are active cultural participants, they demonstrate broad and active engagement across the 11 core artforms.

The proportion of disabled audiences who have engaged with an artform in the past three years (current market) is broadly comparable – or significantly higher – than the wider market. Notably, their engagement with literature (39%, compared to 27% overall), Pacific arts (45% vs 36%), dance (51% vs 43%), ngā toi Māori (56% vs 50%) and craft / object art (60% vs 55%).



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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 **disabled peoples audiences** is n=626. Confidence intervals (margins of error) are calculated using the unweighted base. For the disabled peoples audience, the margin of error is **+/-3.92%** at 50% (i.e., where a result is 50%, the actual result may fall between 46.08% and 53.92%).[1]

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

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