

Māori audiences and the market for ngā toi Māori

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 Māori, Pacific peoples or Asian. 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 or Asian dance festivals.

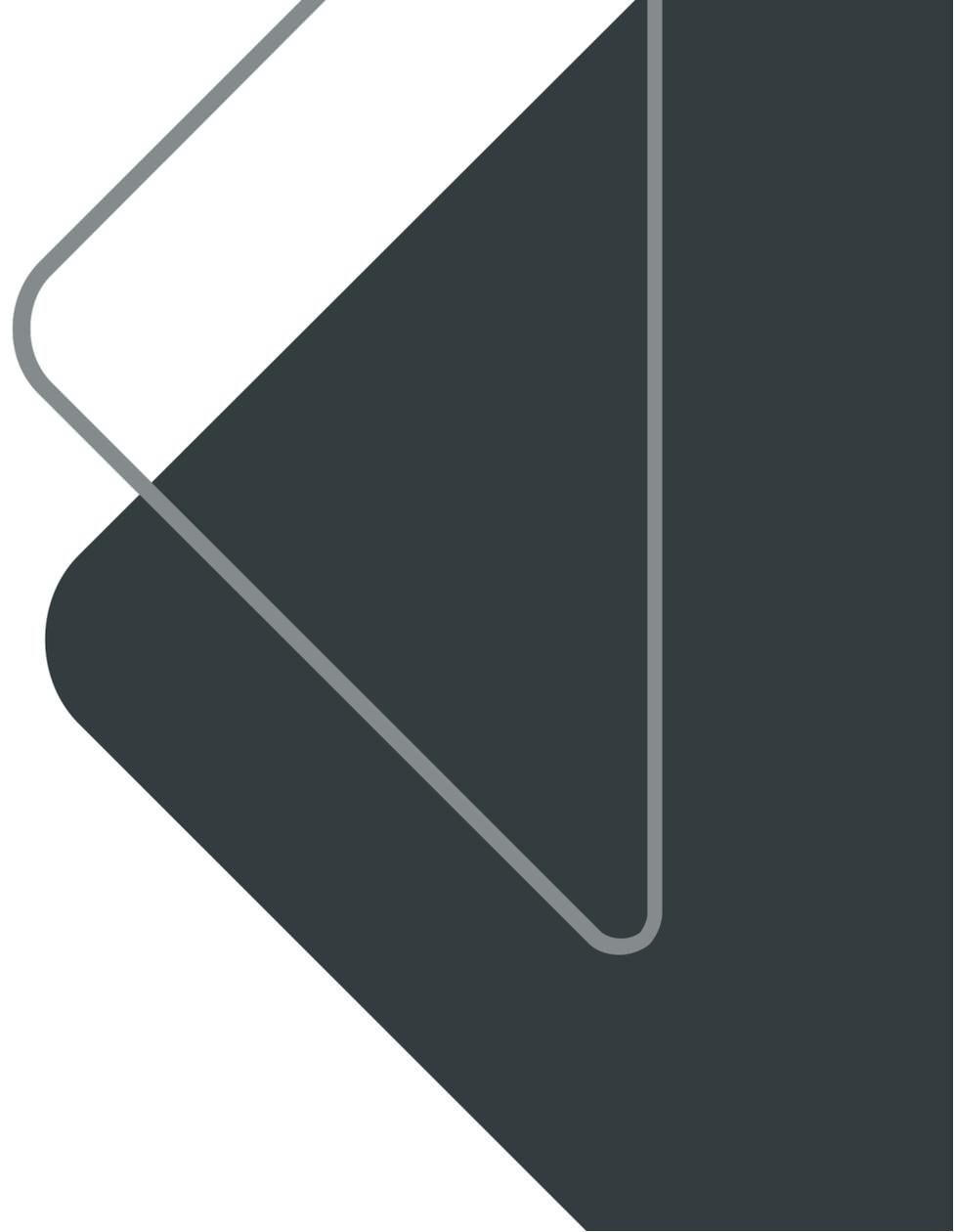
Culture Segments: a sector-specific, values-based segmentation framework.

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

Māori audiences 2025



570k adults in the culture market identify as Māori

4.04 million

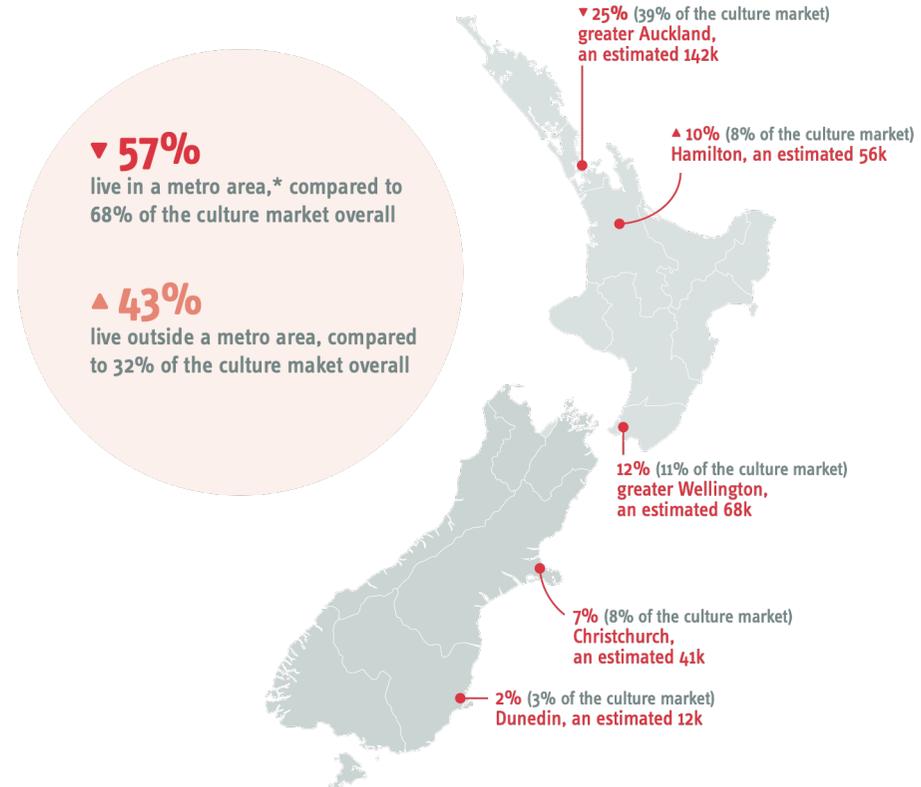
Estimated number of adults in Aotearoa New Zealand in the market for arts and culture (the culture market)

570k

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

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.

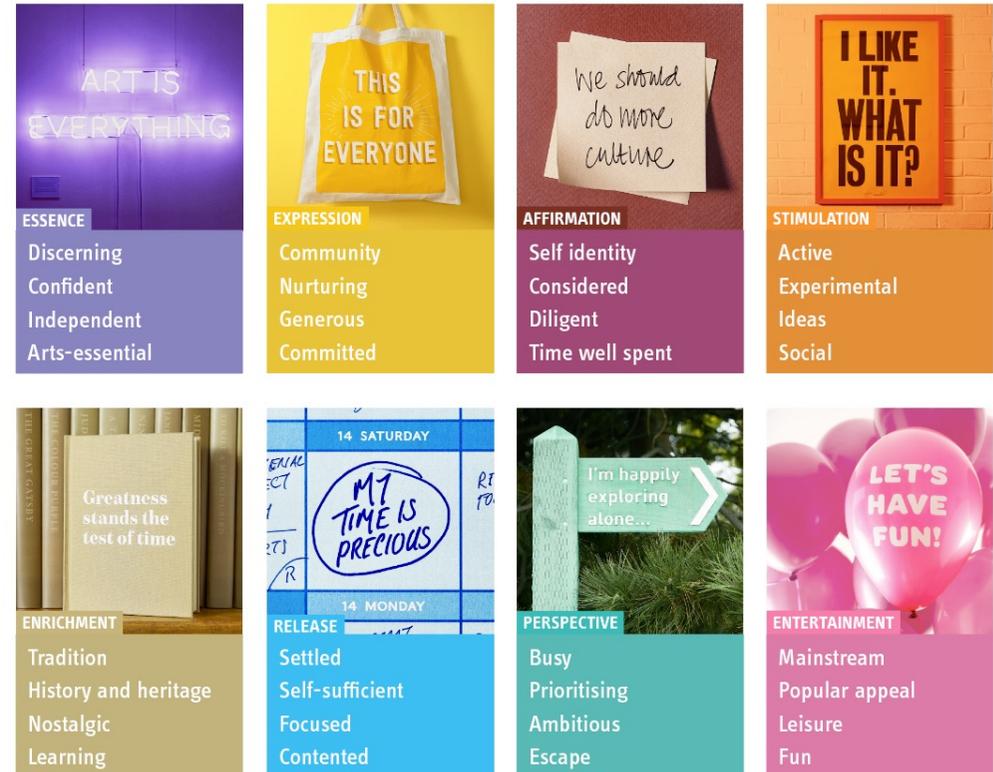
▲▼ where % differs significantly from the culture market average
 *greater Auckland, Hamilton, greater Wellington, Christchurch or Dunedin



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 Māori 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 Māori audiences compared to the market overall.

Essence and Expression are over-represented

Compared to the wider culture market, Essence (12%) and Expression (28%) segments are significantly more common among Māori audiences. Conversely, Enrichment, Perspective and Entertainment are under-represented.

		Culture market	Māori audiences
Essence	'in pursuit of self-actualisation'	9%	▲ 12%
Expression	'people people'	23%	▲ 28%
Stimulation	'all about the big idea'	11%	11%
Affirmation	'do the right thing'	17%	18%
Enrichment	'through the lens of the past'	10%	▼ 6%
Release	'say they're too busy'	12%	12%
Perspective	'happy in their own bubble'	7%	▼ 6%
Entertainment	'looking for fun'	10%	▼ 6%
		Base [4853]	[706]

▼▲ % for Māori 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.



Expression find meaning through connection

Enthusiastic, connection-seeking Expression is one of the most culturally active segments and over-represented among Māori audiences (28%, compared to 23% overall). They value experiences that feel alive and relevant – things to be shared, discussed and enjoyed collectively. Expression audiences also have a deep appreciation for creativity that reflects identity, celebrates skill and brings people together.



Cultural experiences and identity are inseparable for Essence

Essence (12%) is significantly more prominent among Māori audience than in the wider market (9%). This confident segment that sees art and culture not simply as something they do, but as something interwoven with their identity and sense of self.

Essence audiences seek depth and reflection in their cultural experiences and have the curiosity and confidence to pursue experiences that offer that sense of transformation.



Stimulation, Affirmation and Release are as common among Māori audiences as in the wider market

Stimulation (11%) are adventurous seekers of fresh perspectives, unique experiences and bold ideas. They respond best to innovation and spectacle when backed by substance; a compelling 'big idea' to hold their interest. Conversely, Affirmation are cautious and lack the confidence of others. Being conscientious and led by self-improvement, they think carefully about their arts engagement and therefore can be less culturally active than their stated interest might suggest.

Meanwhile, 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.



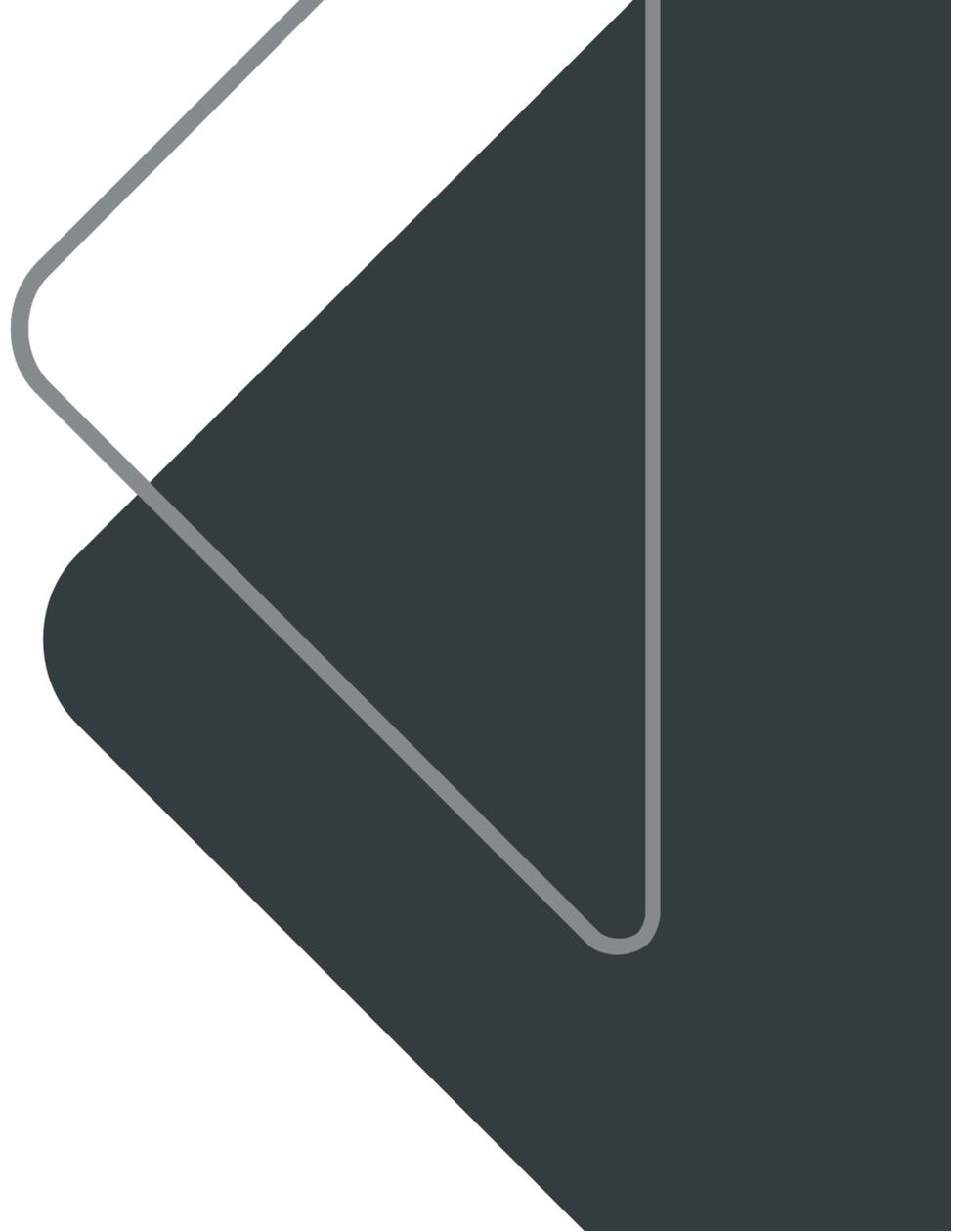
The remaining fifth are a mix of three less culturally active segments

The remaining 18% of Māori audiences are made up of three typically less culturally active segments.

- Traditional Enrichment (6%) are cautious with established tastes and limited interest in new interpretations or staying up-to-date.
- Internally-guided Perspective (6%) tend to be focused on a set of specific personal interests with little appetite to broaden their horizons. Self-contained and unaffected by others' views, they're difficult to activate.
- Fun-loving Entertainment (6%) has conventional tastes. 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

Māori audiences 2025

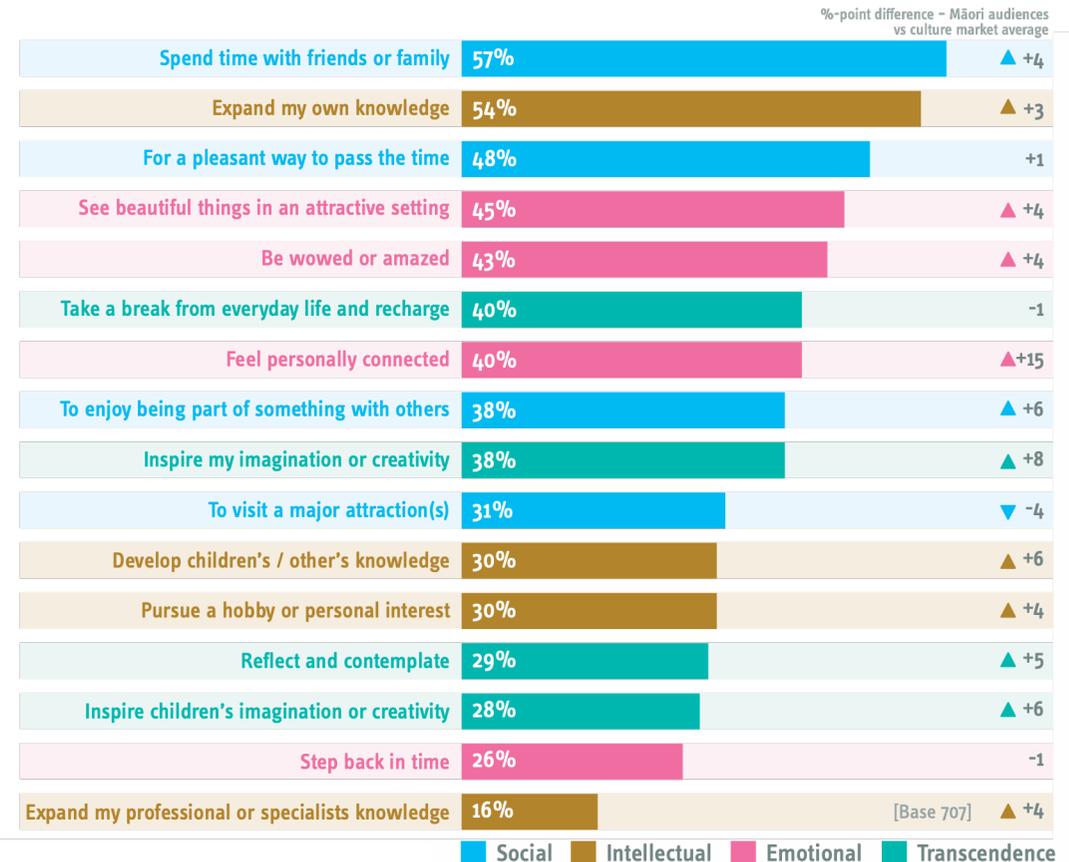


Broader range of deeper benefits sought

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

As with the wider market, ‘spending time with friends or family’ and ‘building knowledge’ are the more prominent drivers. However, Māori audiences demonstrate a broader motivational profile, citing most reasons at significantly higher levels than average. Notably, they are more likely to seek experiences that move, inspire or provoke reflection and contemplation. For around 3 in 10, the opportunity ‘to inspire children’s imagination or creativity’ is also an important consideration.

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



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

Anticipating a main Emotional benefit from engagement more common

Taking a macro view of Māori audiences' primary reason for engaging (**main** motivation) reveals an important difference. While Social connection is common (37%), it is less prominent compared with the wider market. Instead, a larger proportion primarily anticipate an Emotional benefit (21%), suggesting a stronger interest in experiences that feel more meaningful and emotionally resonant.

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

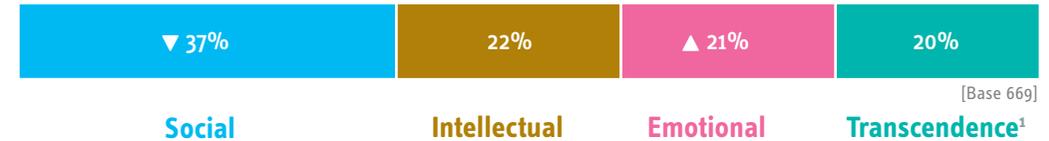
Emotional: Looking to feel and connect through experiences that deeply move and uplift

Transcendence:¹ Seeing cultural experience as opportunities for creative stimulation, but also a means to reflect, escape or recharge

¹ Typically referred to as 'Spiritual' in other contexts.

Primary benefits sought from arts and cultural engagement

Main motivation – Māori audiences



Main motivation – culture market average



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

Close to half ‘missed’ attending at least one recent arts event

▲ **48%** / an estimated **271k**

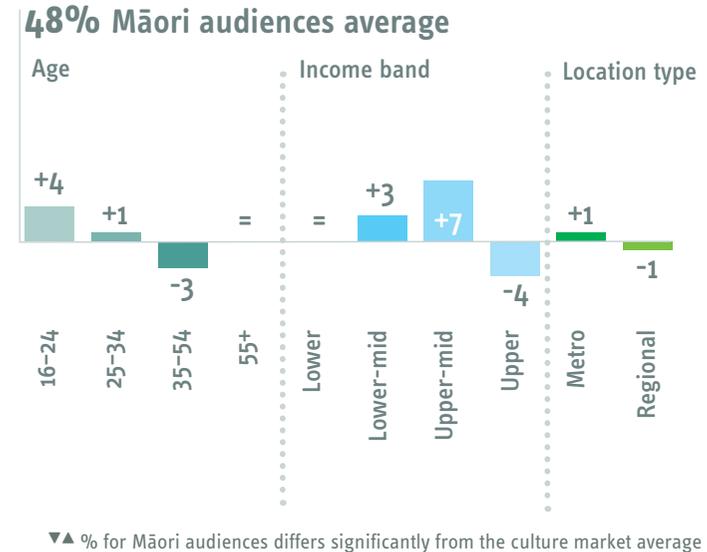
Māori audience members recall at least one occasion¹ in the past 12 months when they wanted to attend a specific arts organisation or event but were prevented from doing so. A significantly higher level compared to the wider culture market (39%).

Māori audiences are significantly more likely than the culture market overall to recall a specific occasion when they were prevented from attending (48%).

Across the income and age bands, the pattern of who was most affected broadly reflects the wider market, with younger Māori audiences more likely than their older counterparts to recall a recent occasion when they were prevented from attending.

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 – Māori audiences

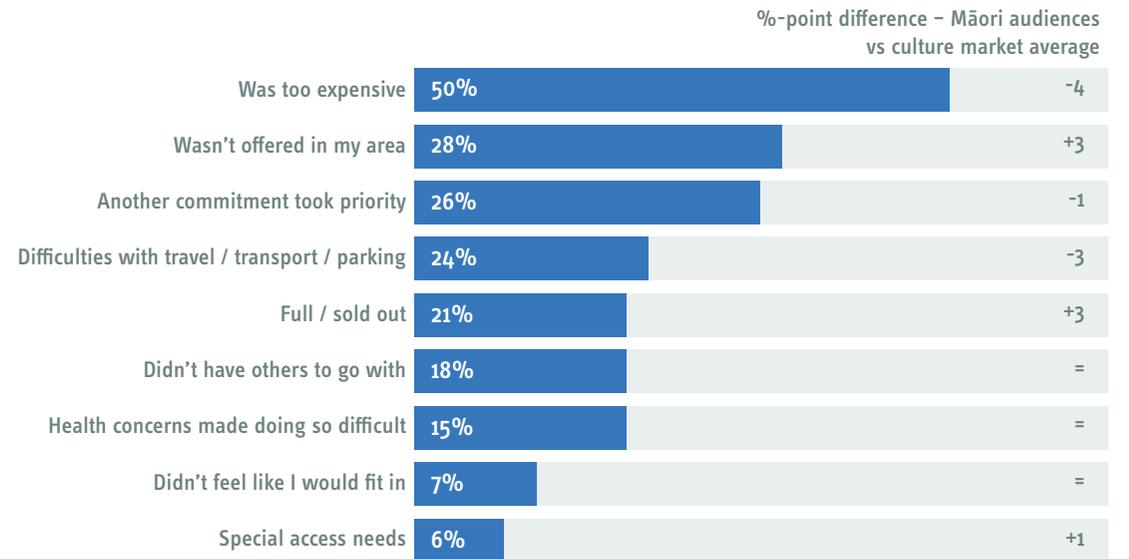


Barriers mirror wider market, but ‘access’ is a challenge

There is little to distinguish the barriers faced by Māori audiences who were recently prevented from attending an arts event from those of the wider market, with cost being the most commonly cited barrier.

However, access – specifically that it was ‘not offered in the area’ – ranked second among Māori audiences (28%), compared to fourth for the wider market (25%). This likely reflects the geographic spread of Māori audiences (see [page 04](#)) and was more pronounced among those living outside metro centres (36%) than their metro-based counterparts (22%), although this pattern broadly mirrored that of the wider market.

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



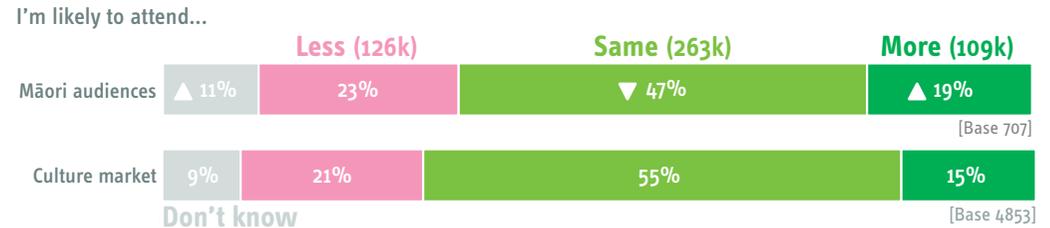
[Base 336]

Steady outlook for arts engagement, under financial pressure

Exploring how Māori audiences perceive their current level of arts attendance compared with expectations for the next 12 months suggests that engagement is likely to remain stable. Close to 5 in 10 expect their attendance to stay the same (47%) or are uncertain (11%). While around a fifth anticipate doing more (19%), this is offset by a higher proportion expecting to do less (23%).

Rising cost-of-living pressures are a key factor, cited by 70% of Māori audiences who expect to attend less. While financial constraints affect all audience groups, ‘health or disability concerns’ are a more prominent factor for Māori audiences (26%) than the wider market (20%).

Anticipated arts and cultural engagement in next 12 months – Māori audiences



Top reasons for expecting to attend less	Culture market	Māori audiences
Increased living costs means / less disposable income	66%	70%
Changes in personal circumstances / responsibilities	41%	46%
Working more	21%	27%
Health / disability concerns	20%	26%
Things on offer don't align with my interests / needs	20%	17%
I no longer have anyone to go with	12%	15%
There will be less on offer	8%	8%
Been disappointed by recent arts and cultural events	8%	8%
I plan to engage with more arts content online	6%	6%

Base

[1039]

[159]

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

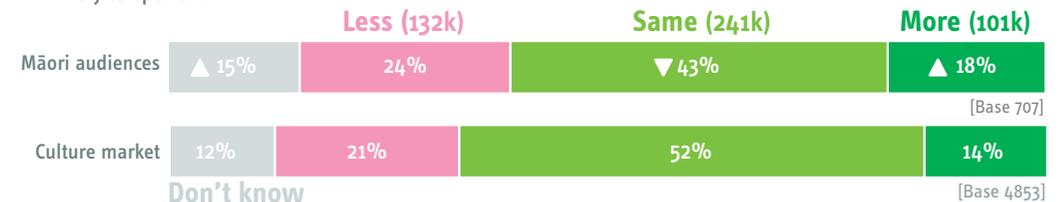
Māori audiences' spending intentions mirror attendance

Building on anticipated future attendance (see previous page), expectations around Māori audiences' future spend follow a similar a pattern. Compared with the wider market, a larger proportion anticipate spending more (18%) on arts engagement over the next 12 months. However, this is offset by a higher proportion expecting to attend less (24%). With over half not anticipating change (43%) or unsure (15%), overall spend is likely to remain stable.

Reasons Māori audiences have for expecting to spend less in the coming 12 months broadly align with the wider market with financial constraints being the key factor across all audiences.

Anticipated arts and cultural engagement in next 12 months – Māori audiences

I'm likely to spend...



Top reasons for expecting to spend less	Culture market	Māori audiences
Increased living costs means / less disposable income	65%	68%
Changes in personal circumstances / responsibilities	31%	37%
Ticket prices have increased too much	27%	27%
I'll seek free arts and cultural events instead of paying	24%	25%
Getting to and from events has become too expensive	16%	18%
Health / disability concerns	16%	16%
I plan to attend less often	16%	15%
Working more	16%	20%
No longer have anyone to go with	11%	13%

Base

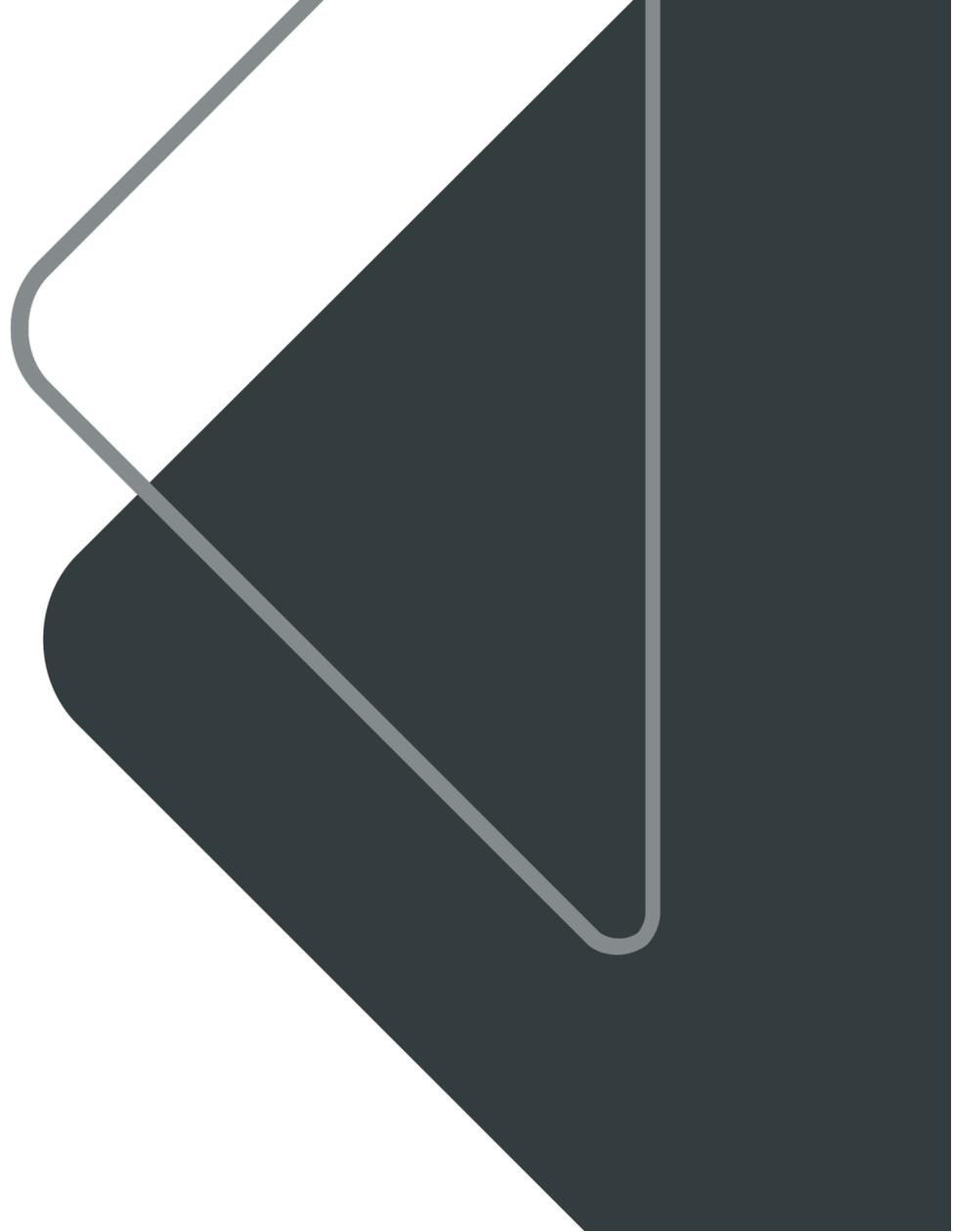
[1022]

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

Artform engagement

Māori audiences



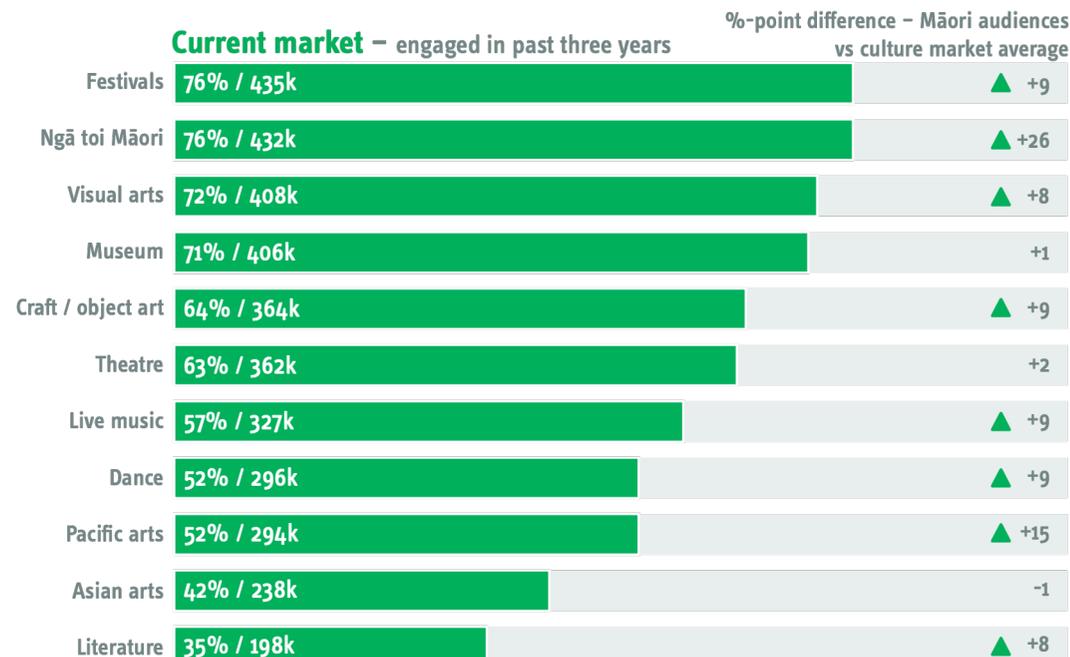
Māori audiences more active across most artforms

Compared to the wider market, Māori audiences demonstrate broad and active engagement being significantly more likely to have engaged with 8 of the 11 core artforms in the past three years (current).

Alongside being more active in relatively mainstream areas such as festivals and visual arts, Māori audiences are more likely to have recently engaged with ngā toi Māori (76%, compared to 50% overall) and Pacific arts (52%, compared to 36%).

Reflecting a rich and varied cultural appetite, Māori audiences are also more active across craft / object art, live music, dance and literature than the wider market.

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



▼▲ % for Māori audiences is significantly different from the culture market average

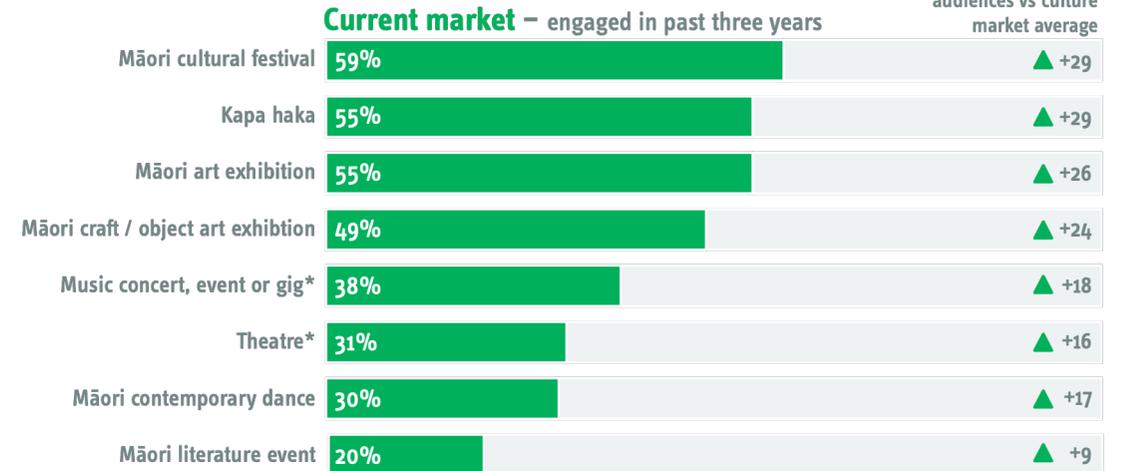
[Base 707]

Wide-ranging engagement across ngā toi Māori

Māori audiences show wide-ranging engagement across the forms of creative expression within ngā toi Māori. While Māori cultural festivals enjoy the largest share of the current market (59%), engagement with kapa haka or the visual artforms – Māori art or craft / object art exhibitions – aren't far behind. The other performing arts categories – live music, theatre, contemporary dance – also attract relatively strong engagement.

Within the dataset, audiences in the current market for Māori cultural festivals stand out from the broader cohort as being younger, more likely to live in family households or strongly Expression – a segment that values shared experiences and connection (34%, compared to 28% among Māori audiences overall).

Current ngā toi Māori market – sub-artforms



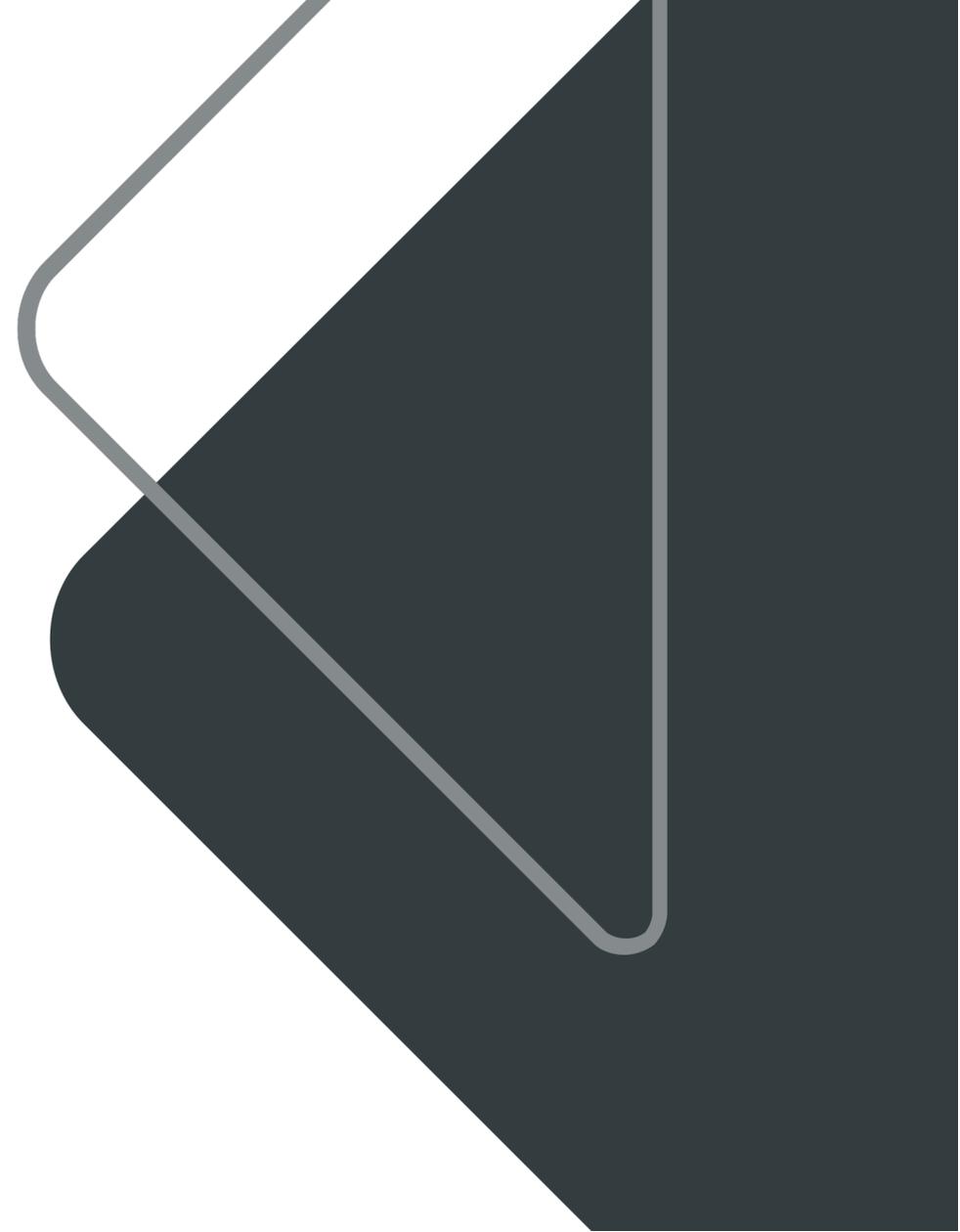
*showcasing Māori artists / performers, stories or production team

[Base 707]

▼▲ % for Māori audiences is significantly different from the culture market average

Engagement with ngā toi Māori

The culture market overall



3.48 million New Zealanders in the market for ngā toi Māori

Most of the culture market (86%) have either engaged with ngā toi Māori in the past or are open to doing so in the future, equating to an estimated 3.48 million adults.

Despite population growth, the size of this market has not developed over the past five years.¹ In 2025, half (50%) the culture market had engaged with ngā toi Māori in the past three years, a significantly lower proportion than in 2020 (61%).

While the active market hasn't developed, sizable potential remains. In real terms, an estimated 617k would consider engaging but haven't done so previously (the potential market) and an estimated 855k last engaged three or more years ago (lapsed).

Market for ngā toi Māori – as real figure estimates



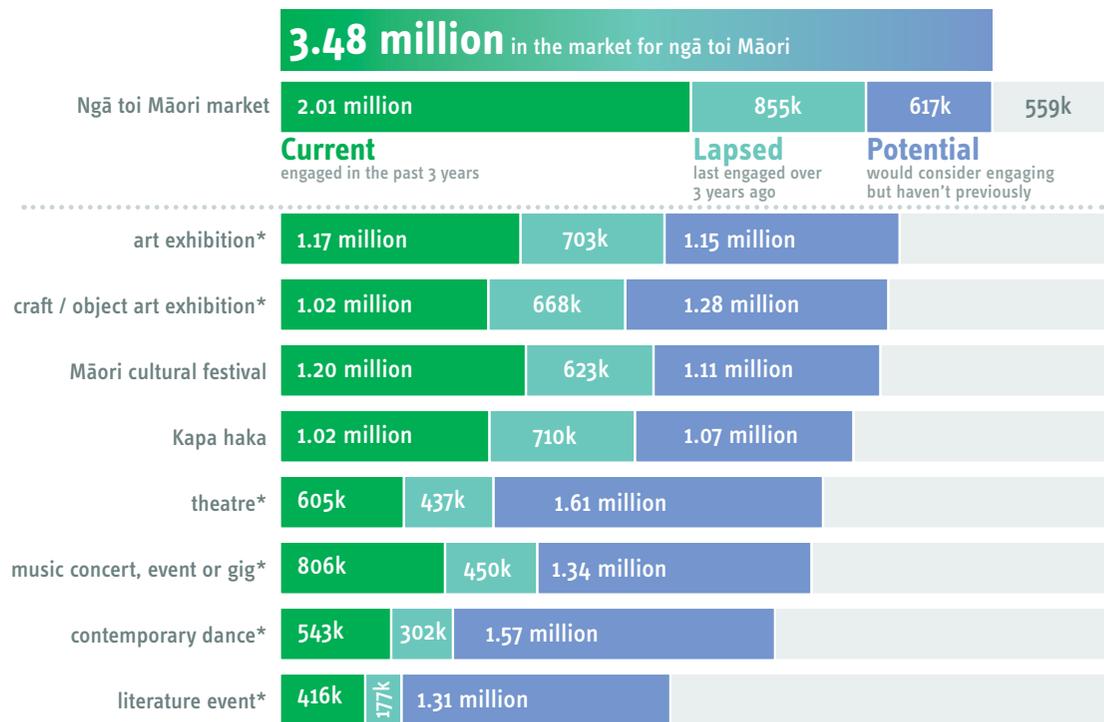
¹ The last Audience Atlas Aotearoa New Zealand study was conducted in 2020.

Numerous entry points into ngā toi Māori engagement

Ngā toi Māori encompasses a rich variety of creative expression. Across the sub-artform categories, cultural festivals (30%) and art exhibitions (29%) hold the larger share of the current market, in addition to kapa haka (25%) and craft / object art (25%).

For all sub-categories, the potential market is as large – or larger – than the active market. For example, an estimated 1.07 million would consider engaging with kapa haka but haven’t previously (the potential market), compared with 1.02 million who have recently engaged – highlighting a sizable untapped opportunity.

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



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

not in the market

Current market for ngā toi Māori 50% or an estimated 2.01 million adults

Age profile



Ethnic identity

▲ 21% (14%) Māori
▲ 9% (7%) Pacific peoples

16% (15%) Asian

▼ 52% (62%) European

Location

69% (68%) metro

31% (32%) regional



▲ 43% (35%) children in the household
[Base 2292]



▲ 14% (12%) Disabled peoples

[Base 2505]

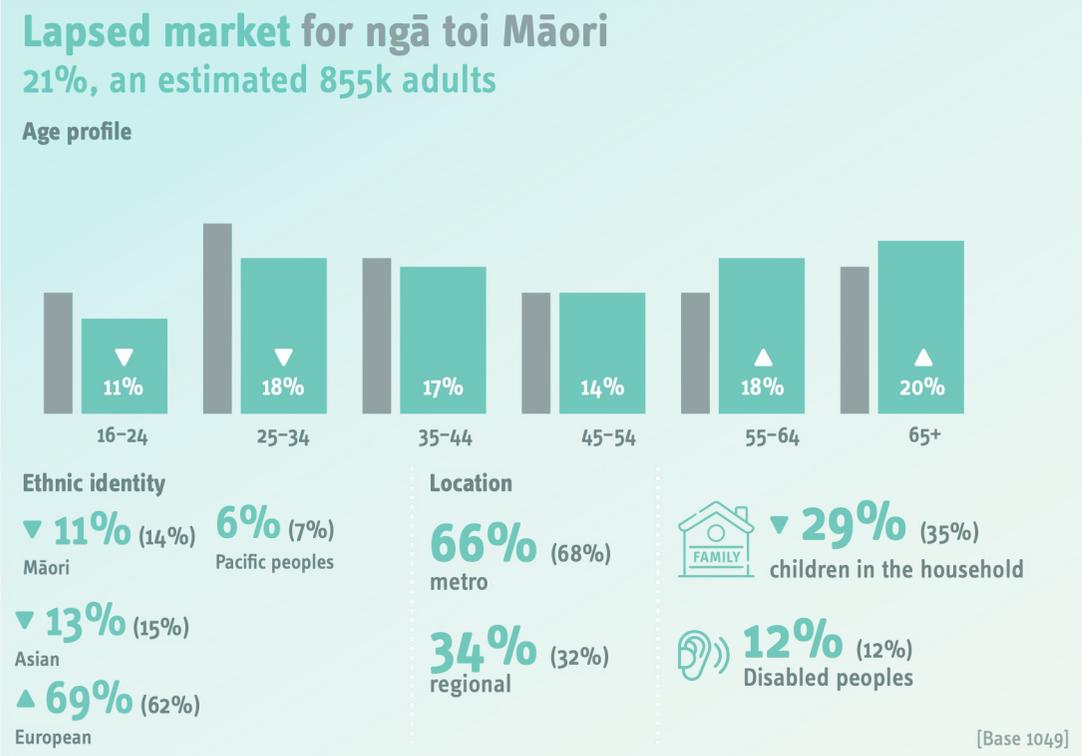
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▲▼ where % is significantly different from the culture market average.
The culture market average is represented as either a grey bar or a % in bracket

Current market for ngā toi Māori

Compared to the culture market overall, those having engaged with ngā toi Māori in the past three years are younger, more diverse and more likely to live in family households:

- 46% are aged under 35, compared to 36% overall, while a fifth are aged 55+ (21%, compared to 32%).
- Māori (21%) and Pacific (9%) audiences are more prominent.
- More likely to live in family households (43%).
- 7 in 10 live in metro areas.
- More likely to identify as a disabled person (14%).
- The four more culturally active segments, Expression (31%), Affirmation (20%), Stimulation (14%) and Essence (12%) are all over-represented.



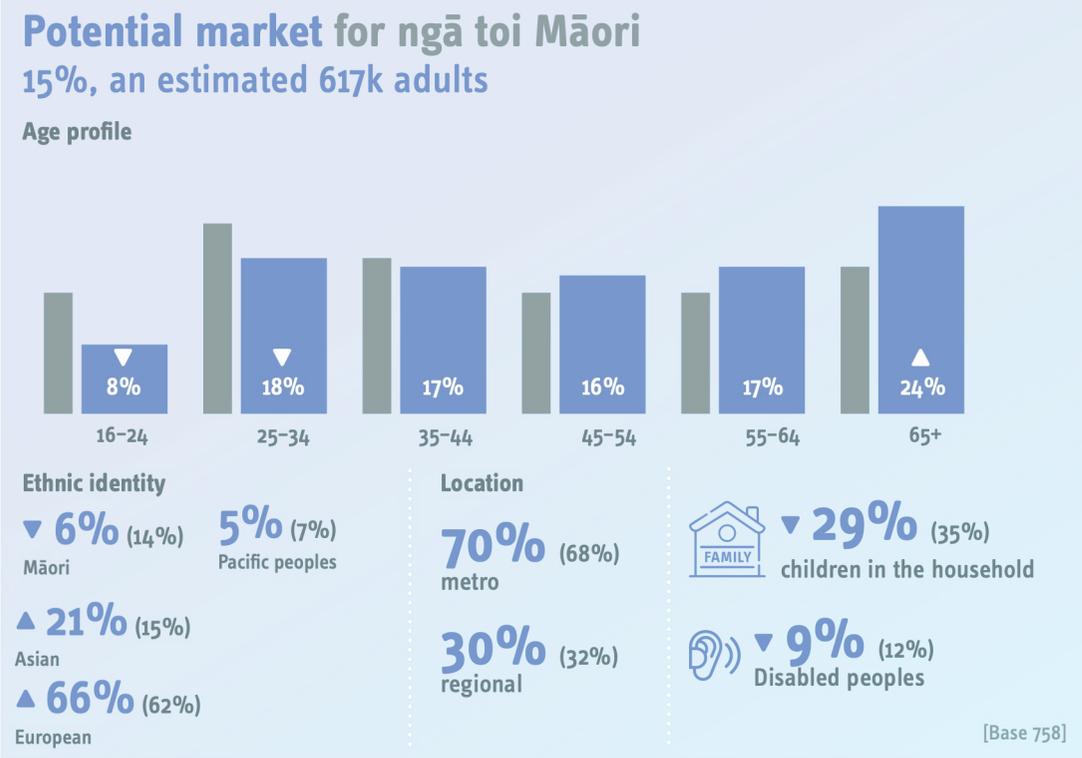
▲▼ where % is significantly different from the culture market average. The culture market average is represented as either a grey bar or a % in bracket

Lapsed market for ngā toi Māori

Compared to the culture market overall, those having engaged with ngā toi Māori before, but not for more than three years (lapsed) are typically older and less diverse:

- Close to 3 in 10 are aged under 35 (29%, compared to 36% overall), while 39% are aged 55+, compared to 32% overall.
- European audiences are over-presented (69%).
- Less likely to live in a family household (29%).
- Around two-thirds live in a metro areas (66%).
- The less culturally active Enrichment (12%) and Release segments (15%) are over-represented and Expression (17%) under-represented.

Icons Freepik on Flaticon



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

icons Freepik on Flaticon

Potential market for ngā toi Māori

Compared to the culture market overall, those who would consider engaging with ngā toi Māori, but haven't previously, are older and less diverse:

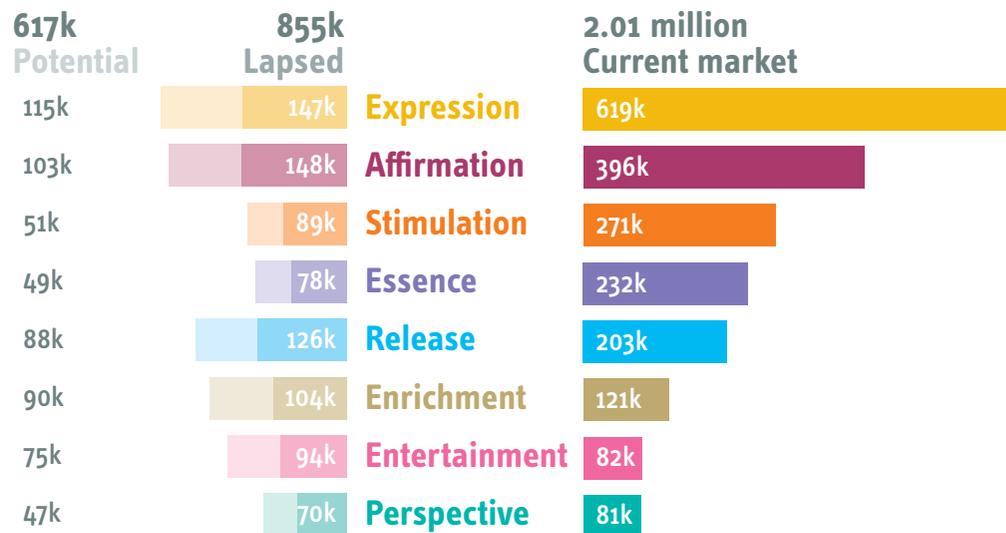
- A quarter are under 35 (26%, compared to 36% overall), while 41% are aged 55+, compared to 32% overall.
- European (66%) and Asian audiences (21%) and are over-represented.
- Less likely to live in family households (29%).
- Less likely to identify as a disabled person (9%).
- Less culturally active Enrichment (15%) is significantly over-represented. However, their prominence is due to the absence of the more active Expression and Stimulation rather than larger numbers of Enrichment. See real figure estimates explored on the following page.

Authenticity and connection at the heart of Expression engagement

Expression (31%) is the largest segment within the current ngā toi Māori market. This segment values inclusivity and seeks experiences that foster connection with others. Their engagement often centres on moments that feel shared and emotionally resonant, grounded in authenticity and a sense of connection to people and place.

Affirmation is also prominent across current, lapsed and potential ngā toi Māori markets. Their appetite for learning and self-development provides an opportunity to deepen engagement, though it is important that experiences feel accessible and welcoming. Affirmation audiences engage most confidently when content supports their curiosity and personal growth without leaving them feeling out of their depth.

Ngā toi Māori 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 **Māori audiences** is n=1073. Confidence intervals (margins of error) are calculated using the unweighted base. For Māori audiences, the margin of error is **+/-2.99%** at 50% (i.e., where a result is 50%, the actual result may fall between 47.01% and 52.99%).

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.

morris
hargreaves
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