Pacific audiences and the market for Pacific Arts

Audience Atlas Aotearoa
New Zealand 2025

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World Dance Crew Championship (WDCC) 2025 at Manukau Events Centre. Photo: These Guys I Know, Edward Fabian.

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 Pacific peoples, Māori 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 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

Pacific audiences 2025

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277k adults in the culture market identify as Pacific peoples

4.04 million

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

277k

Estimated number of adults in the culture market who identify as Pacific peoples

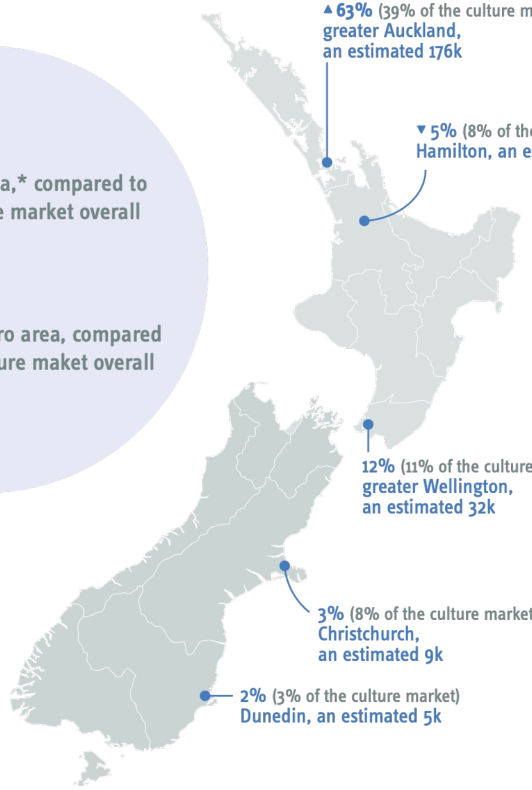
Pacific audiences: respondents who identified as Pacific peoples were included in this analysis. We note that this is an expansive group representing a diverse range of cultural identities. The resulting analyses offers a broad indicative overview of this group.

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

▲ **85%**
live in a metro area,* compared to 68% of the culture market overall

▼ **15%**
live outside a metro area, compared to 32% of the culture maket overall



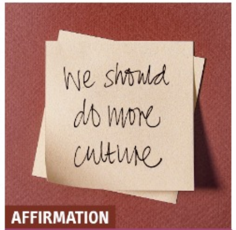
Activating audiences with Culture Segments

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.

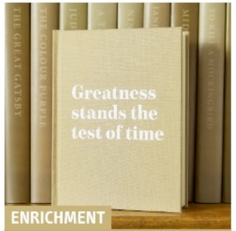
ESSENCE
Discerning
Confident
Independent
Arts-essential

EXPRESSION
Community
Nurturing
Generous
Committed



AFFIRMATION
Self identity
Considered
Diligent
Time well spent

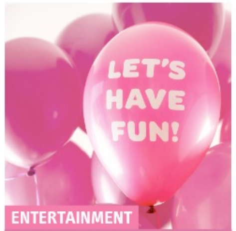
STIMULATION
Active
Experimental
Ideas
Social



ENRICHMENT
Tradition
History and heritage
Nostalgic
Learning

RELEASE
Settled
Self-sufficient
Focused
Contented

PERSPECTIVE
Busy
Prioritising
Ambitious
Escape



ENTERTAINMENT
Mainstream
Popular appeal
Leisure
Fun

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Culture Segment profile of Pacific audiences in Aotearoa

While Culture Segments are grounded in deep-seated human values, demographic factors can create subtle variations. Pacific audiences show a slightly different Culture Segments profile compared to the overall market.

Pacific audiences are strongly Expression

Compared to the culture market overall, there are significantly higher proportion of Expression (41%) among Pacific audiences. Conversely, Enrichment (7%), Perspective (3%) and Entertainment (3%) 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	Pacific audiences
Essence	'in pursuit of self-actualisation'	9%	11%
Expression	'people people'	23%	▲ 41%
Stimulation	'all about the big idea'	11%	9%
Affirmation	'do the right thing'	17%	16%
Enrichment	'through the lens of the past'	10%	▼ 7%
Release	'say they're too busy'	12%	10%
Perspective	'happy in their own bubble'	7%	▼ 3%
Entertainment	'looking for fun'	10%	▼ 3%
	Base	[4853]	[344]

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

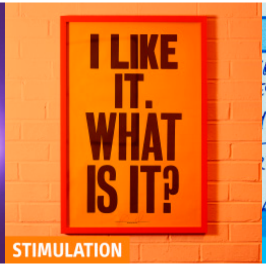
Community and connection seeking Expression dominates

Enthusiastic Expression is one of the segments most likely to regularly engage with arts and culture. They're a segment characterised by strong interest in others, meaning cultural engagement is not only about the activity itself but also about who it is shared with and the sense of belonging it creates.

Expression emerges as the dominant segment within Pacific audiences (41%), reflecting both the importance of cultural connection and the role that shared experiences play in strengthening identity, pride and social bonds.

Conscientious Affirmation is the next most common segment

After Expression, Affirmation is the next most common segment among Pacific audiences (16%, in line with the culture market average). Affirmation 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. 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.

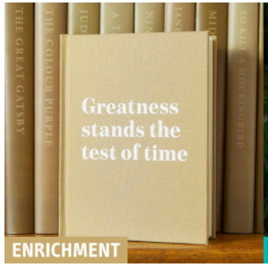


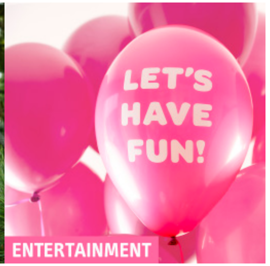
Pacific audiences mirror the wider market in Essence, Stimulation and Release

Mirroring the wider market, around 1 in 10 Pacific audiences fall into each of the Essence, Stimulation and Release segments.

Essence are the cultural connoisseurs, seeking quality, depth and reflective experiences. For them, cultural engagement is not just an activity but central to their identity. Meanwhile, Stimulation are adventurous seekers of the new and unique. They're drawn to variety and risk-taking but need more than just spectacle. A compelling 'big idea' is essential to hold their interest.

Release often feel time-poor and out of the loop. When they do engage, they look for unmissable, high-profile events. Because going out is relatively rare for them, they tend to be more cautious and less experimental in their cultural choices.





Enrichment, Perspective and Entertainment less common compared to the wider market

The remaining 12% of Pacific audiences are made up of three of the less culturally active segments.

- Traditional Enrichment (7%) are cautious with established tastes and limited interest in new interpretations or staying up-to-date.
- Internally-guided Perspective (3%) tend to be focused on a set of specific personal interests with little appetite to broaden their horizons. Being self-contained and unaffected by the views of others, they're difficult to activate.
- Fun-loving Entertainment (3%) 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

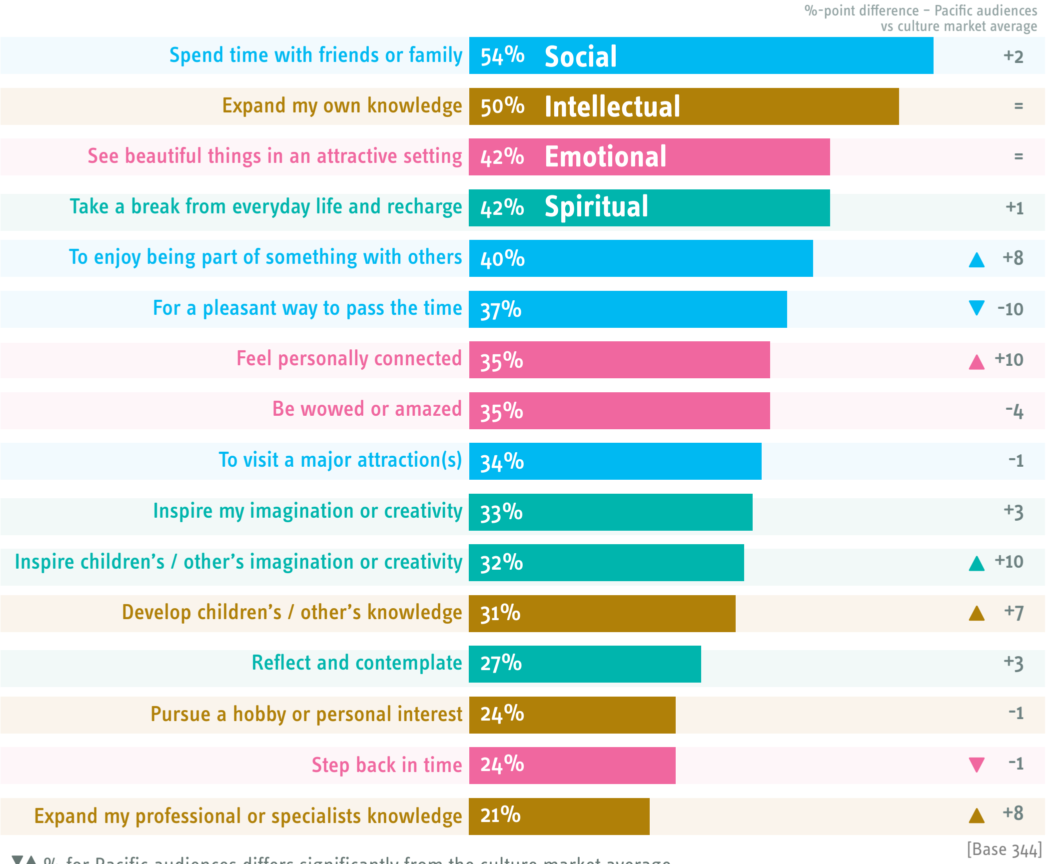
Pacific audiences 2025

‘Shared experiences’ is a key arts engagement driver

In addition to the values shaping attendance – understood and activated through Culture Segments – Pacific 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 most prominent drivers among Pacific audiences. Beyond these, Pacific audiences are more likely than average to be seeking connection, for example ‘being part of something with others’ (40%), a sense of belonging (35%, ‘feeling personally connected’), or to want benefits for others, such as ‘inspiring a child / others’ imagination and creativity’ (32%) or ‘developing a child / other’s knowledge’ (31%).

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



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

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Over 6 in 10 primarily seek a ‘deeper’ reward from their arts engagement

Taking a macro view of Pacific audiences’ primary reason for engaging (**main** motivation) shows that, while seeking Social connection is most common, more seek something deeper. Over 6 in 10 seek a main Intellectual, Emotional or Spiritual benefit from their arts engagement (62%). 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.

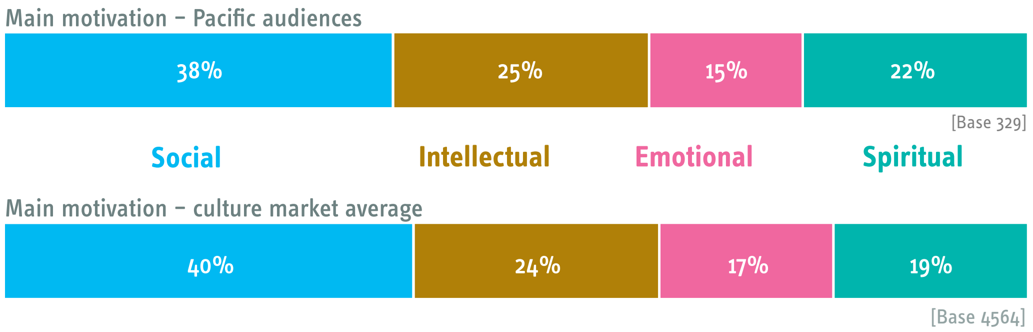
Social: Seeking fun and time with others. The offer is the enabler of shared experiences and memorable moments

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



Half ‘missed’ attending at least one recent arts event

▲ 52% / 143k

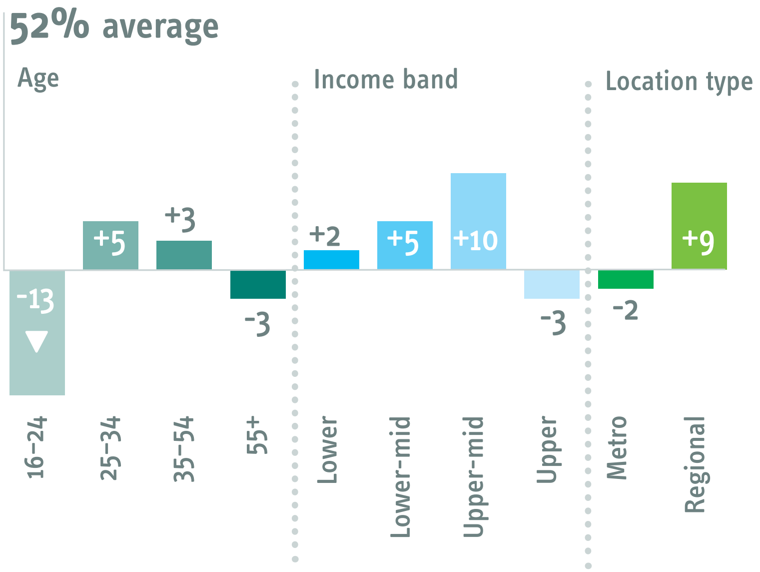
of Pacific audiences can recall at least one occasion[1] in the past 12 months when they had wanted to attend a specific arts organisation or event but were prevented from doing so. A significantly higher level compared to the wider culture market (39%).

Pacific audiences are significantly more likely than the culture market overall to recall a specific occasion when they had been prevented from attending (52%).

Across income bands, the pattern of who was most affected broadly reflects the wider market. However, younger Pacific audiences (aged 16–24) are less likely than their older counterparts to recall a recent occasion when they were prevented from attending an arts or cultural event.

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 - Pacific audiences



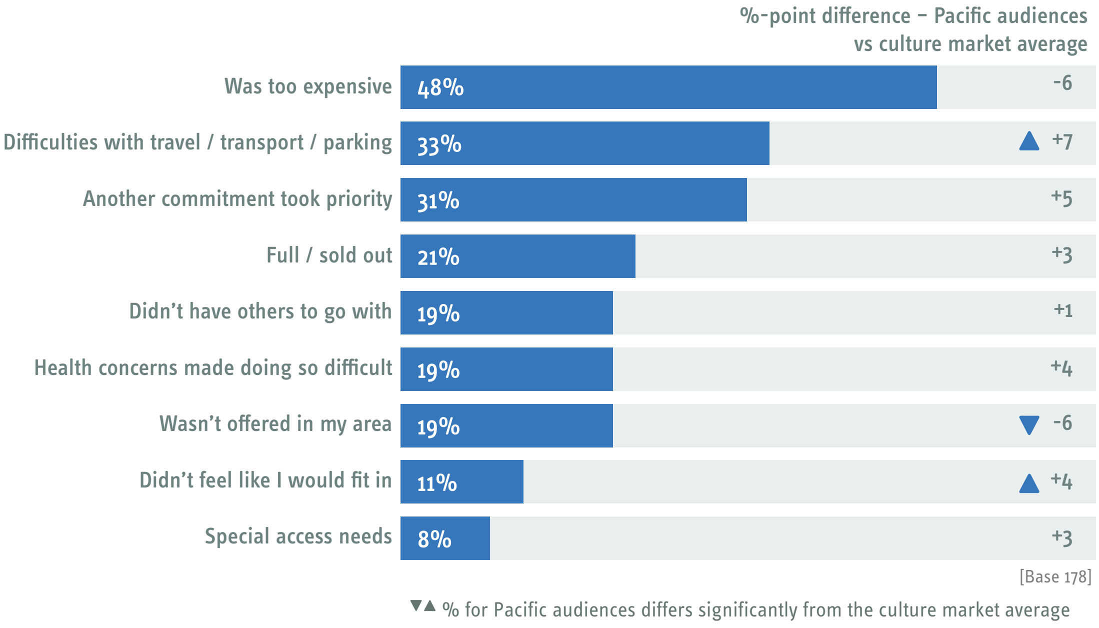
▼▲ % differs significantly from the Pacific audiences’ average

Cost the key barrier, but travel and culture connection matters

Among those who had been prevented from attending a specific arts event in the past 12 months, cost was a key barrier, cited by Pacific audiences at a broadly similar level (48%) to the wider market (54%). However, differences emerged around travel and 'fitting in'.

Pacific audiences were more likely than the wider market to cite difficulties with travel, largely driven by family households.[1] Meanwhile, social barriers (concerns about 'fitting in') disproportionately impact Pacific audiences. Unlike external economic pressures, these cultural disconnects represent addressable challenges, offering organisations opportunities to create genuinely welcoming environments and foster authentic connections with and between audiences.

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



1 52% of Pacific audiences are in a household with children compared to 35% of the wider culture market.

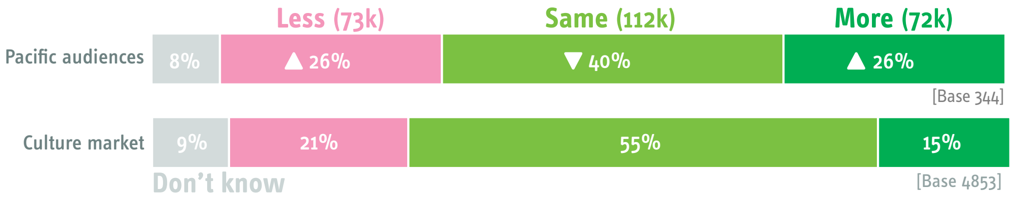
Future attendance stifled and practical pressures outweigh financial barriers

Exploring how Pacific audiences perceive their current level of arts attendance compared to expectations for the next 12 months reveals that engagement is unlikely to change. Around half expect their attendance to match current levels (40%) or are uncertain (8%), and while a quarter anticipate doing more (26%) this is off-set by the same proportion expecting to do less.

Increases in cost-of-living are a key factor for those who anticipate doing less, although among Pacific audiences (53%), this is a less common reason than among the wider market (66%). While financial pressures constrain cultural engagement for all audience groups, practical factors – such as changes in personal circumstances (56%) and work commitments (36%) – are more prominent concerns among Pacific audiences.

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

I'm likely to attend...



Top reasons for expecting to attend less	Culture market	Pacific audiences
Increased living costs means / less disposable income	66%	▼ 53%
Changes in personal circumstances / responsibilities	41%	▲ 56%
Working more	21%	▲ 36%
Health / disability concerns	20%	14%
Things on offer don't align with my interests / needs	20%	▼ 12%
I no longer have anyone to go with	12%	13%
There will be less on offer	8%	6%
Been disappointed by recent arts and cultural events	8%	8%
I plan to engage with more arts content online	6%	8%
Base	[1039]	[90]

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

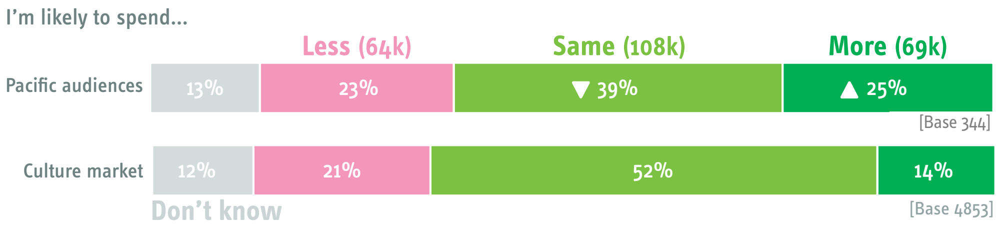
Pacific audiences spending intentions mirror attendance

Building on anticipated future attendance (see previous page), expectations around Pacific audiences' future spend follow a similar pattern. Compared to the wider market, a larger proportion of Pacific audiences anticipate spending more (25%) on arts engagement over the next 12 months. However, this is offset by a similar proportion expecting to attend less (23%). With half not anticipating change (39%) or unsure (13%), overall spend is likely to remain 'stable'.

While cost-of-living pressures is a key factor across all audiences, as with attendance, the reasons Pacific audiences expect to spend less differ slightly. Financial constraints are slightly less pronounced, while practical life pressures feature more strongly – suggesting time and energy, rather than affordability alone, are more immediate limiting factors.

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

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



Top reasons for expecting to spend less	Culture market	Pacific audiences
Increased living costs means / less disposable income	65%	59%
Changes in personal circumstances / responsibilities	31%	39%
Ticket prices have increased too much	27%	30%
I'll seek free arts and cultural events instead of paying	24%	23%
Getting to and from events has become too expensive	16%	18%
Health / disability concerns	16%	11%
I plan to attend less often	16%	16%
Working more	16%	▲ 28%
Things on offer don't align with my interests / needs	11%	9%
Base	[1022]	[79]

Artform engagement

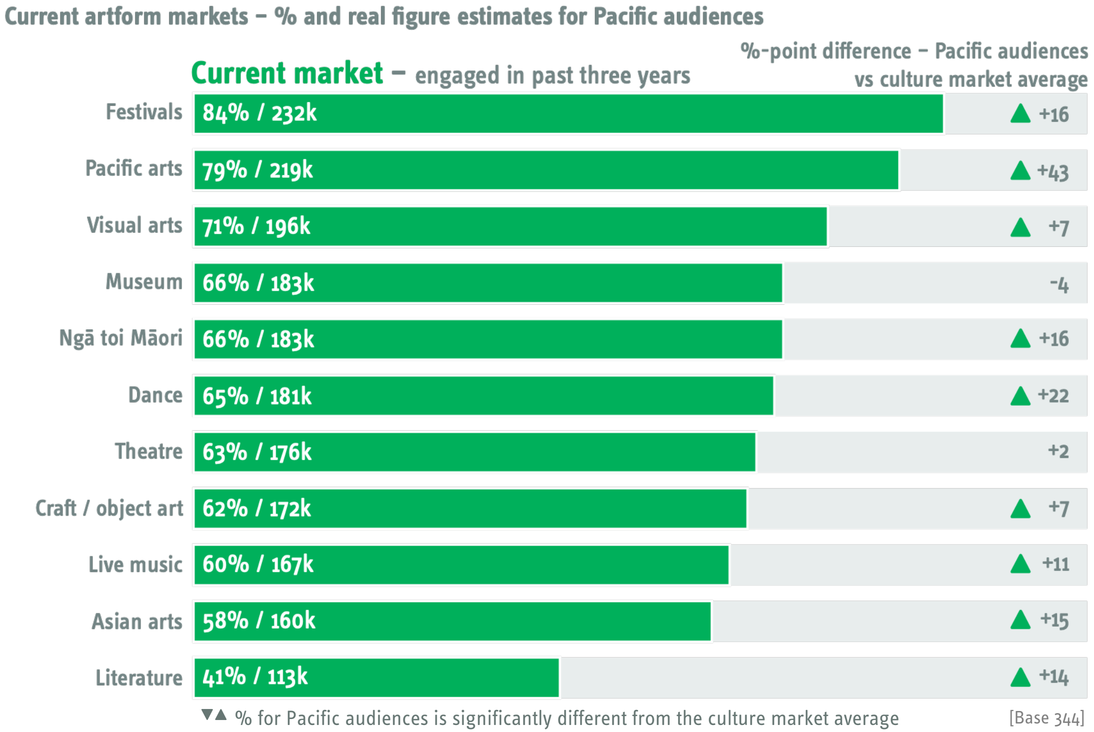
Pacific audiences

Pacific audiences more active across 9 of the 11 core artforms

Compared to the wider market, Pacific audiences demonstrate broad and active engagement, being significantly more likely to have engaged with 9 of the 11 core artforms in the past three years.

Alongside being more active in relatively mainstream areas such as festivals and visual arts, Pacific audiences are more likely to have recently engaged with Pacific arts (79%, compared to 36% overall) and other culturally diverse artforms – ngā toi Māori (66%) and Asian arts (58%).

Reflecting a rich and varied cultural appetite, Pacific audiences are also more active across dance (65%) and literature (41%).



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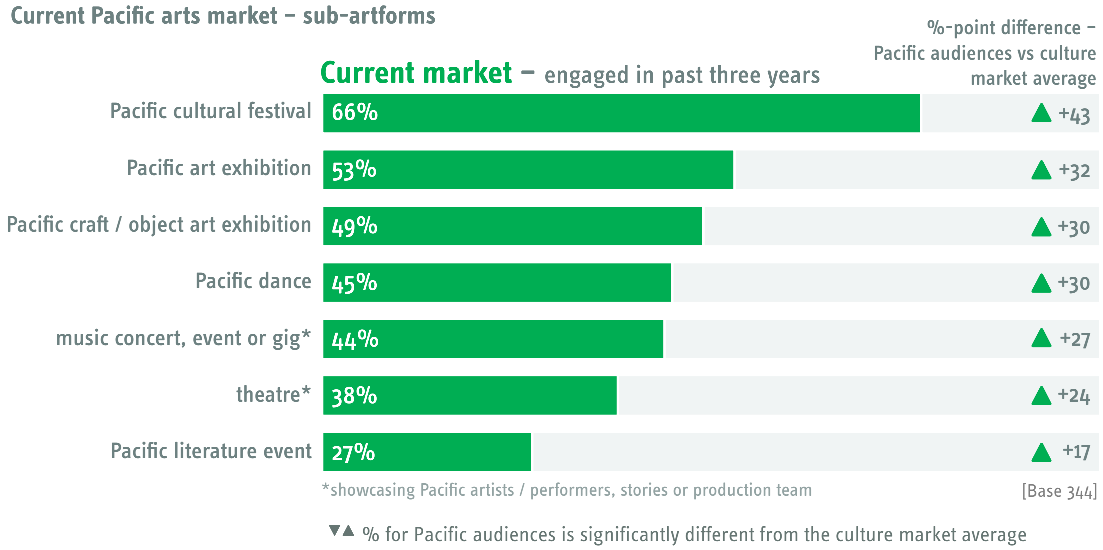
Pacific cultural festivals lead engagement

Pacific arts is a relatively mainstream pursuit for Pacific audiences, with 79% having engaged in the past three years. While engagement is spread across the sub-artform categories that make up Pacific arts, it is grounded in collective experiences, with Pacific cultural festivals enjoying a larger share of the current market (66%). Within the data set, there is little to distinguish Pacific audiences in the current Pacific cultural festival market from the broader cohort, although they are even more strongly Expression – a segment that values shared experiences and connection (47%) – than the Pacific audiences average (41%).

Around half are active in the visual artforms – Pacific art or craft / object art exhibitions – while the performing arts categories – Pacific dance, live music or theatre – also attract relatively strong engagement.



Engagement with Pacific arts

The culture market overall

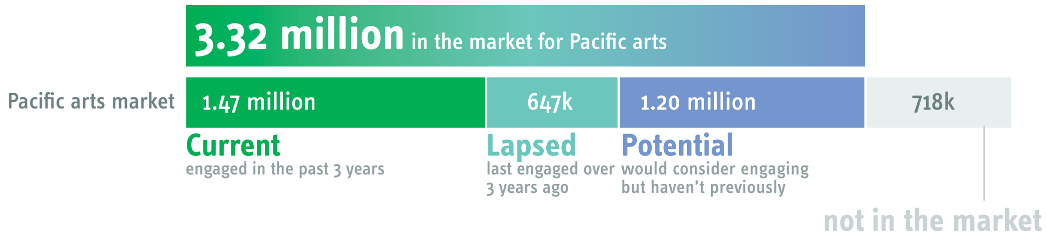
3.32 million New Zealanders in the market for Pacific arts

Most of the culture market (82%) has either engaged with Pacific arts in the past or is open to doing so in the future, equating to an estimated 3.32 million adults.

Despite population growth, the size of this market has receded over the past five years.[1] In 2025, 36% of the culture market had engaged with Pacific 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 1.20 million would consider engaging but haven't done so previously (the potential market), and an estimated 647k have lapsed in their engagement with Pacific arts.

Market for Pacific arts as real figure estimates



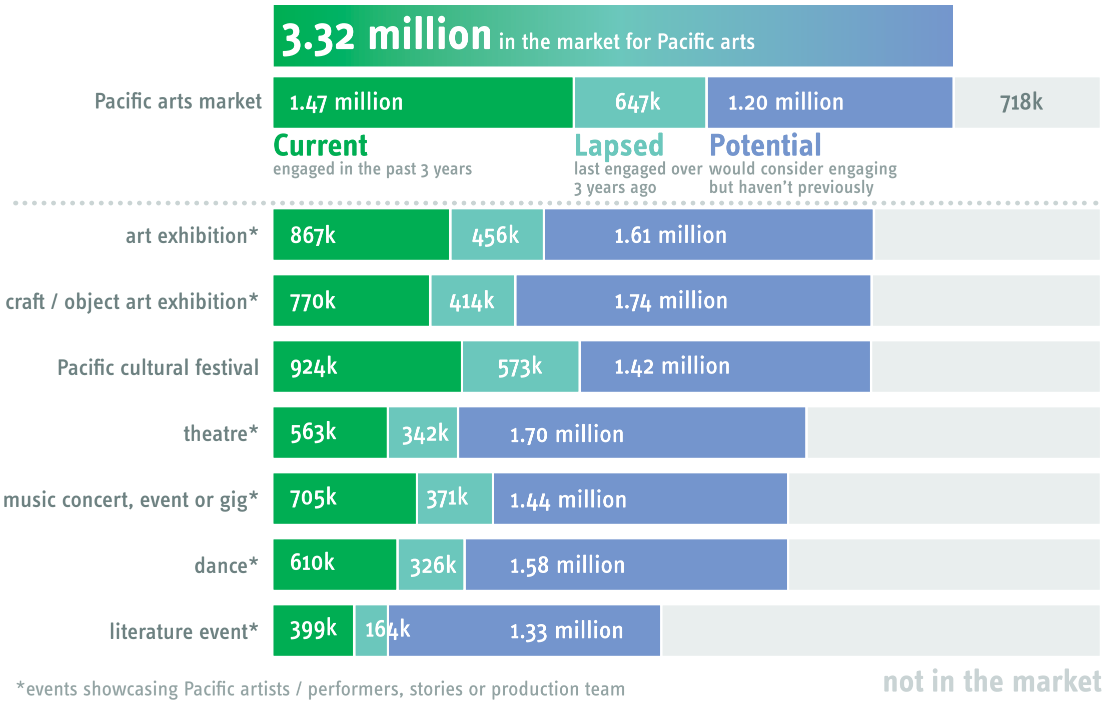
1 The last Audience Atlas Aotearoa New Zealand study was conducted in 2020.

Cultural festivals are the entry point to Pacific arts engagement

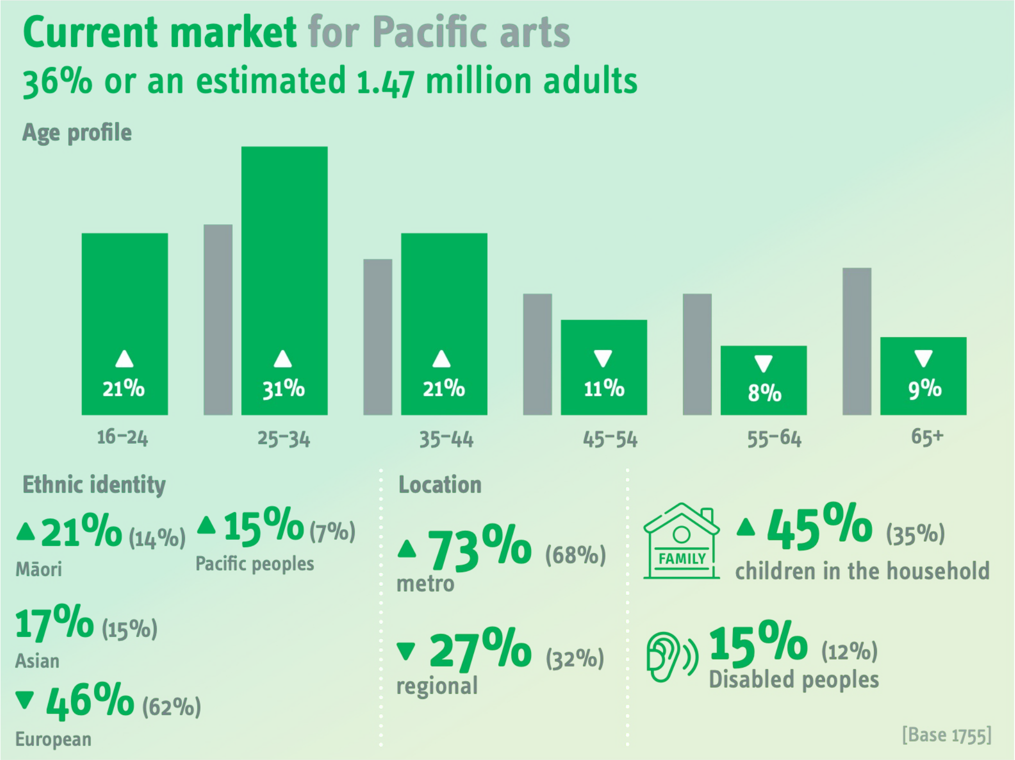
Across the sub-artform categories within Pacific arts, cultural festivals stand out as the most common form of engagement. In 2025, 23% of the culture market (an estimated 924k) had attended a Pacific cultural festival in the past three years, with a potential market of a similar size, indicating capacity for growth.

While cultural festivals aren't necessarily a pathway into other artforms, their broad appeal means they play a central role in overall Pacific 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.

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



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



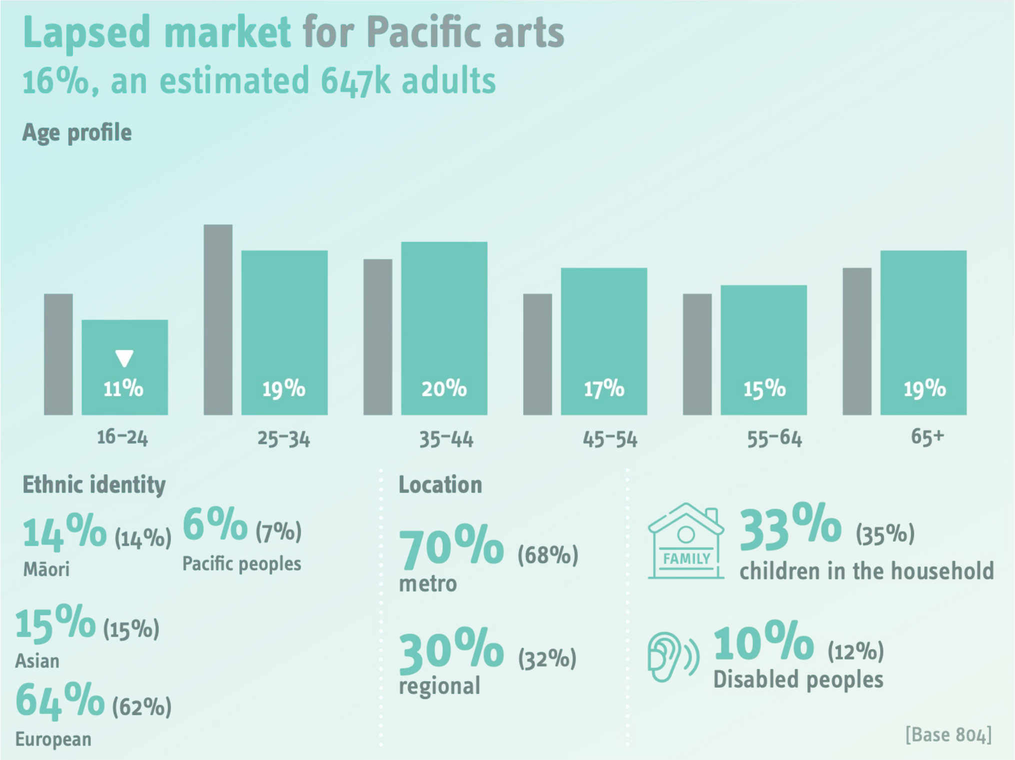
▲▼ where % is significantly different from the culture market average.
The culture market average is represented as either a grey bar or a % in bracket

icons Freepik on Flaticon

Current market for Pacific arts

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

- Over half are aged under 35 (52%, compared to 36% overall), while 16% are aged 55+ (compared to 32%).
- Māori (21%) and Pacific (15%) audiences are more prominent.
- More likely to live in family households (45%).
- Three-quarters live in metro areas.
- Expression (35%), Affirmation (21%) and Stimulation (14%) 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

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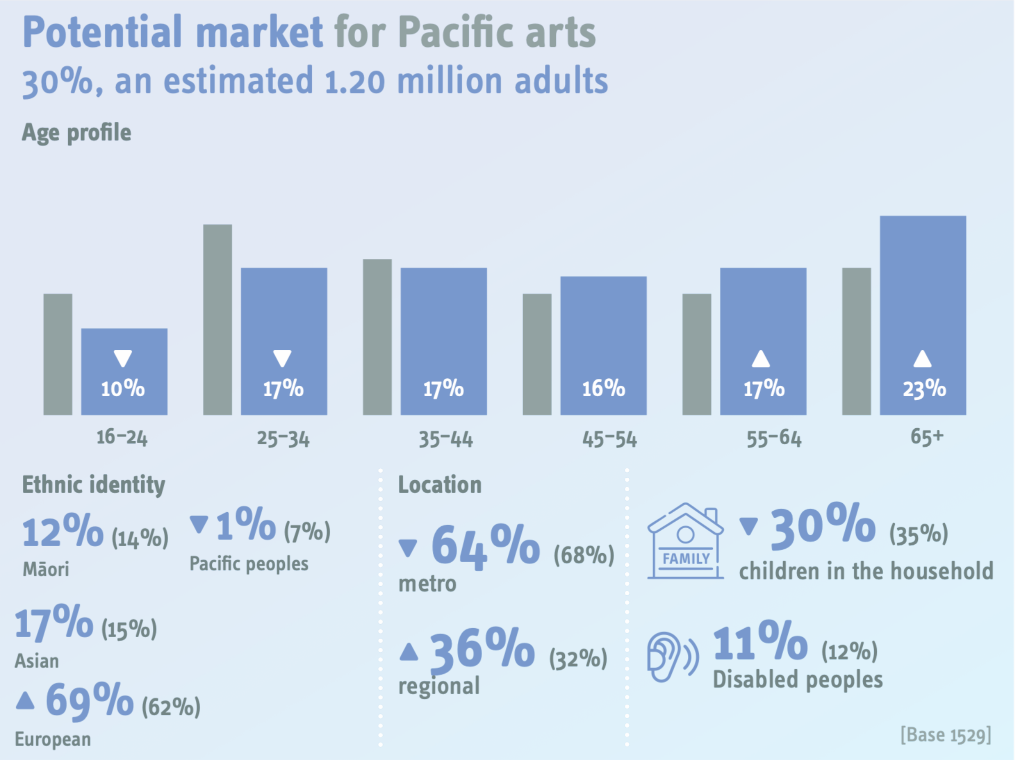
Lapsed market for Pacific arts

Within the data set, there is little to distinguish those who have engaged with Pacific arts before, but not for more than three years (lapsed). However, they are typically older:

- Over half are aged 45+ (51%), compared to 46% overall, while 3 in 10 are aged under 35, compared to 36%.
- A third live in family households (33%).
- 7 in 10 live in metro areas (70%).
- Expression (18%) is under-represented compared to the wider market (23%), while Essence (13%) is 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

icons Freepik on Flaticon

Potential market for Pacific arts

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

- 40% are aged 55+, compared to 32% in the wider market and Close to 3 in 10 are aged under 35 (27%, compared to 36%).
- European audiences are more prominent.
- Less likely to live in family households.
- Close to two-thirds live in a metro area (64%) and 36% regionally.
- The less culturally active Enrichment (12%) segment is significantly over-represented. However, their prominence is due to the absence of the more active Expression rather than larger numbers of this less active segment. See real figure estimates explored on the following page.

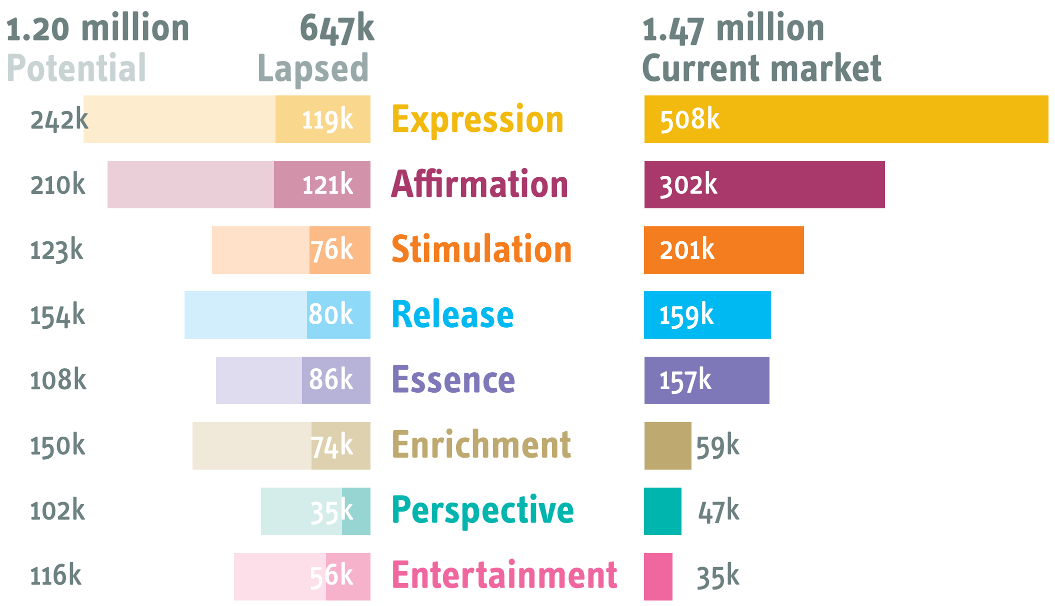
Connection between creativity and community draws Expression

Expression represents over a third of the Pacific arts' current market and is also the most numerous segment across the lapsed and potential markets.

Expression's prominence will be associated with its dominance among Pacific audiences (see page 7), 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



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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 **Pacific audiences is** n=492. Confidence intervals (margins of error) are calculated using the unweighted base. For Pacific audiences, the margin of error is **+/-4.39%** at 50% (i.e., where a result is 50%, the actual result may fall between 45.61% and 54.39%).

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.