Audience Atlas
Aotearoa New Zealand 2025

2025 Research Summary

Plain English Large Print

1. Introduction

This is a summary of the key findings of the 2025 edition of Audience Atlas Aotearoa New Zealand.

This research measures the New Zealand market for arts and culture. It looks at the market by size, profile and segments. The results show arts organisations how to grow their audiences to make the sector more sustainable.

The research is repeated every three to five years.

2. How we did the research

An independent research company called Morris Hargreaves McIntyre did the research.

The research company used online surveys to learn about how New Zealanders engage with different types of arts and culture.

They surveyed 4,836 adults (16 years and older).

More information about how we did the research and the terms we have used is included on pages 8–9.

3. Key findings

The 2025 Audience Atlas shows that more New Zealanders expect to reduce how much they engage and spend on the arts, than increase it. The study also points to actions that will make the most of opportunities to keep the sector stable or grow.

Key findings from the research are:

- **Annual arts spend of $3.3 billion**
  Spending on the arts has declined compared to 2020 and there is now a link between income and spend. In 2025, people with lower incomes were much less likely than average to have spent money on the arts.
- **4.04 million New Zealanders have engaged with the arts in the past 3 years**
  The number of New Zealanders attending culture events is higher than it was five years ago. This is because there are more of us, not because the market is bigger. The proportion of New Zealanders in the market for culture has decreased to 94 percent, from 96 percent in 2020.
- **1.6 million ‘missed’ arts engagement opportunities**
  In 2025, four in ten people could recall a time when they wanted to go to an arts event but couldn’t. The reasons for people ‘missing out’ included it cost too

much, another event was more important, and getting to the event was too hard. Younger, Māori, Pacific and disabled audiences were over-represented among those ‘missing out’.

- **6 in 10 seek ‘deep’ fulfilment**
  While arts-goers are often looking for social connection, six in ten seek something deeper from their engagement.

- **1.2 million potential donors to activate**
  Compared to 2020, arts donations have decreased by 23 percent, but there are opportunities to grow donations. An estimated 1.2 million New Zealanders would consider supporting the arts financially.

- **Membership shows recovery**
  Membership is being a subscriber, member or friend of an arts or cultural organisation. Levels of arts membership increased in 2025. Younger and more culturally diverse New Zealanders are leading the way.

- **Volunteering has increased**
  Volunteering also increased in 2025, driven by both personal interest and a desire to have an impact.

4. Turning insight into action

This report focuses on where we are now and what that tells us about how to grow arts sector audiences.

The findings show what actions to take.

- **Unlock growth by getting lapsed audiences back**
  All artforms have audiences that have lapsed. This means they last engaged over three years ago. In challenging times, it's a good idea to focus on the lapsed market. Lapsed audiences have chosen you before, they know who you are and they understand the benefits they get from engagement. Invite lapsed audiences back with clear, specific offers and reminders of the benefits you deliver.

- **Capitalise on youth momentum**
  There are some positive results relating to younger audiences in 2025. Younger people are more likely to say their arts engagement and spend will soon increase. New ideas, discovery, rule-breaking and social experiences often appeal to younger audiences.

- **Deliver deeper outcomes to develop loyalty**
  Shared social experiences get audiences in the door. Experiences that go further keep interest and build loyalty. This includes experiences that expand

knowledge, spark delight, or create a sanctuary to escape and recharge. Deliver these outcomes to build stronger connections and develop audiences.

- **Future proof participation with inclusive strategies**
  In 2025, the research shows a link between income and arts spending. In 2020, spending patterns were more evenly spread across income levels. This growing divide suggests that economic pressures are beginning to affect audiences. Organisations need to adapt to stay accessible and sustainable. Actions to consider include flexible pricing, expanded free or longer-running programmes, and different ways to bring money in so you are not only relying on ticket sales.

- **Unlock further potential of culturally diverse audiences**
  Culturally diverse audiences, particularly Pacific peoples, stand out in 2025. They are more likely than average to have spent money on the arts, donated or volunteered, and they expect their engagement and spend will continue to grow. Meanwhile, they are overrepresented among those who recall a time when they wanted to participate but couldn’t. More Pacific peoples felt concerns about ‘fitting in.’ Unlike economic pressures, this barrier can be addressed.

- **Amplify impact through collective action**
  There is a strong overlap in audiences across different artforms. This means organisations are often speaking to the same people. Organisations can reach these shared audiences more efficiently by working together on specific campaigns, joint ticketing, co-produced events and bundled experiences. Audiences are looking for cultural offers that blend entertainment, education and social connection. For example, museums partnering with food festivals, to theatres working with tech startups, to galleries working with wellness brands.

5. How we did the research

Independent research company Morris Hargreaves McIntyre conducted an online survey for Audience Atlas Aotearoa New Zealand.

Adult survey

4,836 adults aged 16 years and over took part in the survey in May and June 2025.

Morris Hargreaves McIntyre used online panels that hundreds of thousands of New Zealanders have joined to take part in research.

We boosted the numbers of Māori, Pacific peoples, and Asians to provide more robust data.

Disabled People’s organisations shared accessible survey invitations with their networks.

The maximum margin of error tells us how much the results of the survey might differ from the whole population. It shows us how confident we can be that the data is accurate. The lower the number the more confident we can be.

The maximum margin of error for the adult survey is +/- 1.4% (at the 95% confidence level).

Definitions

Culture market: New Zealand adults aged 16 years or over who have engaged with at least one arts or cultural activity in the past three years. By ‘engaged with’ we mean they have attended an arts or cultural activity.

Current market: New Zealand adults who have engaged in the past three years.

Lapsed market: New Zealand adults who last engaged over three years ago.

Potential market: New Zealand adults who would consider engaging but haven’t previously.

The study covers 11 specific artforms:
- craft/object art
- dance
- festivals
- literature
- live music
- museums
- ngā toi Māori
- Pacific arts
- Asian arts
- theatre
- visual arts.