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How to read this report

A: Culture Segment profile
This model looks at the Culture Segment profile of your current and lapsed / potential markets.

B: Market size
This model compares your market penetration within your artform. This is helpful as it can identify opportunities for growth, for example, NGVA has a current market of 23% but the current visual arts market is 63%, which means there is a large market open to visual arts but not yet visiting NGVA that can be converted.

C: Spotlight on your current market
This section explores the profile of your current market. This is helpful, as once you know about who is already attending, you can capitalise on strengths and work through strategies to retain them.

D: Awareness
This section shows you what proportion of the culture market is aware of your organisation, and how you rank within your artform.

E: Venue crossover
This model shows the top 5 venues that have a crossover with your organisation, and which other organisations your current market attends. This is helpful in identifying collaboration opportunities.

Methodology note
Organisations with current market sub-samples of 150 and above were included in this appendix. When looking at the awareness ranking data, please note some organisations with higher levels of awareness than some organisations in this document were not included in this appendix due to small current market sample sizes.

Cover image: 2019 Melbourne International Comedy Festival, Paul the doorman and front of house staff at the Melbourne Town Hall.
Photograph by Jim Lee Photography
Abbotsford Convent

Abbotsford Convent’s Culture Segment profile

Abbotsford Convent’s market

<table>
<thead>
<tr>
<th>Abbotsford Convent</th>
<th>Current</th>
<th>Lapsed / Potential</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current Market</td>
<td>12%</td>
<td>9%</td>
</tr>
<tr>
<td>Lapsed / Potential Market</td>
<td>10%</td>
<td>2%</td>
</tr>
<tr>
<td>Total</td>
<td>67%</td>
<td>8%</td>
</tr>
</tbody>
</table>

Abbotsford Convent’s current market

37% of Abbotsford Convent’s current audience is likely to attend more arts and culture in the next 12 months, compared to the culture market average of 24%.

38% of Abbotsford Convent’s current audience has used social media to find out about arts events in the last 12 months, compared to the culture market average of 27%.

Awareness of Abbotsford Convent

Abbotsford Convent has the 2nd highest level of awareness (out of 16) within the multi-arts market in Victoria.

Organisation crossover

Proportion of current visitors from other venues who are also current visitors to Abbotsford Convent

Proportion of current Abbotsford Convent visitors who are also current visitors of other venues

Current visitors to Abbotsford Convent

Heide Museum of Modern Art
The Wheeler Centre
The Arts Centre Melbourne
NGV Australia (NGVA)
Her Majesty’s Theatre
Australian Tapestry Workshop
NGV International (NGVI)
Centre for Contemporary Photography
Linden New Art
Crown Casino

Abbotsford Convent

Abbotsford Convent’s current market

Abbotsford Convent Lapsed / Potential Market

Abbotsford Convent's Awareness of Abbotsford Convent

67% Unaware
33% Aware

Abbotsford Convent has the 2nd highest level of awareness (out of 16) within the multi-arts market in Victoria.
Art Gallery of Ballarat

Art Gallery of Ballarat’s Culture Segment profile

Art Gallery of Ballarat’s current market

- **Essence**
  - 15%
- **Expression**
  - 6%
- **Affirmation**
  - 5%
- **Enrichment**
  - 14%
- **Stimulation**
  - 6%
- **Release**
  - 14%
- **Perspective**
  - 10%
- **Entertainment**
  - 24%

Art Gallery of Ballarat’s market

<table>
<thead>
<tr>
<th>Art Gallery of Ballarat</th>
<th>8%</th>
<th>8%</th>
<th>11%</th>
<th>3%</th>
<th>70%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visual arts</td>
<td>63%</td>
<td>19%</td>
<td>6%</td>
<td>11%</td>
<td></td>
</tr>
</tbody>
</table>

Art Gallery of Ballarat’s current market

- **Current**
  - 8%
- **Lapsed**
  - 8%
- **Potential**
  - 11%
- **Unaware**
  - 3%
- **Not in the market**
  - 70%

39% of Art Gallery of Ballarat’s current audience is likely to attend more arts and culture in the next 12 months, compared to the culture market average of 24%.

44% of Art Gallery of Ballarat’s current audience has donated to support arts organisations, compared to the culture market average of 40%.

Awareness of Art Gallery of Ballarat

- **Aware**
  - 30%
- **Unaware**
  - 70%

Art Gallery of Ballarat has the 4th highest level of awareness (out of 13) within the visual arts market in Victoria.

Organisation crossover

- **Current visitors to Art Gallery of Ballarat**
  - 64% Arts Centre Melbourne
  - 62% Ballarat International Foto Biennale
  - 47% Australian Tapestry Workshop
  - 59% Melbourne Museum
  - 42% Gertrude Contemporary
  - 57% Her Majesty’s Theatre
  - 44% Linden New Art
  - 43% Polyglot Theatre

- **Proportion of current visitors from other venues who are also current visitors to Art Gallery of Ballarat**
- **Proportion of current Art Gallery of Ballarat visitors who are also current visitors of other venues**

5 Audience Atlas Victoria – Appendix 1: Individual organisations October 2019
Arts Centre Melbourne

Arts Centre Melbourne's Culture Segment profile

Awareness of Arts Centre Melbourne

Arts Centre Melbourne has the highest level of awareness (out of 16) within the multi-arts market in Victoria.

Organisation crossover

35% of Arts Centre Melbourne's current audience has used social media to find out about arts events in the last 12 months, compared to the culture market average of 27%.

18% of Arts Centre Melbourne's current audience has children at home, compared to the culture market average of 23%.
Athenaeum Theatre

Athenaeum Theatre's Culture Segment profile

- 16% Essence
- 23% Expression
- 35% Affirmation
- 4% Stimulation
- 4% Perspective
- 4% Release
- 0% Release

Athenaeum Theatre's market

<table>
<thead>
<tr>
<th>Current Market</th>
<th>Lapsed / Potential Market</th>
</tr>
</thead>
<tbody>
<tr>
<td>Athenaeum Theatre</td>
<td>16% 23% 35% 4% 42%</td>
</tr>
<tr>
<td>Commercial theatre</td>
<td>21% 19% 6% 6%</td>
</tr>
</tbody>
</table>

Athenaeum Theatre's current market

- 35% of Athenaeum Theatre's current audience is likely to attend more arts and culture in the next 12 months, compared to the culture market average of 24%.
- 35% of Athenaeum Theatre's current audience has used social media to find out about arts events in the last 12 months, compared to the culture market average of 27%.

Awareness of Athenaeum Theatre

- 6th highest level of awareness (out of 7) within the commercial theatre market in Victoria.
- 58% Aware
- 42% Unaware

 Organisation crossover

Current visitors to Athenaeum Theatre

Athenaeum Theatre has the 6th highest level of awareness (out of 7) within the commercial theatre market in Victoria.
Australian Centre for Contemporary Art (ACCA)

ACCA’s Culture Segment profile

ACCA’s market

ACCA

Current Market

Lapsed / Potential Market

ACCA’s current market

49% of ACCA’s current audience is likely to attend more arts and culture in the next 12 months, compared to the culture market average of 24%.

58% of ACCA’s current audience has donated to support arts organisations, compared to the culture market average of 40%.

Awareness of ACCA

ACCA has the 6th highest level of awareness (out of 13) within the visual arts market in Victoria.

Organisation crossover

Current visitors to ACCA
38% of ACMI’s current audience is likely to attend more arts and culture in the next 12 months, compared to the culture market average of 24%.

40% of ACMI’s current audience has used social media to find out about arts events in the last 12 months, compared to the culture market average of 27%.
Bendigo Art Gallery's Culture Segment profile

Bendigo Art Gallery's Market

Bendigo Art Gallery's current market

- **37%** of Bendigo Art Gallery’s audience is likely to attend more arts and culture in the next 12 months, compared to the culture market average of 24%.
- **11%** of Bendigo Art Gallery’s audience has children at home, compared to the culture market average of 23%.

Awareness of Bendigo Art Gallery

Bendigo Art Gallery has the 3rd highest level of awareness (out of 13) within the visual arts market in Victoria.

Organisation crossover
Chinese Museum

Chinese Museum’s Culture Segment profile

Chinese Museum's market

<table>
<thead>
<tr>
<th></th>
<th>Chinese Museum Current Market</th>
<th>Chinese Museum Lapsed / Potential Market</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current</td>
<td>39%</td>
<td>21%</td>
</tr>
<tr>
<td>Lapsed</td>
<td>12%</td>
<td>16%</td>
</tr>
<tr>
<td>Potential</td>
<td>8%</td>
<td>9%</td>
</tr>
<tr>
<td>Not in the market</td>
<td>13%</td>
<td>6%</td>
</tr>
</tbody>
</table>

Chinese Museum's current market

- **25%** of Chinese Museum’s current audience has children at home, compared to the culture market average of 23%.
- **47%** of Chinese Museum’s current audience has donated to support arts organisations, compared to the culture market average of 40%.

Awareness of Chinese Museum

- **30%** Aware
- **70%** Unaware

Chinese Museum has the 6th highest level of awareness (out of 9) within the museum market in Victoria.

Organisation crossover
Circus Oz

Circus Oz's Culture Segment profile

Circus Oz's market

Circus Oz's current market

38% of Circus Oz’s current audience has used social media to find out about arts events in the last 12 months, compared to the culture market average of 27%.

38% of Circus Oz’s current audience has donated to support arts organisations, compared to the culture market average of 40%.

Awareness of Circus Oz

Circus Oz is the only organisation of its kind as part of this study. At 65% it has relatively high awareness.

Organisation crossover

Circus Oz's Culture Segment profile

Circus Oz's current market

38% of Circus Oz’s current audience has used social media to find out about arts events in the last 12 months, compared to the culture market average of 27%.

38% of Circus Oz’s current audience has donated to support arts organisations, compared to the culture market average of 40%.
Comedy Theatre

Comedy Theatre's Culture Segment profile

<table>
<thead>
<tr>
<th>Comedy Theatre's current market</th>
<th>Comedy Theatre Lapsed / Potential Market</th>
</tr>
</thead>
<tbody>
<tr>
<td>Essence</td>
<td>Expression</td>
</tr>
<tr>
<td>Expression</td>
<td>Stimulation</td>
</tr>
<tr>
<td>Affirmation</td>
<td>Release</td>
</tr>
<tr>
<td>Enrichment</td>
<td>Perspective</td>
</tr>
<tr>
<td>Perspective</td>
<td>Entertainment</td>
</tr>
</tbody>
</table>

Comedy Theatre's market

- Comedy Theatre: Current Market
  - Current: 22% Essence, 23% Expression, 17% Stimulation, 5% Perspective, 13% Enrichment, 10% Release, 10% Entertainment
  - Lapsed: 10% Essence, 11% Expression, 10% Stimulation, 11% Perspective, 12% Enrichment, 12% Release, 20% Entertainment
  - Potential: 10% Essence, 10% Expression, 10% Stimulation, 5% Perspective, 12% Enrichment, 12% Release, 15% Entertainment

Awareness of Comedy Theatre

- 33% Unaware
- 67% Aware

Organisation crossover

- Proportion of current visitors from other venues who are also current visitors to Comedy Theatre
- Proportion of current Comedy Theatre visitors who are also current visitors of other venues

Comedy Theatre has the 5th highest level of awareness (out of 7) within the commercial theatre market in Victoria.

Comedy Theatre's current market

- **35%** of Comedy Theatre’s current audience is likely to attend more arts and culture in the next 12 months, compared to the culture market average of 24%.
- **35%** of Comedy Theatre’s current audience has used social media to find out about arts events in the last 12 months, compared to the average of 27%.
Crown Casino

Crown Casino’s Culture Segment profile

Crown Casino’s market

Crown Casino’s current market

33% of Crown Casino’s current audience has used social media to find out about arts events in the last 12 months, compared to the culture market average of 27%.

24% of Crown Casino’s current audience has children at home, compared to the culture market average of 23%.

Awareness of Crown Casino

10% Unaware

90% Aware

1st

Crown Casino has the highest level of awareness (out of 7) within the commercial theatre market in Victoria. It should be noted that the Crown Casino’s offer extends beyond its commercial theatre offering, and its awareness ranking should be read with this in mind.

Organisation crossover

44% Current visitors to Crown Casino

77% White Night 80% St Kilda Festival

44% Arts Centre Melbourne 44% Her Majesty’s Theatre

75% Theatre Works 76% Sidney Myer Music Bowl

38% Princess Theatre 75% Forum Melbourne

38% Regent Theatre 40% Melbourne Museum
Drum Theatre

Drum Theatre Culture Segment profile

Drum Theatre’s market

Drum Theatre current market

45% of the Drum Theatre’s current audience has used social media to find out about arts events in the last 12 months, compared to the culture market average of 27%.

22% of the Drum Theatre’s current audience has children at home, compared to the culture market average of 23%.
Footscray Community Arts Centre

Footscray Community Arts Centre’s Culture Segment profile

Footscray Community Arts Centre’s market

- **Footscray**
  - Current: 32%
  - Lapsed/Potential: 5%
  - Not in the market: 13%
  - Unaware: 21%

- **Multi-arts**
  - Current: 89%
  - Lapsed/Potential: 8%
  - Not in the market: 1%
  - Unaware: 2%

Footscray Community Arts Centre’s current market

- **48%** of Footscray Community Arts Centre’s current audience is likely to attend more arts and culture in the next 12 months, compared to the culture market average of 24%.

- **38%** of Footscray Community Arts Centre’s current audience has children living at home, compared to the culture market average of 23%.

Awareness of Footscray Community Arts Centre

- **9th**
- Proportion of current Footscray Community Arts Centre visitors who are also current visitors of other venues
- Proportion of current visitors from other venues who are also current visitors to Footscray Community Arts Centre

Organisation crossover

Current visitors to Footscray Community Arts Centre

- **48%** Lucy Guerin Inc.
- **67%** Dancehouse
- **48%** Crown Casino
- **68%** Melbourne Museum
- **48%** Short Black Opera
- **53%** Her Majesty’s Theatre
- **59%** State Library Victoria
- **45%** Linden New Art
- **44%** Westside Circus Inc.
- **71%** Crown
- **64%** Arts Centre Melbourne
- **45%** Melbourne Museum
Forum Melbourne

Forum Melbourne’s Culture Segment profile

- Forum Melbourne Current Market
  - Essence: 8%
  - Expression: 16%
  - Affirmation: 25%
  - Enrichment: 4%
  - Stimulation: 14%
  - Release: 14%
  - Perspective: 16%
  - Entertainment: 3%

- Forum Melbourne Lapsed / Potential Market
  - Essence: 10%
  - Expression: 10%
  - Affirmation: 12%
  - Enrichment: 14%
  - Stimulation: 15%
  - Release: 14%
  - Perspective: 10%
  - Entertainment: 7%

Forum Melbourne’s market

<table>
<thead>
<tr>
<th>Forum Melbourne</th>
<th>Current</th>
<th>Lapsed</th>
<th>Potential</th>
<th>Unaware</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current Market</td>
<td>14%</td>
<td>18%</td>
<td>16%</td>
<td>3%</td>
</tr>
<tr>
<td>Commercial theatre</td>
<td>71%</td>
<td>19%</td>
<td>6%</td>
<td>4%</td>
</tr>
</tbody>
</table>

Forum Melbourne’s current market

- 37% of Forum Melbourne’s current market is more likely to attend more arts and culture in the next 12 months, compared to the culture market average of 24%.
- 15% of Forum Melbourne’s current market has children at home, compared to the culture market average of 23%.

Awareness of Forum Melbourne

- 49% Aware
- 51% Unaware

Forum Melbourne has the lowest level of awareness within the commercial theatre market in Victoria.

Organisation crossover
Frankston Arts Centre

Frankston Arts Centre Culture Segments profile

Frankston Arts Centre's market

Frankston Arts Centre Current Market
- Frankston Arts Centre: 28%
- Frankston Arts Centre Lapsed / Potential Market: 22%
- Multi-arts: 89%

Essence: 7%
Expression: 10%
Affirmation: 14%
Enrichment: 15%
Stimulation: 10%
Release: 10%
Perspective: 6%
Entertainment: 10%

Frankston Arts Centre's current market

- 35% of Frankston Arts Centre’s current audience has children at home, compared to the culture market average of 36%.
- 25% of Frankston Arts Centre’s current audience has donated to support arts organisations, compared to the culture market average of 23%.

Awareness of Frankston Arts Centre

Frankston Arts Centre has the 3rd highest level of awareness (out of 16) within the multi-arts market in Victoria.

Organisation crossover

Current visitors to Frankston Arts Centre
- 50% Dancehouse
- 54% Polyglot Theatre
- 59% Arts Centre Melbourne
- 74% Crown Casino
- 56% Her Majesty’s Theatre
- 47% McClelland Sculpture Park and Gallery
- 51% Melbourne Museum
- 44% Arapiles Community Theatre
- 65% Aphids
- 74% Regent Theatre

Proportion of current visitors from other venues who are also current visitors to Frankston Arts Centre: 8%
Proportion of current Frankston Arts Centre visitors who are also current visitors of other venues: 89%
Gasworks Arts Park

Gasworks Arts Park's Culture Segment profile

![Culture Segment Profile Diagram]

Awareness of Gasworks Arts Park

![Awareness Chart]

Gasworks Arts Park has the 4th highest level of awareness (out of 16) within the multi-arts market in Victoria.

Organisation crossover

![Organisation Crossover Diagram]

Gasworks Arts Park's current market

- **48%** of Gasworks Arts Park current audience is likely to attend more arts and culture in the next 12 months, compared to the culture market average of 24%.
- **48%** of Gasworks Arts Park’s current audience has donated to support arts organisations, compared to the culture market average of 40%.
Geelong Performing Arts Centre

Geelong Performing Arts Centre’s Culture Segments profile

Geelong Performing Arts Centre's market

<table>
<thead>
<tr>
<th>Geelong Performing Arts Centre</th>
<th>Current Market</th>
<th>Lapsed / Potential market</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current</td>
<td>7%</td>
<td>9%</td>
</tr>
<tr>
<td>Potential</td>
<td>5%</td>
<td>6%</td>
</tr>
<tr>
<td>Unaware</td>
<td>10%</td>
<td>8%</td>
</tr>
<tr>
<td>Not in the market</td>
<td>10%</td>
<td>14%</td>
</tr>
<tr>
<td>Multi-arts</td>
<td>89%</td>
<td>8%</td>
</tr>
</tbody>
</table>

28% of Geelong Performing Arts Centre’s current audience has used social media to find out about arts events in the last 12 months, compared to the culture market average of 27%.

41% of Geelong Performing Arts Centre’s current audience has donated to support arts organisations, compared to the culture market average of 40%.

Technical note
Following a rebrand announced in August 2019, Geelong Performing Arts Centre is now called Geelong Arts Centre.
Heide Museum of Modern Art

Heide Museum of Modern Art’s Culture Segment profile

Heide Museum of Modern Art’s market

Heide Museum of Modern Art’s current market

44% of Heide Museum of Modern Art’s current audience is likely to attend more arts and culture in the next 12 months, compared to the culture market average of 24%.

46% of Heide Museum of Modern Art’s current audience has donated to support arts organisations, compared to the culture market average of 40%.

Awareness of Heide Museum of Modern Art

Proportion of current visitors from other venues who are also current visitors to Heide Museum of Modern Art

Proportion of current Heide Museum of Modern Art visitors who are also current visitors of other venues

Heide Museum of Modern Art has the 5th highest level of awareness (out of 13) within the visual arts market in Victoria.

Organisation crossover

49% The Wheeler Centre
44% Linden New Art
78% NGV International (NGVI)
78% Arts Centre Melbourne
69% NGV Australia (NGVA)
60% State Library Victoria
41% TarraWarra Museum of Art
39% Australian Tapestry Workshop
43% Centre for Contemporary Photography

Her Majesty’s Theatre

Her Majesty’s Theatre Culture Segment profile

Her Majesty’s Theatre’s current market

<table>
<thead>
<tr>
<th>Segment</th>
<th>Current</th>
<th>Lapsed / Potential</th>
</tr>
</thead>
<tbody>
<tr>
<td>Her Majesty’s Theatre</td>
<td>24%</td>
<td>12%</td>
</tr>
<tr>
<td>Commercial theatre</td>
<td>21%</td>
<td>19%</td>
</tr>
</tbody>
</table>

Her Majesty’s Theatre’s market

- **Current**: 35% of Her Majesty’s Theatre’s current audience has used social media to find out about arts events in the last 12 months, compared to the culture market average of 27%.
- **Lapsed**: 16% of Her Majesty’s Theatre’s current audience has children at home, compared to the culture market average of 23%.

Awareness of Her Majesty’s Theatre

- **Awareness**: 20%
- **Unaware**: 80%

Her Majesty’s Theatre has the 2nd highest level of awareness (out of 7) within the commercial theatre market in Victoria.

Current visitors to Her Majesty’s Theatre

- **Regent Theatre**: 83%
- **Princess Theatre**: 80%
- **Crown Casino**: 72%
- **Arts Centre Melbourne**: 64%
- **Malthouse Theatre**: 79%
- **Athenaeum Theatre**: 79%
- **La Mama**: 74%
- **NGV International (NGVI)**: 50%

Organisation crossover

- Proportion of current visitors from other venues who are also current visitors to Her Majesty’s Theatre
- Proportion of current Her Majesty’s Theatre visitors who are also current visitors of other venues

- **Current visitors**: 35%
Immigration Museum

Immigration Museum’s Culture Segment profile

Immigration Museum’s market

<table>
<thead>
<tr>
<th>Organisation</th>
<th>Current Market</th>
<th>Potential Market</th>
<th>Total Market</th>
</tr>
</thead>
<tbody>
<tr>
<td>Immigration Museum</td>
<td>12%</td>
<td>17%</td>
<td>41%</td>
</tr>
<tr>
<td>Museums</td>
<td>67%</td>
<td>24%</td>
<td>41%</td>
</tr>
</tbody>
</table>

Immigration Museum’s current market

- **40%** of Immigration Museum’s current audience is likely to attend more arts and culture in the next 12 months, compared to the culture market average of **24%**.

- **46%** of Immigration Museum’s current audience has donated to support arts organisations, compared to the culture market average of **40%**.

Awareness of Immigration Museum

- **41%** Unaware
- **59%** Aware

Immigration Museum has the **4th** highest level of awareness (out of 9) within the museum market in Victoria.

Organisation crossover

Current visitors to Immigration Museum
Jewish Museum of Australia

Jewish Museum of Australia’s Culture Segment profile

<table>
<thead>
<tr>
<th>Segment</th>
<th>Current</th>
<th>Lapsed / Potential</th>
</tr>
</thead>
<tbody>
<tr>
<td>Essence</td>
<td>6%</td>
<td>17%</td>
</tr>
<tr>
<td>Expression</td>
<td>6%</td>
<td>16%</td>
</tr>
<tr>
<td>Affirmation</td>
<td>14%</td>
<td>10%</td>
</tr>
<tr>
<td>Enrichment</td>
<td>31%</td>
<td>21%</td>
</tr>
<tr>
<td>Stimulation</td>
<td>8%</td>
<td>9%</td>
</tr>
<tr>
<td>Release</td>
<td>4%</td>
<td>15%</td>
</tr>
<tr>
<td>Perspective</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>Entertainment</td>
<td>0%</td>
<td>0%</td>
</tr>
</tbody>
</table>

Jewish Museum of Australia’s market

Jewish Museum of Australia has the 8th highest level of awareness (out of 9) within the museum market in Victoria.

Awareness of Jewish Museum of Australia

- 73% Unaware
- 27% Aware

37% of Jewish Museum of Australia’s current audience is likely to attend more arts and culture in the next 12 months, compared to the culture market average of 24%.

18% of Jewish Museum of Australia’s current audience has children at home, compared to the culture market average of 23%.

Organisation crossover
Latrobe Performing Arts

Latrobe Performing Arts’ Culture Segment Profile

- **Essence**
- **Expression**
- **Affirmation**
- **Enrichment**
- **Stimulation**
- **Release**
- **Perspective**
- **Entertainment**

Latrobe Performing Arts current market

- **39%** of Latrobe Performing Arts’ current audience has children at home, compared to the culture market average of 23%.

- **48%** of Latrobe Performing Arts’ current audience has donated to support arts organisations, compared to the culture market average of 40%.

Awareness of Latrobe Performing Arts

- **7th highest level of awareness** (out of 16) within the multi-arts market in Victoria.

Current visitors to Latrobe Performing Arts

- **39%** Aphids
- **44%** Westside Circus Inc.
- **39%** West Gippsland Arts
- **51%** Her Majesty’s Theatre
- **51%** Arts Centre Melbourne
- **62%** Crown Casino
- **50%** Dancehouse
- **46%** Western Edge Youth Arts
- **51%** State Library Victoria
- **45%** Western Edge Youth Arts

Latrobe Performing Arts has the 7th highest level of awareness (out of 16) within the multi-arts market in Victoria.
Malthouse Theatre

Malthouse Theatre's Culture Segment profile

- Malthouse Theatre Current Market:
  - 21% Essence
  - 19% Expression
  - 17% Affirmation
  - 5% Enrichment
  - 9% Stimulation
  - 4% Perspective
  - 9% Release
  - 4% Entertainment

- Malthouse Theatre Lapsed / Potential Market:
  - 15% Essence
  - 15% Expression
  - 15% Affirmation
  - 11% Enrichment
  - 9% Stimulation
  - 4% Perspective
  - 9% Release
  - 4% Entertainment

Malthouse Theatre's market

<table>
<thead>
<tr>
<th>Malthouse Theatre</th>
<th>Current</th>
<th>Potential</th>
<th>Lapsed</th>
<th>Not in the market</th>
</tr>
</thead>
<tbody>
<tr>
<td>Theatre</td>
<td>10%</td>
<td>10%</td>
<td>24%</td>
<td>56%</td>
</tr>
</tbody>
</table>

Malthouse Theatre’s current market

- **47%** of Malthouse Theatre’s current audience is likely to attend more arts and culture in the next 12 months, compared to the culture market average of 24%.

- **45%** of Malthouse Theatre’s current audience has donated to support arts organisations, compared to the culture market average of 40%.

Awareness of Malthouse Theatre

- **44%** Aware
- **56%** Unaware

Malthouse Theatre has the 2nd highest level of awareness (out of 25) within the theatre market in Victoria.

Organisation crossover

- **67%** Lucy Guerin Inc.
- **63%** Westside Circus Inc.
- **85%** Arts Centre Melbourne
- **62%** fortyfive downstairs
- **72%** Regent Theatre
- **75%** NGV International (NGVI)
- **79%** Her Majesty’s Theatre
- **62%** Dancehouse
- **62%** Rawcus Theatre
- **73%** Princess Theatre
McClelland Sculpture Park and Gallery

McClelland Sculpture Park and Gallery’s Culture Segment profile

Awareness of McClelland Sculpture Park and Gallery

McClelland Sculpture Park and Gallery has the 7th highest level of awareness (out of 13) within the visual arts market in Victoria.

Organisation crossover

34% of McClelland Sculpture Park and Gallery’s current audience has used social media to find out about arts events in the last 12 months, compared to the culture market average of 27%.

22% of McClelland Sculpture Park and Gallery’s current audience has children at home, compared to the culture market average of 23%.
Meat Market

Meat Market’s Culture Segment profile

Meat Market's market

<table>
<thead>
<tr>
<th>Segment</th>
<th>Meat Market</th>
<th>Multi-arts</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current</td>
<td>6%</td>
<td>89%</td>
</tr>
<tr>
<td>Lapsed</td>
<td>7%</td>
<td>8%</td>
</tr>
<tr>
<td>Potential</td>
<td>11%</td>
<td>3%</td>
</tr>
<tr>
<td>Not in the market</td>
<td>3%</td>
<td>1%</td>
</tr>
</tbody>
</table>

Meat Market’s current market

41% of Meat Market’s current audience has used social media to find out about arts events in the last 12 months, compared to the culture market average of 27%.

42% of Meat Market’s current audience has donated to support arts organisations, compared to the culture market average of 40%.

Awareness of Meat Market

Meat Market has the 5th highest level of awareness (out of 16) within the multi-arts market in Victoria.

Organisation crossover

Proportion of current visitors from other venues who are also current visitors to Meat Market

Proportion of current Meat Market visitors who are also current visitors of other venues
Melbourne Chamber Orchestra

Melbourne Chamber Orchestra’s Culture Segment profile

<table>
<thead>
<tr>
<th>Melbourne Chamber Orchestra Current Market</th>
<th>Melbourne Chamber Orchestra Lapsed / Potential Market</th>
</tr>
</thead>
<tbody>
<tr>
<td>Essence: 8%</td>
<td>Stimulation: 10%</td>
</tr>
<tr>
<td>Expression: 15%</td>
<td>Perspective: 11%</td>
</tr>
<tr>
<td>Affirmation: 15%</td>
<td>Release: 15%</td>
</tr>
<tr>
<td>Enrichment: 15%</td>
<td>Entertainment: 17%</td>
</tr>
<tr>
<td>Stimulation: 17%</td>
<td>Awareness: 51%</td>
</tr>
<tr>
<td>Perspective: 17%</td>
<td>Potential: 21%</td>
</tr>
<tr>
<td>Release: 17%</td>
<td>Lapsed / Potential Market: 44%</td>
</tr>
<tr>
<td>Entertainment: 17%</td>
<td>Current Market: 68%</td>
</tr>
<tr>
<td>Awareness: 51%</td>
<td>Lapsed / Potential Market: 44%</td>
</tr>
</tbody>
</table>

Melbourne Chamber Orchestra’s Market

<table>
<thead>
<tr>
<th>Melbourne Chamber Orchestra</th>
<th>Live music</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current: 35%</td>
<td>68%</td>
</tr>
<tr>
<td>Lapsed: 14%</td>
<td>19%</td>
</tr>
<tr>
<td>Potential: 7%</td>
<td>7%</td>
</tr>
<tr>
<td>Not in the market: 4%</td>
<td>5%</td>
</tr>
</tbody>
</table>

Melbourne Chamber Orchestra’s current market

45% of Melbourne Chamber Orchestra’s current audience is likely to attend more arts and culture in the next 12 months, compared to the culture market average of 24%.

50% of Melbourne Chamber Orchestra’s current audience has donated to support arts organisations, compared to the culture market average of 40%.

Awareness of Melbourne Chamber Orchestra

Melbourne Chamber Orchestra has the 5th highest level of awareness (out of 8) within the live music market in Victoria.

Organisation crossover

47% of Melbourne Chamber Orchestra’s current audience is likely to attend Ranters Theatre, compared to the culture market average of 44%.

46% of Melbourne Chamber Orchestra’s current audience has donated to NGV International (NGVI), compared to the culture market average of 61%.

46% of Melbourne Chamber Orchestra’s current audience is likely to attend State Library Victoria, compared to the culture market average of 60%.

46% of Melbourne Chamber Orchestra’s current audience is likely to attend Melbourne Museum, compared to the culture market average of 36%.
Melbourne Fringe Festival

Melbourne Fringe Festival’s Culture Segment profile

- **Melbourne Fringe Festival Current Market**
  - Essence: 8%
  - Expression: 21%
  - Affirmation: 13%
  - Stimulation: 12%
  - Enrichment: 4%
  - Release: 16%
  - Perspective: 8%
  - Entertainment: 14%
  - Total: 37%

- **Melbourne Fringe Festival Lapsed / Potential Market**
  - Essence: 8%
  - Expression: 21%
  - Affirmation: 13%
  - Stimulation: 12%
  - Enrichment: 4%
  - Release: 16%
  - Perspective: 8%
  - Entertainment: 14%
  - Total: 37%

Melbourne Fringe Festival’s market

<table>
<thead>
<tr>
<th>Melbourne Fringe Festival</th>
<th>Current Market</th>
<th>Lapsed / Potential Market</th>
</tr>
</thead>
<tbody>
<tr>
<td>Essence</td>
<td>7%</td>
<td>8%</td>
</tr>
<tr>
<td>Expression</td>
<td>26%</td>
<td>21%</td>
</tr>
<tr>
<td>Affirmation</td>
<td>16%</td>
<td>13%</td>
</tr>
<tr>
<td>Stimulation</td>
<td>16%</td>
<td>16%</td>
</tr>
<tr>
<td>Enrichment</td>
<td>8%</td>
<td>4%</td>
</tr>
<tr>
<td>Release</td>
<td>45%</td>
<td>30%</td>
</tr>
<tr>
<td>Total</td>
<td>78%</td>
<td>78%</td>
</tr>
</tbody>
</table>

Melbourne Fringe Festival’s current market

- **51%** of Melbourne Fringe Festival’s current audience is likely to attend more arts and culture in the next 12 months, compared to the culture market average of 24%.

- **47%** of Melbourne Fringe Festival’s current audience has donated to support arts organisations, compared to the culture market average of 40%.

Awareness of Melbourne Fringe Festival

- **5th**
- **45%** Unaware
- **55%** Aware

Melbourne Fringe Festival has the 5th highest level of awareness (out of 14) within the festival market in Victoria.

Organisation crossover

- **Current visitors to Melbourne Fringe Festival**
  - Lucy Guerin Inc.: 80%
  - Aphids: 78%
  - Melbourne International Comedy Festival: 79%
  - Guerin Inc.: 66%
  - ILBIJERRI Theatre Company: 68%
  - NGV International (NGVI): 66%
  - Back to Back Theatre: 71%
  - Melbourne Museum: 69%
  - ILBIJERRI Theatre Company: 68%
  - Crown Casino: 71%
  - Melbourne Museum: 69%
  - Rawcus Theatre: 65%

**Proportion of current visitors from other venues who are also current visitors to Melbourne Fringe Festival**

**Proportion of current Melbourne Fringe Festival visitors who are also current visitors of other venues**

---

30  Audience Atlas Victoria – Appendix 1: Individual organisations October 2019
Melbourne International Arts Festival

Melbourne International Arts Festival’s Culture Segment profile

Melbourne International Arts Festival’s market

<table>
<thead>
<tr>
<th>Melbourne International Arts Festival</th>
<th>Current Market</th>
<th>Lapsed / Potential Market</th>
</tr>
</thead>
<tbody>
<tr>
<td>Melbourne International Arts Festival</td>
<td>4%</td>
<td>53%</td>
</tr>
<tr>
<td>Melbourne International Arts Festival</td>
<td>16%</td>
<td>15%</td>
</tr>
<tr>
<td>Melbourne International Arts Festival</td>
<td>21%</td>
<td>12%</td>
</tr>
<tr>
<td>Melbourne International Arts Festival</td>
<td>39%</td>
<td>16%</td>
</tr>
</tbody>
</table>

Awareness of Melbourne International Arts Festival

Melbourne International Arts Festival has the 7th highest level of awareness (out of 14) within the festival market in Victoria.

Organisation crossover

53% of Melbourne International Arts Festival’s current audience is likely to attend more arts and culture in the next 12 months, compared to the culture market average of 24%.

57% of Melbourne International Arts Festival’s current audience has donated to support arts organisations, compared to the culture market average of 40%.
Melbourne International Comedy Festival

Melbourne International Comedy Festival’s Culture Segment profile

Awareness of Melbourne International Comedy Festival

Melbourne International Comedy Festival has the highest level of awareness (out of 14) within the festival market in Victoria.

36% of Melbourne International Comedy Festival’s current audience is likely to attend more arts and culture in the next 12 months, compared to the culture market average of 26%.

40% of Melbourne International Comedy Festival’s current audience has used social media to find about arts events in the last 12 months, compared to the culture market average of 27%.
Melbourne International Film Festival (MIFF)

MIFF’s Culture Segment profile

- **Essence**: 7% Current, 4% Lapsed / Potential, 13% Not in the market
- **Expression**: 3% Current, 3% Lapsed / Potential, 13% Not in the market
- **Affirmation**: 8% Current, 11% Lapsed / Potential, 16% Not in the market
- **Stimulation**: 14% Current, 10% Lapsed / Potential, 16% Not in the market
- **Perspective**: 11% Current, 11% Lapsed / Potential, 31% Not in the market
- **Release**: 6% Current, 6% Lapsed / Potential, 31% Not in the market
- **Entertainment**: 12% Current, 11% Lapsed / Potential, 31% Not in the market

Awareness of MIFF

- 36% Aware, 64% Unaware

**3rd**

MIFF has the 3rd highest level of awareness (out of 14) within the festival market in Victoria.

Organisation crossover

Proportion of current visitors from other venues who are also current visitors to MIFF

Proportion of current MIFF visitors who are also current visitors of other venues

**43%** of MIFF’s current audience is likely to attend more arts and culture in the next 12 months, compared to the culture market average of 24%.

**46%** of MIFF’s current audience has donated to support arts organisations, compared to the culture market average of 40%.
Melbourne International Jazz Festival

Melbourne International Jazz Festival’s Culture Segment profile

<table>
<thead>
<tr>
<th>Segment</th>
<th>Current</th>
<th>Lapsed</th>
<th>Potential</th>
<th>Not in the market</th>
</tr>
</thead>
<tbody>
<tr>
<td>Melbourne Int. Jz Fest Current Market</td>
<td>18%</td>
<td>6%</td>
<td>10%</td>
<td>25%</td>
</tr>
<tr>
<td>Melbourne Int. Jz Fest Lapsed / Potential Market</td>
<td>16%</td>
<td>10%</td>
<td>6%</td>
<td>25%</td>
</tr>
</tbody>
</table>

Melbourne International Jazz Festival’s market

<table>
<thead>
<tr>
<th>Festival</th>
<th>Current</th>
<th>Lapsed</th>
<th>Potential</th>
<th>Unaware</th>
</tr>
</thead>
<tbody>
<tr>
<td>Melbourne Int. Jz Fest</td>
<td>41%</td>
<td>14%</td>
<td>10%</td>
<td>34%</td>
</tr>
<tr>
<td>Melbourne Int. Comedy Fest</td>
<td>34%</td>
<td>13%</td>
<td>23%</td>
<td>30%</td>
</tr>
</tbody>
</table>

Melbourne International Jazz Festival’s current market

- 49% of Melbourne International Jazz Festival’s current audience is likely to attend more arts and culture in the next 12 months, compared to the culture market average of 24%.
- 22% of Melbourne International Jazz Festival’s current audience has children at home, compared to the culture market average of 23%.

Awareness of Melbourne International Jazz Festival

- 6th

Melbourne International Jazz Festival has the 6th highest level of awareness (out of 14) within the festival market in Victoria.

Organisation crossover

[Diagram showing organisation crossover]
Melbourne Museum

Melbourne Museum’s Culture Segment profile

Melbourne Museum's market

Melbourne Museum’s current market

35% of Melbourne Museum’s current audience has used social media to find out about arts events in the last 12 months, compared to the culture market average of 27%.

30% of Melbourne Museum’s current audience has children at home, compared to the culture market average of 23%.

Awareness of Melbourne Museum

Melbourne Museum has the highest level of awareness (out of 9) within the museum market in Victoria.

Organisation crossover

Proportion of current visitors from other venues who are also current visitors to Melbourne Museum

Proportion of current Melbourne Museum visitors who are also current visitors to other venues

Current visitors to Melbourne Museum

NGV International (NGVI)

NGV International (NGVI)

67% Crown Casino

51% State Library Victoria

55% Arts Centre Melbourne

75% Centre for Contemporary Photography

75% Melbourne

76% Linden New Art

49% Her Majesty’s Theatre

75% Scienceworks

77% Immigration Museum

77% Scienceworks

77% Immigration Museum

84% Aware

16% Unaware

1st
Melbourne Recital Centre

Melbourne Recital Centre's Culture Segment profile

Awareness of Melbourne Recital Centre

Melbourne Recital Centre has the 6th highest level of awareness (out of 8) within the live music market in Victoria.

Organisation crossover

44% of Melbourne Recital Centre’s current audience is likely to attend more arts and culture in the next 12 months, compared to the culture market average of 24%.

48% of Melbourne Recital Centre’s current audience has donated to support arts organisations, compared to the culture market average of 40%.
Melbourne Symphony Orchestra

42% of Melbourne Symphony Orchestra’s current audience is likely to attend more arts and culture in the next 12 months, compared to the culture market average of 24%.

41% of Melbourne Symphony Orchestra’s current audience has donated to support art organisations, compared to the culture market average of 40%.

Melbourne Symphony Orchestra has the 2nd highest level of awareness (out of 8) within the live music market in Victoria.

Melbourne Symphony Orchestra’s Culture Segment profile

- Expression: 33%
- Affirmation: 16%
- Enrichment: 16%
- Stimulation: 14%
- Perspective: 9%
- Entertaining: 6%

Melbourne Symphony Orchestra’s market

- Current: 68%
- Lapsed: 19%
- Potential: 5%
- Not in the market: 5%
- Unaware: 71%
- Awareness of Melbourne Symphony Orchestra: 29%

Current visitors to Melbourne Symphony Orchestra and other organisations:

- Princess Theatre: 68%
- Her Majesty’s Theatre: 64%
- Pentecostal: 64%
- Lucy Guerin Inc.: 62%
- Arts Centre Melbourne: 61%
- Melbourne Chamber Orchestra: 57%
- Short Black Opera: 46%
- NGV Interim (NGVI): 43%
- Crown Casino: 43%
- NGV International (NGVI): 43%
- Melbourne Recital Centre: 37%
Melbourne Theatre Company

Melbourne Theatre Company’s Culture Segment profile

Awareness of Melbourne Theatre Company

Melbourne Theatre Company has the highest level of awareness (out of 25) within the theatre market in Victoria.

1st

44% of Melbourne Theatre Company’s current audience is likely to attend more arts and culture in the next 12 months, compared to the culture market average of 24%.

44% of Melbourne Theatre Company’s current audience has donated to support art organisations, compared to the culture market average of 40%.

Organisation crossover
Melbourne Writers Festival

Melbourne Writers Festival’s Culture Segment profile

Awareness of Melbourne Writers Festival

Melbourne Writers Festival has the 8th highest level of awareness (out of 14) within the festival market in Victoria.

Melbourne Writers Festival’s Current Market

37% of Melbourne Writers Festival’s current audience has used social media to find out about arts events in the last 12 months, compared to the culture market average of 27%.

24% of Melbourne Writers Festival’s current audience has children at home, compared to the culture market average of 36%.

Organisation crossover

Current visitors to Melbourne Writers Festival

71% Punctum
58% Back to Back Theatre
84% Arts Centre Melbourne
72% NGV International (NGVI)
54% Lucy Guerin Inc.
67% State Library Victoria
69% Melbourne Museum
55% Arapiles Community Theatre
58% Ranter's Theatre
73% Melbourne International Comedy Festival
8% Melbourne Museum
5% Punctum
3% Back to Back Theatre
3% NGV International (NGVI)
3% Lucy Guerin Inc.
3% State Library Victoria
3% Melbourne Museum
3% Arapiles Community Theatre
3% Ranter's Theatre
3% Melbourne International Comedy Festival
3% Melbourne Museum
3% Punctum
3% Back to Back Theatre
3% NGV International (NGVI)
3% Lucy Guerin Inc.
3% State Library Victoria
3% Melbourne Museum
3% Arapiles Community Theatre
3% Ranter's Theatre
3% Melbourne International Comedy Festival

Proportion of current visitors from other venues who are also current visitors to Melbourne Writers Festival

Proportion of current Melbourne Writers Festival visitors who are also current visitors of other venues

Current market

8th
Midsumma Festival

Midsumma Festival’s Culture Segment profile

- Midsumma Festival’s Current Market
  - Essence: 8%
  - Expression: 4%
  - Affirmation: 3%
  - Enrichment: 13%
  - Stimulation: 37%
  - Perspective: 10%
  - Release: 6%
  - Entertainment: 15%

- Midsumma Festival’s Lapsed / Potential Market
  - Essence: 10%
  - Expression: 5%
  - Affirmation: 4%
  - Enrichment: 18%
  - Stimulation: 26%
  - Perspective: 6%
  - Release: 15%
  - Entertainment: 10%

Midsumma Festival’s market

<table>
<thead>
<tr>
<th>Midsumma Festival</th>
<th>Festivals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current</td>
<td>Lapsed</td>
</tr>
<tr>
<td>53</td>
<td>3</td>
</tr>
<tr>
<td>34</td>
<td>13</td>
</tr>
</tbody>
</table>

Midsumma Festival’s current market

38% of Midsumma Festival’s current audience has used social media to find out about arts events in the last 12 months, compared to the culture market average of 27%.

42% of Midsumma Festival’s current audience has donated to support arts organisations, compared to the culture market average of 40%.

Awareness of Midsumma Festival

- 9th highest level of awareness (out of 14) within the festival market in Victoria.
- 27% Aware
- 73% Unaware

Organisation crossover

Current visitors to Midsumma Festival

- 92% Lucy Guerin Inc.
- 69% Western Edge Youth Arts
- 66% Melbourne ArtCentre Melbourne
- 69% Melbourne International Comedy Festival
- 66% NGV International (NGVI)
- 58% Rawcus Theatre
- 65% Crown Casino
- 57% Westside Circus Inc.
- 55% Dancehouse
- 92% Her Majesty’s Theatre
- 61% Melbourne International Comedy Festival
- 66% NGV International (NGVI)
Mildura Arts Centre

Mildura Arts Centre's Culture Segment profile

- Mildura Arts Centre's current market
  - Current Market
    - 38% Essence
    - 15% Expression
    - 14% Stimulation
    - 9% Affirmation
    - 7% Enrichment
    - 4% Perspective
    - 4% Release
    - 4% Entertainment
  - Lapsed / Potential Market
    - 41% Essence
    - 10% Expression
    - 9% Stimulation
    - 9% Affirmation
    - 7% Enrichment
    - 6% Perspective
    - 6% Release
    - 5% Entertainment

Mildura Arts Centre has the 11th highest level of awareness (out of 16) within the multi-arts market in Victoria.

- Proportion of current Mildura Arts Centre visitors who are also current visitors of other venues
- Proportion of current visitors from other venues who are also current visitors to Mildura Arts Centre

Mildura Arts Centre's current market

- 42% of Mildura Arts Centre's current audience is likely to attend more arts and culture in the next 12 months, compared to the culture market average of 24%.
- 31% of Mildura Arts Centre's current audience has children at home, compared to the culture market average of 23%.
NGV Australia (NGVA)

NGVA’s Culture Segment profile

- NGVA’s Current Market
  - 8% Essence
  - 18% Expression
  - 24% Stimulation
  - 15% Release
  - 7% Enrichment
  - 8% Perspective
  - 15% Entertainment

- NGVA’s Lapsed / Potential Market
  - 11% Essence
  - 15% Expression
  - 13% Stimulation
  - 16% Release
  - 17% Enrichment
  - 11% Perspective
  - 9% Entertainment

NGVA’s market

<table>
<thead>
<tr>
<th>Organisation</th>
<th>Current</th>
<th>Potential</th>
<th>Unaware</th>
<th>Not in the market</th>
</tr>
</thead>
<tbody>
<tr>
<td>NGVA</td>
<td>33%</td>
<td>11%</td>
<td>9%</td>
<td>2%</td>
</tr>
<tr>
<td>Visual arts</td>
<td>63%</td>
<td>19%</td>
<td>8%</td>
<td>11%</td>
</tr>
</tbody>
</table>

NGVA’s current market

- 34% of NGVA’s current audience has used social media to find out about arts events in the last 12 months, compared to the culture market average of 27%.
- 41% of NGVA’s current audience has donated to arts organisations, compared to the culture market average of 40%.

Awareness of NGVA

- 46% Aware
- 54% Unaware
- NGVA has the 2nd highest level of awareness (out of 13) within the visual arts market in Victoria.

Organisation crossover

NGVA has a high level of awareness, with 80% of current NGVA visitors also being current visitors to The Wheeler Centre and 72% to the TarraWarra Museum of Art.
NGV International (NGVI)

NGVI has the highest level of awareness (out of 13) within the visual arts market in Victoria.

NGVI's Culture Segment profile

- **NGVI Current Market**
  - Essence: 14%
  - Expression: 23%
  - Affirmation: 16%
  - Enrichment: 9%
  - Stimulation: 10%
  - Perspective: 10%
  - Release: 10%
  - Entertainment: 7%

- **NGVI Lapsed / Potential Market**
  - Essence: 10%
  - Expression: 12%
  - Affirmation: 13%
  - Enrichment: 11%
  - Stimulation: 18%
  - Perspective: 11%
  - Release: 14%
  - Entertainment: 10%

NGVI's market

- **NGVI**
  - Current: 49%
  - Lapsed: 32%
  - Potential: 15%
  - Not in the market: 4%

- **Visual arts**
  - Current: 63%
  - Potential: 19%
  - Not in the market: 11%

NGVI's current market

- **34%** of NGVI's current audience has used social media to find out about arts events in the last 12 months, compared to the culture market average of 27%.

- **34%** of NGVI's current audience has donated to arts organisations, compared to the culture market average of 40%.

Awareness of NGVI

- **49%** Unaware
- **51%** Aware

Organisation crossover

- Proportion of current visitors from other venues who are also current visitors to NGVI
- Proportion of current NGVI visitors who are also current visitors of other venues

- **80%** NGVA
- **83%** TarraWarra Museum of Art
- **58%** Melbourne Museum
- **51%** Crown Casino
- **75%** Malthouse Theatre
- **55%** Her Majesty’s Theatre
- **78%** Heide Museum of Modern Art
- **77%** The Wheeler Centre
- **80%** NGVA
- **83%** TarraWarra Museum of Art
- **58%** Melbourne Museum
- **51%** Crown Casino
- **75%** Malthouse Theatre
- **55%** Her Majesty’s Theatre
- **78%** Heide Museum of Modern Art
- **77%** The Wheeler Centre
Opera Australia

Opera Australia’s Culture Segment profile

Opera Australia’s market

Opera Australia’s current market

48% of Opera Australia’s current audience is likely to attend more arts and culture in the next 12 months, compared to the culture market average of 24%.

52% of Opera Australia’s current audience has donated to arts organisations, compared to the culture market average of 40%.

Awareness of Opera Australia

Opera Australia has the 3rd highest level of awareness (out of 8) within the live music market in Victoria.

Organisation crossover

Proportion of current visitors from other venues who are also current visitors to Opera Australia

Proportion of current Opera Australia visitors who are also current visitors of other venues
Princess Theatre's Culture Segment profile

- Princess Theatre Current Market
  - Essence: 6%
  - Expression: 2%
  - Stimulation: 13%
  - Affirmation: 11%
  - Enrichment: 8%
  - Perspective: 0%
  - Release: 10%

- Princess Theatre Lapsed / Potential Market
  - Essence: 7%
  - Expression: 15%
  - Stimulation: 8%
  - Affirmation: 13%
  - Enrichment: 10%
  - Perspective: 10%
  - Release: 11%

Princess Theatre's market

- Princess Theatre
  - Current: 25% (30%)
  - Lapsed / Potential: 68% (28%)
  - Not in the market: 7% (14%)
  - Unaware: 8% (4%)

- Commercial theatre
  - Current: 71% (66%)
  - Lapsed / Potential: 19% (19%)
  - Not in the market: 6% (6%)
  - Unaware: 5% (6%)

Princess Theatre’s current market

- 34% of Princess Theatre’s current audience has used social media to find out about arts events in the last 12 months, compared to the culture market average of 27%.
- 16% of Princess Theatre’s current audience has children at home, compared to the culture market average of 23%.

Awareness of Princess Theatre

- 76% Aware
- 24% Unaware

Princess Theatre has the 3rd highest level of awareness (out of 7) within the commercial theatre market in Victoria.

Organisation crossover

Current visitors to Princess Theatre:

- 74% Athenaeum Theatre
- 73% Malthouse Theatre
- 80% Her Majesty’s Theatre
- 72% Crown Casino
- 72% fortyfive downstairs
- 65% Arts Centre Melbourne
- 69% Victorian Opera
- 72% Dancehouse
- 52% NGV International (NGVI)
- 70% Regent Theatre

Proportion of current visitors from other venues who are also current visitors to Princess Theatre

Proportion of current Princess Theatre visitors who are also current visitors of other venues
Regent Theatre

Regent Theatre’s Culture Segment profile

Regent Theatre’s market

<table>
<thead>
<tr>
<th>Segment</th>
<th>Current</th>
<th>Lapsed</th>
<th>Potential</th>
<th>Unaware</th>
</tr>
</thead>
<tbody>
<tr>
<td>Regent Theatre</td>
<td>26%</td>
<td>13%</td>
<td>13%</td>
<td>8%</td>
</tr>
<tr>
<td>Commercial theatre</td>
<td>21%</td>
<td>13%</td>
<td>13%</td>
<td>13%</td>
</tr>
</tbody>
</table>

Regent Theatre’s current market

- **36%** of Regent Theatre’s current audience has used social media to find out about arts events in the last 12 months, compared to the culture market average of 27%.
- **31%** of Regent Theatre’s current audience has children at home compared to the culture market average of 36%.

Awareness of Regent Theatre

- 27% Unaware
- 73% Aware

Regent Theatre has the 4th highest level of awareness (out of 7) within the commercial theatre market in Victoria.

Organisation crossover

- Proportion of current visitors from other venues who are also current visitors to Regent Theatre
- Proportion of current Regent Theatre visitors who are also current visitors of other venues

Current visitors to Regent Theatre

- 72% Her Majesty’s Theatre
- 72% Malthouse Theatre
- 70% Princess Theatre
- 83% Her Majesty’s Theatre International (NGVI)
- 69% Crown Casino
- 67% Arts Centre Melbourne
- 66% Athenaeum Theatre
- 65% St Martins Youth Arts Centre
- 50% NGV International (NGVI)
Scienceworks' Culture Segment profile

Scienceworks' market

Awareness of Scienceworks

Scienceworks has the 2nd highest level of awareness (out of 9) within the museum market in Victoria.

Organisation crossover

38% of Scienceworks' current audience has children at home, compared to the culture market average of 23%.

36% of Scienceworks' current audience has donated to support arts organisations, compared to the culture market average of 40%.
Sidney Myer Music Bowl

Sidney Myer Music Bowl’s Culture Segment profile

Sidney Myer Music Bowl’s market

<table>
<thead>
<tr>
<th>Sidney Myer Music Bowl Current Market</th>
<th>Sidney Myer Music Bowl Lapsed / Potential Market</th>
</tr>
</thead>
<tbody>
<tr>
<td>Essence</td>
<td>19%</td>
</tr>
<tr>
<td>Expression</td>
<td>37%</td>
</tr>
<tr>
<td>Stimulation</td>
<td>18%</td>
</tr>
<tr>
<td>Perspective</td>
<td>4%</td>
</tr>
<tr>
<td>Entertainment</td>
<td>22%</td>
</tr>
<tr>
<td>Current</td>
<td>26%</td>
</tr>
<tr>
<td>Lapsed</td>
<td>21%</td>
</tr>
<tr>
<td>Not in the market</td>
<td>7%</td>
</tr>
</tbody>
</table>

34% of Sidney Myer Music Bowl’s current audience is likely to attend more arts and culture in the next 12 months, compared to the culture market average of 24%.

39% of Sidney Myer Music Bowl’s current audience has used social media to find out about arts events in the last 12 months, compared to the culture market average of 27%.

Awareness of Sidney Myer Music Bowl

1st

Sidney Myer Music Bowl has the highest level of awareness (out of 8) within the live music market in Victoria.

Organisation crossover

Current visitors to Sidney Myer Music Bowl

- 64% Dancehouse
- 60% The Substation (Newport)
- 67% Arts Centre Melbourne
- 58% NGV International (NGVI)
- 58% Theatre Works
- 58% Princess Theatre
- 55% Arts House (North Melbourne)
- 55% Gertrude Contemporary
- 63% Her Majesty’s Theatre
- 76% Crown Casino
- 58% NGV International (NGVI)
Sovereign Hill Gold Museum

Sovereign Hill Gold Museum’s Culture Segment profile

Sovereign Hill Gold Museum’s market

<table>
<thead>
<tr>
<th>Museums</th>
<th>Current</th>
<th>Potential</th>
<th>Unaware</th>
<th>Not in the market</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sovereign Hill Gold Museum</td>
<td>35%</td>
<td>68%</td>
<td>8%</td>
<td>2%</td>
</tr>
<tr>
<td>Museums</td>
<td>67%</td>
<td>24%</td>
<td>4%</td>
<td>4%</td>
</tr>
</tbody>
</table>

Sovereign Hill Gold Museum has the 3rd highest level of awareness (out of 9) within the museum market in Victoria.

Awareness of Sovereign Hill Gold Museum

Proportion of current visitors from other venues who are also current visitors to Sovereign Hill Gold Museum

Proportion of current Sovereign Hill Gold Museum visitors who are also current visitors of other venues

3rd

73% Aware

Organisation crossover

Sovereign Hill Gold Museum’s current market

- 36% of Sovereign Hill Gold Museum’s current audience has children at home, compared to the culture market average of 23%.
- 38% of Sovereign Hill Gold Museum’s current audience has donated to support arts organisations, compared to the culture market average of 40%.
St Kilda Festival

St Kilda Festival's Culture Segment profile

St Kilda Festival's current market

- 36% St Kilda Festival Current Market
- 21% St Kilda Festival Lapsed / Potential Market

St Kilda Festival's market

<table>
<thead>
<tr>
<th>Organisation</th>
<th>Current</th>
<th>Lapsed</th>
<th>Not in the market</th>
<th>Unaware</th>
</tr>
</thead>
<tbody>
<tr>
<td>St Kilda Festival</td>
<td>15%</td>
<td>37%</td>
<td>20%</td>
<td>3%</td>
</tr>
<tr>
<td>Festivals</td>
<td>34%</td>
<td>33%</td>
<td>23%</td>
<td>10%</td>
</tr>
</tbody>
</table>

St Kilda Festival’s current market

- 38% of St Kilda Festival’s current audience is likely to attend more arts and culture in the next 12 months, compared to the culture market average of 24%.
- 38% of St Kilda Festival’s current audience has used social media to find out about arts events in the last 12 months, compared to the culture market average of 27%.

Awareness of St Kilda Festival

- 63% Aware
- 37% Unaware

St Kilda Festival has the 4th highest level of awareness (out of 14) within the festival market in Victoria.

Organisation crossover

- Aphids: 70%
- Lucy Guerin Inc.: 74%
- Melbourne International Comedy Festival: 63%
- Crown Casino: 80%
- Chunky Move: 61%
- Her Majesty’s Theatre: 51%
- Melbourne Museum: 57%
- Arts Centre Melbourne: 60%
- Dance Massive: 61%
- Arapiles Community Theatre: 61%
State Library Victoria’s Culture Segment profile

State Library Victoria’s market

<table>
<thead>
<tr>
<th>Segment</th>
<th>Current Market</th>
<th>Lapsed / Potential Market</th>
</tr>
</thead>
<tbody>
<tr>
<td>State Library Victoria</td>
<td>26%</td>
<td>30%</td>
</tr>
<tr>
<td>Libraries</td>
<td>64%</td>
<td>25%</td>
</tr>
</tbody>
</table>

State Library Victoria’s current market

- 36% of State Library Victoria’s current audience has used social media to find out about arts events in the last 12 months, compared to the culture market average of 27%.
- 38% of State Library Victoria’s current audience has donated arts organisations, compared to the culture market average of 40%.

Awareness of State Library Victoria

State Library Victoria is the only library in this study. At 75%, it has a high level of awareness.

Organisation crossover

Current visitors to State Library Victoria

- The Wheeler Centre: 73%
- Dancehouse: 73%
- 66% Crown Casino
- 65% Melbourne Museum
- 71% Immigration Museum
- 58% NGV International (NGVI)
- 52% Her Majesty’s Theatre
- 70% Lucy Guerin Inc.
- 71% Koorie Heritage
- 62% Arts Centre Melbourne

Proportion of current visitors from other venues who are also current visitors to State Library Victoria

Proportion of current State Library Victoria visitors who are also current visitors of other venues
TarraWarra Museum of Art

TarraWarra Museum of Art’s Culture Segment profile

- TarraWarra Museum of Art’s Current Market
  - 5% Essence
  - 8% Expression
  - 18% Stimulation
  - 12% Perspective
  - 10% Release
  - 16% Enrichment
  - 17% Entertainment

- TarraWarra Museum of Art Lapsed / Potential Market
  - 21% Essence
  - 25% Expression
  - 16% Stimulation
  - 21% Perspective
  - 17% Release
  - 13% Enrichment
  - 10% Entertainment

TarraWarra Museum of Art’s market

- TarraWarra Museum of Art: Current
  - 91% Current
  - 7% Lapsed
  - 2% Potential
  - 0% Unaware

- TarraWarra Museum of Art: Visual arts
  - 63% Current
  - 19% Lapsed
  - 11% Potential
  - 0% Unaware

TarraWarra Museum of Art’s current market

- 34% of TarraWarra Museum of Art’s current audience is likely to attend more arts and culture in the next 12 months, compared to the culture market average of 24%.

- 32% of TarraWarra Museum of Art’s current audience has used social media to find out about arts events in the last 12 months, compared to the culture market average of 27%.

Organisation crossover

- TarraWarra Museum of Art has the 8th highest level of awareness (out of 13) within the visual arts market in Victoria.
The Australian Ballet

The Australian Ballet's Culture Segment profile

The Australian Ballet's market

The Australian Ballet's current market

49% of The Australian Ballet's current audience is likely to attend more arts and culture in the next 12 months, compared to the culture market average of 24%.

45% of The Australian Ballet's current audience has donated to support arts organisations, compared to the culture market average of 40%.

Awareness of The Australian Ballet

1st

The Australian Ballet has the highest level of awareness (out of 6) within the dance market in Victoria.

Organisation crossover

Current visitors to The Australian Ballet

85% Lucy Guerin Inc.
85% Short Black Opera
70% Short Black Opera
71% Her Majesty's Theatre
67% Princess Theatre
66% Crown Casino
66% NGV International (NGVI)
59% Arapiles Community Theatre
59% Ranters Theatre
61% Punctum
68% NGV International (NGVI)
85% Arts Centre Melbourne
85% Lucy Guerin Inc.
The Butterfly Club

The Butterfly Club’s Culture Segment profile

- **Essence:** 6%
- **Expression:** 4%
- **Affirmation:** 21%
- **Stimulation:** 16%
- **Enrichment:** 37%
- **Release:** 10%
- **Perspective:** 3%
- **Entertainment:** 20%

The Butterfly Club’s current market

- **Current Market:**
  - 31% Current
  - 14% Lapsed
  - 1% Not in the market

The Butterfly Club’s lapsed/potential market

- **Lapsed/Potential Market:**
  - 10% Current
  - 14% Lapsed

Awareness of The Butterfly Club

- **91%** Aware
- **9%** Unaware

The Butterfly Club has the 7th highest level of awareness (out of 25) within the Theatre market in Victoria.

Organisation crossover

- **Current visitors to The Butterfly Club:**
  - 60%
  - 32% Arts House (North Melbourne)
  - 32% Regent Theatre
  - 29% Crown Casino
  - 24% Melbourne International Comedy Festival

- **Current visitors from other venues:**
  - 33% The Wheeler Centre
  - 63% Her Majesty’s Theatre
  - 64% Dancehouse
  - 66% Melbourne International Comedy Festival
  - 67% Melbourne Arts Centre

**53%** of The Butterfly Club’s current audience has used social media to find out about arts events in the last 12 months, compared to the culture market average of 27%.

**53%** of The Butterfly Club’s current audience has donated to support arts organisations, compared to the culture market average of 40%.
The Capital or Ulumbarra Theatre

The Capital or Ulumbarra’s Culture Segment profile

The Capital / Ulumbarra’s current market

- Essence: 11%
- Affirmation: 11%
- Stimulation: 7%
- Release: 7%
- Expression: 13%
- Enrichment: 13%
- Perspective: 17%
- Entertainment: 27%

The Capital / Ulumbarra’s lapsed / potential market

- Essence: 9%
- Affirmation: 10%
- Stimulation: 9%
- Release: 9%
- Expression: 15%
- Enrichment: 15%
- Perspective: 14%
- Entertainment: 28%

Awareness of The Capital / Ulumbarra

- Aware: 93%
- Unaware: 7%

The Capital / Ulumbarra’s current market

- Current: 93%
- Lapsed / Potential: 7%
- Not in the market: 10%

Organisation crossover

- Proportion of current visitors from other venues who are also current visitors to The Capital / Ulumbarra: 31%
- Proportion of current visitors at The Capital / Ulumbarra who are also current visitors of other venues: 44%

The Capital / Ulumbarra has the 14th highest level of awareness (out of 16) within the multi-arts market in Victoria.

The Capital / Ulumbarra’s culture segment profile

- Essence: 27%
- Expression: 25%
- Stimulation: 15%
- Release: 15%
- Perspective: 11%
- Entertainment: 11%

38% of The Capital / Ulumbarra’s current audience is likely to attend more arts and culture in the next 12 months, compared to the culture market average of 24%.

15% of The Capital / Ulumbarra’s current audience has children living at home, compared to the culture market average of 23%.
The Wheeler Centre

The Wheeler Centre is the only literature organisation as part of this study. At 12%, it has relatively low awareness.

The Wheeler Centre’s Culture Segment profile

The Wheeler Centre’s market

<table>
<thead>
<tr>
<th>The Wheeler Centre</th>
<th>Awareness of The Wheeler Centre</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current Market</td>
<td>28%</td>
</tr>
<tr>
<td>Lapsed / Potential Market</td>
<td>21%</td>
</tr>
</tbody>
</table>

The Wheeler Centre’s current market

- **49%** of The Wheeler Centre’s current audience is likely to attend more arts and culture in the next 12 months, compared to the culture market average of 24%.

- **71%** of The Wheeler Centre’s current audience has donated to support arts organisations, compared to the culture market average of 40%.

The Wheeler Centre is the only literature organisation as part of this study. At 12%, it has relatively low awareness.

Current visitors to The Wheeler Centre

- **43%** Dancehouse
- **46%** Lucy Guerin Inc.
- **70%** ACMI
- **43%** Melbourne Writers Festival
- **72%** NGV Australia (NGVA)
- **36%** Emerging Writers Festival
- **35%** Gertrude Contemporary
- **77%** NGV International (NGVI)
- **83%** Arts Centre Melbourne
- **73%** State Library Victoria

Organisation crossover

- Proportion of current visitors from other venues who are also current visitors to The Wheeler Centre
- Proportion of current The Wheeler Centre visitors who are also current visitors of other venues
Victorian Opera

Victorian Opera’s Culture Segment profile

Victorian Opera’s market

Victorian Opera’s current market

46% of Victorian Opera’s current audience is likely to attend more arts and culture in the next 12 months, compared to the culture market average of 24%.

55% of Victorian Opera’s current audience have donated to support arts organisations, compared to the culture market average of 40%.
Virgin Australia Melbourne Fashion Festival (VAMFF)

VAMFF’s Culture Segment profile

- VAMFF Current Market: Essence (22%), Expression (3%), Stimulation (47%), Release (13%), Enrichment (6%), Perspective (2%), Entertainment (3%)
- VAMFF Lapsed / Potential Market: Essence (11%), Expression (4%), Stimulation (17%), Release (17%), Enrichment (6%), Perspective (13%), Entertainment (26%)

VAMFF’s market

<table>
<thead>
<tr>
<th>VAMFF</th>
<th>Current Visitors to Other Venues</th>
<th>Proportion of current visitors from other venues who are also current visitors to VAMFF</th>
</tr>
</thead>
<tbody>
<tr>
<td>VAMFF</td>
<td>22%</td>
<td>74%</td>
</tr>
<tr>
<td>Festivals</td>
<td>34%</td>
<td>34%</td>
</tr>
</tbody>
</table>

VAMFF’s current market

- 25% of VAMFF’s current audience has children at home, compared to the culture market average of 23%.
- 44% of VAMFF’s current audience is likely to attend more arts and culture in the next 12 months, compared to the culture market average of 24%.

Awareness of VAMFF

- 26% Aware, 74% Unaware

VAMFF has the 10th highest level of awareness (out of 14) within the festival market in Victoria.

Organisation crossover

- Proportion of current visitors from other venues who are also current visitors to VAMFF
- Proportion of current VAMFF visitors who are also current visitors of other venues

Current visitors to VAMFF

- 71% Punctum
- 72% Crown Casino
- 57% Her Majesty’s Theatre
- 47% Snuff Puppets
- 56% Melbourne International Comedy Festival
- 65% Arts Centre Melbourne
- 47% Ranters Theatre
- 60% NGV International (NGVI)
- 45% Lucy Guerin Inc.
West Gippsland Arts Centre

West Gippsland Arts Centre’s market

West Gippsland Arts Centre’s current market

37% of West Gippsland Arts Centre’s current audience is likely to attend more arts and culture in the next 12 months, compared to the culture market average of 24%.

34% of West Gippsland Arts Centre’s current audience has used social media to find out about arts events in the last 12 months, compared to the culture market average of 27%.

West Gippsland Arts Centre has the 13th highest level of awareness (out of 16) within the multi-arts market in Victoria.
White Night Melbourne has the 2nd highest level of awareness (out of 14) within the festival market in Victoria.

36% of White Night Melbourne’s current audience is likely to attend more arts and culture in the next 12 months, compared to the culture market average of 24%.

42% of White Night Melbourne’s current audience has used social media to find out about arts events in the last 12 months, compared to the culture market average of 27%.
Yarra Ranges Arts and Cultural Program

Yarra Ranges arts and cultural program’s Culture Segment profile

- **Essence**: 11%
- **Expression**: 4%
- **Affirmation**: 11%
- **Stimulation**: 10%
- **Release**: 10%
- **Perspective**: 10%
- **Enrichment**: 9%
- **Entertainment**: 12%

Yarra Ranges arts and cultural program’s market

<table>
<thead>
<tr>
<th>Segment</th>
<th>Current</th>
<th>Lapsed / Potential</th>
</tr>
</thead>
<tbody>
<tr>
<td>Multi-arts</td>
<td>90%</td>
<td>11%</td>
</tr>
<tr>
<td>Other venues</td>
<td>89%</td>
<td>8%</td>
</tr>
</tbody>
</table>

Yarra Ranges arts and cultural program’s current market

- **35%** of Yarra Ranges arts and cultural program’s current audience has children at home, compared to the culture market average of 23%.
- **59%** of Yarra Ranges arts and cultural program’s current audience has donated to support arts organisations, compared to the culture market average of 40%.

Awareness of Yarra Ranges arts and cultural program

- **90%** Aware
- **10%** Unaware

Organisation crossover

- Proportion of current visitors from other venues who are also current visitors to Yarra Ranges Arts and Cultural Program
- Proportion of current Yarra Ranges Arts and Cultural Program visitors who are also current visitors of other venues

Yarra Ranges arts and cultural program has the **12th highest level of awareness** (out of 14) within the multi-arts market in Victoria.