Audience Atlas Victoria 2024

Exploring the market for arts and culture in Victoria

November 2024

Contents

Audience Atlas Victoria 2024 is based on 2,876 responses collected between 06–29 June 2024 from people aged 18 years and over. The data is weighted to be representative of the Victorian population.

- Where percentages do not add up exactly to 100%, this is due to rounding.
- Any real numbers shown are estimates only, based on the weighted proportions and population figures to convert percentages into real figures.

Please see the research parameters for more detail on sampling, methodology and confidence intervals.

This is the third edition of Audience Atlas Victoria. The first edition took place in 2013, followed by 2019.

Commissioned by Creative Victoria, the Victorian Government body dedicated to growing and strengthening the state's creative industry.

Audience Atlas introduction

Audience Atlas is a unique way of understanding the market for arts and culture. With a robust population survey at its core, an Audience Atlas sizes, profiles and segments the market and provides strategic insight in how to target and engage audiences to ensure sector growth.

Audience Atlas studies have been undertaken across the globe from Washington DC to Sweden. This is the third of its kind in the state of Victoria.

Findings in this study are drawn from a representative sample of 2,876 Victorians, sampled using quotas and weighted using Census data.

Please refer to the research parameters for detailed information on sampling methodology and confidence intervals.

% of the adult population in the market for arts and culture

China	60%
San Francisco Bay Area	92%
New York City	90%
New Zealand	96%
Sweden	95%
Saudi Arabia	94%
UK	85%
Victoria, Australia	99%

Key terms:

- Culture market: Victorian adults aged 18 or over who have engaged with at least one arts or cultural activity in the past or would do so in the future. The definition is inclusive, from attending the opera to going to the cinema.
- Current market: engaged in the past 3 years.
- Lapsed market: last engaged over 3 years ago.
- Ever market: engaged at any stage in the past.
- 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: dance, design, festivals, film, First Peoples arts, literature, live music, museums, musicals and comedy, theatre and visual arts. Most artforms encompass a range of sub-artforms. For example, 'dance' includes ballet, contemporary dance, First Peoples dance and dance festivals.
- Culture Segments: a practical tool for understanding and responding to people's deep-seated values, helping organisations achieve their visitor-focused goals.

How to read this report

Section 1: culture market overview

This section gives a broad overview of Victoria's culture market and introduces Culture Segments as a strategic tool to help action the insights presented.

Section 2: arts and cultural engagement

This section explores how Victorians compare their arts and cultural engagement to five years ago, their anticipated future attendance and barriers to engagement.

Section 3: arts and cultural spend

This section explores the arts and cultural spending habits of Victorians, including who is more likely to be spending and how Victorians anticipate that their arts spending might change in the future.

Section 4: support for the arts

This section explores the arts and cultural giving and joining habits of Victorians, including where most potential lies.

Section 5: reaching the market

This section explores media consumption, including how Victorians find out about arts and cultural events and places.

Section 6: engagement by individual artform

This section provides an in-depth summary of 11 core artforms, exploring market penetration alongside each market's Culture Segment profile. This part of the report is a rich data directory for individual organisations to pinpoint the market data most relevant to them.

The backdrop to this study

Social and economic impacts post-pandemic continue to be felt in 2024, and there are unique and specific challenges affecting the Victorian arts and culture sector.

Despite this, the sector continues to adapt and change, demonstrating its resilience.

The insight generated through this study is designed to support the sector on this path – offering additional fuel to encourage development and growth against a challenging backdrop.

A tough economic climate

The current economic climate is challenging for all, with high inflation, rising interest rates and increased living costs.

For everyday Victorians, these economic strains have reduced discretionary spend, which for many has meant cutting back on non-essential activities such as arts and culture.

As a result, many organisations are experiencing decreased ticket sales and lower overall engagement, forcing them to adapt through pricing adjustments, more flexible offerings, or shifting to digital formats to retain audiences.

Audience habits and behaviour have shifted

Coupled with financial pressures, changes in audience behaviour also connect to shifts in preference, lifestyle and habits brought about by the pandemic.

Lockdowns forced people to slow down and explore new interests and other forms of enjoyment. Audiences now are looking for things that ‘fit in’ with this re-set lifestyle, meaning that many who were culturally active before are not attending as regularly as they were.

The sector is adapting

In response to the current climate, many arts and cultural organisations in Victoria are making strategic changes to adapt.

Many are focusing more on flexible pricing strategies to make events more accessible to cost-conscious audiences. This includes offering tiered ticket pricing, discounts, and ‘pay what you can’ options.

Some organisations, such as museums and galleries, have increased their free programming or extended the duration of temporary exhibitions.

Additionally, many institutions are diversifying their income streams, moving beyond ticket sales by focusing on membership programs, sponsorships and corporate partnerships to secure financial stability.

Key findings

5.08 million Victorians are ‘in the market’ for culture

Victoria is a culturally active state. In 2024, an estimated 5.08 million adults report having engaged with at least one arts or cultural activity in the past three years. Equating to 99% of Victoria’s adult population, this ‘culture market’ is the largest (proportionally) of all countries, states and territories explored through Audience Atlas to date.

A third have spent money on arts engagement recently

Younger, linguistically diverse Victorians are more likely than average to have spent recently on arts engagement, as are First Peoples.

$3.4 billion

is the estimated annual spend on the arts by Victorians.

80% are ‘in the market’ for First Peoples arts and culture

With an estimated 1.49 million Victorians having not yet engaged with First Peoples arts, but willing to give it a go, there is sizeable growth potential. The First Peoples arts market is strongly Expression.

Affirming results relating to younger audiences

Younger Victorians are more likely than average to have recently spent on the arts, donated or have a current arts membership. They are also more likely to anticipate that their arts engagement will soon increase.

Victorians are engaging with a diverse range of artforms

Film and museums lead the way as relatively mainstream pursuits. Victorians are more active in their engagement with First Peoples arts, festivals, and design, than dance or literature

A well-balanced distribution of Culture Segments

Expression is most numerous in Victoria (23%), followed by Affirmation (15%). First Peoples are strongly Expression and there is an over-representation of Affirmation among families..

2.6 million plan to 'maintain' their level of arts engagement

Half of Victorian adults don't anticipate changing their level of arts engagement in the next 12 months. Those who are currently limiting their engagement, report that they are 'cutting back on everything' (not just the arts)

2.1 million Victorians are open to donating to the arts

Younger Victorians are over-represented among current donors, and two thirds of those who have donated before are Essence, Expression or Stimulation.

1.1 million have seen value in arts membership before

Current members and subscribers are typically younger and more highly educated.

More Victorians listen to podcasts than read the paper

A larger proportion of the market listens to podcasts in a typical week than reads a printed newspaper.

Access barriers restrict arts engagement for 1.1 million

There are a wide range of ways the sector can improve accessibility, including offering 'less crowded' events.

Recommendations

Re-activating lapsed audiences is critical

In challenging times, focusing on re-engaging lapsed audiences is a prudent approach. Lapsed audiences have chosen to engage before, they know who you are and understand the benefits they will get from their engagement — they just need to be compelled to engage again.

Lapsed audiences need to be invited back with clear, enticing offers and reminded of the Social, Intellectual, Emotional and Spiritual benefits you deliver, alongside how engagement with you will fulfil their deep-seated needs.

Optimise offers to those with most return on investment potential

Victoria's 2024 Culture Segment profile shows a well-balanced distribution of segments. Enthusiastic Expression is most plentiful (23%), followed by the self-developers, Affirmation (15%). Although not as numerous as others, Essence (8%) and Stimulation (11%) reveal themselves across data points (along with Expression and Affirmation) as likely to offer organisations the most return on their investment.

Prioritise Expression, Essence, Stimulation and Affirmation

Demonstrating their value, Expression, Essence, Stimulation and Affirmation are significantly more likely than others to anticipate increasing their arts attendance in the coming year. Furthermore, Expression, Stimulation and Essence are more likely to have spent money on the arts recently (Affirmation's results were marginally above average), and the profile of current donors also skews heavily towards Expression (and, to a lesser extent, towards Essence and Stimulation).

This confirms that specific segment clusters offer more opportunity than others and that focusing on these more receptive segments gives you the best chance of audience success.

- Expression is seeking connection with others and to feel part of something bigger than themselves.
- Essence is seeking a sense of themselves through emotional connection, reflection and intellectual stimulation.

- Stimulation is seeking to be moved emotionally and challenged intellectually while consuming culture socially.
- Affirmation is seeking security and self-esteem through personal development and getting a sense of their place in the world

Culture Segments, used as a critical lens for data exploration in this study, provides the sector a vital tool to build enduring engagement with audiences. By understanding what people are seeking to fulfil in themselves through experiencing arts and culture, you can target them more accurately, engage them more deeply and build relationships to maximise loyalty and support.

Capitalise on ‘youth’ momentum with Stimulation

There are a number of affirming results relating to younger audiences in 2024. Younger adults are more likely than average to have recently spent on the arts, donated or have a current arts membership. They are also more likely to anticipate that their arts engagement will soon increase. The challenge for the sector is to support this to become a reality.

While demographics don’t define Culture Segments, demographic skews can be present among segment clusters and Stimulation is a case in point – this segment skews younger. Not only this, but what appeals to Stimulation (new things, discovery, rule-breaking and social experiences, for example) tends also to resonate with younger age groups. Therefore, a Stimulation-focused audience development approach is an excellent strategy for ‘youth’ retention and growth.

Offer social engagement as a gateway to deeper connection

On average, Victorians cite 5.03 reasons for engaging with cultural activities, with 84% having at least one Social driver. Looking at main motivations reveals that while the market is most commonly seeking social reward for their engagement, more are looking for deeper fulfilment – Intellectual, Emotional or Spiritual reward – an extension of a purely social encounter.

This suggests that success lies in arts and cultural offers that combine these factors, particularly those that use social engagement as a gateway for deeper connection.

Explore alternative pricing models

With arts organisations under increasing pressure to ensure financial sustainability, the need for alternative pricing models to ensure growth and diversity, alongside fiscal prosperity, has never been greater. While seemingly counter-intuitive, 'access' pricing models, such as 'pay what you can', and other experimental approaches, need consideration. Organisations want to 'top the list' of things your audience isn't prepared to give up in the future. Exposing the market to the unique benefits you offer now will help to future-proof your sustainability.

Re-think arts membership

The sector is competing in a fast-moving world of opportunity and distraction. As a result, there is an increasing trend for people to want to try more things and to expect more choice and flexibility.

Subscription models outside the arts sector are moving to higher levels of flexibility. People are comfortable committing and paying to access 'a lot of stuff' rather than purchase one at a time or to subscribe to a viewing channel that gives choice and variety but doesn't lock in viewing times. The sector's challenge is finding the arts equivalent of this flexibility and choice.

The future is collaborative

The future of the arts and cultural sector lies in collaboration — a movement that is already reshaping how the sector works, creates, and connects with its audiences.

Beyond traditional marketing partnerships and cross-promotion, the cross-sector development of programming has become increasingly commonplace — amplifying reach, creating richer experiences for audiences and reducing resource pressure on individual organisations. Collaboration isn't just a trend, it's essential to ensuring the survival and growth of the sector. Opportunities to collaborate within, and across artforms, should be explored.

Section 1: culture market overview

5.08m Victorians in the market for culture

In 2024, there are 5.08 million Victorian adults who have engaged with at least one arts or cultural activity within the past three years. The proportion of Victorians in the culture market has increased since the 2019 study.

Victoria is a culturally active state

In 2024, 99% of Victorian adults (aged 18 and over) report having engaged with at least one arts or cultural activity in the past three years.

This equates to an estimated 5.08 million adults in the state's culture market, 9% more than in 2019. The culture market's rate of growth is higher than that seen among the Victorian population (7%).

In 2024, 76% of the culture market reside in Melbourne and 24% elsewhere in the state. Results are in line with five years ago and the population spread.

Breakdown of Victoria's culture market by SA4 and Greater Capital City Statistical Area (GCCSA)

Region	Total market %
Inner	22%
North East	9%
North West	6%
Outer East	8%
South West	12%
West	13%
Mornington Peninsula	6%
Ballarat	3%
Bendigo	1%
Geelong	5%
Hume	2%
Latrobe - Gippsland	6%
North West	2%
Shepparton	2%
Warrnambool and South West	2%
Base	2893

Statistical Area Level 4 (SA4) are geographic areas and the largest sub-state regions used by the Australian Bureau of Statistics

Understanding what drives engagement

Culture Segments is a psychographic segmentation system that clusters people based on their deep-seated values towards arts and culture. These values shape an individual's attitudes, lifestyle choices, and, ultimately, cultural consumption.

Culture Segments gives the sector real insight into what motivates the market and the tools to not only predict, but influence future behaviour.

Using Culture Segments, the sector can grow audiences, encourage repeat attendance, and develop long-lasting, mutually beneficial audience relationships.

The eight Culture Segment clusters

Culture Segments is a subtle, granular and sophisticated system designed specifically for organisations with an arts and cultural offer. The eight segments are centred around people's core values, giving insight into why each would like the arts in their lives and what benefits they perceive it to offer. Unlike other systems, it doesn't simply try to explain, predict or describe current patterns. It gives you drivers to influence and change those patterns.

Essence	Expression	Affirmation	Stimulation
Discerning	Community	Self-identity	Active
Confident	Nurturing	Considered	Experimental
Independent	Generous	Diligent	Ideas
Arts-essential	Committed	Time well spent	Social

Enrichment	Release	Perspective	Entertainment
Tradition	Busy	Settled	Mainstream
History and heritage	Prioritising	Self-sufficient	Popular appeal
Nostalgic	Ambitious	Focused	Leisure
Learning	Escape	Contented	Fun

Understand values, influence behaviour

The big idea behind Culture Segments is that only when you understand an individual's deep-seated beliefs and values can you develop an offer and communications that will resonate. Rather than profiling existing habits or assuming a link between demographics and arts engagement, Culture Segments is designed to help you understand what drives people at their very core so that you can influence that behaviour.

Culture Segments is powered by an algorithm developed by MHM over the past 20 years. Using a small number of 'Golden Questions' (which can be inserted into any research survey), the algorithm instantly establishes a respondents' segment.

Culture Segments and demographics

Basing a segmentation system on demographics creates a simplistic but reassuringly statistical way to target, refer to, and evaluate audience groups. It helps define the group we wish to target. However, these descriptors can't give the understanding you need to influence this group's behaviour.

This is why demographics aren't used as definers for Culture Segments. Suggesting all young people are into experimental theatre is as crude as saying that all older people love classical ballet. Or, just because a group of people enjoy a certain level of disposable income or live in the same postcode doesn't make them all active cultural consumers.

Instead, we defined Culture Segments using psychographic factors – values and mindsets specific to culture. While there may be demographic skews in some segments or segment skews in some demographic groups, all demographic groups are found across all eight segments.

Culture Segments are used throughout this report as a lens to investigate the market, helping organisations understand which segments best align with their proposition and offer the best return on investment.

Discover your segment here: mhminsight.com/segmentme

A well balanced Culture Segment profile

Victoria’s 2024 Culture Segment profile reveals a well-balanced distribution of segments. Expression is the most numerous in the market, followed by Affirmation.

Culture Segments are based on values, and are not defined by demographics, however, there are some demographic skews within segment clusters.

First Peoples are strongly Expression and Affirmation is over-represented among those with children in their household. Expression and Stimulation are over-represented in the inner city, while Perspective and Entertainment are more prominent outside of Melbourne.

Victorian culture market Culture Segment profile and real figure estimates

	Total market %	Total market real figure estimate
Essence	8%	399k
Expression	23%	1.16 million
Affirmation	15%	775k
Enrichment	13%	675k
Stimulation	11%	541k
Release	9%	473k
Perspective	11%	566k
Entertainment	10%	493k
Base	2876	

Essence	Expression
Essence consider the arts and culture essential to their very being. They're confident and knowledgeable and look for deeply emotional connections. High quality culture is their primary concern and they veer away from the mainstream, considering it unsophisticated. 8% of the Victorian culture market	Expression are open and full of enthusiasm with varied and eclectic tastes. They enjoy activities that help them connect with and share experiences with others. They like to be sure that everyone is welcome to join in and enjoy things, and as such put a high price on inclusivity. 23% of the Victorian culture market

Affirmation	Stimulation
Affirmation make measured decisions, seeking endorsement before making choices. One of many leisure choices, they embrace culture as important and worthwhile; part of their commitment to personal wellbeing. They recognise opportunity for self-improvement as well as quality time with others. 15% of the Victorian culture market	Stimulation are an active group who love adventure and live for the moment. They seek out new experiences to live a varied life and keep ahead of the curve. They are all about big ideas and are looking for something 'out of the ordinary'. But they also attend cultural events for the social experience. 11% of the Victorian culture market

Enrichment	Release
Enrichment tend to be lovers of history – things that have stood the test of time command their respect. They know what they'll enjoy, are independently minded and exert their right to be cautious. It's not that new things hold no worth, but Enrichment will look for the thread that links them to what went before. 13% of the Victorian culture market	Release are looking for escape and to unwind from the stresses of everyday life. They can feel a under siege from different pressures on their time. These conflicts may be reality, but often it is the feeling of being time-poor rather than the actual reality of not having any time. They'd like to do more, but it isn't always easy. 9% of the Victorian culture market

Perspective	Entertainment
Perspective are very self-sufficient and don’t rely on others for fulfilment. They prefer to make their own discoveries and are happy doing their own thing, driven by their own agenda. They focus on one or two existing interests they find satisfying and rewarding and have a low appetite for expanding this repertoire.	Entertainment see culture as on the periphery of their lives. Their occasional visits are likely to be for mainstream events or days out. Leisure time is for fun, entertainment and escapism. If they do attend, it will be socially motivated. Their engagement is typically the lowest of all segments.
11% of the Victorian culture market	10% of the Victorian culture market

Close to a quarter are community-minded Expression

In 2024, 23% of adults in the Victorian culture market – an estimated 1.16 million are Expression. Expression is one of the segments most likely to engage with arts and culture regularly. They are also likely to join in and share their experiences with others and tend to be great advocates.

A sizable Affirmation cohort seeking self-development

Affirmation follows Expression in terms of size in the market (15%). Affirmation is a segment keen on learning and self-improvement. They are conscientious and keen to grow through their engagement with arts and culture. For Affirmation, the arts offer a chance to develop and build their sense of identity. They often lack the confidence of other segments and tend to engage with offers they see as ‘low-risk’.

Adventurous Stimulation and discerning Essence are important arts engagers

Although not as large as some other segments in the market, Essence (8%) and Stimulation (11%) are important cultural engagers. Stimulation is characterised by two key traits: their desire for something new and unique and their desire to explore ‘big ideas’. Essence is looking for ‘quality’, are discerning and seek reflective connections through their cultural consumption.

While these two segments are different, they are both independent decision makers with a willingness to stand out from the crowd. This marks Essence and Stimulation as influential tastemakers and leaders within the cultural landscape.

More than 1 in 10 are ‘traditional’ Enrichment

While representing 13% of the state’s culture market, Enrichment isn’t particularly motivated by being up-to-date. A respect for the past leads their cultural engagement, and they tend to be cautious cultural consumers with established tastes. Enrichment isn’t looking for new interpretations; they know what they enjoy and veer towards the familiar.

Busy Release, self-contained Perspective and fun-loving Entertainment round out the market

The remaining 30% of the market is made up of busy Release (9%), Perspective (11%) and fun-loving Entertainment (10%).

Release are often people who feel unable to prioritise the arts as much as they'd like. They seek relaxation on their days off, which makes them a difficult segment to mobilise. They tend to come out for box office hits and blockbuster exhibitions, where they can be reassured that their investment of time and money will be well spent.

Perspective can be thought of as a more narrowly focused and introverted Essence, however, they lack the ardent appetite for the arts and are typically focused on their own personal areas of interest.

For Entertainment, arts and culture is on the periphery of their lives. If they do engage it is with mainstream events or fun days out.

Stimulation is more prominent in urban areas

While Culture Segments are defined by values not demographics, and all segments are present in all demographics, segment skews within demographic groups can occur. For example, in Victoria, Enrichment and Perspective skew older, and Expression and Stimulation skew younger. In addition, Stimulation is more prominent in culturally vibrant urban areas, and in Victoria they are joined by Expression in being over-represented in inner Melbourne. Conversely, the market living outside greater Melbourne skews toward Perspective and Entertainment, two segments with typically lower levels of cultural engagement.

First Peoples are strongly Expression

Within Victoria's cultural market, close to 4 in 10 identifying as First Peoples are Expression, significantly higher than the market average (23%). Expression is defined by its close connection to community. Therefore, Expression being more commonplace among this cohort may be correlated to a community identity, with family at the heart of social structures.

Culture Segment profile – Victoria 2024

	Total market %	Melbourne – inner	Melbourne – elsewhere in Melbourne	Elsewhere in Victoria	First Peoples	Children in household
Essence	8%	7%	8%	8%	9%	9%
Expression	23%	^ 27%	23%	v 19%	^ 37%	24%
Affirmation	15%	15%	16%	13%	13%	^ 19%
Enrichment	13%	11%	14%	13%	8%	12%
Stimulation	11%	^ 14%	10%	9%	14%	9%
Release	9%	10%	9%	8%	6%	10%
Perspective	11%	v 8%	10%	^ 17%	6%	v 6%
Entertainment	10%	v 7%	9%	^ 13%	7%	10%
Base	2876	647	1544	685	78*	806

^	% is significantly higher than the culture market average
v	% is significantly lower than the culture market average

Connection between Affirmation and the family market

There is an over-representation of Affirmation in family households in Victoria (19%), a typical finding in market studies and one that highlights how important Affirmation can be in reaching families.

Understanding motivations adds nuance

In addition to values driving engagement (Culture Segments), the market has a range of motivations for engaging on any given day.

Unlike deep-seated values, these will vary across artforms and within different contexts. For example, a person may attend the opera one evening looking to ‘take a break from everyday life and recharge’. The same person may then visit a museum on the weekend, looking to ‘develop their children’s knowledge’ during this visit.

While this person’s profound beliefs about the arts hasn’t changed (their Culture Segment) what is driving them to engage on a particular day has. This has changed according to context and artform.

Understanding patterns across the market and how these might vary for different sub-groups and correlate with Culture Segments, is an additional tool to strengthen audience development.

Motivations for engaging with arts and culture – all

Motivation	Total market %
To spend time with friends or family	50%
For a pleasant way to pass the time	47%
To expand my own knowledge	47%
To take a break from everyday life and recharge	43%
To see beautiful things in an attractive setting	43%
To be wowed or amazed	39%
To visit a major attraction(s)	35%
To enjoy being part of something with others	30%
To inspire my imagination or creativity	29%
To step back in time	24%
To pursue a hobby or personal interest	24%
To reflect and contemplate	23%
To feel personally connected	21%
To develop children's / other's knowledge	19%
To inspire children's / others imagination or creativity	18%
To expand my professional or specialists knowledge	12%
None of these	8%
Base	2876

A balanced mix of drivers

Motivations for engaging can be clustered into four broad categories: Social, Intellectual, Emotional and Spiritual.

Social motivations, such as ‘spending time with others’, ‘passing the time pleasantly’ along with the Intellectual driver of ‘expanding knowledge’, are important considerations for half the Victorian market. This is followed by around 4 in 10 who are seeking a ‘break from everyday life’, looking to experience ‘beautiful things’ or to be ‘wowed and amazed’. As such, motivations to engage are a balanced mix of Social, Intellectual, Spiritual and Emotional drivers.

6 in 10 seek more than ‘just’ Social interaction

On average, Victorians cite 5.03 reasons for engaging with cultural activities, with 84% having at least one Social driver. Other core motivations are not far behind, with 72% seeking Emotional or Spiritual fulfilment and 69% at least one Intellectual outcome.

Looking at main motivations, reveals that while the market is most commonly seeking Social reward for their engagement, more are looking for deeper fulfilment – Intellectual, Emotional or Spiritual reward, an extension on a purely Social encounter.

This suggests that success lies in arts and cultural offers that combine these factors, particularly those that use social engagement as a gateway for deeper connection.

Motivations for engaging with arts and culture

Motivation	All motivations	Main motivation
Social	84%	38%
Intellectual	69%	19%
Emotional	72%	21%
Spiritual	72%	23%
Base	2637	2637

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Segments have distinct motivations

Exploring motivations and Culture Segments together, reveals clear patterns. Beyond the universal ‘spending time with others’ and ‘finding a pleasant way to pass the time’, there are some distinct segment differences:

- Essence sees cultural experiences as a way to ‘transcend’, providing ‘sanctuary’ with benefits that can be described as Spiritual. They are the segment most likely to seek ‘inspiration’, ‘contemplative reflection’ or a ‘break to recharge’.
- A key driver for Expression is community and connection. They are the segment most likely to want to be part of a ‘communal or shared experience’ or to ‘feel personally connected’. Overall, however, as core cultural engagers Expression are seeking ‘deep’ connection and fulfilment, so are less likely than average to report a Social activity as their ‘main’ reason for engaging.
- As a visual, experiential and emotionally-led segment, Expression, along with Essence, is more likely to be looking to ‘see beautiful things in an attractive setting’.
- Conscientious Affirmation seek learning opportunities and want to ‘expand their knowledge’. This a key driver for the ‘highly’ motivated Essence and Expression segments, too.
- As Affirmation are more likely to live in households with children and like to be seen ‘doing the right thing’, they are more likely than others to be looking to ‘inspire a child’s imagination or creativity’.
- Adventurous Stimulation wants to be ‘wowed and amazed’. They like adventure and to consume culture in a social way, but don’t want a shallow experience, and only Essence beats them for seeking the Spritual benefit of ‘reflecting and contemplating’.
- The other segments, Enrichment, Release, Perspective and Entertainment, are less motivated to engage and have more Social drivers as they typically place lower value on arts engagement.

Main motivation by Culture Segment

Motivation	**Total market %**	Essence	Expression	Affirmation	Stimulation
Social	v 38%	v 30%	32%	34%	35%
Intellectual	19%	20%	20%	21%	19%
Emotional	21%	17%	24%	18%	25%
Spiritual	23%	32%	24%	^ 27%	22%
Base	2637	219	635	422	300

Motivation	**Total market %**	Enrichment	Release	Perspective	Entertainment
Social	38%	42%	42%	^ 47%	^ 51%
Intellectual	19%	18%	17%	20%	17%
Emotional	21%	21%	22%	17%	14%
Spiritual	23%	19%	19%	v 17%	18%
Base	2637	353	241	260	207

^	% is significantly higher than the culture market average
v	% is significantly lower than the culture market average

CREATIVE VICTORIA

Section 2: arts and cultural engagement

2.6m plan to ‘maintain’ their engagement

Looking at how Victorians compare their cultural engagement in 2024 to five years ago reveals a complex landscape of behaviours. An estimated 841k Victorians report increased attendance, while 2.1 million indicate they attend less.

Although overall there is no change in what the market anticipates doing in the future (a net neutral picture), 2.6 million Victorians plan to ‘maintain’ their engagement and 929k plan to do more.

Those who ‘value’ the arts most (Essence, Expression and Stimulation) are more likely to anticipate increasing their attendance soon, so look to reduce contextual impacts with resonant offers for these key segments.

Victorians are attending less than five years ago

Exploring how Victorians perceive their level of current arts attendance compared to what it was five years ago, confirms what the sector already knows intuitively.

While 17% report attending more now than before (an estimated 841k adults), more than twice that proportion (41%, or an estimated 2.10 million) report doing less, meaning an estimated 1.26 million Victorians are less culturally active than five years ago.

Attendance at arts and cultural events and places compared to five years ago (pre-pandemic, 2020)

	Total market %	Total market real figure estimate
More	17%	841k
About the same	35%	1.78 million
Less	41%	2.10 million
Don’t know	7%	351k
Base	2876	

While the market tends towards lower activity overall, around half believe their attendance mirrors levels from five years ago, with 35% doing the same and 7% uncertain.

The less culturally active segments, Perspective and Entertainment, are significantly over-represented in this ‘culturally consistent’ group, suggesting that the loss is within the more culturally engaged. Those who’ve never had much of a relationship with the arts are relatively unchanged.

Essence ‘doing less’ than five years ago

Essence considers the arts essential to their lives and were the segment most eager to return when Covid restrictions eased. At first glance then, it is surprising given what we know about this segment, that Essence is over-represented among those doing less now than before (53%).

However, it is important to remember that the shift is relative to their pre-2020 engagement. Essence’s ‘less now’ is still likely more than most, and as explored overleaf, Essence is significantly more likely to anticipate increasing attendance in the coming year.

Younger, culturally diverse Victorians report ‘doing more’

While overall the market is doing less, it is interesting to look at who thinks they are more active now than five years ago.

There is an over-representation of enthusiastic Expression (26%) and adventurous Stimulation (22%), along with younger adults (25% of 18–34s) and those identifying as linguistically diverse (23%) in the ‘doing more’ group.

The shift, however, is again relative to an individual’s engagement from five years ago, and the younger cohort for example, were not necessarily at an age prior where they were making independent choices, or were still developing their personal tastes.

Half anticipate maintaining their current level of engagement

The market was asked how they anticipate behaving in the coming 12 months. In 2024, 19% of the market (an estimated 929k adults) anticipate attending more arts and cultural events over the coming 12 months than currently. However, the number anticipating attending less is slightly higher (an estimated 984k).

Representing a relatively positive outlook given the economic uncertainty, the remainder of the culture market anticipates either making no change to their level of attendance (52%) or are uncertain (10%), an estimated 3.14 million Victorians.

Anticipated in-person arts and cultural attendance in next 12 months: I'm likely to attend...

	Total market %	Total market real figure estimate
More	19%	949k
Same	52%	2.64 million
Less	19%	984k
Don't know	10%	509k
Base	2876	

CREATIVE VICTORIA

Those who 'value' the arts most anticipate attending more

Patterns emerge when we explore anticipated future attendance among sub-groups.

Market pressures have concentrated arts attendance around core audiences. As such, the four most culturally active segments – particularly Essence, Expression and Stimulation, and those with higher levels of education, are more likely to anticipate increasing attendance in the coming year.

- Younger, culturally diverse Victorians predict attending more
- Younger adults anticipate a higher level of future attendance compared to their older counterparts.
- Victorians who speak a language other than English at home and First Peoples are also more likely than average to anticipate increasing their engagement.
- Families are another group more likely than average to anticipate increased engagement.
- Some correlation with household income, but other factors have more 'influence'
- Broadly, those in the upper-income brackets are more likely to anticipate doing more. However, the lower end is not significantly different from the market average. While personal income is an associated link, other factors, such as the value derived from the arts (Culture Segments), exert more 'influence'.

Anticipation of attending more in next 12-months – %-point difference vs average

	%-point difference vs average (19%)
Essence	^ +11
Expression	^ +11
Stimulation	^ +5
Affirmation	+2
Enrichment	v -8
Release	v -5
Perspective	v -12
Entertainment	v -14
Greater Melbourne	+1
Elsewhere in the state	-2
Aged 18–34	^ +7
Aged 35–54	+1
Aged 55+	v -7

^	% is significantly higher than the culture market average
v	% is significantly lower than the culture market average

Anticipation of attending more in next 12-months – %-point difference vs average continued

	%-point difference vs average (19%)
Lower income band	-2
Lower-mid income band	+2
Upper-mid income band	^ +4
Upper income band	+3
Educational attainment – non-degree	-2
Educational attainment – degree	^ +4
Linguistically diverse	^ +4
English only	-1
First Peoples	^ +18
Rest of population	=
Children in household	^ +3
No children in household	-1
Access barriers	-2
Rest of population	+1

^	% is significantly higher than the culture market average
v	% is significantly lower than the culture market average

Attendance primarily impacted by broader economic context

Those reporting that they are attending less than five years ago, along with those anticipating doing less in the future, were asked their reasons for this change in behaviour.

Most notably, financial concerns are limiting cultural attendance in the immediate future, with Victorians most likely to report that they are ‘cutting back on everything’ (53%) and that ‘ticket prices have become too high’ (47%).

While half of those currently or intending on doing less are cutting back generally, close to 4 in 10, have chosen to make specific cuts to their arts engagement (38%) and a quarter have decided their money is better spent elsewhere.

Shift in audience behaviours

Not only is the cost of living impacting engagement, but the pandemic interrupted established patterns in behaviour for close to 3 in 10. Aligned with this, 12% have decided that their time is better spent on other things, and 8% will engage with more cultural content at home instead.

Compel engagement with more resonant offers

There is no doubt that the current economic context is impacting current and anticipated arts engagement, and there are limits to what the sector can do to influence this. However, there are other ‘barriers’ that organisations can focus on mitigating.

Close to 1 in 5 of those who anticipate attending less are simply not ‘getting around to it’, and some feel there’s ‘less on offer’ or what is on offer ‘doesn’t cater to their tastes’. While these aren’t as commonly cited reasons for limiting engagement as income and price, focusing on these will give organisations an edge. To start this process, organisations need to go back to basics:

- What is it that you are striving to achieve as an organisation (your vision)?
- Who is this for (your target audience)?
- Is your offer relevant to this audience and aligned with their needs?
- Are you communicating with them in the most compelling way?

By looking at people's needs and values and focusing on understanding what they seek to fulfil in themselves from experiencing your offer, you can target them more accurately, engage them more deeply and build relationships to maximise loyalty.

Reasons for attending less than five years ago or anticipate attending less in next 12 months

	Total market %
Cost of living increases mean I have to cut back on everything	53%
Ticket prices have / will become too high	47%
Cost of living increases mean I have to cut back on arts engagement	38%
Pandemic interrupted my attendance habits	27%
Decided that my money is better spend on other things	25%
Changes in personal circumstances	25%
Changes to my income	23%
Mean to but never get round to it	19%
No longer have people to go with	15%
Avoiding the risk of illness attendance exposes me to	14%
Plan to attend only free cultural events or places now	14%
Decided that my time is better spent on other things	12%
Taste / hobbies have changed	11%
Engaging with more cultural content at home / online	8%
There is less on offer	7%
What is on offer now doesn't cater to my tastes	6%
Base	1322

Opportunities to support access

Arts engagement is limited by access barriers for 22% of the Victorian culture market. However, there are a wide range of areas the sector can focus on to improve accessibility.

Increase accessibility with ‘smaller’ events and quiet spaces

Being around too many people and having accessible transport are important considerations for around 3 in 10. In addition to not wanting crowds, 15% ‘felt quiet spaces and low sensory sessions’ would better support their engagement.

Elements that make an arts activity, event or venue accessible

	Total market %
Not too many people there	29%
Accessible transport	27%
Website is accessible	24%
Information about accessibility provided pre-visit	22%
Accessibility venues or facilities	17%
Staff understand accessibility and disability	17%
Support staff available	15%
Quiet spaces or low sensory sessions available	15%
Support worker or carer with me at no extra cost	12%
Engaged beforehand about my access needs	8%
Assistive technology available	6%
Information is in accessible formats	6%
Sign language interpreters available	3%
Base	605

Section 3: arts and cultural spend

Estimated annual arts spend of $3.4 billion

Equating to an estimated 1.6 million individuals, one third of the Victorian culture market spent on arts engagement in the four weeks prior to the research.

Spenders are typically younger, educated and culturally diverse and core Culture Segments are over-represented. Connected to the volume of arts and cultural offerings in the state capital, residents of Greater Melbourne are also more likely to have spent than their regional counterparts.

Although more anticipate spending less in the immediate future, two thirds anticipate that their spending will be the same or more. Younger people and Expression are over-represented in this group.

1.6 million Victorians spent on the arts in month prior

A third of the culture market reported having spent on cultural engagement in the four weeks prior to the research (32%), equating to an estimated 1.6 million adults. Likely connected to the external context, this is 14% fewer than five years ago (an estimated 1.85 million).

Proportion of the culture market who have spent on arts and culture in the past 4-weeks

	2019	2024
Total market %	40%	32%
Total real figure estimate	1.85 million	1.6 million
Base	1929	2876

Spenders are younger, more culturally diverse and educated

Spend by location is associated with other factors. Compared to their regional counterparts, the metro market is younger, more culturally diverse, achieved higher levels of educational attainment and income. Also, half are Expression, Stimulation or Affirmation – segments most likely to value and engage with cultural activities and events. Therefore, these members of the Victorian culture market are the most active in the cultural space generally and more likely than average to have spent on engagement.

Spend on arts and culture activities

	2019	2024
Proportion of the market spending	40%	32%
Number of people spending	1.85 million	1.6 million
Average spend of spenders	$164.84	$164.48
Total four week spend	$305.81 million	$263.12 million
Total annual spend	$3.98 billion	$3.42 billion
Base	1929	2876

Annual arts spend estimated at $3.4 billion

Spenders reported having spent an average of $164.48 on the arts in the four week's prior to the research. At face value, this is comparable to the 2019 study ($164.84), however, when adjusted for inflation, this can be considered a decrease.

Regardless of the comparative decrease however, this $164.48 four week average equates to an estimated $3.4 billion per annum – an impressive figure given the challenging economic climate.

The average 'per capita' four week spend on arts and culture in 2024 is $52. This is made up primarily of admissions ($28).

Victorian's culture market per capita spend on attending arts and cultural activities (past 4-weeks)

	2019	2024
Admission	$35	$28
Refreshments	$15	$12
Programs / souvenirs	$3	$4

Arts and cultural spend centres around Melbourne

Likely associated with the greater number of cultural offerings the state capital enjoys, those living in Melbourne are significantly more likely to have recently spent on arts engagement (34%) than their regional counterparts (24%). Particularly those residing in inner Melbourne (40%) and the West (39%).

The average per capita spend is also higher in the metro area (an average of $55 vs $42). Inner and west Melbourne have the highest propensity to spend (40% and 39%, respectively) and higher average spends ($65 and $63).

Culture market by capita spend by area – % who spend and average per capita spend

	Total market %	Cost $	Base
Elsewhere in Victoria average	v 24%	$42	685
Greater Melbourne average	34%	$55	2191
Melbourne - Inner	^ 40%	$65	647
Melbourne - North East	31%	$49	258
Melbourne - North West	32%	$52	161
Melbourne - Outer East	v 25%	$42	233
Melbourne - South East	28%	$48	345
Melbourne - West	^ 39%	$63	372
Mornington Peninsula	27%	$42	176

^	% is significantly higher than the culture market average
v	% is significantly lower than the culture market average

Personally spent on arts and culture in a four month period – %-point difference vs average

	%-point difference vs average (32%)
Essence	^ +6
Expression	^ +19
Stimulation	^ +9
Affirmation	+3
Enrichment	v -14
Release	v -7
Perspective	v -20
Entertainment	v -15
Greater Melbourne	+2
Elsewhere in the state	v -8
Aged 18–34	^ +14
Aged 35–54	+1
Aged 55+	v -12

^	% is significantly higher than the culture market average
v	% is significantly lower than the culture market average

Personally spent on arts and culture in a four month period – %-point difference vs average continued

	%-point difference vs average (32%)
Lower income band	v -9
Lower-mid income band	^ +5
Upper-mid income band	^ +10
Upper income band	^ +9
Educational attainment – non-degree	v -4
Educational attainment – degree	^ +9
Linguistically diverse	^ +11
English only	-2
First Peoples	^ +30
Rest of population	-1
Children in household	+3
No children in household	-1
Access barriers	v -4
Rest of population	+1

^	% is significantly higher than the culture market average
v	% is significantly lower than the culture market average

A combination of factors impacts paid engagement

There are some anticipated patterns among those spending on arts engagement, including the value they place on the arts and income.

The four most culturally active segments – particularly Expression, Stimulation and Essence – are significantly more likely to have recently spent on arts engagement. Affirmation's results were marginally above average.

Diverse, younger Victorians are more likely to be 'spenders'

As explored earlier, younger, linguistically diverse audiences were more likely to anticipate doing more in the future. These groups were also more likely than average to report having recently spent on arts engagement, as were First Peoples.

Spend is associated with personal income

In similar studies, few discernible links between income and spend have been observed. However, in Victoria this is not the case. Those with a lower income are less likely to be spending, underscoring the influence of the external context in suppressing natural behaviours.

Regional Victorians are less likely to have spent than their metro counterparts

As outlined on the previous page, there is a marked spending difference between metro and regional Victorians. This is likely impacted by the profile of the market in these locations as well as availability of arts and culture activities.

749k anticipate spending more in the future

Although a larger proportion of the market anticipates spending less in the immediate future than now, close to two thirds anticipate that their spend will be the same or more in the next 12 months (64%).

Anticipated personal spend on arts and cultural attendance in next 12 months. Compared to now, in the next 12 months I'm likely to spend...

	Total market %	Real figure estimate
More	15%	746k
Same	50%	2.52 million
Less	23%	1.17 million
Don't know	13%	645k
Base	2876	

Future-proofing with alternative pricing models

With arts organisations under increasing pressure to ensure financial sustainability, the need for alternative pricing models to ensure growth and diversity, alongside fiscal prosperity, has never been greater. While seemingly counter-intuitive, 'access' pricing models, such as 'pay what you can' and other experimental approaches, need consideration. You want to 'top the list' of things your audience isn't prepared to give up in the future. Exposing the market now to the unique benefits you provide your audiences will help to future-proof your sustainability.

Close to half anticipate ‘consumption consistency’

The largest slice of the market (an estimated 2.03 million) can be considered ‘culturally consistent’, not anticipating making changes to their arts attendance or spending.

629k are seeking value and 886k are ‘cautiously reserved’

Around 15% expect to attend more in the next 12 months, yet spend less, or, not change attendance behaviour but spend less on it. We can consider this group to be seeking value in their cultural consumption, and estimate around 629k Victorians to be in this group, seeking out free cultural events or opting for a cheaper ticket option when attending paid events.

A sizable proportion anticipates doing less or the same and spending less on the arts in the coming 12 months. There are an estimated 886k of these ‘cautiously reserved’ Victorians and compared to average, this group are older (40% aged 55+, compared to 36% overall) and more likely to have a health condition impacting their cultural engagement (27%, compared to 22% overall).

737k Victorians are ‘culturally engaged’ or ‘treaters’

The remaining 17% of the market anticipate spending more – either in conjunction with doing more – or to be ‘treating’ themselves when they do choose to engage.

While the ‘culturally engaged’ group could be considered the ‘growth market’ (as they anticipate doing and spending more), ‘treaters’, as a group who are likely choosing what they do more carefully, are an excellent cohort to work to entice.

When they do engage, ‘treaters’ might purchase a more expensive ticket or indulge in another element to elevate the experience.

The ‘culturally engaged’ and ‘treater’ groups have some common traits. Both are younger than average (43%–44% aged 18–34, compared to 30% overall) and are more strongly Expression (38% compared to 23% overall).

Future attendance by spend

	Spend less	Spend Unchanged	Spend More
Attend More	2%	6%	13%
Attendance unchanged	7%	47%	3%
Attend Less	17%	4%	1%

13% / 558k culturally engaged

anticipate doing more and spending more.

4% / 179k treaters

anticipate doing less, but spending more or the same. For example, choosing what they do more carefully, purchasing a more expensive ticket option.

21% / 886k cautiously reserved

anticipate attending less and spending less or the same.

47% / 2.03 million culturally consistent

don't anticipate changing current behaviour patterns.

15% / 629k value seekers

anticipate doing more, but spending less and are likely to seek out free engagement or cheaper ticketing options.

An estimated 799k of the market don't know if they are going to attend or spend more in the next 12 months and have been excluded from analysis.

Section 4: support for the arts

2.1 million would consider donating

In 2024, 12% of Victorians report having donated to the arts in the last three years.

Despite this being a dip in current giving (compared to 2019), there remains a sizable potential donor base – there are an estimated 2.1 million Victorians who are open to giving.

The external context sets the stage for targeted efforts to reactivate and expand efforts to encourage donations, leveraging segment insights to cultivate support.

Supported the arts financially in past 3 years

	2019	2024
Total market %	26%	12%
Cost $	1.22 million	600k
Base	1984	2876

Victorians are less likely to be donating to the sector...

The proportion of Victorians giving to the arts financially in the past three years (current donors) experienced a steep drop compared to 2019. In 2024, 12% of the market – an estimated 600k individuals – reported donating to an arts or cultural organisation in the past three years (51% fewer givers than in 2019).

... but a sizable pool is open to supporting in this way

While 12% report giving to the sector in the past three years, 42% of the market is open to supporting the sector financially. Therefore, while there is more resistance to the idea of giving than five years ago (58%, compared to 47% in 2019), a sizable pool of potential givers remains. In 2024, an estimated 2.1 million Victorians would consider giving to an arts organisation.

- an estimated 600k have donated in the past three years (current)
- an estimated 567k last donated three or more years ago (lapsed)
- an estimated 964k have never given to the sector but are open to doing so (potential)

Culture Segments to activate giving behaviour

When asked what motivates current donors to support the arts financially, it is most common for them to want to support a particular organisation (47%), followed by contributing to something that is a personal passion (44%) or being able to make a difference (41%).

However, ‘giving’ to an organisation requires a deep level of connection, and as explored throughout this report, the segments are not equal in this regard.

Enrichment, Release, Perspective and Entertainment are typically less culturally engaged, with other priorities. Meanwhile, Enrichment are more cautious and price-sensitive than others. These segments have higher levels of resistance to supporting the arts financially (on average, 79% haven’t and won’t, compared to 39% of Essence, Expression or Stimulation).

Culture Segment profile – donated to an arts or culture organisation in the past 3 years

	Total market %	Donated in past 3 years
Essence	8%	11%
Expression	23%	^ 44%
Affirmation	15%	16%
Enrichment	13%	v 3%
Stimulation	11%	14%
Release	9%	v 5%
Perspective	11%	v 4%
Entertainment	10%	v 2%
Base	2876	340

^	% is significantly higher than the culture market average
v	% is significantly lower than the culture market average

Three segments represent two thirds of those who have donated before

The profile of current donors skews heavily towards Expression and, to a lesser extent, Essence and Stimulation, showing organisations where to prioritise their efforts in activating giving.

Expanding the view to include those who have given before but not for more than three years (lapsed donors) reveals that Essence, Expression and Stimulation are all significantly over-represented. These segments represent two-thirds of the market who have ever donated (66%).

This, in conjunction with Expression being the most open to giving, means that appeals that demonstrate how giving directly benefits the community you serve will likely have a discernible impact on a campaign’s success.

This could mean emphasising the important role arts and culture play in community building, belonging and personal well-being. This kind of messaging will be crucial for developing and sustaining levels of support with a segment like Expression.

Essence give because they believe in the value of the arts

- They want to nurture the development of ‘exceptional’ art in society – but it’s an inwardly focused motivation, it’s for their own personal need;
- They want to support organisations that will deliver them deep personal outcomes and with whom they feel connected;
- They only support organisations that live up to their ‘high standards’.

Expression give because they want to make the world a better place

- They want to support organisations that authentically demonstrate alignment with their values – accessibility, inclusion, diversity;
- They support to make a direct impact;
- They prefer to support smaller, local, less recognised organisations;
- They want to feel ‘part of something’ in their giving.

Stimulation give to align with their personal brand

- To support a unique, new or cutting-edge initiative;
- If it gets them exclusive access – first through the door to see or experience something;
- If a campaign is 'too good' to ignore – quirky, funny, clever;
- If something you do blows them away, they'll give to reward you.

A younger generation of educated, culturally diverse supporters

In addition to segment differences:

- Younger Victorians are more likely to be current donors than average, while older Victorians are less so. Similarly, those in the culture market who are linguistically diverse or identify as First Peoples are more likely to have given to an arts or cultural organisation in the past three years. This underscores the importance of understanding behaviour through insight, as findings can often contradict popular opinion.
- There is some variation when it comes to income level and educational attainment – however, only the lower brackets are significantly less likely to be current donors. Degree holders are significantly more likely to be a current donor than the average.
- Those outside Greater Melbourne are less likely to be current donors and their openness to giving is generally weaker.

Donated to an arts or cultural organisation in past 3 years (current) – %-point difference vs average

	%-point difference vs average (12%)
Essence	^ +5
Expression	^ +11
Stimulation	+4
Affirmation	=
Enrichment	v -9
Release	v -5
Perspective	v -8
Entertainment	v -9
Greater Melbourne	+1
Elsewhere in the state	v -3
Aged 18–34	^ +7
Aged 35–54	-1
Aged 55+	v -6

^	% is significantly higher than the culture market average
v	% is significantly lower than the culture market average

Donated to an arts or cultural organisation in past 3 years – %-point difference vs average continued

	%-point difference vs average (12%)
Lower income band	v -4
Lower-mid income band	^ +3
Upper-mid income band	+3
Upper income band	^ +5
Educational attainment – non-degree	-1
Educational attainment – degree	^ +3
Linguistically diverse	^ +4
English only	-1
First Peoples	^ +13
Rest of population	=
Children in household	^ +3
No children in household	-1
Access barriers	+1
Rest of population	=

^	% is significantly higher than the culture market average
v	% is significantly lower than the culture market average

CREATIVE VICTORIA

Arts membership needs rethinking

Victoria's arts and cultural organisations are not immune to the trend of membership decline observed in other territories. In 2024, 9% of the Victorian market maintained at least one active cultural membership or subscription.

With 22% of the market having lapsed, there is an opportunity to revitalise engagement through innovative, flexible models that better resonate with the market's evolving needs and expectations. By aligning with the cultural values of those most open to joining, targeted strategies could rekindle interest in supporting an organisation's mission through membership.

Decline in arts membership...

In 2024, 9% of the Victorian culture market held at least one active membership or subscription to an arts or cultural organisation. In real terms, this represents an estimated 473k active members or subscribers, 26% fewer than in 2019, a trend of membership decline that we have seen in other territories.

... but a sizeable pool of lapsed members to reactivate with the right offer

The number of active cultural members or subscribers in Victoria is less than 1 in 10. However, 22% have been connected to an organisation in this way in the past. This means that an estimated 1.1 million Victorians have seen value in such a connection before, but have not been compelled to continue the relationship. This suggests that traditional membership models and offers have not kept pace with changing expectations. To rebuild this type of support, the sector must adopt fresh, flexible approaches that better align with market expectations.

Active member, subscriber or friends of the arts or cultural organisation

	2019	2024
Total market %	14%	9%
Cost $	642k	473k
Base	1984	2876

- an estimated 473k are an active subscriber, member or friend of at least one arts or cultural organisation
- an estimated 1.1 million are not currently a subscriber, member or friend of an arts or cultural organisation but have been in the past

Re-thinking arts membership

The sector is competing in a fast-moving world of opportunity and distraction. As a result, there is an increasing trend for people to want to try more things and to expect more choice and flexibility.

Subscription models outside the arts sector are moving to higher levels of flexibility. People are comfortable committing and paying to access 'a lot of stuff' rather than purchase one at a time or to subscribe to a viewing channel that gives choice and variety but doesn't lock in viewing times. The challenge for the sector is to find the arts equivalent of this flexibility and choice.

Leading cultural thinker the late Diane Ragsdale has proposed the need for a collaborative sector-wide subscription model. The proposed model would allow subscribers access to a range of arts engagement – comedy, dance, the orchestra, theatre, an exhibition – all offered as part of one subscription and facilitated through a concierge service. Not only does this align with the market's evolving understanding of subscriptions, but it also supports strength across the sector by promoting the discovery of new artforms and experiences.

Expression values align with membership

Similar to giving, the Culture Segment profile of active members or subscribers skews towards segments with higher levels of cultural value alignment. This clearly identifies the segments with the most relationship potential.

Expression is dominant among active members or subscribers (41%), Essence is also over-represented compared to the market average (12%), and Stimulation marginally so.

Other active segments could be reactivated with a targeted approach

There are around 136k fewer members or subscribers in the market than five years ago, and Essence (12%), Expression (30%) and Affirmation (20%) are over-represented among those who have lapsed. These culturally active segments have seen the value of membership in the past, and with offers designed and targeted for them, they could be persuaded back.

Culture Segment profile – active member / subscribers

	Total market %	Active members / subscribers
Essence	8%	^ 12%
Expression	23%	^ 41%
Affirmation	15%	14%
Enrichment	13%	v 5%
Stimulation	11%	14%
Release	9%	6%
Perspective	11%	v 7%
Entertainment	10%	v 2%
Base	2876	268

^	% is significantly higher than the culture market average
v	% is significantly lower than the culture market average

Expression join to connect with a community

Expression love to join, and they do this to be part of a community, something bigger than themselves. While Expression wants to be part of the club, it's important to them that this isn't an 'exclusive' group and that everyone is welcome. They are also the most altruistic of the segments, so membership is also a way for them to give back to the community. Expression isn't known to be passive bystanders; by joining something, they are often also looking to participate actively. Opportunities to get involved through their membership offer will be important to this segment.

Essence join to get closer to the 'art'

Although they're highly active cultural consumers, Essence aren't natural joiners and aren't looking to build a relationship with you or 'belong' to your organisation. Instead, Essence joins if it enables them to get closer to 'the art' – get close to your creatives, your experts and things that enable them to engage more deeply. Essence can be enticed into a membership if it gives them exclusive access or insider information.

Affirmation join for personal development

Affirmation's thirst for growth is the key driver for their joining. They want to extend themselves, so any learning opportunities offered through membership are perfect for this segment. Affirmation are particularly price conscious, so joining is also a way to maximise benefit. They'll respond well to discounts or multiple entries associated with memberships, so highlighting these benefits for them is key.

Active member of at least one arts or cultural organisation – %-point difference vs average

	%-point difference vs average (9%)
Essence	^ +5
Expression	^ +7
Stimulation	+3
Affirmation	-1
Enrichment	v -6
Release	-3
Perspective	v -4
Entertainment	v -8
Greater Melbourne	+1
Elsewhere in the state	-2
Aged 18–34	^ +4
Aged 35–54	=
Aged 55+	v -3

^	% is significantly higher than the culture market average
v	% is significantly lower than the culture market average

Active member of at least one arts or cultural organisation – %-point difference vs average continued

	%-point difference vs average (9%)
Lower income band	-1
Lower-mid income band	=
Upper-mid income band	^ +5
Upper income band	+5
Educational attainment – non-degree	v -2
Educational attainment – degree	^ +4
Linguistically diverse	+3
English only	=
First Peoples	^ +10
Rest of population	=
Children in household	+2
No children in household	=
Access barriers	+1
Rest of population	=

^	% is significantly higher than the culture market average
v	% is significantly lower than the culture market average

Active members are typically younger

There is less to distinguish active members or subscribers when it comes to demographics, however:

- Those aged 18–34 are significantly more likely than the average to be active members or subscribers of a cultural organisation.

Active members earn more and are highly educated

- Those in the upper-income brackets and with higher levels of education attainment are more likely to be a member or subscriber.

A link between Expression and First Peoples' propensity to join

- Members and subscribers are strongly Expression. Associated with this, First Peoples have an elevated propensity towards joining. As explored earlier, close to 4 in 10 First Peoples audiences are Expression.

Section 5: reaching the market

Shifting patterns of media consumption

Victorians are navigating a rapidly evolving media landscape. While older cohorts remain invested in legacy media, digital platforms dominate how most people consume information and discover cultural events. In 2024, a larger proportion of the market listens to podcasts in a typical week than reads a printed newspaper. For younger adults, Instagram and TikTok are key channels to learn about arts activities, reflecting a broader trend towards personalised, on-demand content.

Subscription TV has overtaken free-to-air

Victorians engage with a range of media during a typical week. Reflective of the changing landscape, watching scheduled free to air TV (65%) sits below subscription streaming services (67%) and using social media (66%).

Consuming media through reading is less common than watching or listening. Of the top 10 most accessed media channels, only two are text-based; 45% read a news site or app, and 17% read a printed national or metro newspaper.

In 2024, a larger proportion of the market is listening to podcasts (31%) than reading a printed newspaper.

General media used in a typical week

Motivation	Total market %
Subscription streaming service	67%
Social media	66%
Scheduled live free to air TV	65%
Listen to scheduled live radio	50%
News site or app	45%
Listened to subscription service	45%
On demand TV	42%
Listened to podcasts	31%
National or metro newspaper (print)	17%
Radio through a streaming platform	17%
Local / community newspaper (print)	15%
Magazine (print)	11%
Read an online blog	10%
Magazine (online)	8%
Base	2876

Younger people are less engaged with legacy media

As the media landscape becomes increasingly diverse, the market's attention is divided across a wider range of channels. On average, the market engages with 4.89 types of information-driven media in a typical week, and particular channels capture the attention of different pockets of the market.

Younger audiences are lifting the average for engagement with music subscription services and podcasts but are less likely than average to consume traditional media such as free to air TV, live radio or print newspapers and magazines. The 55+ cohort is more likely than average to be engaged with these forms of legacy media.

General media used in a typical week by age

	Total %	18–34	35–54	55+
Subscription streaming service	67%	^ 74%	^ 73%	v 57%
Social media	66%	^ 71%	^ 71%	v 59%
Scheduled live free to air TV	65%	v 42%	61%	^ 87%
Listen to scheduled live radio	50%	v 38%	50%	^ 60%
News site or app	45%	v 36%	^ 50%	48%
Listened to subscription service	45%	^ 62%	^ 49%	v 26%
On demand TV	42%	v 34%	^ 46%	^ 45%
Listened to podcasts	31%	^ 42%	^ 36%	v 18%
National or metro newspaper (print)	17%	v 10%	v 13%	^ 28%
Radio through a streaming platform	17%	16%	^ 22%	v 13%
Local / community newspaper (print)	15%	v 8%	v 12%	^ 23%
Magazine (print)	11%	v 7%	9%	^ 15%
Read an online blog	10%	^ 14%	12%	v 6%
Magazine (online)	8%	10%	9%	v 5%
Base	2876	860	981	1035

^	% is significantly higher than the culture market average
v	% is significantly lower than the culture market average

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9 in 10 younger adults are Instagram users

Two thirds of the market engages with social media in a typical week and the channel most commonly used is Facebook (86%). However, although 73% of those aged 18–24 report using Facebook in a typical week, use of this platform is more prevalent among those aged 55+ (93%).

Younger Victorians are significantly more 'active' on social media, engaging with, on average, six channels in a typical week compared to 2.61 for the 55+ cohort. Where Facebook is most likely to have been used by older groups, younger adults (18–24s) are more likely to be using Instagram (89%) or watching YouTube (77%) and are as likely to be listening to Spotify (73%) as using Facebook (73%) in a typical week.

18–24s are most distinctive in their use of TikTok. More than 7 in 10 18–24 year-olds use TikTok in a typical week, 44–percentage points above the market average (27%).

Top social media platform used in a typical week – by age band

	Total %	18–24	25-34	35-54	55+
Facebook	86%	v 73%	84%	84%	^ 93%
YouTube	62%	^ 77%	^ 68%	^ 66%	v 48%
Instagram	60%	^ 89%	^ 76%	64%	v 37%
Spotify	38%	^ 73%	^ 57%	35%	v 20%
TikTok	27%	^ 71%	^ 44%	v 22%	v 9%
Snapchat	23%	^ 61%	^ 41%	v 18%	v 6%
LinkedIn	19%	15%	23%	^ 23%	v 13%
Twitter / X	18%	^ 36%	20%	18%	v 12%
Pinterest	15%	^ 31%	17%	13%	12% v
Discord	8%	^ 29%	^ 11%	6%	1%
Base	1910	167	444	692	607

^	% is significantly higher than the culture market average
v	% is significantly lower than the culture market average

CREATIVE VICTORIA

Top information sources to find out about arts or culture events or organisations

All sources	Total market %
Free to air television	34%
Facebook	33%
Instagram	21%
Recommendation	21%
Online site or app	18%
Radio	18%
YouTube	13%
Outdoor media	11%
Local / community newspaper (print)	11%
TikTok	10%
A specific organisation's website	9%
National newspaper (print)	9%
On demand TV	9%
Brochures or flyers	9%
Online listings	6%
A specific organisation's enews	6%
Base	2876

Free TV and Facebook are used to find out what's on

The adjacent chart looks at how the market finds out about arts events and cultural activities.

Around a third use free to air TV or Facebook and 1 in 5 are informed through Instagram, a personal recommendation, an online news site or app or the radio.

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Younger adults most likely to use Instagram and TikTok

While free to air TV is the most commonly cited information source overall, when viewing results by age, this is only true for those in the market aged 55+.

For 25–34s, Facebook is the most common way to find out about arts events, and for younger adults (18–24s), it is Instagram (41%) or TikTok (35%).

Top social media platform used in a typical week – by age band

	Total %	18–24	25–34	35-54	55+	Melbourne	Elsewhere in state
Free to air television	34%	v 19%	v 28%	33%	^ 43%	34%	35%
Facebook	33%	29%	^ 40%	^ 39%	v 23%	32%	34%
Instagram	21%	^ 41%	^ 34%	23%	v 6%	23%	v 15%
Recommendation	21%	17%	22%	22%	20%	22%	v 17%
Online news site or app	18%	19%	21%	21%	v 14%	19%	v 15%
Radio (streamed or live)	18%	11%	14%	19%	20%	17%	18%
YouTube	13%	^ 26%	16%	14%	v 6%	14%	v 9%
Outdoor media	11%	12%	^ 18%	12%	v 7%	12%	v 8%
Local paper (print)	11%	10%	10%	10%	^ 14%	v 9%	^ 17%
TikTok	10%	^ 35%	^ 19%	v 7%	v 1%	11%	8%
Base	2876	244	616	981	1035	2191	685

^	% is significantly higher than the culture market average
v	% is significantly lower than the culture market average

A market of early bookers

Describing their typical behaviour for purchasing tickets for arts and cultural events, overall the market is close to twice as likely to book early (47%) – 'as soon as tickets go on sale' or 'about a month before' – than in the week leading up to the event (25%).

Early bookers are more likely to be female and earn more

In addition to being more likely to be aged 35–54, individuals who report typically purchasing tickets early are significantly more likely than the culture market average to be female and have a higher personal income.

These early bookers represent the most active members of Victoria's culture market. They are notably significantly more likely to have spent on engagement in the past four weeks, be active members or subscribers, or have made a financial contribution to an arts or cultural organisation in the past three years. The enthusiastic Expression segment is also over-represented within this group.

Younger audiences are more likely to book closer to the event

Broadly, younger Victorians are more likely be late bookers than average, 30% book within the 7 days prior, compared to 25% overall.

Close to 3 in 10 don't have a typical pattern of behaviour

However, a sizeable proportion of the market (28%) doesn't feel they have a typical purchasing pattern for cultural engagement, indicating that many do not follow a consistent approach. This is particularly notable among the older cohort and those from outside Melbourne, who are significantly more likely to have no set pattern of behaviour.

When do you typically purchase tickets for arts and cultural events and places

	Total %	18–34	35-54	55+	Melbourne	Elsewhere in state
As soon as tickets go on sale	20%	20%	^ 23%	v 17%	21%	17%
About a month before	28%	30%	28%	25%	28%	27%
In the 7 days before	15%	^ 20%	15%	v 11%	16%	v 11%
The day before	3%	^ 5%	4%	v 1%	3%	4%
The day of	7%	5%	7%	7%	6%	7%
Unsure / don't know	28%	v 20%	v 22%	^ 39%	26%	^ 34%
Base	2876	244	981	1035	2191	685

^	% is significantly higher than the culture market average
v	% is significantly lower than the culture market average

Section 6: engagement by individual artform

Victorians embrace a variety of artforms

Victorians are engaging with a diverse range of artforms, with film and museums leading as relatively mainstream pursuits.

Commercial theatre and visual arts also retain a sizable share, both with larger current markets than live music.

Victorians are more active in their engagement with First Peoples arts, festivals, and design than dance or literature.

Current artform markets – % and real figure estimates

	Total market %	Real figure estimate
Film	85%	4.31 million
Museum	64%	3.26 million
Commercial Theatre	61%	3.08 million
Visual Arts	60%	3.04 million
Live Music	56%	2.85 million
Theatre	50%	2.52 million
Festivals	40%	2.04 million
Design	40%	2.03 million
First Peoples arts and culture	37%	1.86 million
Dance	28%	1.40 million
Literature	18%	906k
Base	2876	

Film and museums are mainstream pursuits

Of the 11 individual artforms explored in this study, film (at the cinema or other venues, including festivals) has the largest current market, with 85% or an estimated 4.31 million Victorians having engaged in the last three years. Museums are also a relatively mainstream pursuit, with 64% having been to a museum in the past three years.

Around 6 in 10 have recently engaged with visual arts

In 2024, a similar proportion report having engaged with visual arts in the last three years, as with musicals and comedy (60% and 61%, respectively), while fewer have engaged with live music (56%). The estimated number of Victorians having been to a live music performance in the last three years is 2.85 million, compared to 3.08 million for musicals and comedy and 3.04 million for visual arts.

A sizable market share for musicals and comedy

While the musicals and theatre market is more active than the comedy market, the number of Victorians 'in the market' for either artform, is similar. An estimated 4.78 million have engaged with musicals or comedy at some point in the past or would consider doing so in the future, and 4.61 million have, or would, for theatre.

4 in 10 Victorians in the active market for First Peoples arts and culture

The current market size for festivals, design and First Peoples arts and culture is similar. While all three artforms are towards the 'mid-sized end' of the scale, around 4 in 10 Victorians are in the current market for either, and all have larger current markets than dance.

Dance remains a relatively niche proposition, with 28% of the market having engaged in the last three years. Only literature has a smaller current market share.

Small market for literature, but potential remains

In 2024, there are an estimated 906k Victorians in the current market for literature, giving it the smallest share of the market of all artforms (18%).

However, literature holds potential, with an estimated 1.61 million Victorian adults who would consider engaging with it but haven't previously.

The future is collaborative

The future of the arts and cultural sector lies in collaboration — a movement that is already reshaping how the sector works, creates, and connect with its audiences.

Beyond traditional marketing partnerships and cross-promotion, the cross-sector development of programming has become increasingly commonplace — amplifying reach, creating richer experiences for audiences and reducing resource pressure on individual organisations. Collaboration isn't just a trend, it's essential to ensuring the survival and growth of the sector. Opportunities should be explored within, and across artforms.

1.56m Victorians for museums to reactivate...

There are sizable lapsed audiences for some of the more mainstream artforms – notably, 1.56 million Victorians who have lapsed in their engagement with museums. Engagement with museums is near a universal activity; 95% have been to one at some point in the past (64% current + 31% lapsed).

Therefore, the market is familiar with the experience and doesn't need convincing that a museum visit is worthwhile. However, to activate their return, they need to understand what makes a particular offer unique and what specific benefits a visit will provide.

Lapsed artform markets – % and real figure estimates

	Total market %	Real figure estimate
Film	13%	643k
Museum	31%	1.56 million
Commercial Theatre	25%	1.27 million
Visual Arts	23%	1.15 million
Live Music	27%	1.39 million
Theatre	31%	1.55 million
Festivals	21%	1.09 million
Design	18%	934k
First Peoples arts and culture	14%	731k
Dance	23%	1.17 million
Literature	11%	551k
Base	2876	

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... as well as sizable lapsed markets across the performing arts

The number lapsing in their theatre engagement is similar to that of museums. In addition, an estimated 1.39 million last attended live music three or more years ago, and there are 1.27 million Victorians in the lapsed market for musicals and comedy and 1.17 million for dance.

Between 80% and 86% of the market has engaged with theatre, musicals and comedy, or live music at some point in the past. As with museums, performing arts organisations don't need to convince the market of their value. Instead, it's about giving people a reason to return and a sense of urgency to do this now. Organisations need to make it easy for lapsed attendees to re-engage and once reactivated, the relationship needs to be maintained. Ongoing, resonant communication between visits is critical.

Focus on re-engaging lapsed audiences

Persuading new audiences to visit or attend for the first time is a worthy pursuit, however, in challenging times, a focus on re-engaging lapsed audiences is arguably more prudent. Lapsed audiences have chosen you before. They know who you are and have (some) understanding of what they will 'get' from their engagement with you (the benefits).

These audiences need to be compelled to engage again. They need to be reminded that they should prioritise your organisation and of the Social, Intellectual, Emotional and Spiritual benefits you offer, alongside how their engagement will fulfil their deep-seated needs.

Literature and First Peoples arts have the largest potential markets

Looking at those who would consider engaging but haven't previously (potential market) reveals capacity for growth, particularly across some of the less mainstream artforms.

Literature has the largest potential market, an estimated 1.61 million, followed by First Peoples arts and culture at an estimated 1.49 million. This suggests that a sizeable number of Victorians are waiting to be enticed with the right offer. While positive, it is worth noting that these artforms also have sizable resistant markets (40% and 20%, respectively).

Potential artform markets – % and real figure estimates

	Total market %	Real figure estimate
Film	1%	51k
Museum	3%	151k
Commercial Theatre	9%	436k
Visual Arts	8%	426k
Live Music	10%	518k
Theatre	11%	538k
Festivals	27%	1.35 million
Design	25%	1.29 million
First Peoples arts and culture	29%	1.49 million
Dance	25%	1.26 million
Literature	32%	1.61 million
Base	2876	

Dance market

Three quarters of the market, an estimated 3.83 million Victorians, have been to a dance performance before or would be open to doing so.

Being one of the smaller markets, we see a concentration of more engaged groups among dance attendees. For example, the current dance market is second only to literature in the prominence of Expression (39% and 42%, respectively) and the upper-income brackets. Associated with this fact, the current market is more likely to be donors and members of cultural organisations.

Dance market definition

The dance market is defined as anyone in the culture market who has engaged with dance before, or would consider engaging in the future including, ballet and classical dance, contemporary dance, First Peoples dance or a dance festival.

3.83 million in the dance market in 2024

	Total market %	Real figure estimates
Current	28%	1.40 million
Lapsed	23%	1.17 million
Potential	25%	1.26 million
Not in market	25%	1.25 million
Base size	2876	

Introduction to dance market

The current dance market is typically younger, more diverse and from a higher income bracket. Where it differs significantly from the culture market average includes:

- A younger skew (40% aged 18–34 vs 30%);
- Culturally diverse (18% are linguistically diverse vs 14%);
- 5% identify as First Peoples vs 3%;
- Live in a family household (34% vs 29%);
- Only literature draws more heavily on the upper income brackets than dance (30% of dance's current market is in upper-mid to upper bracket vs 23% overall and 33% for literature);
- Associated with this, close to 3 in 10 have given to the arts, and 20% are active arts members / subscribers. Only the current literature market has higher levels of donors and members / subscribers.

Per capita spend on arts and culture (past 4 weeks)

	Culture market average	Dance's current market
Admission	$27.75	$53.75
Refreshments	$11.92	$28.46
Merchandise	$3.77	$5.52
Base size	2876	791

Expression and Affirmation account for close to 6 in 10 of the current market

Dance has a relatively narrow Culture Segment profile, clustering around the most culturally active segments. Only literature has a higher proportion of Expression than dance (42% and 39%, respectively). Along with Affirmation, these two segments make up close to 6 in 10 in the current market. They are also most numerous in the lapsed and potential markets, making them the most valuable audiences to maintain relationships with, reactivate or persuade to take a risk and attend a dance event for the first time.

Meanwhile, traditional Enrichment, busy Release, self-contained Perspective and assured-fun-driven Entertainment represent less than 20% of dance's current market.

While Enrichment might be considered a development segment, being well represented in the lapsed and potential markets, this is a segment with traditional tastes and not interested in new interpretations. Their engagement with dance is more likely to be for traditional ballet performances than contemporary interpretations.

Culture Segment profile and real figure estimates for the dance market

Culture Segment	Total market %	Current market %	Current market real figure estimate	Lapsed market %	Lapsed market real figure estimate	Potential market %	Potential market real figure estimate
Essence	8%	10%	142k	11%	128k	9%	115k
Expression	23%	39%	538k	19%	223k	23%	294k
Affirmation	15%	19%	268k	21%	243k	18%	221k
Enrichment	13%	6%	78k	15%	171k	13%	168k
Stimulation	11%	14%	192k	13%	153k	12%	147k
Release	9%	6%	88k	10%	119k	11%	144k
Perspective	11%	4%	51k	8%	90k	8%	102k
Entertainment	10%	3%	40k	4%	46k	6%	71k
Base	2876	791		664		715	

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A similar number in the market for ballet as contemporary dance

While 75% of the market is open to dance, the picture varies by sub-category. Each sub-artform has a distinct current market share, ranging from 8% for First Peoples dance to 15% for ballet. Meanwhile, close to half are not in the market for each sub-category, with 42% having no interest in attending ballet or classical dance, rising to 54% for a dance festival.

In the ballet or classical dance sub-artform the ever market (current + lapsed) is larger than the potential market. It also enjoys a slightly larger current market share than contemporary dance. Despite this, the numbers are relatively similar in real terms: an estimated 2.94 million are in the market for ballet or classical dance, compared to 2.8 million for contemporary dance, closely followed by First Peoples dance (an estimated 2.54 million).

There is some overlap between the sub-category's current markets. Notably, 63% of the current ballet market is also in the current market for contemporary dance. However, the most pronounced cross-over is between First Peoples and contemporary dance; 78% of the current First Peoples dance market is in the current market for contemporary dance.

Dance market penetration – including sub-artforms

	Current market %	Current market real figure estimate	Lapsed market %	Lapsed market real figure estimate	Potential market %	Potential market real figure estimate	Not in market %
Dance	28%	1.40m	23%	1.17m	25%	1.26m	25%
Ballet or classical dance	15%	785k	17%	881k	25%	1.27m	42%
Contemporary dance	12%	634k	13%	646k	30%	1.52m	45%
First Peoples dance	8%	398k	4%	225k	38%	1.92m	50%
Dance festival	12%	599k	8%	421k	26%	1.34m	54%

First Peoples dance holds potential

An estimated 623k adults in the culture market have engaged with First Peoples dance at some point (current and lapsed markets), compared to 1.34 million who would consider engaging but haven't yet (potential market). While there is reason for optimism, growth for First Peoples dance may be challenging, as convincing new audiences to take a risk on something unfamiliar is more intensive than engaging existing audiences or reactivating lapsed ones.

All sub-categories' current markets are strongly Expression

As a relatively niche offer, the shape of the Culture Segment profile is relatively narrow at a sub-artform level for dance. All current markets are strongly Expression, notably First Peoples dance (53%) or a dance festival (51%).

Expression is also most numerous in the potential markets of all four categories. As a segment that values diversity and inclusion, it is particularly prevalent in the potential market for First Peoples dance.

Essence prominent in the contemporary dance market

While not as numerous as Expression, Affirmation, and Stimulation, the Essence segment is traditionally a high-frequency engager, making them a valuable part of the market. They are significantly over-represented in all three contemporary dance market groups (current, lapsed, and potential), which aligns with our understanding of the sorts of things they like. This is a segment that is confident in their ability to derive meaning from cultural experiences.

Sub-artform for the dance market by Culture Segment with real figure estimates

Ballet or classical dance

Culture Segment	Current market %	Current market real figure estimate	Lapsed market %	Lapsed market real figure estimate	Potential market %	Potential market real figure estimate
Essence	10%	78k	12%	107k	12%	152k
Expression	44%	347k	21%	189k	26%	326k
Affirmation	18%	144k	24%	211k	21%	273k
Enrichment	5%	36k	14%	126k	9%	114k
Stimulation	13%	101k	13%	112k	14%	183k
Release	6%	47k	7%	65k	12%	148k
Perspective	2%	18k	6%	54k	3%	41k
Entertainment	2%	14k	2%	17k	3%	36k
Base	445		449		721	

Contemporary dance

Culture Segment	Current market %	Current market real figure estimate	Lapsed market %	Lapsed market real figure estimate	Potential market %	Potential market real figure estimate
Essence	12%	79k	12%	75k	13%	196k
Expression	46%	292k	26%	168k	27%	415k
Affirmation	20%	127k	24%	153k	24%	372k
Enrichment	1%	8k	11%	68k	7%	109k
Stimulation	14%	88k	13%	85k	14%	211k
Release	5%	30k	11%	69k	10%	159k
Perspective	1%	5k	3%	21k	3%	41k
Entertainment	1%	5k	1%	8k	1%	20k
Base	359		366		863	

First Peoples dance

Culture Segment	Current market %	Current market real figure estimate	Lapsed market %	Lapsed market real figure estimate	Potential market %	Potential market real figure estimate
Essence	8%	30k	13%	29k	13%	249k
Expression	53%	213k	31%	70k	28%	529k
Affirmation	16%	64k	18%	39k	23%	435k
Enrichment	2%	8k	4%	10k	8%	146k
Stimulation	16%	63k	18%	41k	13%	257k
Release	5%	19k	10%	23k	9%	182k
Perspective	<1%	2k	5%	12k	5%	90k
Entertainment	-	-	-	-	2%	33k
Base	226		127		1088	

Dance festival

Culture Segment	Current market %	Current market real figure estimate	Lapsed market %	Lapsed market real figure estimate	Potential market %	Potential market real figure estimate
Essence	7%	43k	10%	42k	13%	179k
Expression	51%	306k	30%	128k	28%	374k
Affirmation	16%	94k	16%	66k	24%	322k
Enrichment	2%	14k	6%	26k	5%	68k
Stimulation	14%	85k	15%	63k	13%	180k
Release	6%	34k	13%	53k	10%	135k
Perspective	3%	17k	3%	11k	3%	42k
Entertainment	1%	7k	8%	32k	3%	37k
Base	339		239		757	

Design market

Design is a rich and broad category. In 2024, an estimated 4.26 million Victorian adults are in the market for design, 84% of the culture market. Underscoring scope for development, most design sub-categories have a larger potential market than have ever engaged (current + lapsed).

Affirmation is particularly well represented in the current design market. However, Expression – a segment inherently supportive of others' creativity – is the key segment, as design or applied arts can often provide the context for them to meet and connect with makers.

Design market definition

The design market is defined as anyone in the culture market who has engaged with design before, or would consider engaging in the future, including an applied arts or design event or exhibition, a First Peoples applied arts or design event or exhibition, a fashion show or a First Peoples fashion event.

4.26 million in the design market in 2024

	Total market %	Real figure estimates
Current	40%	2.03 million
Lapsed	18%	934k
Potential	25%	1.29 million
Not in market	16%	821k
Base size	2876	

Introduction to design market

The current market for design is similar to that of most other artforms. For example, compared to the culture market average, they're significantly more likely to skew younger, hold a degree or be in the upper-mid to upper-income brackets. Where the design market is distinct from other artforms current markets are:

- Along with dance, it has the highest level of Affirmation (19%);
- Only literature has a more educated current market (39% hold a degree vs 42% for literature);
- 5% identify as First Peoples compared to 3% overall.

Per capita spend on arts and culture (past 4 weeks)

	Culture market average	Design's current market
Admission	$27.75	$45.95
Refreshments	$11.92	$23.32
Merchandise	$3.77	$5.56
Base size	2876	1150

Expression seeks human connection

While a broad category, design's current market Culture Segment profile skews strongly towards the four most culturally active segments, Essence, Expression, Affirmation and Stimulation (79%). The prominence of Expression is likely associated with their innate desire to support others' creativity. Design or applied arts can often provide the context for this segment to meet and connect to makers.

Affirmation and Stimulation are secondary targets

While enthusiastic Expression is the most numerous, Stimulation aligns well with the contemporary aspects of design. Stimulation is all about contemporary culture and appreciating good design aesthetics. Along with Affirmation, Stimulation should be considered a secondary target. While Stimulation seeks new discoveries and clever collisions, Affirmation is a less confident segment that needs safe gateways into engagement, and the applied nature of craft and design can offer a non-challenging entry point to new artforms.

Culture Segment profile and real figure estimates for the design market

Culture Segment	Total market %	Current market %	Current market real figure estimate	Lapsed market %	Lapsed market real figure estimate	Potential market %	Potential market real figure estimate
Essence	8%	11%	226k	8%	79k	6%	82k
Expression	23%	36%	721k	18%	173k	17%	216k
Affirmation	15%	19%	376k	16%	153k	15%	193k
Enrichment	13%	6%	123k	17%	161k	17%	223k
Stimulation	11%	14%	279k	9%	86k	12%	158k
Release	9%	6%	132k	12%	111k	11%	143k
Perspective	11%	5%	96k	13%	125k	12%	161k
Entertainment	10%	4%	78k	5%	47k	9%	114k
Base	2876	1150		529		731	

3.3 million in the market for First Peoples craft or applied art

Of the six design sub-artforms, the current applied art event or exhibition market is the largest (an estimated 1.58 million), followed by a design event or exhibition (1.14 million). The current First Peoples design market is smaller, meaning there is a greater potential for growth. An estimated 3.28 million Victorians are waiting to be enticed to engage with First Peoples craft or applied art, and 3.02 million for a First Peoples design event.

Opportunities to expand engagement with First Peoples fashion

There is some cross-over between design categories. The strongest cross-over is between the more ‘mainstream’ applied arts and design categories; 78% of the current market for a design event or exhibition is in the current market for applied arts. In contrast, the connections in the fashion categories are weaker, with 42% of those who have attended a fashion show or event in the past three years also being in the current market for a First Peoples fashion event.

Design market penetration – including sub-artforms

	Current market %	Current market real figure estimate	Lapsed market %	Lapsed market real figure estimate	Potential market %	Potential market real figure estimate	Not in market %
Design	40%	2.02m	18%	934k	25%	1.29m	16%
Applied Arts Event or exhibition	31%	1.58m	15%	765k	27%	1.36m	27%
Design event or exhibition	23%	1.14m	12%	592k	33%	1.69m	33%
First Peoples craft or applied event or exhibition	16%	836k	8%	410k	40%	2.04m	35%
Fashion show or exhibition	15%	759k	12%	613k	29%	1.48m	44%
First Peoples design event or exhibition	12%	629k	6%	293k	41%	2.10m	40%
First Peoples fashion event	7%	373k	3%	157k	37%	1.88m	53%

Expression and Stimulation are the most active

Compared to other segments, Expression and Affirmation are most common across design sub-categories. Expression is particularly dominant – for example, they make up 48% of the current fashion show or exhibition market and 40% of the current design event market. It makes sense for Expression to be well represented, as they appreciate others' artistic expression and admire craft skills.

Affirmation and Stimulation offer promise

While representation from Affirmation is elevated for applied arts events and exhibitions – in both the general and First Peoples categories – it's Stimulation who are significantly over-represented across all design sub-categories. Tapping into Stimulation's attraction to contemporary culture and Affirmation's need for safe accessible experiences would be a sound approach to development.

Sub-artform for the Design market by Culture Segment with real figure estimates

Applied Arts Event or Exhibition

Culture Segment	Current market %	Current market real figure estimate	Lapsed market %	Lapsed market real figure estimate	Potential market %	Potential market real figure estimate
Essence	12%	190k	8%	64k	8%	103k
Expression	36%	572k	23%	173k	21%	281k
Affirmation	19%	304k	16%	125k	18%	242k
Enrichment	6%	97k	17%	129k	14%	189k
Stimulation	13%	212k	11%	86k	14%	184k
Release	6%	101k	8%	60k	12%	160k
Perspective	4%	66k	13%	101k	9%	121k
Entertainment	2%	34k	3%	27k	6%	76k
Base	892		434		768	

Design Event or Exhibition

Culture Segment	Current market %	Current market real figure estimate	Lapsed market %	Lapsed market real figure estimate	Potential market %	Potential market real figure estimate
Essence	11%	131k	10%	56k	10%	164k
Expression	40%	457k	23%	135k	23%	393k
Affirmation	17%	190k	21%	122k	19%	328k
Enrichment	5%	57k	10%	57k	12%	199k
Stimulation	15%	166k	12%	72k	13%	216k
Release	5%	54k	13%	79k	11%	190k
Perspective	4%	40k	9%	54k	8%	136k
Entertainment	4%	48k	3%	17k	4%	65k
Base	648		336		958	

First Peoples craft or applied arts

Culture Segment	Current market %	Current market real figure estimate	Lapsed market %	Lapsed market real figure estimate	Potential market %	Potential market real figure estimate
Essence	10%	81k	9%	37k	11%	219k
Expression	44%	371k	28%	116k	23%	478k
Affirmation	19%	159k	20%	82k	19%	391k
Enrichment	3%	28k	11%	44k	12%	249k
Stimulation	15%	128k	12%	50k	12%	254k
Release	4%	31k	9%	37k	10%	211k
Perspective	3%	23k	8%	31k	8%	169k
Entertainment	2%	15k	3%	12k	3%	67k
Base	473		232		1155	

Fashion show or exhibition

Culture Segment	Current market %	Current market real figure estimate	Lapsed market %	Lapsed market real figure estimate	Potential market %	Potential market real figure estimate
Essence	9%	67k	10%	59k	12%	174k
Expression	48%	368k	25%	152k	25%	365k
Affirmation	16%	125k	21%	127k	21%	311k
Enrichment	3%	23k	9%	58k	10%	152k
Stimulation	15%	115k	14%	88k	12%	179k
Release	4%	28k	11%	68k	10%	149k
Perspective	1%	8k	7%	44k	5%	75k
Entertainment	3%	25k	3%	17k	5%	73k
Base	430		347		837	

First Peoples design event or exhibition

Culture Segment	Current market %	Current market real figure estimate	Lapsed market %	Lapsed market real figure estimate	Potential market %	Potential market real figure estimate
Essence	10%	64k	7%	20k	12%	252k
Expression	50%	315k	32%	94k	24%	512k
Affirmation	18%	113k	18%	53k	20%	411k
Enrichment	2%	10k	8%	22k	10%	216k
Stimulation	14%	87k	12%	36k	14%	295k
Release	4%	26k	10%	29k	10%	200k
Perspective	2%	10k	8%	23k	7%	148k
Entertainment	1%	4k	5%	16k	3%	66k
Base	357		166		1189	

First Peoples fashion event

Culture Segment	Current market %	Current market real figure estimate	Lapsed market %	Lapsed market real figure estimate	Potential market %	Potential market real figure estimate
Essence	7%	25k	8%	12k	12%	233k
Expression	55%	205k	40%	64k	29%	542k
Affirmation	16%	60k	14%	22k	22%	406k
Enrichment	-	-	1%	2k	8%	142k
Stimulation	18%	67k	20%	31k	13%	242k
Release	3%	12k	13%	21k	9%	170k
Perspective	1%	5k	3%	4k	4%	78k
Entertainment	-	-	1%	2k	3%	62k
Base	211		89		1062	

Opportunities for Expression to experience First Peoples fashion

The current market for a First Peoples fashion event is 7%, matched only by a First Peoples literature event. While a smaller current market share also means a sizable potential for growth, convincing audiences to take a risk on something new to them is challenging, particularly with hard-to-activate segments. For this reason, an Expression-led development approach is key for these sub-artforms. Expression is numerous and enthusiastic, enjoys shared experiences, and values creative expression and inclusivity above all else.

95% of the current market for First Peoples fashion is drawn from the four most culturally active segments, with over half being Expression (55%). Stimulation is the next most prominent. This is a segment that likes feeling that they've discovered something new and experimental.

Festivals market

The definition of festivals is broad, and 88% of Victorians (an estimated 4.48 million adults) have been to one before or are open to going in the future.

While much of the market is open to festivals, there are challenges. At a sub-category level, the share of the market is modest. There is scope for growth with sizable potential markets, but – excluding a film festival – the market's resistance is strong.

One avenue for development is strengthening the cross-over between festival categories, which at the moment is limited.

Festivals market definition

The festivals market is defined as anyone in the culture market who has been to a festival before, or would consider going in the future, including a film festival, a First Peoples film festival, a literature event associated with a festival and a dance, multi-arts, First Peoples or music festival.

4.48 million in the festivals market in 2024

	Total market %	Real figure estimates
Current	40%	2.04 million
Lapsed	21%	1.09 million
Potential	27%	1.35 million
Not in market	12%	599k
Base size	2876	

Introduction to festivals market

The current festivals market represents a younger, diverse audience compared to the market average. Significant differences include:

- skews younger (42% aged 18–34 vs 30%);
- most pronounced skew towards metro residents (82% vs 18% regional);
- one of the most skewed Culture Segment profiles – 79% are Essence, Expression, Affirmation or Stimulation vs 57% overall;
- more likely to identify as First Peoples (5% vs 3%);
- more likely to be linguistically diverse (17% vs 14%);
- less likely to have access barriers (17% vs 22%);
- draws more heavily on the upper and upper-mid income brackets than most other artforms (29% vs 23%).

Per capita spend on arts and culture (past 4 weeks)

	Culture market average	Festival's current market
Admission	$27.75	$47.21
Refreshments	$11.92	$23.36
Merchandise	$3.77	$5.07
Base size	2876	791

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8 in 10 are drawn from the four most active segments

The current festivals segment profile is narrower than many. Essence, Expression and Stimulation are over-represented and, with Affirmation, represent 79% of the current market. Conversely, traditional Enrichment – a segment that appreciates nostalgia and traditional artforms – is under-represented, as are Perspective, Entertainment and busy Release.

Scope to develop Affirmation

There is also a sizeable number of Affirmation in the lapsed and potential markets to entice. Affirmation wants to be more culturally active but tends to lack confidence in trying new things. A festival can offer opportunities for this segment to make 'safe experiments'.

Meanwhile, Enrichment represents a sizeable chunk of the festival's potential market, but this segment is more price-sensitive than others and has traditional tastes, making them challenging to activate.

Culture Segment profile and real figure estimates for the festivals market

Culture Segment	Total market %	Current market %	Current market real figure estimate	Lapsed market %	Lapsed market real figure estimate	Potential market %	Potential market real figure estimate
Essence	8%	11%	214k	10%	108k	5%	71k
Expression	23%	37%	746k	17%	190k	14%	188k
Affirmation	15%	16%	330k	20%	215k	16%	214k
Enrichment	13%	5%	111k	14%	148k	21%	283k
Stimulation	11%	15%	309k	10%	109k	9%	116k
Release	9%	7%	147k	11%	123k	12%	163k
Perspective	11%	4%	89k	10%	106k	14%	195k
Entertainment	10%	4%	91k	8%	90k	9%	121k
Base	2876	1154		617		765	

Potential scope for growth, but there are challenges

Across the festival sub-categories, only a film festival has a larger ever market (current + lapsed) than potential market. This means festivals must work hard to convert brand-new audiences rather than reactivate existing ones. Festivals have the added challenge of maintaining relationships between events.

Positively, there is scope for growth, with sizable potential markets. However, certain festival types must work hard to educate the market about their value to attract interest. For example, 54% of the culture market is not interested in attending a dance festival, the highest level across sub-categories in any art form. Similarly, there is an opportunity to educate the market about the value of attending a First Peoples, literature and multi-arts festival or a First Peoples film festival.

Opportunities for cross-over to develop the festival market

While activating brand-new audiences is challenging, there's a modest cross-over between the current sub-artform markets, which suggests one avenue for development. For example, 31% of the current film festival market is also in the current market for a First Peoples film festival, and 43% of the current multi-arts festival market is in the current market for a First Peoples festival. Strengthening these connections is one way to develop the market.

The strongest level of cross-over was between the current First Peoples festival market and that of multi-arts (87%).

Festivals market penetration – including sub-artforms

	Current market %	Current market real figure estimate	Lapsed market %	Lapsed market real figure estimate	Potential market %	Potential market real figure estimate	Not in market %
Festivals	40%	2.04m	21%	1.09m	27%	1.35m	12%
Film Festivals	25%	1.25m	16%	568k	35%	1.76m	25%
Contemporary Music Festival	16%	798k	11%	568k	33%	1.69m	40%
Multi arts festival	14%	713k	6%	319k	33%	1.67m	47%
Dance Festival	12%	599k	8%	421k	26%	1.34m	54%
Literature event associated with a festival	11%	570k	8%	383k	33%	1.68m	48%
First Peoples film festival	9%	444k	3%	158k	44%	2.21m	45%
First Peoples festival	7%	349k	3%	134k	39%	1.99m	51%

Expression is a natural fit and Stimulation seek excitement

Expression is a natural fit for festivals, and this is reflected in the sizes of Expression's current markets. Stimulation chases one-off uniqueness, excitement, and new experiences and is, therefore, well-represented. Stimulation are leaders and tastemakers who want to inform others about what's new. Consuming culture through socially driven events is perfect for them.

Affirmation to nurture

Meanwhile, there is a sizable number of Affirmation in the potential market for all festival sub-categories. Affirmation aspires to do more in the cultural space and wants to be seen going to interesting things. To convert this segment, experiences need to be accessible and positioned in a way that won't make them feel out of their depth. However, Affirmation are followers and need the endorsement of leaders like Stimulation and Essence. While these segments might not be as numerous, they are important to get on board early on.

Sub-artform for the Festivals market by Culture Segment with real figure estimates

Film Festival

Culture Segment	Current market %	Current market real figure estimate	Lapsed market %	Lapsed market real figure estimate	Potential market %	Potential market real figure estimate
Essence	10%	126k	12%	96k	8%	145k
Expression	42%	528k	20%	156k	20%	351k
Affirmation	14%	181k	21%	168k	19%	331k
Enrichment	4%	56k	12%	93k	15%	264k
Stimulation	15%	182k	14%	107k	12%	202k
Release	7%	88k	10%	79k	11%	191k
Perspective	3%	43k	8%	60k	10%	168k
Entertainment	4%	47k	4%	30k	6%	103k
Base	708		447		994	

Contemporary Music Festival

Culture Segment	Current market %	Current market real figure estimate	Lapsed market %	Lapsed market real figure estimate	Potential market %	Potential market real figure estimate
Essence	9%	71k	11%	65k	12%	207k
Expression	46%	364k	29%	167k	24%	404k
Affirmation	16%	129k	18%	105k	25%	416k
Enrichment	2%	13k	3%	16k	2%	42k
Stimulation	18%	140k	18%	103k	16%	270k
Release	6%	45k	12%	66k	12%	202k
Perspective	2%	15k	3%	18k	3%	57k
Entertainment	3%	22k	5%	29k	6%	95k
Base	452		322		958	

Multi Arts Festival

Culture Segment	Current market %	Current market real figure estimate	Lapsed market %	Lapsed market real figure estimate	Potential market %	Potential market real figure estimate
Essence	11%	76k	14%	43k	11%	188k
Expression	46%	325k	33%	105k	27%	458k
Affirmation	15%	109k	18%	56k	23%	384k
Enrichment	3%	25k	4%	11k	6%	101k
Stimulation	16%	112k	18%	58k	14%	229k
Release	5%	35k	8%	27k	11%	183k
Perspective	2%	13k	4%	11k	5%	89k
Entertainment	3%	18k	2%	8k	2%	35k
Base	404		181		944	

Dance Festival

Culture Segment	Current market %	Current market real figure estimate	Lapsed market %	Lapsed market real figure estimate	Potential market %	Potential market real figure estimate
Essence	7%	43k	10%	42k	13%	179k
Expression	51%	306k	30%	128k	28%	374k
Affirmation	16%	94k	16%	66k	24%	322k
Enrichment	2%	14k	6%	26k	5%	68k
Stimulation	14%	85k	15%	63k	13%	180k
Release	6%	34k	13%	53k	10%	135k
Perspective	3%	17k	3%	11k	3%	42k
Entertainment	1%	7k	8%	32k	3%	37k
Base	339		239		757	

Literature Event associated with a Festival

Culture Segment	Current market %	Current market real figure estimate	Lapsed market %	Lapsed market real figure estimate	Potential market %	Potential market real figure estimate
Essence	10%	57k	14%	53k	12%	207k
Expression	48%	277k	28%	109k	28%	468k
Affirmation	15%	86k	21%	81k	20%	337k
Enrichment	2%	11k	7%	26k	8%	133k
Stimulation	15%	86k	17%	66k	13%	213k
Release	6%	35k	8%	32k	10%	174k
Perspective	3%	16k	4%	14k	5%	90k
Entertainment	1%	3k	1%	3k	4%	62k
Base	323		217		954	

First Peoples film festival

Culture Segment	Current market %	Current market real figure estimate	Lapsed market %	Lapsed market real figure estimate	Potential market %	Potential market real figure estimate
Essence	5%	21k	17%	27k	13%	277k
Expression	58%	256k	36%	56k	25%	558k
Affirmation	15%	66k	14%	22k	20%	446k
Enrichment	3%	12k	3%	5k	9%	189k
Stimulation	14%	62k	13%	21k	14%	320k
Release	4%	20k	11%	17k	9%	196k
Perspective	1%	4k	1%	2k	7%	156k
Entertainment	1%	4k	5%	9k	3%	70k
Base	252		89		1253	

First Peoples Festival

Culture Segment	Current market %	Current market real figure estimate	Lapsed market %	Lapsed market real figure estimate	Potential market %	Potential market real figure estimate
Essence	5%	17k	14%	18k	14%	272k
Expression	58%	201k	47%	62k	29%	568k
Affirmation	15%	52k	14%	19k	21%	428k
Enrichment	1%	3k	3%	4k	6%	113k
Stimulation	15%	51k	12%	16k	14%	276k
Release	5%	18k	5%	7k	9%	184k
Perspective	1%	2k	4%	5k	6%	110k
Entertainment	1%	4k	2%	3k	2%	39k
Base	197		76		1127	

Sizable potential for ‘niche’ festivals

While holding current markets close and reactivating lapsed audiences is easier than persuading brand new people to give something a try, the potential market for literature or a First Peoples festivals is larger than the ever market (current and lapsed combined). Therefore, an acquisition strategy and raising awareness is needed, ideally taking an Expression-focused approach.

Film market

Engagement with film remains a relatively universal pursuit, and in 2024, 85% of Victorians in the culture market have seen at least one film at a cinema in the past three years.

There is potential to activate the market to engage with a film festival, with an estimated 1.76 million in the potential market for such a festival.

Film market definition

The film market is defined as anyone in the culture market who has been to a film outside the home before, or would consider doing so, including film at the cinema or other venue or a film festival, First Peoples film or film festival.

5 million in the film market in 2024

	Total market %	Real figure estimates
Current	85%	4.31 million
Lapsed	13%	634k
Potential	1%	51k
Not in market	1%	75k
Base size	2876	

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Introduction to film market

With relatively universal engagement, compared to other artforms, there is little to distinguish the current film market as it is comparable to the culture market average in most areas.

- like other artforms, the current film market skews younger, but not as strongly as other artforms (33% 18–34 vs 30%);
- of the 11 core artforms, the current film market relies less on the upper income brackets;
- and are less likely to have access barriers (18% vs 22%).

Per capita spend on arts and culture (past 4 weeks)

	Culture market average	Films's current market
Admission	$27.75	$32.16
Refreshments	$11.92	$13.54
Merchandise	$3.77	$3.69
Base size	2876	791

The Culture Segment profile for film mirrors the market

Although there is a marginal skew towards Expression and away from self-contained Perspective, due to the high market penetration for this mainstream activity, film's Culture Segment profile is broadly comparable to the culture market.

Essence veer from the mainstream

Essence enjoys film – they are prominent in the film festival market. However, they tend to veer away from mainstream cinema if they perceive it to be too populist or unsophisticated. This accounts for the lower prominence of these core cultural engagers within the current film market. While Essence's current market size sits at the bottom, it is similar to that of busy Release, Entertainment and Perspective.

Culture Segment profile and real figure estimates for the film market

Culture Segment	Total market %	Current market %	Current market real figure estimate	Lapsed market %	Lapsed market real figure estimate	Potential market %	Potential market real figure estimate
Essence	8%	9%	370k	4%	23k	11%	6k
Expression	23%	25%	1.08m	10%	65k	11%	6k
Affirmation	15%	16%	692k	11%	72k	16%	8k
Enrichment	13%	12%	518k	22%	140k	13%	7k
Stimulation	11%	11%	487k	8%	51k	7%	4k
Release	9%	9%	397k	10%	63k	11%	6k
Perspective	11%	9%	379k	23%	148k	24%	12k
Entertainment	10%	9%	383k	13%	81k	7%	4k
Base	2876	2440		364		29	

Due to the limitations of the sample of the potential film market results should be interpreted as indicative only

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One third are open to attending a film festival for the first time

While 84% of the market has seen a film at a cinema in the past three years, there is opportunity for growth in the film festival and First Peoples film markets. This would come from enticing the sizable number of the market who would consider engaging but haven't previously (34% and 41%, respectively, in the potential market). However, the proportion of the market resistant to each is similar in size to that of the potential markets.

The general film market is distinct from less mainstream offers

While there is strong cross-over between the current film festivals, First Peoples film or First Peoples film festival markets, and general film (96%–98%), the reverse is less common. For example, 29% of the current general film market is in the current market for a film festival, 14% for First Peoples film and 10% for film at a First Peoples film festival, revealing a limited shared market.

Film market penetration – including sub-artforms

	Current market %	Current market real figure estimate	Lapsed market %	Lapsed market real figure estimate	Potential market %	Potential market real figure estimate	Not in market %
Film	85%	4.31m	13%	643k	1%	51k	1%
Film (cinema or other venue)	84%	4.27m	13%	667k	1%	59k	2%
Film festival	25%	1.25m	16%	790k	35%	1.76m	25%
First Peoples film	13%	636k	6%	317k	41%	2.07m	40%
First Peoples film festival	9%	444k	3%	158k	44%	2.21m	45%

Expression key to mainstream and niche film offers

Highlighting the mainstream nature of general film, Enrichment is the third most numerous segment in the current market, although, along with Perspective, they are over-represented in the lapsed market. Enrichment values the importance of storytelling and is a segment that tends to enjoy films that offer historical or cultural insights.

Expression is key to all cultural offerings, and film is no exception. This is a visually driven segment that doesn't distinguish between art forms, so are as well represented at First Peoples as at mainstream film.

Essence is ripe for film festival reactivation

Stimulation, a segment drawn to new perspectives and social engagement, is over-represented in the current film festival market. In contrast, Essence is over-represented in the lapsed market for this category, making them a key group to focus on for reactivation.

Sub-artform for the film market by Culture Segment with real figure estimates

Any film at a cinema or other venue

Culture Segment	Current market %	Current market real figure estimate	Lapsed market %	Lapsed market real figure estimate	Potential market %	Potential market real figure estimate
Essence	9%	368k	4%	25k	3%	2k
Expression	25%	1.07 million	10%	68k	18%	11k
Affirmation	16%	688k	11%	72k	22%	13k
Enrichment	12%	515k	21%	141k	12%	7k
Stimulation	11%	476k	9%	58k	9%	5k
Release	9%	396k	10%	65k	3%	2k
Perspective	9%	373k	23%	153k	21%	12k
Entertainment	9%	377k	13%	83k	13%	8k
Base	2416		378		33	

Due to the limitations of the sample of the potential film market results should be interpreted as indicative only

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Film festival

Culture Segment	Current market %	Current market real figure estimate	Lapsed market %	Lapsed market real figure estimate	Potential market %	Potential market real figure estimate
Essence	10%	126k	12%	96k	8%	145k
Expression	42%	528k	20%	156k	20%	351k
Affirmation	14%	181k	21%	168k	19%	331k
Enrichment	4%	56k	12%	93k	15%	264k
Stimulation	15%	182k	14%	107k	12%	202k
Release	7%	88k	10%	79k	11%	191k
Perspective	3%	43k	8%	60k	10%	168k
Entertainment	4%	47k	4%	30k	6%	103k
Base	708		447		994	

First Peoples film

Culture Segment	Current market %	Current market real figure estimate	Lapsed market %	Lapsed market real figure estimate	Potential market %	Potential market real figure estimate
Essence	9%	58k	12%	38k	12%	243k
Expression	50%	319k	29%	94k	24%	499k
Affirmation	17%	108k	16%	51k	20%	404k
Enrichment	3%	18k	8%	26k	10%	203k
Stimulation	13%	85k	17%	55k	13%	277k
Release	5%	29k	11%	35k	9%	192k
Perspective	1%	7k	3%	11k	8%	160k
Entertainment	2%	11k	3%	8k	4%	91k
Base	360		180		1172	

First Peoples film festival

Culture Segment	Current market %	Current market real figure estimate	Lapsed market %	Lapsed market real figure estimate	Potential market %	Potential market real figure estimate
Essence	5%	21k	17%	27k	13%	277k
Expression	58%	256k	36%	56k	25%	558k
Affirmation	15%	66k	14%	22k	20%	446k
Enrichment	3%	12k	3%	5k	9%	189k
Stimulation	14%	62k	13%	21k	14%	320k
Release	4%	20k	11%	17k	9%	196k
Perspective	1%	4k	1%	2k	7%	156k
Entertainment	1%	4k	5%	9k	3%	70k
Base	252		89		1253	

First Peoples arts and culture market market

The current market share for First Peoples arts and culture presents a sizable opportunity for growth. In 2024, 80% of Victorian adults are in the market for First Peoples arts, including an estimated 1.49 million who have yet to engage but would consider it.

The First Peoples arts market is strongly Expression, but opportunities to nurture Affirmation and challenge Stimulation exist.

First Peoples arts and culture market definition

The First Peoples arts and culture market is defined as anyone in the culture market who has engaged with First Peoples arts and culture before, or would consider doing so in the future, including First Peoples film or film festival, First peoples craft, applied arts, design event or exhibition a First Peoples fashion or literature event, a First Peoples art gallery or exhibition, museum, theatre performance, First Peoples dance or festival or a music concert or event showcasing First Peoples artists.

4.98 million in the First Peoples arts and culture market in 2024

	Total market %	Real figure estimates
Current	37%	1.86 million
Lapsed	14%	731k
Potential	29%	1.49 million
Not in market	20%	996k
Base size	2876	

Introduction to First Peoples arts and culture market

The current First Peoples arts and culture market is distinct from the culture market average. Significant differences include:

- one of the youngest artform markets (44% 18–34 vs 30%);
- one of the more educated markets (37% hold a degree vs 30%);
- close to 8 in 10 are Essence, Expression, Affirmation or Stimulation vs 57% overall.
- 5% identify as First Peoples vs 3% overall, and 19% are linguistically diverse vs 14%;
- more likely to live in a family household (33% vs 29%).

Per capita spend on arts and culture (past 4 weeks)

	Culture market average	First Peoples arts and culture's current market
Admission	$27.75	$41.68
Refreshments	$11.92	$23.24
Merchandise	$3.77	$6.21
Base size	2876	1052

First Peoples arts and culture aligns with Expression values

The current market for First Peoples arts and culture sees an over-representation of Expression, Essence and Stimulation. These segments are active in their cultural consumption.

Expression value inclusivity in their cultural experiences, and they enjoy activities that help them connect with others. First Peoples art offers unique perspectives, culture and connection to Country. These types of meaningful experiences align with Expression values, empathy and desire to connect.

Harness Affirmation's thirst for self-improvement

Affirmation, too, is well represented across markets, and their thirst for learning and self-improvement can be targeted to drive their engagement with First Peoples art and culture.

Culture Segment profile and real figure estimates for the First Peoples arts and culture market

Culture Segment	Total market %	Current market %	Current market real figure estimate	Lapsed market %	Lapsed market real figure estimate	Potential market %	Potential market real figure estimate
Essence	8%	11%	199k	11%	79k	7%	100k
Expression	23%	36%	673k	21%	157k	17%	257k
Affirmation	15%	17%	316k	17%	123k	18%	276k
Enrichment	13%	7%	129k	14%	103k	16%	234k
Stimulation	11%	14%	257k	11%	83k	11%	157k
Release	9%	7%	126k	10%	74k	11%	167k
Perspective	11%	4%	80k	9%	69k	13%	187k
Entertainment	10%	4%	76k	6%	43k	8%	118k
Base	2876	1052		414		846	

Relatively strong cross-over of First Peoples categories

Split into 12 sub-artform categories, the First Peoples art and culture market encapsulates a rich variety of creative output. The wider picture indicates a relatively consistent picture of modest ever markets (current + lapsed), sizeable potential markets, but equally large resistant groups.

The similar sizes of current markets point to a sizeable cross-over between sub-categories. For example, 78% of those in the current First Peoples theatre market have also attended a live music event showcasing First Peoples in the past three years.

First Peoples museums and art galleries have the highest engagement

First Peoples museums or art galleries have the largest share of the market (20% in the current market).

At the other end of the scale (see the following page), First Peoples fashion, literature or festival events have a considerably smaller market share (7% in the current market for each).

Growth potential opportunities

A sizeable volume of Victorians are in the potential market for all First Peoples sub-artform categories. An estimated 2 million Victorians have yet to visit a First Peoples museum but would consider doing it in the future, and an estimated 1.95 million would consider a First Peoples art gallery or exhibition.

The relatively low engagement across categories points more to the availability of experiences as opposed to interest. Therefore, increasing the availability of experiences could tap into the growth potential of First Peoples arts and culture.

First Peoples arts and culture market penetration – including sub-artforms

	Current market %	Current market real figure estimate	Lapsed market %	Lapsed market real figure estimate	Potential market %	Potential market real figure estimate	Not in market %
First Peoples arts and culture	37%	1.86m	14%	731k	29%	1.49m	20%

	Current market %	Current market real figure estimate	Lapsed market %	Lapsed market real figure estimate	Potential market %	Potential market real figure estimate	Not in market %
First Peoples museum	20%	1.03m	10%	509k	39%	2.00m	30%
First Peoples art gallery or exhibition	20%	1.01m	9%	450k	38%	1.95m	33%
First Peoples craft or applied event or exhibition	16%	836k	8%	410k	40%	2.04m	35%
Music concert or event showcasing First Peoples artists	14%	719k	7%	373k	38%	1.94m	40%
First Peoples film	13%	636k	6%	317k	41%	2.07m	40%
First Peoples design event or exhibition	12%	629k	6%	293k	41%	2.10m	40%
First Peoples film festival	9%	444k	3%	158k	44%	2.21m	45%
First Peoples dance	8%	398k	4%	225k	38%	1.92m	50%
First Peoples theatre	8%	382k	4%	183k	42%	2.14m	47%
First Peoples fashion event	7%	373k	3%	157k	37%	1.88m	53%
First Peoples literature event	7%	367k	4%	213k	36%	1.84m	52%
First Peoples festival	7%	349k	3%	134k	39%	1.99m	51%

A strongly Expression market

First Peoples arts and culture align with Expression values. This is a promising outlook as Expression is not only the most numerous in the wider culture market but a segment that enjoy sharing experiences with others, making them great advocates.

While Expression is the most active segment in all the sub-category current markets, there are more of them to entice with a sizable potential market. This is a segment looking for personal, emotionally-literate communications and personal visitor experiences.

Nurture Affirmation and Stimulation are up for a challenge

Alongside the strong Expression market is a consistent presence of Affirmation and Stimulation. While less active with First Peoples arts and culture, they are the next most numerous across the current and potential markets.

Stimulation is an audience that invites playful and creative approaches and is one organisations can have fun with as they want to take risks and try innovative programming. Captivate their desire for novelty and excitement with unique, exclusive experiences that position them as trendsetters among their peers. Consider pop-up events encompassing unexpected themes that encourage exploration and participation. Another example is Up late or 'secret' events showcasing experimental performances, live music and immersive experiences that challenge traditional formats and are hosted in unconventional venues to reveal hidden gems in the local arts scene.

Meanwhile, Affirmation are diligent and cautious, requiring a high degree of reassurance to try something new. Their prominence in the potential market, as opposed to the current market, suggests they need careful encouragement to explore new experiences. Experiences aimed at Affirmation need to be accessible and positioned in a way that ensures they feel comfortable and confident without feeling out of their depth.

First Peoples art gallery or exhibition

Culture Segment	Current market %	Current market real figure estimate	Lapsed market %	Lapsed market real figure estimate	Potential market %	Potential market real figure estimate
Essence	11%	107k	10%	46k	10%	190k
Expression	41%	417k	29%	129k	23%	439k
Affirmation	17%	177k	18%	83k	20%	390k
Enrichment	7%	68k	10%	47k	12%	242k
Stimulation	14%	138k	12%	56k	13%	254k
Release	5%	54k	10%	45k	10%	198k
Perspective	3%	30k	7%	30k	9%	166k
Entertainment	2%	21k	3%	15k	4%	68k
Base	573		255		1102	

First Peoples craft or applied arts event or exhibition

Culture Segment	Current market %	Current market real figure estimate	Lapsed market %	Lapsed market real figure estimate	Potential market %	Potential market real figure estimate
Essence	10%	81k	9%	37k	11%	219k
Expression	44%	371k	28%	116k	23%	478k
Affirmation	19%	159k	20%	82k	19%	391k
Enrichment	3%	28k	11%	44k	12%	249k
Stimulation	15%	128k	12%	50k	12%	254k
Release	4%	31k	9%	37k	10%	211k
Perspective	3%	23k	8%	31k	8%	169k
Entertainment	2%	15k	3%	12k	3%	67k
Base	473		232		1155	

First Peoples design event or exhibition

Culture Segment	Current market %	Current market real figure estimate	Lapsed market %	Lapsed market real figure estimate	Potential market %	Potential market real figure estimate
Essence	10%	64k	7%	20k	12%	252k
Expression	50%	315k	32%	94k	24%	512k
Affirmation	18%	113k	18%	53k	20%	411k
Enrichment	2%	10k	8%	22k	10%	216k
Stimulation	14%	87k	12%	36k	14%	295k
Release	4%	26k	10%	29k	10%	200k
Perspective	2%	10k	8%	23k	7%	148k
Entertainment	1%	4k	5%	16k	3%	66k
Base	357		166		1189	

First Peoples fashion event

Culture Segment	Current market %	Current market real figure estimate	Lapsed market %	Lapsed market real figure estimate	Potential market %	Potential market real figure estimate
Essence	7%	25k	8%	12k	12%	233k
Expression	55%	205k	40%	64k	29%	542k
Affirmation	16%	60k	14%	22k	22%	406k
Enrichment	-	0k	1%	2k	8%	142k
Stimulation	18%	67k	20%	31k	13%	242k
Release	3%	12k	13%	21k	9%	170k
Perspective	1%	5k	3%	4k	4%	78k
Entertainment	-	0k	1%	2k	3%	62k
Base	211		89		1062	

First Peoples Museum

Culture Segment	Current market %	Current market real figure estimate	Lapsed market %	Lapsed market real figure estimate	Potential market %	Potential market real figure estimate
Essence	11%	112k	13%	65k	9%	180k
Expression	41%	423k	26%	134k	22%	445k
Affirmation	16%	170k	17%	84k	19%	379k
Enrichment	6%	58k	10%	50k	13%	255k
Stimulation	15%	153k	11%	55k	13%	252k
Release	5%	57k	10%	52k	10%	193k
Perspective	4%	43k	9%	44k	10%	193k
Entertainment	2%	18k	5%	26k	5%	107k
Base	585		289		1135	

First Peoples literature event

Culture Segment	Current market %	Current market real figure estimate	Lapsed market %	Lapsed market real figure estimate	Potential market %	Potential market real figure estimate
Essence	8%	31k	9%	18k	14%	249k
Expression	57%	210k	37%	79k	28%	524k
Affirmation	11%	41k	18%	39k	21%	383k
Enrichment	1%	4k	3%	7k	7%	125k
Stimulation	15%	54k	19%	41k	14%	255k
Release	5%	17k	10%	22k	9%	167k
Perspective	3%	10k	1%	2k	5%	98k
Entertainment	-	0k	3%	6k	2%	43k
Base	208		121		1044	

First Peoples theatre

Culture Segment	Current market %	Current market real figure estimate	Lapsed market %	Lapsed market real figure estimate	Potential market %	Potential market real figure estimate
Essence	7%	26k	13%	24k	13%	274k
Expression	54%	207k	31%	56k	27%	577k
Affirmation	17%	64k	17%	31k	21%	447k
Enrichment	1%	4k	5%	9k	9%	184k
Stimulation	16%	62k	17%	31k	13%	275k
Release	5%	19k	9%	16k	9%	193k
Perspective	0%	2k	8%	16k	6%	130k
Entertainment	-	0k	-	0k	3%	62k
Base	217		104		1213	

First Peoples dance

Culture Segment	Current market %	Current market real figure estimate	Lapsed market %	Lapsed market real figure estimate	Potential market %	Potential market real figure estimate
Essence	8%	30k	13%	29k	13%	249k
Expression	53%	213k	31%	70k	28%	529k
Affirmation	16%	64k	18%	39k	23%	435k
Enrichment	2%	8k	4%	10k	8%	146k
Stimulation	16%	63k	18%	41k	13%	257k
Release	5%	19k	10%	23k	9%	182k
Perspective	0%	2k	5%	12k	5%	90k
Entertainment	-	0k	-	0k	2%	33k
Base	226		127		1088	

First Peoples festival

Culture Segment	Current market %	Current market real figure estimate	Lapsed market %	Lapsed market real figure estimate	Potential market %	Potential market real figure estimate
Essence	5%	17k	14%	18k	14%	272k
Expression	58%	201k	47%	62k	29%	568k
Affirmation	15%	52k	14%	19k	21%	428k
Enrichment	1%	3k	3%	4k	6%	113k
Stimulation	15%	51k	12%	16k	14%	276k
Release	5%	18k	5%	7k	9%	184k
Perspective	1%	2k	4%	5k	6%	110k
Entertainment	1%	4k	2%	3k	2%	39k
Base	197		76		1127	

Music concert or event showcasing First Peoples artists

Culture Segment	Current market %	Current market real figure estimate	Lapsed market %	Lapsed market real figure estimate	Potential market %	Potential market real figure estimate
Essence	7%	53k	15%	54k	12%	225k
Expression	48%	347k	31%	114k	24%	469k
Affirmation	16%	116k	15%	55k	21%	408k
Enrichment	2%	15k	8%	31k	9%	174k
Stimulation	16%	113k	13%	50k	14%	264k
Release	6%	44k	9%	34k	10%	186k
Perspective	3%	20k	6%	24k	6%	124k
Entertainment	2%	12k	3%	11k	4%	85k
Base	407		211		1096	

First Peoples film

Culture Segment	Current market %	Current market real figure estimate	Lapsed market %	Lapsed market real figure estimate	Potential market %	Potential market real figure estimate
Essence	9%	58k	12%	38k	12%	243k
Expression	50%	319k	29%	94k	24%	499k
Affirmation	17%	108k	16%	51k	20%	404k
Enrichment	3%	18k	8%	26k	10%	203k
Stimulation	13%	85k	17%	55k	13%	277k
Release	5%	29k	11%	35k	9%	192k
Perspective	1%	7k	3%	11k	8%	160k
Entertainment	2%	11k	3%	8k	4%	91k
Base	360		180		1172	

First Peoples Film Festival

Culture Segment	Current market %	Current market real figure estimate	Lapsed market %	Lapsed market real figure estimate	Potential market %	Potential market real figure estimate
Essence	5%	21k	17%	27k	13%	277k
Expression	58%	256k	36%	56k	25%	558k
Affirmation	15%	66k	14%	22k	20%	446k
Enrichment	3%	12k	3%	5k	9%	189k
Stimulation	14%	62k	13%	21k	14%	320k
Release	4%	20k	11%	17k	9%	196k
Perspective	1%	4k	1%	2k	7%	156k
Entertainment	1%	4k	5%	9k	3%	70k
Base	252		89		1253	

Literature market

Of the 11 core artforms, Literature has the smallest share of the market; an estimated 3.06 million Victorians have engaged with a literature event in the past or are open to doing so.

Those who currently engage with Literature are among the most active members of the culture market, and there is potential to entice new audiences with compelling offers. However, 4 in 10 are resistant, the highest level of resistance among artforms.

Literature market definition

The literature market is defined as anyone in the culture market who have ever engaged with a literature event or would consider doing so in the future. For example, attending a general literature event, a First Peoples literature event or a literature event associated with a festival.

3.06 million in the Literature market in 2024

	Total market %	Real figure estimates
Current	18%	906k
Lapsed	11%	551k
Potential	32%	1.61 million
Not in market	40%	2.01 million
Base size	2876	

Introduction to literature market

Of the 11 core artforms the current literature market stands out as having the:

- strongest male skew (54% vs 49% overall);
- narrowest segment profile (84% Essence, Expression, Affirmation and Stimulation vs 57%).

In addition, compared to the culture market average, the current literature market:

- draws heavily on the upper and upper-mid income brackets (33% vs 23%).
- are most likely to have spent on arts engagement in the past four weeks (68% vs 32%), be a current donor (37% vs 12%) or a member / subscriber (26% vs 9%);
- are most likely to hold a degree (42% vs 30%), be linguistically diverse (21% vs 14%) or identify as First Peoples (7% vs 3%).

Per capita spend on arts and culture (past 4 weeks)

	Culture market average	Literature's current market
Admission	$27.75	$58.60
Refreshments	$11.92	$33.65
Merchandise	$3.77	$7.45
Base size	2876	791

A narrow segment profile for literature

Current Literature event engagers are more concentrated around core arts attenders, including the Culture Segment profile. Expression dominates (42%), and Stimulation is significantly over-represented (17%). As a result, 84% of the current market is drawn from the four most culturally active segments.

Re-engage Essence

While the four most culturally active segments dominate, there is still an opportunity to extend the reach. Expression and Affirmation are the most numerous among the lapsed and potential markets, and there is also untapped potential with Stimulation and Essence.

Essence is significantly over-represented in the lapsed literature market compared to the market average. To reactivate these confident attendees, flatter their levels of existing knowledge and appeal to their desire for access to experts.

Culture Segment profile and real figure estimates for the literature market

Culture Segment	Total market %	Current market %	Current market real figure estimate	Lapsed market %	Lapsed market real figure estimate	Potential market %	Potential market real figure estimate
Essence	8%	10%	92k	13%	71k	11%	173k
Expression	23%	42%	376k	28%	152k	25%	404k
Affirmation	15%	15%	140k	19%	102k	21%	336k
Enrichment	13%	4%	40k	12%	66k	9%	141k
Stimulation	11%	17%	151k	13%	70k	13%	202k
Release	9%	7%	65k	9%	49k	10%	167k
Perspective	11%	3%	30k	5%	28k	7%	114k
Entertainment	10%	1%	13k	2%	12k	4%	69k
Base	2876	513		312		910	

CREATIVE VICTORIA

A smaller market, but potential

Of the 11 core artforms, literature has the smallest current market, and at 7%, the current First Peoples literature event market is the smallest of the sub-artform categories. While the current markets are generally smaller than those of other artforms, this also offers opportunity for growth.

Overall, 32% would consider engaging with literature events but haven't previously (potential market). Across the sub-artform categories, the potential market for First Peoples literature events is the largest, with an estimated 1.84 million Victorians. However, over half are 'not in the market', meaning they haven't engaged before and wouldn't consider doing so.

Literature market penetration – including sub-artforms

	Current market %	Current market real figure estimate	Lapsed market %	Lapsed market real figure estimate	Potential market %	Potential market real figure estimate	Not in market %
Literature	18%	906k	11%	551k	32%	1.60m	40%
Literature event	16%	814k	10%	527k	28%	1.41m	46%
Literature event as part of a festival	11%	570k	8%	383k	33%	1.68m	48%
First Peoples literature event	7%	367k	4%	213k	36%	1.84m	52%

Differentiated messaging to activate latent interest

While Expression dominates the literature market, there are more of them who haven't yet attended but are interested in doing so (potential). Affirmation, Stimulation and Essence are also well represented in the lapsed and potential markets.

Literature events have scope for differentiation by segment. Essence prefers intimate literary event settings and to hear directly from leaders and experts, whereas Expression will enjoy the shared experience and meeting like-minded creatives. Meanwhile, Stimulation will be drawn to edgier events offering challenging perspectives. On the other hand, Affirmation is looking for self-improvement and promoting learning outcomes to pique their interest.

Sub-artform for the Literature market by Culture Segment with real figure estimates

Literature Event

Culture Segment	Current market %	Current market real figure estimate	Lapsed market %	Lapsed market real figure estimate	Potential market %	Potential market real figure estimate
Essence	10%	82k	13%	70k	11%	162k
Expression	41%	337k	28%	148k	26%	372k
Affirmation	16%	130k	18%	93k	22%	306k
Enrichment	4%	35k	12%	63k	8%	119k
Stimulation	16%	131k	13%	68k	12%	172k
Release	7%	59k	10%	53k	9%	133k
Perspective	3%	27k	5%	25k	7%	94k
Entertainment	2%	13k	2%	8k	4%	55k
Base	461		299		801	

Literature Event associated with a festival

Culture Segment	Current market %	Current market real figure estimate	Lapsed market %	Lapsed market real figure estimate	Potential market %	Potential market real figure estimate
Essence	10%	57k	14%	53k	12%	207k
Expression	48%	277k	28%	109k	28%	468k
Affirmation	15%	86k	21%	81k	20%	337k
Enrichment	2%	11k	7%	26k	8%	133k
Stimulation	15%	86k	17%	66k	13%	213k
Release	6%	35k	8%	32k	10%	174k
Perspective	3%	16k	4%	14k	5%	90k
Entertainment	1%	3k	1%	3k	4%	62k
Base	323		217		954	

First Peoples literature event

Culture Segment	Current market %	Current market real figure estimate	Lapsed market %	Lapsed market real figure estimate	Potential market %	Potential market real figure estimate
Essence	8%	31k	9%	18k	14%	249k
Expression	57%	210k	37%	79k	28%	524k
Affirmation	11%	41k	18%	39k	21%	383k
Enrichment	1%	4k	3%	7k	7%	125k
Stimulation	15%	54k	19%	41k	14%	255k
Release	5%	17k	10%	22k	9%	167k
Perspective	3%	10k	1%	2k	5%	98k
Entertainment	-	0k	3%	6k	2%	43k
Base	208		121		1044	

Live Music market

Live music encompasses a broad range of genres, and 4.76 million Victorians (94% of the culture market) are in the market for live music. In 2024, 56% have attended in the past three years (current market) and more than a quarter have lapsed. These audiences need a compelling reason to entice them to return to in-person attendance.

Expression and Stimulation are core segments for live music being the most active across a range of genres. Stimulation is a key target for music festivals, which cater to their desire for one-off uniqueness, contemporary culture and consuming cultural experiences socially.

Live Music market definition

The live music market is defined as anyone in the culture market who has engaged with live music before, or would consider doing so in the future, including a classical, jazz or blues, country or folk, or contemporary music concert or gig, a music concert showcasing First Peoples artists, or a music festival

4.76 million in the Live Music market in 2024

	Total market %	Real figure estimates
Current	56%	2.85 million
Lapsed	27%	1.39 million
Potential	10%	518k
Not in market	6%	316k
Base size	2876	

Introduction to live music market

Being one of the larger artforms, there is little to distinguish the current live music market. In many ways, it is similar to other the current markets of other artforms, including being younger than the market average and more likely to have spent on arts engagement:

- 39% are aged 18–34 vs 30% overall;
- 45% spent on arts engagement in the past four weeks vs 32% overall;
- 70% are Essence, Expression, Affirmation or Stimulation vs 57% overall;
- are significantly less likely to have an access barrier impacting their arts engagement (18%) than the market average (22%).

Per capita spend on arts and culture (past 4 weeks)

	Culture market average	Live Music's current market
Admission	$27.75	$41.77
Refreshments	$11.92	$18.18
Merchandise	$3.77	$4.76
Base size	2876	1614

Expression and Stimulation are core live music segments

Expression is the dominant segment in live music's current market, and Stimulation is also over-represented. While enthusiastic Expression is always in the mix, live music's variation, continual development and the cultural relevance of some genres make it attractive to Stimulation, particularly, as a concert or gig provides the ideal context for them to consume culture socially.

Other segments in the mix are less active

While Expression and Stimulation are core segments for live music, Essence and Affirmation do engage. Meanwhile, as a broad artform, the less culturally active segments are reasonably well represented but are less active. Notably, Enrichment and Perspective are the most likely to have lapsed.

Culture Segment profile and real figure estimates for the Live Music market

Culture Segment	Total market %	Current market %	Current market real figure estimate	Lapsed market %	Lapsed market real figure estimate	Potential market %	Potential market real figure estimate
Essence	8%	9%	263k	8%	106k	5%	26k
Expression	23%	30%	861k	13%	185k	17%	90k
Affirmation	15%	16%	465k	15%	205k	17%	89k
Enrichment	13%	8%	238k	20%	283k	18%	91k
Stimulation	11%	14%	400k	8%	107k	6%	33k
Release	9%	8%	214k	11%	149k	14%	73k
Perspective	11%	7%	202k	16%	219k	11%	56k
Entertainment	10%	7%	206k	10%	139k	12%	60k
Base	2876	1614		790		293	

Highest penetration for contemporary music concerts

A contemporary music concert or gig has the highest penetration among live music's sub-artform categories. 37% of the culture market has attended such an event in the past three years.

Although a contemporary music festival or an event showcasing First Peoples artists has a smaller share of the market (16% and 14%, respectively, in the current market), there is potential for growth; 33% and 38%, respectively, would consider engaging but haven't previously.

While there is scope to reach new audiences across the live music sub-categories, reactivating the sizable lapsed audiences is a more straightforward proposition. Those who have lapsed already know the benefits of attending live music; they just need a compelling reason to be enticed back.

Classical, jazz and folk concerts enjoy a similar share of the market

The current markets for classical, jazz or blues, and country or folk are a similar size (21%–19% of the culture market). There is also some cross-over between the three. For example, 63% of the current classical concert market is in the current market for jazz, and 52% in the current market for country or folk.

Live Music market penetration – including sub-artforms

	Current market %	Current market real figure estimate	Lapsed market %	Lapsed market real figure estimate	Potential market %	Potential market real figure estimate	Not in market %
Live Music	56%	2.85m	27%	1.39m	10%	518k	6%
Contemporary music concert or gig	37%	1.86m	23%	1.16m	17%	869k	23%
Classical concert	21%	1.04m	19%	987k	23%	1.17m	37%
Jazz or blues concert or gig	19%	987k	20%	998k	27%	1.39m	34%
Country or folk music concert or gig	19%	966k	19%	955k	28%	1.42m	34%
Contemporary music festival	16%	798k	11%	568k	33%	1.69m	40%
Music event showcasing First Peoples artists	14%	719k	7%	373k	38%	1.94m	40%

Eclectic Expression is prominent no matter what the genre

Expression is a group with eclectic tastes, so it's not surprising to see them more prominent in the current market for all the music genres – from classical concerts (43% of the current market) to contemporary music (32%). Meanwhile, Stimulation is over-represented in the current jazz or blues (16%), contemporary music (16%) and music festival (18%) markets.

Affirmation has potential but are less active than other segments

As they represent a larger proportion of the overall market, Affirmation is as numerous as Stimulation across sub-artform categories. However, Affirmation has a tendency to gravitate to accessible and more mainstream events and is not as active as Stimulation, particularly in the jazz and folk markets.

Music festivals have potential across a range of segments

There is sizable potential for engagement with contemporary music festivals among a range of segments from busy Release (an estimated 202k) to conscientious Affirmation (an estimated 416k). However, it's worth considering which segments already engage with this artform.

Expression is active in the contemporary music festival market, yet Stimulation is the key target. These events cater to Stimulation's desire for 'one-off uniqueness', enthusiasm for contemporary culture and consuming cultural experiences socially with friends.

The shape is relatively similar to a music event showcasing First Peoples artists, with Expression and Stimulation more active than other segments. Meanwhile, the potential market has a sizable number of Essence, Affirmation and Stimulation.

Contemporary music concert or gig

Culture Segment	Current market %	Current market real figure estimate	Lapsed market %	Lapsed market real figure estimate	Potential market %	Potential market real figure estimate
Essence	10%	188k	9%	103k	8%	72k
Expression	32%	590k	19%	225k	24%	207k
Affirmation	16%	302k	17%	203k	18%	158k
Enrichment	6%	118k	15%	175k	12%	101k
Stimulation	16%	294k	10%	112k	10%	89k
Release	8%	140k	10%	116k	12%	107k
Perspective	5%	90k	11%	125k	9%	76k
Entertainment	7%	134k	9%	103k	7%	59k
Base	1052		658		492	

Classical Concert

Culture Segment	Current market %	Current market real figure estimate	Lapsed market %	Lapsed market real figure estimate	Potential market %	Potential market real figure estimate
Essence	8%	87k	12%	115k	10%	120k
Expression	43%	449k	20%	194k	25%	288k
Affirmation	17%	179k	20%	200k	21%	242k
Enrichment	6%	61k	16%	157k	11%	125k
Stimulation	13%	134k	13%	124k	13%	148k
Release	5%	53k	9%	92k	13%	150k
Perspective	5%	49k	6%	64k	5%	57k
Entertainment	3%	30k	4%	40k	4%	44k
Base	591		559		665	

Jazz or blues concert or gig

Culture Segment	Current market %	Current market real figure estimate	Lapsed market %	Lapsed market real figure estimate	Potential market %	Potential market real figure estimate
Essence	9%	90k	10%	103k	10%	135k
Expression	44%	431k	19%	192k	24%	335k
Affirmation	14%	143k	16%	161k	23%	314k
Enrichment	5%	51k	13%	131k	10%	141k
Stimulation	16%	154k	15%	147k	10%	143k
Release	4%	40k	11%	114k	11%	159k
Perspective	4%	39k	9%	92k	7%	93k
Entertainment	4%	39k	6%	57k	5%	72k
Base	559		566		788	

Country or folk music concert or gig

Culture Segment	Current market %	Current market real figure estimate	Lapsed market %	Lapsed market real figure estimate	Potential market %	Potential market real figure estimate
Essence	10%	97k	12%	110k	8%	116k
Expression	42%	403k	22%	211k	23%	326k
Affirmation	14%	136k	16%	153k	22%	313k
Enrichment	5%	49k	12%	112k	12%	175k
Stimulation	14%	136k	14%	137k	10%	146k
Release	5%	45k	9%	90k	10%	143k
Perspective	5%	52k	10%	96k	7%	106k
Entertainment	5%	48k	5%	47k	7%	93k
Base	547		541		803	

Contemporary music festival

Culture Segment	Current market %	Current market real figure estimate	Lapsed market %	Lapsed market real figure estimate	Potential market %	Potential market real figure estimate
Essence	9%	71k	11%	65k	12%	207k
Expression	46%	364k	29%	167k	24%	404k
Affirmation	16%	129k	18%	105k	25%	416k
Enrichment	2%	13k	3%	16k	2%	42k
Stimulation	18%	140k	18%	103k	16%	270k
Release	6%	45k	12%	66k	12%	202k
Perspective	2%	15k	3%	18k	3%	57k
Entertainment	3%	22k	5%	29k	6%	95k
Base	452		322		958	

Music concert or event showcasing First Peoples artists

Culture Segment	Current market %	Current market real figure estimate	Lapsed market %	Lapsed market real figure estimate	Potential market %	Potential market real figure estimate
Essence	7%	53k	15%	54k	12%	225k
Expression	48%	347k	31%	114k	24%	469k
Affirmation	16%	116k	15%	55k	21%	408k
Enrichment	2%	15k	8%	31k	9%	174k
Stimulation	16%	113k	13%	50k	14%	264k
Release	6%	44k	9%	34k	10%	186k
Perspective	3%	20k	6%	24k	6%	124k
Entertainment	2%	12k	3%	11k	4%	85k
Base	407		211		2096	

Museums market

As a relatively mainstream pursuit, only film has a larger share of the market than museums. Close to two-thirds of the Victorian culture market have engaged with a museum in the past three years (current), and an estimated 1.56 million visited more than 3 years ago (lapsed).

As a relatively common activity, there is a broad range of segments open to museum experiences. However, Expression, Essence and Affirmation are the most active and segments like Enrichment are more likely to have lapsed.

Museums market definition

The museums market is defined as anyone in the culture market who has been to a museum before, or would consider doing so in the future, including a general or a First Peoples museum.

4.96 million in the Literature market in 2024

	Total market %	Real figure estimates
Current	64%	3.26 million
Lapsed	31%	1.56 million
Potential	3%	151k
Not in market	2%	113k
Base size	2876	

Introduction to museums market

The overall demographic profile of the current museums market is similar to the current market of the other artforms. For example:

- skews younger (35% aged 18–34 vs 30%);
- completed education later (37% hold a degree vs 30% overall);
- 28% drawn from upper + upper-mid income brackets vs 23% overall;
- has a broader segment profile than most other artforms; 66% are Essence, Expression, Affirmation or Stimulation vs 57% overall.
- more likely than average to live in a family household (33% vs 29% overall);
- less likely than average to have a problem or condition impacting cultural access (17% vs 22% overall).

Per capita spend on arts and culture (past 4 weeks)

	Culture market average	Museums current market
Admission	$27.75	$35.97
Refreshments	$11.92	$16.46
Merchandise	$3.77	$4.66
Base size	2876	1844

A range of segments to target

Museums are a fairly mainstream cultural activity, and the current market Culture Segment profile is more reflective of the broader market than some other artforms. Common skews are also apparent, with Expression over-represented and Enrichment, Perspective and Entertainment under-represented.

Most people in all eight segments are in the market for museums, so there is potential to broaden reach by activating some less culturally active segments, such as Enrichment, Perspective and Entertainment. However, these segments are less active and more likely to have lapsed.

Emphasising learning could convince Enrichment a visit is worthwhile. Similarly, a deep dive into specific topics may appeal to certain members of the Perspective segment, while incorporating an element of ‘fun’ could expand appeal to Entertainment and broaden the audience base. However, these segments typically show lower loyalty and value alignment. In contrast, enthusiastic Expression is central to any cultural offer. As museums are often family-orientated, tailoring messages to Affirmation can activate families and is a strategy which offers a higher return.

Culture Segment profile and real figure estimates for the museums market

Culture Segment	Total market %	Current market %	Current market real figure estimate	Lapsed market %	Lapsed market real figure estimate	Potential market %	Potential market real figure estimate
Essence	8%	9%	308k	6%	86k	3%	5k
Expression	23%	28%	916k	13%	207k	15%	22k
Affirmation	15%	16%	526k	14%	218k	17%	25k
Enrichment	13%	11%	364k	18%	287k	12%	18k
Stimulation	11%	12%	392k	8%	132k	11%	16k
Release	9%	9%	285k	10%	152k	10%	16k
Perspective	11%	8%	260k	17%	264k	14%	21k
Entertainment	10%	6%	205k	14%	211k	19%	29k
Base	2876	1844		882		86	

3 in 10 have engaged with a First Peoples museum

The general museum market dominates the overall artform, while a First Peoples museum share of the market is very different. In 2024, 1.03 million Victorians have engaged with a First Peoples museum in the past three years (current). However, there is a sizable opportunity for development, with an estimated 2 million Victorian adults open to engaging with a First Peoples museum but haven't previously.

1.59 million general museum visitors have lapsed

While general museums have a healthy current market, they also have a sizable lapsed market, which has grown since 2019. Reactivate audiences by conveying what makes your offer unique and what specific Social, Intellectual or Emotional benefits it offers.

Museums attract a broad mix of people from a values standpoint

Expression is the most numerous segment dominating the current museum market. However, other segments are well represented. Along with Expression, members of the Essence, Stimulation and Affirmation segments are active in the museums market. Meanwhile, others are less active, with Enrichment, Perspective and Entertainment most likely to have lapsed.

While less numerous and engaged than some other segments, traditional Enrichment deeply appreciates history and is in the museums mix. However, their focus is preservation, and they are not necessarily interested in reinterpretations of the past. Therefore, museums that have moved beyond their traditional bounds may no longer align with this segment's values, and the higher return lies with those segments already active in the market.

Museums market penetration – including sub-artforms

	Current market %	Current market real figure estimate	Lapsed market %	Lapsed market real figure estimate	Potential market %	Potential market real figure estimate	Not in market %
Museums	64%	3.26m	31%	1.56m	3%	151k	2%
Museum	63%	3.22m	31%	1.59m	3%	149k	2%
First Peoples Museum	20%	1.03m	10%	509k	39%	2.00m	30%

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Sub-artform for the Museums market by Culture Segment with real figure estimates

Museum

Culture Segment	Current market %	Current market real figure estimate	Lapsed market %	Lapsed market real figure estimate	Potential market %	Potential market real figure estimate
Essence	10%	308k	5%	86k	2%	3k
Expression	28%	902k	14%	220k	15%	22k
Affirmation	16%	523k	14%	219k	17%	25k
Enrichment	11%	359k	18%	290k	12%	18k
Stimulation	12%	379k	9%	142k	12%	17k
Release	9%	280k	10%	153k	11%	16k
Perspective	8%	260k	17%	264k	14%	21k
Entertainment	6%	202k	13%	213k	18%	27k
Base	1821		900		85	

First Peoples museum

Culture Segment	Current market %	Current market real figure estimate	Lapsed market %	Lapsed market real figure estimate	Potential market %	Potential market real figure estimate
Essence	11%	112k	13%	65k	9%	180k
Expression	41%	423k	26%	134k	22%	445k
Affirmation	16%	170k	17%	84k	19%	379k
Enrichment	6%	58k	10%	50k	13%	255k
Stimulation	15%	153k	11%	55k	13%	252k
Release	5%	57k	10%	52k	10%	193k
Perspective	4%	43k	9%	44k	10%	193k
Entertainment	2%	18k	5%	26k	5%	107k
Base	585		289		1135	

Musicals and Comedy market

In 2024, 94% or an estimated 4.78 million Victorians, are in the market for musicals and comedy, having been before or would consider going.

Reflecting this strong market penetration, musicals and comedy attract a broad range of people from a values point of view, meaning there are a range of segments to target.

Expression and Stimulation are the most active, and there are more of them in the market to activate.

Musicals and Comedy market definition

The musicals and comedy market is defined as anyone in the culture market who has engaged with musical theatre or comedy before, or would consider engaging in the future.

4.78 million in the Musicals and Comedy market in 2024

	Total market %	Real figure estimates
Current	61%	3.08 million
Lapsed	25%	1.27 million
Potential	9%	436k
Not in market	6%	292k
Base size	2876	

Introduction to musicals and comedy market

Significant differences between the current musicals and comedy market and the culture market average include:

• being more concentrated around 25–44 year-olds (47% vs 41%);

• more likely to live in family households (33%, compared to 29% overall)

• more likely to be Expression (29%) or Stimulation (13%);

• less likely to have an access barriers (18% vs 22%).

Similar to other artforms, those in the current market musicals and comedy are more likely to have completed higher education (35% are degree holders vs 30%) and are drawn from the upper income brackets (29% vs 23%).

Per capita spend on arts and culture (past 4 weeks)

	Culture market average	Musicals and Comedy's current market
Admission	$27.75	$41.64
Refreshments	$11.92	$17.22
Merchandise	$3.77	$4.48
Base size	2876	1742

Expression, Affirmation and Stimulation are key...

The Culture Segment profile of the musical and comedy current market is relatively broad. However, Expression and Affirmation are the most numerous segments, with Expression significantly over-represented compared to the market average. Adventurous Stimulation is also well represented. Together, these three segments make up half the current market.

... and there are more of them to reactivate

As musicals and comedy have strong market penetration (86% have ever engaged, current + lapsed), maintaining relationships with current audiences and reactivating lapsed groups holds the most opportunity.

There are a sizable number of Enrichment and Perspective in the lapsed market, but these are difficult segments to mobilise and not necessarily looking for ‘new’ things to do. Reconnecting with current and lapsed Expression, Affirmation, and Stimulation is a more natural fit.

Culture Segment profile and real figure estimates for the Musicals and Comedy market

Culture Segment	Total market %	Current market %	Current market real figure estimate	Lapsed market %	Lapsed market real figure estimate	Potential market %	Potential market real figure estimate
Essence	8%	9%	285k	7%	91k	4%	17k
Expression	23%	29%	883k	14%	180k	17%	76k
Affirmation	15%	17%	516k	14%	180k	17%	75k
Enrichment	13%	10%	314k	20%	256k	13%	56k
Stimulation	11%	13%	388k	9%	111k	9%	38k
Release	9%	8%	235k	11%	144k	13%	56k
Perspective	11%	8%	232k	16%	198k	14%	61k
Entertainment	10%	7%	221k	9%	114k	13%	56k
Base	2876	1742		721		247	

Half have engaged with musical theatre in the past three years

Exploring the sub-artforms shows that the markets for musicals and comedy are similar, but the musicals market is slightly larger. In 2024, there are an estimated 4.44 million Victorians in the market for musical theatre and 4.34 million for comedy.

Comedy has more potential for growth

The market is less likely to have tried comedy in the past (67% have ever engaged) than musical theatre (78%), meaning comedy's potential market – those who would consider it but are yet to give it a go – is around twice the size of musical's potential market, an estimated 923k and 503k respectively.

A sizable cross-over

There is also strong cross-over between the two sub-groups. For example, 63% of those in the current market for musicals are also in the current market for comedy. On the other hand, 73% of those in the current comedy market are also in the current musicals market.

Musicals and Comedy market penetration – including sub-artforms

	Current market %	Current market real figure estimate	Lapsed market %	Lapsed market real figure estimate	Potential market %	Potential market real figure estimate	Not in market %
Musicals and Comedy	61%	3.08m	25%	1.27m	9%	436k	6%
Musical Theatre / Musicals	49%	2.49m	29%	1.46m	10%	503k	12%
Comedy	43%	2.16m	25%	1.26m	18%	923k	15%

Stimulation is a natural fit for comedy

Expression's natural exuberance for communal experiences shines through in being over-represented in the current markets for both musicals and comedy. While Affirmation is over-represented in the musicals market, it is Stimulation when it comes to comedy. This segment enjoys dynamic experiences within a social context, and comedy will appeal to their desire for excitement and new perspectives. While Affirmation is slightly more numerous, they're a segment that doesn't like surprises or to feel uncomfortable. Comfort with the familiar is more Affirmation's natural game, which is something musical theatre experiences are more likely to offer.

Entertainment is higher ranking for comedy

For Entertainment, arts and culture aren't priorities, and they are a segment with relatively low levels of arts engagement. However, being primarily focused on light entertainment, they are better represented in comedy's current market than most other artforms.

Sub-artform for the Musicals and Comedy market by Culture Segment with real figure estimates

Musical theatre / musicals

Culture Segment	Current market %	Current market real figure estimate	Lapsed market %	Lapsed market real figure estimate	Potential market %	Potential market real figure estimate
Essence	9%	234k	8%	110k	8%	42k
Expression	30%	743k	16%	237k	23%	116k
Affirmation	19%	460k	13%	196k	19%	94k
Enrichment	10%	248k	18%	265k	10%	50k
Stimulation	12%	306k	11%	156k	11%	53k
Release	7%	183k	11%	161k	10%	51k
Perspective	7%	174k	13%	196k	9%	45k
Entertainment	6%	138k	9%	135k	10%	52k
Base	1407		824		285	

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Comedy

Culture Segment	Current market %	Current market real figure estimate	Lapsed market %	Lapsed market real figure estimate	Potential market %	Potential market real figure estimate
Essence	10%	218k	7%	89k	7%	65k
Expression	32%	681k	17%	217k	21%	190k
Affirmation	16%	339k	18%	228k	18%	167k
Enrichment	8%	173k	18%	231k	13%	118k
Stimulation	14%	302k	9%	118k	11%	98k
Release	7%	147k	12%	145k	11%	105k
Perspective	6%	138k	13%	158k	11%	105k
Entertainment	7%	159k	6%	73k	8%	74k
Base	1223		713		523	

Theatre market

Half of Victoria's culture market has attended theatre in the past 3 years (current market), and a third – an estimated 1.55 million Victorians, have lapsed.

Theatre's current market has the strongest female identifying skew of all the artforms, and close to three-quarters are drawn from the four most culturally active segments. However, there are clear preferences, and organisations can target audiences with optimised messaging based on segment needs.

Theatre market definition

The theatre market is defined as anyone in the culture market who has attended theatre before, or would consider doing so in the future, including a play or drama, experimental theatre, opera or operetta, cabaret or burlesque or First Peoples theatre.

4.61 million in the theatre market in 2024

	Total market %	Real figure estimates
Current	50%	1.52 million
Lapsed	31%	1.55 million
Potential	11%	538k
Not in market	9%	466k
Base size	2876	

Introduction to theatre market

Compared to the culture market average, the current theatre market:

- has the strongest female identifying skew of the 11 core artforms (56% vs 51%);
- is more likely to be part of a family household (33% vs 29%);
- less likely to experience an access barrier (19% vs 22%).

Like other artforms, theatre's current market:

- skews younger (35% vs 30%);
- completed education later (37% hold a degree vs 30%);
- are more likely to be drawn from the upper + upper-mid income brackets (28% vs 23%).
- 73% drawn from the four most culturally active segments vs 57%).

Per capita spend on arts and culture (past 4 weeks)

	Culture market average	Theatre's current market
Admission	$27.75	$47.55
Refreshments	$11.92	$20.38
Merchandise	$3.77	$5.63
Base size	2876	1428

A range of segments to target...

... but Essence, Expression, Affirmation and Stimulation are core

While there is a range of segments to target for theatre, looking at the percentage of each segment in the four market groups (current, lapsed, potential and resistant), the four most culturally active segments, Essence, Expression, Affirmation and Stimulation are the most active in the current theatre market.

Meanwhile, Enrichment and Perspective are less active in the current market and are more likely to have lapsed.

Culture Segment profile and real figure estimates for the Theatre market

Culture Segment	Total market %	Current market %	Current market real figure estimate	Lapsed market %	Lapsed market real figure estimate	Potential market %	Potential market real figure estimate
Essence	8%	10%	246k	8%	125k	4%	24k
Expression	23%	31%	792k	15%	233k	16%	84k
Affirmation	15%	18%	466k	14%	213k	16%	86k
Enrichment	13%	9%	237k	19%	287k	15%	80k
Stimulation	11%	13%	333k	11%	164k	8%	41k
Release	9%	7%	178k	11%	174k	14%	74k
Perspective	11%	6%	144k	14%	212k	14%	78k
Entertainment	10%	5%	126k	9%	143k	13%	71k
Base	2876	1428		879		305	

Plays have a sizable lapsed audience to reactivate

Of theatre's sub-artform categories, a play or drama has the largest share of the market (44% current). However, a sizable lapsed audience, an estimated 1.52 million Victorians, needs a compelling reason to engage again.

More resistance to less mainstream offers

The current markets for other theatre categories are markedly smaller than that of play or drama. While their share of the market is more modest (8%–13% current), this subsequently means there is a sizable proportion who'd consider engaging but haven't previously (potential).

For example, 11% have engaged with First Peoples theatre before (current + lapsed), yet an estimated 2.14 million Victorians (42%) are in the potential market. The relative size of these market groups for First Peoples theatre, particularly, is likely connected to provision but suggests that there is an appetite for more.

Relatively distinct markets

Looking at the crossover of current markets for Theatre sub-artform categories suggests that they are relatively distinct. One-quarter of those in the current market for a play or drama are also in the current market for the other categories, dropping to 15% for First Peoples theatre.

Theatre market penetration – including sub-artforms

	Current market %	Current market real figure estimate	Lapsed market %	Lapsed market real figure estimate	Potential market %	Potential market real figure estimate	Not in market %
Theatre	50%	2.52m	31%	1.55m	11%	538k	9%
Play or drama	44%	2.25m	30%	1.52m	11%	575k	14%
Cabaret or burlesque	13%	654k	20%	1.02m	33%	1.65m	35%
Experimental theatre	13%	653k	10%	486k	35%	1.76m	43%
Opera or operetta	12%	597k	17%	859l	26%	1.32m	45%
First Peoples Theatre	8%	382k	4%	183k	42%	2.14m	47%

Different segments are seeking different theatre experiences

Although the overall picture indicates consistency in Culture Segment breakdown, within the sub-artforms for theatre, there are clear preferences, with different segments seeking distinct experiences. While a play or drama has broader appeal, Stimulation is more open to experimental theatre or cabaret than opera and operetta. The diversity of genres within the theatre artform means that organisations that produce or show a range of work can target audiences with optimised messaging based on segment needs. For example, Essence is more literary and able to place each work in a critical and historical context. Expression seeks the personal narrative and empathises deeply with characters; they enjoy connecting with performers and playwrights (living and dead) and, above all, want to be part of an audience community. Stimulation are seeking real drama through intrigue, spectacle and surprise and appreciates the visual presentation of the work.

Potential to reach new Essence, Expression and Affirmation audiences

Opera and First Peoples theatre have a smaller share of the theatre market (12% and 8%, respectively). Interestingly, there is some cross-over between the two current markets as 70% of the current First Peoples theatre market is in the current opera or operetta market, and 45% of the current opera market is in the current market for First Peoples theatre.

Sub-artform for the Theatre market by Culture Segment with real figure estimates

Play or Drama

Culture Segment	Current market %	Current market real figure estimate	Lapsed market %	Lapsed market real figure estimate	Potential market %	Potential market real figure estimate
Essence	10%	219k	8%	127k	7%	40k
Expression	32%	727k	16%	249k	18%	104k
Affirmation	19%	419k	14%	216k	18%	102k
Enrichment	9%	206k	18%	280k	15%	87k
Stimulation	13%	290k	12%	175k	9%	50k
Release	7%	157k	10%	148k	14%	82k
Perspective	6%	130k	13%	196k	11%	63k
Entertainment	4%	97k	9%	131k	8%	47k
Base	1272		863		326	

Experimental theatre

Culture Segment	Current market %	Current market real figure estimate	Lapsed market %	Lapsed market real figure estimate	Potential market %	Potential market real figure estimate
Essence	9%	57k	15%	71k	11%	186k
Expression	47%	309k	28%	137k	27%	472k
Affirmation	16%	106k	18%	88k	23%	396k
Enrichment	2%	11k	7%	34k	8%	132k
Stimulation	16%	106k	14%	70k	13%	223k
Release	6%	42k	9%	43k	10%	167k
Perspective	1%	9k	6%	29k	6%	114k
Entertainment	2%	14k	3%	14k	4%	70k
Base	370		275		998	

Opera or operetta

Culture Segment	Current market %	Current market real figure estimate	Lapsed market %	Lapsed market real figure estimate	Potential market %	Potential market real figure estimate
Essence	9%	51k	11%	98k	11%	140k
Expression	46%	276k	21%	182k	29%	382k
Affirmation	17%	101k	23%	195k	21%	272k
Enrichment	4%	23k	14%	120k	9%	113k
Stimulation	14%	84k	10%	89k	13%	175k
Release	5%	28k	10%	82k	10%	137k
Perspective	4%	27k	6%	56k	5%	61k
Entertainment	1%	8k	4%	37k	3%	44k
Base	338		486		750	

Cabaret and burlesque

Culture Segment	Current market %	Current market real figure estimate	Lapsed market %	Lapsed market real figure estimate	Potential market %	Potential market real figure estimate
Essence	9%	60k	11%	107k	10%	173k
Expression	43%	280k	25%	258k	23%	381k
Affirmation	18%	115k	16%	167k	21%	354k
Enrichment	4%	25k	13%	136k	9%	151k
Stimulation	17%	112k	11%	107k	13%	216k
Release	6%	36k	8%	79k	12%	197k
Perspective	3%	16k	11%	109k	6%	93k
Entertainment	1%	9k	5%	51k	5%	87k
Base	370		575		936	

First Peoples theatre

Culture Segment	Current market %	Current market real figure estimate	Lapsed market %	Lapsed market real figure estimate	Potential market %	Potential market real figure estimate
Essence	7%	26k	13%	24k	13%	274k
Expression	54%	207k	31%	56k	27%	577k
Affirmation	17%	64k	17%	31k	21%	447k
Enrichment	1%	4k	5%	9k	9%	184k
Stimulation	16%	62k	17%	31k	13%	275k
Release	5%	19k	9%	16k	9%	193k
Perspective	0%	2k	8%	16k	6%	130k
Entertainment	-	0k	-	0k	3%	62k
Base	217		104		1213	

CREATIVE VICTORIA

Visual Arts market

Six in ten have engaged with visual arts in the past three years, equating to an estimated 3.04 million. The market's development lies primarily in re-engaging lapsed visitors – an estimated 1.15 million.

While visual arts attendance is relatively universal, engagement with a First Peoples art gallery or exhibition is markedly lower. However, the market is open and ready to engage with First Peoples visual arts experiences; they need the opportunity and motivation to give it a try.

While not as numerous as other segments Essence, are active visual arts engagers and core to the market. Followed closely by Expression and Stimulation.

Visual Arts market definition

The visual arts market is defined as anyone in the culture market who has engaged with visual arts before, or would consider doing so in the future, including a general art gallery or exhibition or a First Peoples art gallery or exhibition.

4.62 million in the Visual Arts market in 2024

	Total market %	Real figure estimates
Current	60%	3.04 million
Lapsed	23%	1.15 million
Potential	8%	426k
Not in market	9%	460k
Base size	2876	

Introduction to visual arts market

The current visual arts market is similar to the other artform markets in that compared to the culture market average:

- skews younger (34% aged 18–34 vs 30% overall;
- has one of the more educated markets, 39% hold a degree vs 30% overall);
- 70% are drawn from the four most culturally active segments vs 57% overall;
- less likely to have access barriers that impact arts engagement (18% vs 22%);
- 27% drawn from upper and upper-mid income brackets, significantly higher than average (23%), but at the lower end compared to other artforms.

Per capita spend on arts and culture (past 4 weeks)

	Culture market average	Visual Art's current market
Admission	$27.75	$37.60
Refreshments	$11.92	$17.14
Merchandise	$3.77	$5.11
Base size	2876	1720

Essence are core engagers for visual arts

Compared to the culture market average, the more culturally active segments are over-represented in the current visual arts market.

While not as numerous as other segments, Essence are core engagers and the most active segment in the current visual arts market, followed closely by Expression and Stimulation. Other segments, like Enrichment and Release, are relatively open to going to art galleries and exhibitions. However, they visit less frequently and are significantly more likely to have last visited over three years ago (lapsed).

At the other end of the spectrum, Entertainment is not particularly active and is significantly under-represented in the current visual arts market.

Culture Segment profile and real figure estimates for the Visual arts market

Culture Segment	Total market %	Current market %	Current market real figure estimate	Lapsed market %	Lapsed market real figure estimate	Potential market %	Potential market real figure estimate
Essence	8%	11%	322k	5%	55k	5%	22k
Expression	23%	29%	885k	15%	176k	16%	66k
Affirmation	15%	17%	518k	15%	172k	19%	80k
Enrichment	13%	12%	354k	21%	242k	15%	65k
Stimulation	11%	13%	401k	10%	110k	7%	29k
Release	9%	8%	238k	13%	148k	14%	59k
Perspective	11%	7%	225k	16%	187k	15%	64k
Entertainment	10%	3%	95k	5%	63k	10%	42k
Base	2876	1720		654		241	

CREATIVE VICTORIA

Potential to introduce audiences to First Peoples art

Attendance at an art gallery or exhibition is relatively universal, and 82% of the market has done so at some point (current + lapsed).

Meanwhile, engagement with a First Peoples art gallery or exhibition is smaller (29% have ever engaged). However, the potential market is sizable (38%), indicative of a market open to engaging but may not have had the opportunity or motivation to give it a try.

Visual Arts market penetration – including sub-artforms

	Current market %	Current market real figure estimate	Lapsed market %	Lapsed market real figure estimate	Potential market %	Potential market real figure estimate	Not in market %
Visual Arts	60%	3.04m	23%	1.15m	8%	426k	9%
Art gallery or exhibition	58%	2.96m	24%	1.20m	8%	410k	10%
First Peoples art gallery or exhibition	20%	1.01m	9%	450k	38%	1.95m	33%

Scope to differentiate elements of the offer

Expression is a highly visual, emotionally-led segment prominent in the visual arts market. The current market for a First Peoples art gallery or exhibition is particularly strong in Expression (an estimated 868k adults). However, untapped potential remains as there are an additional estimated 568k Expression in the lapsed and potential markets.

Visual arts has the scope to align elements of the offer with the needs of different segments. For example, Expression values inclusivity and believes that art should represent a wide range of voices, experiences and perspectives. They appreciate artistic expression showcasing the richness of different cultures and backgrounds, as it fosters a sense of connection and community. Quality-focused Essence views galleries as a ‘sanctuary’ offering spiritual enrichment, preferring quiet spaces for reflection. Meanwhile, adventurous Stimulation craves new perspectives and the interplay of culturally relevant ‘big ideas’. They’re looking to be challenged but to consume culture socially, making them ideal candidates for after-hours ‘salon’ style arts events.

Sub-artform for the Visual Arts market by Culture Segment with real figure estimates

Art gallery or exhibition

Culture Segment	Current market %	Current market real figure estimate	Lapsed market %	Lapsed market real figure estimate	Potential market %	Potential market real figure estimate
Essence	11%	317k	5%	60k	5%	22k
Expression	29%	868k	15%	186k	17%	68k
Affirmation	17%	512k	14%	171k	20%	83k
Enrichment	12%	342k	21%	251k	16%	67k
Stimulation	13%	383k	10%	123k	7%	29k
Release	8%	231k	13%	155k	14%	55k
Perspective	7%	218k	16%	194k	15%	60k
Entertainment	3%	89k	5%	65k	6%	24k
Base	1677		682		232	

CREATIVE VICTORIA

First Peoples art gallery or exhibition

Culture Segment	Current market %	Current market real figure estimate	Lapsed market %	Lapsed market real figure estimate	Potential market %	Potential market real figure estimate
Essence	11%	107k	10%	46k	10%	190k
Expression	41%	417k	29%	129k	23%	439k
Affirmation	17%	177k	18%	83k	20%	390k
Enrichment	7%	68k	10%	47k	12%	242k
Stimulation	14%	138k	12%	56k	13%	254k
Release	5%	54k	10%	45k	10%	198k
Perspective	3%	30k	7%	30k	9%	166k
Entertainment	2%	21k	3%	15k	4%	68k
Base	573		255		1102	

Appendix 1: Culture Segment pen portraits

Appendix 1 includes detailed pen portraits for each of the eight Culture Segments. These provide key information to help you really get to know each segment, and use the system for strategic audience development activity.

Getting to the heart of why people engage

Culture Segments is defined by people's attitudes to culture. It uses deep, sophisticated, meaningful insight into audiences and potential audiences for arts and culture.

The system is values-based. The segments have distinct mindsets, motivations and approaches to culture – so you can craft messages that will resonate, targeting them more accurately and effectively. Rather than just describing a person, for example, in demographic terms, Culture Segments is a tool you can use to influence engagement.

The system includes everyone in the culture market

Culture Segments considers everyone in the culture market, across all demographics and behaviours, and therefore helps you reach the people who you don't already have – resulting in more diverse audiences.

It includes current attenders as well as those you haven't yet reached. Using Culture Segments to understand how and why you connect with current audiences helps understand routes to reaching others.

A system designed for practical application

Culture Segments can be used on a daily basis to inform decisions, helping to put audiences at the heart of your organisation's conversations.

The system helps you target more people more accurately, engage them more deeply, build relationships, increase frequency and spend, increase satisfaction and maximise loyalty – ultimately, it is designed to help you increase sustainability and return on your efforts.

It provides a common language for different departments to think about audiences holistically – from marketing through to curating and front-of-house. It therefore drives effective audience development and reduces silo working.

Culture Segments is easily adopted: use these pen portraits as a daily ready-reckoner to always have your priority audiences in mind, tag your database records affordably, brief your media buyer, optimise your copy. The system uses a small set of Golden Questions, which can easily be included in audience surveys or databases to evaluate the success of campaigns and better understand your existing audiences.

Through embedding the system, you can analyse your brand relationships, survey and profile your audience, identify opportunities in the wider market, identify membership potential, optimise benefits to their needs, grow altruism, understand spending habits and potential, test interpretation and increase engagement, review your digital impacts, increase retail income and more.

Essence are in pursuit of self actualisation

Essence represent 8% or an estimated 399k adults in the Victorian culture market

Who are they?

As core cultural attenders Essence considers arts and culture essential to their very being. They're independent, discerning and confident. High-quality culture is their primary concern. They are the cultural connoisseurs.

Priorities

Exploration, learning, arts and culture and peak experiences. Essence is the segment most likely to say, 'I'll be the judge of that' and least likely to say 'What would you recommend?'

Essence vs the culture market average

	Essence	Current market %
Children in the household	34%	29%
Have an undergraduate degree or higher	37%	30%
Employed full time	49%	44%
Retired	12%	20%
Linguistically diverse	13%	14%
First Peoples	3%	3%
Aged 18–24	8%	8%
Aged 25–34	22%	21%
Aged 35–44	22%	19%
Aged 45–54	18%	15%
Aged 55–64	16%	16%
Aged 65+	13%	20%

What role does culture play?

Culture is an essential part of their lives

This segment is called Essence because culture is essential to their identity. They're the one segment for whom the arts aren't just something they do; it's a fundamental part of who they are. It's the very fibre of their being. If you were to take the arts away from them, it would be like taking oxygen away: they can't imagine their life without it.

The arts are a way of exploring the world and reflecting on meaning, as well as providing deep emotional connections. They will experience it with or without others.

38% have personally spent money on arts and cultural events and places (32% culture market average).

Of the eight segments, Essence have...

The third highest spend on admission

The fourth highest spend on food & drink at cultural events or venues

The second highest spend of merchandise

Essence are more interested in...

Art gallery

Play or drama

Museums

Literature event

Multi arts festival

... and less interested in

Contemporary music festival

Cabaret or burlesque

Fashion show

Top Tip

None of us wants to put Essence off – they are a small but core arts audience. Be assured, they neither attend because of the marketing nor stay away if they don't like it. Make sure the facts are available but it is unlikely they will read the body text. They are driven by their own agenda and quickly decide what is worthy of their interest. So, use marketing copy to encourage less confident and knowledgeable audiences.

How do they approach arts and culture?

Essence are typically confident, experienced and knowledgeable. They've seen lots of other art before and understand how it works. It's important that organisations recognise this; Essence won't need much explanation about a show or event in the copy and can perceive too much explanation as 'dumbing down'. Essence have a deep appreciation for the way the art is made, and they're able to access the underlying ideas and context.

Where Essence's motivations for engaging differ most from the market average

	Essence	Total market %
Expand my knowledge	62%	47%
See beautiful things in an attractive setting	59%	43%
A break from everyday life and recharge	56%	43%
Inspire my imagination or creativity	51%	29%
Reflect and contemplate	37%	23%

How to reach them

As arts and culture is at the very heart of what they do, they're highly proactive in keeping themselves up to date about cultural events. That being said, this doesn't mean they turn to marketing for recommendations on what to choose. They almost make a virtue out of not being influenced. They might even quite enjoy not liking something everybody else likes.

How do Essence choose?

When choosing what to see or do, Essence's primary concern is quality. Based on the credentials of the creative team and approach, they'll discern for themselves whether something is or isn't up to their required standards. Essence are fiercely independent, and as such, may not be persuaded to see something based on marketing alone – in fact, they view marketing as something for other people, not for them.

Key messages:

The programming team has credentials

It's seriously high quality

It has depth, substance and intellectual rigour

Not mainstream entertainment

Top five ways Essence finds out about arts and cultural activities in Victoria

	Essence	Total market %
Facebook	39%	33%
Personal recommendation	38%	21%
Free to air television	34%	34%
Online news site or app	26%	18%
Instagram	24%	21%

67% of members of the Essence segment spent time on social media in a typical week.

Of those who do...	Essence
Facebook	84%
YouTube	64%
Instagram	63%
Spotify	44%
TikTok	27%

How Essence engage with the arts online:

It will only ever be an extra: a wrap-around enhancement.

The internet is a rich, extensive resource that feeds Essence's thirst for knowledge and learning. A means to an end, they use it to research, extend their knowledge and keep up with current affairs.

Essence use the internet to support their culture habit but not as an alternative form of distribution. They'll engage with video content to understand more about a show / exhibition but it won't replace live interaction. So they are using online resources to plan / research their real-world visits.

Building relationships with them

Essence are not natural joiners in that they don't feel a need to be communally engaged. If they do join a membership program, they will do so to access the benefits the program offers, such as priority booking or early seat selection. It may be because of this, that Essence are more likely than average to be an active member of a cultural organisation.

14% are an active member / subscriber or friend of an arts or cultural organisation, compared to 9% for the culture market overall.

17% have donated money to an arts or cultural organisation in the past 3 years, compared to 12% for the culture market overall.

Essence is one of the segments most likely to have ever donated, reflecting the importance of arts and culture in their lives.

Top reasons for donating money to the arts

	Essence	Total market %
Support the organisation	47%	43%
Contribute to something I'm personally interested in	47%	41%
Make a difference	46%	41%
Be part of something bigger than myself	27%	22%
Be true to my philosophical values	21%	14%

How do you develop them

Because of the major role it plays in their lives, Essence are highly proactive and will actively seek out arts and culture. Marketers won't need to do much to reach this group – as long as the organisation has a reputation for high quality programming, Essence will find it on their own. When writing copy, ensure the technical details are present and avoid 'marketing speak' as this may give them the wrong impression. Signposts of quality, sophistication and credentials will increase their likelihood of engagement.

Key focuses:

Quality and sophistication

Acknowledging their discerning interests

Opportunities for taste development and challenge

Expression seeking community + connection

Expression represent 23% or an estimated 1.16 million adults in the Victorian culture market

Who are they?

Creative Expression see culture as a way of broadening horizons and expressing themselves. They are community-minded and like to be sure everyone can enjoy the benefits of arts and culture. They are the ‘people people’.

Priorities

Living life to the full, community and family, arts, crafts, culture, creativity and nature. Expression is the segment most likely to say, ‘Art is for everyone’ and least likely to say ‘But what’s in it for me?’

Expression vs the culture market average

	Expression	Current market %
Children in the household	31%	29%
Have an undergraduate degree or higher	32%	30%
Employed full time	51%	44%
Retired	11%	20%
Linguistically diverse	18%	14%
First Peoples	4%	3%
Aged 18–24	10%	8%
Aged 25–34	27%	21%
Aged 35–44	22%	19%
Aged 45–54	15%	15%
Aged 55–64	14%	16%
Aged 65+	12%	20%

What role does culture play?

Culture is a communal experience

Culture is not a private thing for Expression; it's a communal thing. A good experience for Expression is when others are also having a great time; they thrive off this rather than keeping the arts a secret.

They want the masses to go and enjoy things – to share them and reflect on them together. Because of this, they're more likely to gravitate towards free events as a broader group of people will be able to engage.

51% have personally spent money on arts and cultural events and places (32% culture market average).

Of the eight segments, Expression have...

The highest spend on admission

The highest spend on food & drink at cultural events or venues

The highest spend of merchandise

Expression are more interested in...

Play or drama

Applied arts

Design

Art gallery

Music festival

... and less interested in

Cabaret or burlesque

Opera or operetta

Top Tip

Expression are often visually driven. Organisations must make sure marketing has beautiful, natural images. Being ‘people people’, they also like to see close-up faces of artists and a range of people in all their diversity. Organisations that are doing something that promotes egalitarianism, access, and democracy command more of their support.

How do they approach arts and culture?

This is the segment that makes the least distinction between professional and amateur art. They’ll absolutely appreciate the excellence of the professional and think it’s wonderful. But they’re not disdainful of community or amateur art – as talent comes in many forms. In fact, they’d love an opportunity to be hands-on themselves, be it meeting makers or expressing their creative side by making something.

Where Expression’s motivations for engaging differ most from the market average

	Expression	Total market %
See beautiful things in an attractive setting	54%	43%
Be wowed or amazed	49%	39%
Be part of something with others	43%	30%
Inspire my imagination or creativity	41%	29%
To feel personally connected	33%	21%

How to reach them

Expression appreciates seeing lots of different potential access points because it allows many people to engage and shows an organisation to be open. It makes them very happy to see everybody together being part of something. Marketing needs to actively demonstrate a desire to welcome the widest possible audience.

How do Expression choose?

Expression don't like being marketed to because they want to be inside, and part of the conversation. They don't want to be advertised to because it feels too impersonal to them. They want emotional, personal connection with organisations – more like a friend. This segment is highly visual, so ensure the artwork used in any sort of collateral is bright, eye-catching and tells a story.

Key messages:

It will be immersive, emotional escapism

Everyone will enjoy a shared experience

It will be something to discuss

You'll appreciate the artistic expression – and maybe have the opportunity to express yourself

Top five ways Expression finds out about arts and cultural activities in Victoria

	Expression	Total market %
Free to air television	43%	34%
Facebook	41%	33%
Instagram	29%	21%
Radio streamed or live	26%	18%
Personal recommendation	25%	21%

73% of members of the Expression segment spent time on social media in a typical week.

Of those who do...	Expression
Facebook	86%
YouTube	69%
Instagram	68%
Spotify	49%
TikTok	37%

How Expression engage with the arts online:

Hold them closer. Curating this online community would build huge brand equity.

Expression typically have high online use and really embrace the internet as a tool for sharing experiences, networking and connecting. The internet is another equally valid way of expressing themselves creatively. They appreciate how the internet can essentially democratise culture.

Expression are looking for content that brings a subject to life: human stories, real voices, interactivity and audio-visual help deliver this.

Building relationships with them

Rather than joining for tangible benefits, Expression see membership as a way to support an organisation they love, so will respond best to messages about how their membership is helping the organisation. They'll be even more willing to join if there are social events where they can meet like-minded people.

Expression are natural networkers, and along with Essence are the segment most likely to be a member of an arts, culture or heritage organisation.

17% are an active member / subscriber or friend of an arts or cultural organisation, compared to 9% for the culture market overall.

23% have donated money to an arts or cultural organisation in the past 3 years, compared to 12% for the culture market overall.

Expression is naturally hard-wired to support arts organisations and after Essence are the segment most likely to have donated money or time in the past.

Top reasons for donating money to the arts

	Expression	Total market %
Support the organisation	46%	43%
Make a difference	46%	41%
Contribute to something I'm personally interested in	42%	41%
Be part of something bigger than myself	27%	22%
Feel good about myself	23%	19%

How do you develop them

Expression talk about the arts organisations they love in terms of their diversity, creativity and inclusivity. They can be wary of organisations who may appear to place quality above inclusion, so organisations need to be conscious of the way they talk about upcoming shows and events so that this group feels that everyone is welcome, not just those in the know. Ensure marketing copy highlights the human stories behind the art in a way that everyone can understand – this will appeal to Expression's human need to make emotional connections, and they'll feel everyone is welcome.

Key focuses:

Human stories behind the art

Opportunities to join in

A chance to meet like-minded people

Stimulation are all about ‘big ideas’

Stimulation represent 11% or an estimated 541k adults in the Victorian culture market

Who are they?

Stimulation are highly active and love new experiences. They’re after the big ideas and out of the ordinary experiences. They like to make their own discoveries and want to be ahead of the curve. They are the innovators.

Priorities

Enjoying life, going out, taking risks, contemporary culture, live music, food and drink. Stimulation is the segment most likely to say, ‘What’s the big idea?’ and least likely to say ‘Are you sure it’s safe?’

Stimulation vs the culture market average

	Stimulation	Current market %
Children in the household	25%	29%
Have an undergraduate degree or higher	32%	30%
Employed full time	49%	44%
Retired	14%	20%
Linguistically diverse	10%	14%
First Peoples	4%	3%
Aged 18–24	9%	8%
Aged 25–34	26%	21%
Aged 35–44	24%	19%
Aged 45–54	14%	15%
Aged 55–64	13%	16%
Aged 65+	14%	20%

What role does culture play?

New perspectives

For Stimulation, their motivation to engage with culture appears quite cerebral – it's about big ideas. These can be historical, political or societal. But they also want to do this with their friends and a beer in hand. Ultimately, they want to be moved emotionally and challenged intellectually but consume culture socially.

Stimulation are looking for new perspectives – something they haven't seen before. Or not from that angle before. Rule-breaking can be irresistible. They like colliding things that don't necessarily go together.

41% have personally spent money on arts and cultural events and places (32% culture market average).

Of the eight segments, Stimulation have...

The second highest spend on admission

The second highest spend on food & drink at cultural events or venues

The fifth highest spend of merchandise

Stimulation are more interested in...

Comedy

Contemporary music concert

Contemporary music festival

Film festivals

... and less interested in

Opera or operetta

Classical concert

Ballet or classical dance

Top Tip

Stimulation needs a clear articulation of what makes your experiences unique. They are drawn to strong, confident brands that stand out. Capture their attention by doing something bold and unexpected. Stimulation thrives on spectacle; they love happenings, like when fireworks are going off or pop-ups. They like it to be after-dark, on the roof or in the basement, starting at 10 o'clock. Create moments that make them stop, take notice and reconsider.

How do they approach arts and culture?

Stimulation wants to be the first to know, and they pride themselves on being ahead of the curve. They don't need things to have a proven track record or for others to have endorsed them. In fact, they would prefer it if they were the ones who dragged their friends along or for their friends to see them as the adviser, the person who'll tell them about something new and astonishing. This early adopter nature also means they make good brand ambassadors.

Where Stimulation's motivations for engaging differ most from the market average

	Stimulation	Total market %
Pleasant way to pass the time	51%	47%
Beautiful things in an attractive setting	49%	43%
Be wowed or amazed	47%	39%
Reflect and contemplate	32%	23%
Feel personally connected	27%	21%

How to reach them

Highly visual with a preference for short, punchy content, Stimulation want to be the first to make discoveries about arts and culture. Marketing needs to highlight the hook or the twist; the thing that makes it incredible and different and alters their view. But no spoilers please – don't give too much away. Intrigue them and spark their interest, but the 'reveal' should happen during the experience itself.

Stimulation enjoy marketing as an artform in its own right. If it's clever, or beautiful, or visual, or tech-y, or gadget-y, they'll rave about it and share it with friends. But if it misses the mark or seems behind the times, they'll also share it with everyone – but not in a good way.

How do Stimulation choose?

Events listings sites provide a route to up-to-date information and a variety of options. Curiosity means this segment proactively uses search, and as early adopters they'll experiment with smaller, newer channels to seek out interesting things to do. Social media offers these same qualities and ensures they're keeping up.

Key messages:

New, unusual, different

Like nothing you've seen before

Best kept secret – see it before everyone catches on

It offers new perspectives and shows you're in the know

Top five ways Stimulation finds out about arts and cultural activities in Victoria

	Stimulation	Total market %
Facebook	40%	33%
Instagram	30%	21%
Free to air television	30%	34%
News site or app	22%	18%
Personal recommendation	22%	21%

63% of members of the Stimulation segment spent time on social media in a typical week.

Of those who do...	Stimulation
Facebook	90%
Instagram	65%
YouTube	63%
Spotify	40%
TikTok	25%

How Stimulation engage with the arts online:

They've discovered new sources to feed their habit.

Stimulation are digitally plugged-in, early adopters with high online usage. The internet is more than a means to an end – it is a world full of adventure and possibility that they fully embrace. It also allows them to keep up-to-date in real-time, keeping tabs with new developments as they happen.

Building relationships with them

While Stimulation are as likely as average to be an active member of a cultural organisation, loyalty does not come naturally to this segment. Membership that doubles as a pass into new and extraordinary experiences may increase the loyalty of an otherwise promiscuous segment.

Stimulation are as likely as average to have volunteered for arts organisations but significantly more likely to have donated in the past.

12% are an active member / subscriber or friend of an arts or cultural organisation, compared to 9% for the culture market overall.

15% have donated money to an arts or cultural organisation in the past 3 years, compared to 12% for the culture market overall.

Stimulation is one of the segments most likely to have donated in the past three years. Only Expression and Essence are more likely to be a current donor.

Top reasons for donating money to the arts

	Stimulation	Total market %
Make a difference	40%	41%
Support the organisation	39%	43%
Contribute to something I'm personally interested in	37%	41%
To feel good about myself	21%	19%
A sense of belonging	18%	17%

How do you develop them

Alerting Stimulation to potentially interesting arts events at a sufficiently early juncture, and focusing on the new, experimental, quirky and one-off, will encourage attendance. There is little point in targeting the Stimulation segment with mainstream or blockbuster events, but letting them know about less well-known, riskier events is a good way to generate interest. Grab their attention by doing something different.

Key focuses:

Events with a quirky hook or theme

Promoting social element

Highlighting the unexpected or new perspectives

Conscientious Affirmation do the right thing

Affirmation represent 15% or an estimated 775k adults in the Victorian culture market

Who are they?

Affirmation believes that culture is an important and worthwhile activity, and makes their lives better. They make considered, measured choices and are adventurous in the arts but need assurance they've done the right thing. Nothing happens by accident.

Priorities

Personal development, doing the right thing, good value, learning and enjoyment. Affirmation is the segment most likely to say, 'It's on my bucket list' and least likely to say 'C'mon – let's just take a punt!'

Affirmation vs the culture market average

	Affirmation	Current market %
Children in the household	35%	29%
Have an undergraduate degree or higher	38%	30%
Employed full time	43%	44%
Retired	16%	20%
Linguistically diverse	17%	14%
First Peoples	2%	3%
Aged 18–24	13%	8%
Aged 25–34	23%	21%
Aged 35–44	23%	19%
Aged 45–54	11%	15%
Aged 55–64	14%	16%
Aged 65+	17%	20%

What role does culture play?

Culture is self-improving

Affirmation welcomes culture as a way of enjoying quality time with others as a means of doing something more worthwhile in their leisure time. Cultural visits are self-improving, build memories and add richness to life. Affirmation do care what others think of them and hope to be recognised as going to interesting things and places.

They will, however, be aware of other commitments that may also demand time, so don't exclusively spend their leisure time in arts and cultural activities.

34% have personally spent money on arts and cultural events and places (32% culture market average).

Of the eight segments, Affirmation have...

The fourth highest spend on admission

The third highest spend on food & drink at cultural events or venues

The sixth highest spend of merchandise

Affirmation are more interested in...

Applied arts exhibition

Art gallery

Musical theatre

Museums

... and less interested in

Country or folk music

Jazz or blues concert

Dance festival

Top Tip

Part of getting things right (and feeling in control) includes not being ripped off. This is one of the reasons culture makes the cut in their leisure choices – it does hold real value. Affirmation wants to engage with top-notch culture and, at times, will invest in a really special occasion but, on the whole, will appreciate a good deal. When Affirmation is weighing up the options, a discount or offer could just put the final tick in the ‘pros’ column.

How do they approach arts and culture?

They may have been on cultural visits as children, but for a large proportion, this won’t have been central to their family lives, and as adults, there remain lots they are keen to explore. On the one hand, they’re adventurous, wanting to try things, but on the other hand, they want to try safe things rather than biting off more than they can chew. This slight insecurity comes from the fear of getting things wrong and letting themselves down.

Where Affirmation’s motivations for engaging differ most from the market average

	Affirmation	Total market %
Spend time with friends or family	56%	50%
Expand my knowledge	52%	47%
Visit a major attraction(s)	40%	35%
Inspire my own imagination or creativity	35%	29%
Inspire a child’s / others imagination or creativity	24%	18%

How to reach them

Affirmation makes very well-researched decisions. Ultimately, they look for reinforcement that they're choosing the right thing. To do that, they need full and comprehensive details. They need plenty of endorsement and supporting evidence that a show or event is worth their time. Word-of-mouth from a trusted friend would be the ultimate. However, online user reviews, such as TripAdvisor or similar sources, will assure Affirmation that it will be worth their time.

How do Affirmation choose?

Once they have decided, they then want to be sure to have the best experience, make smart choices about seats, arrive in plenty of time to check their coat, have a drink, know how to get to their seats and so on. The devil is in the detail for Affirmation. Sending out pre-show information, either via email or text, will provide Affirmation with valuable information to plan their experience and help ease any insecurity or anxieties.

Key messages:

It will be worth your while – good value for money

It has good reviews

You'll get something out of it

It is modern and relevant (but not 'out there')

Top five ways Affirmation finds out about arts and cultural activities in Victoria

	Affirmation	Total market %
Facebook	41%	33%
Free to air television	36%	34%
Personal recommendation	27%	21%
Instagram	24%	21%
Online news site or app	23%	18%

70% of members of the Affirmation segment spent time on social media in a typical week.

Of those who do...	Affirmation
Facebook	85%
YouTube	65%
Instagram	63%
Spotify	41%
TikTok	32%

How Affirmation engage with the arts online:

Being able to try before they hazard a visit could become a key part of their visit decisions.

The internet offers several qualities that suit the Affirmation mindset: allowing them to give consideration to all options in one place; and thorough research, sense-checking and risk elimination.

If they aren't visit planning, Affirmation want to feel as though they have learnt something. But this needs to be enjoyable so online content that is too dense or academic will not capture them.

They are happy to defer to you as an authority in your area, expecting you to identify and signpost highlights for them on your website.

Building relationships with them

Membership may provide Affirmation with the opportunity to get even more value. They will initially join to gain personal benefits, but as a segment looking for ways to feel good about themselves, a membership fosters a sense of affiliation and helps them feel they are personally helping organisations they care about.

8% are an active member / subscriber or friend of an arts or cultural organisation, compared to 9% for the culture market overall.

12% have donated money to an arts or cultural organisation in the past 3 years, compared to 12% for the culture market overall.

Affirmation is as open as the market average to making a one-off donation.

Top reasons for donating money to the arts

	Affirmation	Total market %
Make a difference	42%	41%
Support the organisation	41%	43%
Contribute to something I'm personally interested in	41%	41%
Be part of something bigger than myself	24%	22%
Feel good about myself	20%	19%

How do you develop them

This segment holds untapped market potential. Affirmation is constantly shortlisting what to do with a rolling list of potential things that would be worthwhile. In reality there's a lot of stuff on the list, so they won't get around to all of it. Highlighting how organisations offer 'wholesome leisure' – something that is both fun and educational – resonates strongly with Affirmation. Conversely, they are likely to be alienated if something is positioned as too experimental or risky. This group needs a gentle, non-intimidating 'way in', for example, first-timer programming or introductory tours.

Key focuses:

Promoting learning outcomes

Wraparound offers to plan their whole experience

Early notice for events

Enrichment – though the lens of the past

Enrichment represent 13% or an estimated 675k adults in the Victorian culture market

Who are they?

Enrichment tend to be lovers of history with a respect for the past. They have established tastes and tend to veer to arts and culture that have stood the test of time and command respect. Seeing the present through the lens of the past.

Priorities

Understanding the past, home life, lifelong learning and arts & craft. Enrichment is the segment most likely to say, ‘It’s stood the test of time’ and least likely to say ‘So much better than the original.’

Enrichment vs the culture market average

	Enrichment	Current market %
Children in the household	26%	29%
Have an undergraduate degree or higher	30%	30%
Employed full time	34%	44%
Retired	33%	20%
Linguistically diverse	11%	14%
First Peoples	2%	3%
Aged 18–24	3%	8%
Aged 25–34	15%	21%
Aged 35–44	12%	19%
Aged 45–54	16%	15%
Aged 55–64	21%	16%
Aged 65+	33%	20%

What role does culture play?

Looking to the past to make sense of the world

Enrichment are drawn to arts and cultural experiences that connect with existing interests. They have reverence for the past and a value for heritage. For them, learning the origins of something heightens its worth and is enriching. They enjoy making sense of the world and appreciate how the heritage of things helps us understand how we got here.

Enrichment love to learn more about the areas they've an interest in. Cultural visits offer pleasant escapism as well as greater fulfilment within their lives.

18% have personally spent money on arts and cultural events and places (32% culture market average).

Of the eight segments, Enrichment have...

The fifth highest spend on admission

The seventh highest spend on food & drink at cultural events or venues

The third highest spend of merchandise

Enrichment are more interested in...

Film

Art gallery

Opera or operetta

Ballet or classical dance

Museum

... and less interested in

Comedy

Contemporary music festival

Film festivals

Applied arts exhibition or event

Top Tip

Enrichment are great planners and love an itinerary. As well as aiding a decision whether something is worth the time and money, they look for comprehensive information to plan their visit. They expect venue websites to have full and complete details including where to park, where to get a cup of tea and how long to allow for their visit.

How do they approach arts and culture?

Enrichment is drawn to arts and cultural experiences that connect with existing interests. While they don't all-out reject change, they also believe we shouldn't throw away everything we once cherished, so enjoy escapism and nostalgia. Their distrust of the rewriting of history also means they may be less persuaded by updated productions if there is nothing wrong with the original. They are one of the least digitally focused segments and often prefer physical collateral and programs.

Where Enrichment's motivations for engaging differ most from the market average

	Enrichment	Total market %
Enjoy being part of something with others	23%	30%
Inspire my imagination or creativity	22%	29%
Reflect and contemplate	17%	23%
Feel personally connected	14%	21%
Expand a specialist knowledge	5%	12%

How to reach them

Enrichment is inherently suspicious of gimmicks or anything that appears to be flimsy, lightweight or capricious. They don't like the idea that marketing will trick them or manipulate them into buying something. Instead, they look for plain English information that supports the quality of the product. This segment are also keen planners and will want thorough information to plan their experience.

How do Enrichment choose?

Like their appetite for culture, their media consumption is lower and narrower than the average and reflect Enrichment's tendency toward the 'tried and true'.

Due to their cautious nature, anything that can lower risk will pay off. Opportunities to try before you buy, clips or excerpts from the show and thorough information will reassure them. They are also price sensitive and often assess value for their money, wanting to know exactly what they're investing in.

Key messages:

There are familiar or classic themes or features

It offers good value for money

It will evoke a sense of nostalgia

It will be well done and enjoyable

Top five ways Enrichment finds out about arts and cultural activities in Victoria

	Enrichment	Total market %
Free to air television	32%	34%
Facebook	24%	33%
Personal recommendation	14%	21%
Radio streamed or live	14%	18%
Online news site or app	11%	18%

69% of members of the Enrichment segment spent time on social media in a typical week.

Of those who do...	Enrichment
Facebook	87%
YouTube	53%
Instagram	51%
Spotify	22%
LinkedIn	17%

How Enrichment engage with the arts online:

The convenience of home viewing is very appealing but difficult to monetise in this price-conscious segment.

The Enrichment segment has no need to be early adopters, but their online activity is catching up with others, and they can appreciate the efficiency this offers. They are more likely to engage online where there is a digital version of something they are familiar with offline.

While keen learners, they do look for atmosphere and experience online, so don't appreciate too much dense reading on a website. They find overt marketing and some 'modern' elements on websites disruptive to the experience.

Building relationships with them

Enrichment are not natural supporters and tend to be less likely to have donated or volunteered in the past or be willing to do so.

Enrichment are not looking to broaden their horizons and will remain loyal to the organisations that feel most relevant to them. Membership is a route to closer engagement by providing increased value – either monetary or through additional, rewarding expert opinion and information.

3% are an active member / subscriber or friend of an arts or cultural organisation, compared to 9% for the culture market overall.

3% have donated money to an arts or cultural organisation in the past 3 years, compared to 12% for the culture market overall.

Enrichment is one of the segments least likely to have made donation to an arts or cultural organisation and only Perspective and Entertainment are less open to doing so.

Top reasons for donating money to the arts

	Enrichment	Total market %
Support the organisation	49%	43%
Contribute to something I'm personally interested in	41%	41%
Make a difference	36%	41%
Tax deduction	13%	16%
To feel good about myself	12%	19%

How do you develop them

Depending on your offer, Enrichment may be under-represented in your audiences. Enrichment are likely to have a small number of organisations they know will cater to their needs. Reaching this segment will rely on convincing them of the personal relevance to them. Positioning events as contemporary, experimental or cutting-edge is likely to turn them off. Instead, venues need to appeal to more traditional tastes that align with their interests in history, heritage and nature.

Key focuses:

Nostalgia

Highlighting the traditional and established

Providing good value for money

Busy Release seek escape from stress

Release represent 9% or an estimated 473k adults in the Victorian culture market

Who are they?

The Release segment is looking for escape from the stresses of everyday life. For some, these conflicts may be a reality, but often, being in the Release segment is more a state of mind. They 'always feel too busy'.

Priorities

Work, home and family, relaxation and juggling commitments. Release is the segment most likely to say, 'We should do this more often' and least likely to say 'Don't worry so much – there's plenty of time.'

Release vs the culture market average

	Release	Current market %
Children in the household	32%	29%
Have an undergraduate degree or higher	28%	30%
Employed full time	43%	44%
Retired	16%	20%
Linguistically diverse	20%	14%
First Peoples	2%	3%
Aged 18–24	10%	8%
Aged 25–34	20%	21%
Aged 35–44	20%	19%
Aged 45–54	19%	15%
Aged 55–64	17%	16%
Aged 65+	15%	20%

What role does culture play?

Culture is a way to escape

Culture can be a means of staying in the loop with things that are current and contemporary. However, when day-to-day life is busy, it is easy to become switched off to this optional pastime, with other things jostling for priority. This means Release tends to veer towards more popular things.

Because they don't have much time, they're not prepared to take a risk on the one chance to go out. Due to the competing priorities in their lives, Release are not especially culturally active. Release are in the current market for most artforms at similar, or lower, levels to the market average.

24% have personally spent money on arts and cultural events and places (32% culture market average).

Of the eight segments, Release have...

The sixth highest spend on admission

The fifth highest spend on food & drink at cultural events or venues

The second lowest spend of merchandise

Release are more interested in...

Film

Museum

Cabaret and burlesque

... and less interested in

Art galleries

Musical theatre

Comedy

Jazz or blues

Top Tip

Sometimes it is easy to see why Release feels conflicting demands on their time – a busy job, children or elderly parents to care for and so on. But there are other segments who, on paper, are doing twice as many things and still trying to fit more in. This isn't a life-stage segment or about actual capacity, it is the mind-set: "When am I going to fit it in?!". It's to do with how you deal with the stresses of daily life.

How do they approach arts and culture?

Release doesn't have time to proactively look for what's on. As a result, very few things come across their radar. So they only find out about things that are 'unmissable'. Literally, you can't miss it because it's advertised everywhere. Or, more likely, someone they know points something out to them and asks if they've been. Release often uses logistics to talk themselves out of organising outings, but they aspire to go to more things and enjoy the escape and relaxation this can provide. Release feels time-poor, so make things irresistibly easy for them by reducing the effort.

Where Release's motivations for engaging differ most from the market average

	Release	Total market %
Expand my knowledge	39%	47%
Take a break from everyday life and recharge	32%	43%
Be wowed or amazed	32%	39%
Inspire my imagination or creativity	19%	29%
Pursue a personal interest	16%	24%

How to reach them

For Release, organisations should imagine they have one shot at capturing their attention. Provide all the necessary information on a silver platter, with multiple reasons to go and a hard stop call to action. They want to do things but may have been putting it off for months, so if it is only happening this week, make sure they know.

How do Release choose?

Overall, like their cultural consumption, Release engages with media less than average. This is particularly the case for mediums that require a bit more cognitive load or time, such as print or online newspapers. Highlight multiple benefits – maybe an activity to entertain the kids is also a great chance to catch up with friends (and it's guaranteed their kids will like it, too). This will help make Release feel like it really is an unmissable event, as it ticks all the boxes.

Key messages:

It will be relaxing

If you do only one thing this month, it should be this

The venue has everything you need

It will tick all the boxes for a fun time out

Top five ways Release finds out about arts and cultural activities in Victoria

	Release	Total market %
Free to air television	31%	34%
Facebook	23%	33%
Instagram	20%	21%
Personal recommendation	19%	21%
Online news site or app	17%	18%

CREATIVE VICTORIA

63% of members of the Enrichment segment spent time on social media in a typical week.

Of those who do...	Enrichment
Facebook	77%
Instagram	63%
YouTube	60%
Spotify	35%
TikTok	31%

How Release engage with the arts online:

Remote consumption suits them, as long as it's from trusted sources.

The efficiency of digital channels and in-home / on-the-go entertainment appeals to Release.

Release use online resources to plan / research their in-person visits; however, they don't have the time to refer to multiple sources so are less likely to check things out. In fact, they don't spend a lot of time looking for what's on at all. Release will find out what's on if it lands in their lap and is literally unmissable.

Building relationships with them

Release tend not to be forthcoming in support for arts and cultural institutions and are unlikely to find time to make the most of cost-saving benefits of membership. For Release, it's more about efficient transactions than becoming a close ally to the cause.

Release may not be the first port of call to build a supporter base, however, schemes that reward return at the same time as providing concierge-style services could help keep you top of mind and decrease the perceived obstacles of planning and arranging a visit.

6% are an active member / subscriber or friend of an arts or cultural organisation, compared to 9% for the culture market overall.

7% have donated money to an arts or cultural organisation in the past 3 years, compared to 12% for the culture market overall.

Release is one of the segments least likely to have made donation to or be a member of an arts or cultural organisation.

Top reasons for donating money to the arts

	Release	Total market %
Contribute to something I'm personally interested in	40%	41%
Support the organisation	30%	43%
Make a difference	29%	41%
Tax deduction	21%	16%
Be part of something bigger than myself	16%	22%

How do you develop them

There are significant numbers of Release in the cultural market who are currently not convinced that cultural engagement can sufficiently meet their needs and the effort will be worth it. They need to be reminded what they are missing out on and that time spent enjoying arts and culture is time well spent. Risk reduction is key for activating Release; they want assurances of a guaranteed good time. Affiliate marketing, list purchase and endorsements through known brands, individuals and organisations that the Release segment is already engaged with will be key to reaching them.

Key focuses:

Packaging experiences on a plate – easy to consume

Endorsements through well-recognised brands

Special offers and discounts

Perspective are happy in their bubble

Perspective represent 11% or an estimated 566k adults in the Victorian culture market

Who are they?

Perspective is very focused on a limited number of interests and has a low appetite for expanding this repertoire. They're highly self-sufficient and are driven by their desire to learn about their key interests.

Priorities

Reading, learning, personal space and the outdoors. Perspective is the segment most likely to say, 'Really, I'm fine doing my own thing' and least likely to say 'Let's go out and do something totally different.'

Perspective vs the culture market average

	Perspective	Current market %
Children in the household	16%	29%
Have an undergraduate degree or higher	18%	30%
Employed full time	32%	44%
Retired	36%	20%
Linguistically diverse	6%	14%
First Peoples	2%	3%
Aged 18–24	4%	8%
Aged 25–34	11%	21%
Aged 35–44	14%	19%
Aged 45–54	12%	15%
Aged 55–64	21%	16%
Aged 65+	37%	20%

What role does culture play?

A way to pursue their interests

Perspective tend to do things on their own terms. Going to a communal experience like a theatre, or a big, busy museum, is not Perspective's natural game. Rather, they prefer entering a private, affective, personal bubble.

They typically have a particular thing they pursue, enjoy, and are knowledgeable about. The externalisation of this is not so relevant – that it is rewarding to them is what matters.

11% have personally spent money on arts and cultural events and places (32% culture market average).

Of the eight segments, Perspective have...

The second lowest spend on admission

The lowest spend on food & drink at cultural events or venues

The lowest spend of merchandise

Perspective are more interested in...

Literature

Country or folk concert

Classical concert

... and less interested in

Play or drama

Contemporary music concert

Musical theatre

Comedy

Top Tip

Given that Perspective have a relatively small set of activities they turn to, their loyalty can be valuable to those able to win it. Membership will provide them with access under their own terms, giving them the functional benefits of flexibility and good value. They're not, however, interested in being part of something collective.

How do they approach arts and culture?

Perspective are thinkers, so it's not that they are averse to new things and ideas, rather that they already have an enthusiasm for particular subjects and want to focus their time in ways that relate. They therefore register lower levels of interest in most artforms as the artform itself will not be the pull – more the subject matter being dealt with.

Think of Perspective as a much more narrowly focused and introverted breed of Essence. They lack the ardent appetite for cultural fixes and have honed in on their personal specialist subject. They pay even less attention to what others think and are serious about their interests and confident in their choices.

Where Perspective's motivations for engaging differ most from the market average

	Perspective	Total market %
See beautiful things in an attractive setting	32%	43%
Be wowed or amazed	28%	39%
Enjoy being part of something with others	18%	30%
Inspire my imagination or creativity	16%	29%
Feel personally connected	10%	21%

How to reach them

When it comes to marketing, Perspective are the one segment that have no fear of missing out. All the other segments think there's probably something happening somewhere that they've not heard of. Perspective think they've already found it, so they're not looking.

How do Perspective choose?

Perspective are less engaged with media than the majority of the other segments. They tend to use a narrower set of information sources – perhaps are looking for deep dives into their personal passions rather than broad brush or generic days out information.

Given their focused nature, if what you're doing aligns with their pre-existing interests and ignites their passion, then they will be motivated to engage. However, they won't be influenced by messaging; it will be for them to discern its relevance to them.

Key messages:

It will be personally rewarding

It's nice to do something special occasionally

It will be interesting, engaging and spark your imagination

It will help you dive deeper into your interests

Top five ways Perspective finds out about arts and cultural activities in Victoria

	Release	Total market %
Free to air television	28%	34%
Facebook	19%	33%
Personal recommendation	12%	21%
Online news site or app	11%	18%
Radio (streamed or live)	11%	18%

57% of members of the Perspective segment spent time on social media in a typical week.

Of those who do...	Perspective
Facebook	90%
YouTube	52%
Instagram	42%
Spotify	27%
Snapchat	17%

How Perspective engage with the arts online:

They've discovered new sources to feed their habit.

Perspective are not against the idea of digital cultural engagement, which can provide an appealing self-affecting bubble to engage with their interests rather than attending in person and among the crowds.

They have the confidence and knowledge to dive in and sift for themselves, so are not intimidated by lots of text. They are very much content-led; delivery style is secondary.

Building relationships with them

Perspective tends to be self-centred and not ultimately interested in having a relationship with you. Remote is fine. They are interested in what artists do, but they don't feel a need to meet them.

Perspective are not especially interested in developing a relationship with arts organisations, and only Entertainment are less likely to be an active member of an arts, cultural or heritage organisation, to have volunteered or donated to the arts in the past three years.

6% are an active member / subscriber or friend of an arts or cultural organisation, compared to 9% for the culture market overall.

4% have donated money to an arts or cultural organisation in the past 3 years, compared to 12% for the culture market overall.

Perspective is one of the segments least likely to have ever made a donation to an arts or cultural organisation and among the least open to doing so.

Top reasons for donating money to the arts

	Perspective	Total market %
Support the organisation	53%	43%
Contribute to something I'm personally interested in	38%	41%
Make a difference	34%	41%
Be true to my values	14%	14%
A sense of belonging	14%	17%

How do you develop them

You could ignore Perspective for a life time and they wouldn't realise. They view it as their business if they decide to engage with you – not yours to try and persuade them.

Therefore, on the most part they don't make a priority segment to actively target as the return on investment is less rewarding than for other segments. Those in the market for what you do, are likely to attend – providing you have sufficient profile and people can find out what's on. Others will come on their own terms and you may pick them up along the way.

Key focuses:

Respecting their individuality and encouraging exploration

Tapping into existing interests

Fun loving Entertainment

Perspective represent 10% or an estimated 493k adults in the Victorian culture market

Who are they?

Entertainment tends to see arts and culture as very much on the periphery of their lives. Leisure time is for fun, and this segment is looking for entertainment and escapism. Enjoys mainstream entertainment.

Priorities

Home and pub, celebrity, sports,thrill & spectacle, close to home. Entertainment is the segment most likely to say, ‘Go on – entertain me’ and least likely to say ‘Let’s find something new – with plenty of food for thought.’

Entertainment vs the culture market average

	Entertainment	Current market %
Children in the household	31%	29%
Have an undergraduate degree or higher	18%	30%
Employed full time	42%	44%
Retired	22%	20%
Linguistically diverse	9%	14%
First Peoples	2%	3%
Aged 18–24	8%	8%
Aged 25–34	23%	21%
Aged 35–44	17%	19%
Aged 45–54	14%	15%
Aged 55–64	13%	16%
Aged 65+	25%	20%

What role does culture play?

Not a priority for their leisure time

If asked, Entertainment would probably say culture doesn't really play a role in their lives. They don't see themselves as cultural attenders or arts goers as such. But they do go out – sometimes this could include a blockbuster exhibition or a popular show.

The emphasis is on having fun with other people rather than intellectual pursuit and the meaning behind the art.

16% have personally spent money on arts and cultural events and places (32% culture market average).

Of the eight segments, Entertainment have...

The lowest spend on admission

The sixth highest spend on food & drink at cultural events or venues

The fourth highest spend of merchandise

Entertainment are more interested in...

Film

Contemporary music

Comedy

... and less interested in

Art galleries

Applied arts

Museums

Top Tip

This is not a segment to target for membership or support. Instead, try to increase spending while they're onsite through catering, retail and added extras. At the same time, help them make a real day or night of it.

How do they approach arts and culture?

Entertainment are the one segment who don't have some kind of taxonomy of culture. They don't reflect on all the different artform categories they could be choosing between – they just see it all as leisure. It's the same as shopping, going to the beach, going for a meal, going ten-pin bowling. Therefore, culture and the arts are literally competing against everything.

Where Entertainment's motivations for engaging differ most from the market average

	Entertainment	Total market %
Pleasant way to pass the time	28%	47%
Expand my own knowledge	21%	47%
Be wowed or amazed	20%	39%
See beautiful things in an attractive setting	14%	43%
Inspire my imagination or creativity	7%	29%

How to reach them

Entertainment prefers to stick with the tried and tested, and they view popularity and celebrity casting an endorsement of quality. Therefore, they only try things which have established popular currency and have little interest in engaging with what could be considered specialist or niche.

How do Entertainment choose?

This segment likes marketing and advertising – it's a useful way to get information. They can tell a lot from marketing – a big, expensive billboard campaign, for example, is an indicator that something has high production values.

This segment does not actively seek out culture online. However, social media channels can be a space where it finds them. Entertainment are more likely to stumble upon events through these platforms than find them elsewhere online. If your offering guarantees entertainment, they will recognise it.

Key messages:

It's popular

There's a celebrity in it

It will be fun and enjoyable for everyone

It's a great night out and an 'easy sell' to others

Top five ways Entertainment finds out about arts and cultural activities in Victoria

	Entertainment	Total market %
Free to air television	31%	34%
Facebook	24%	33%
Instagram	13%	21%
YouTube	12%	13%
Radio (streamed or live)	10%	18%

62% of members of the Perspective segment spent time on social media in a typical week.

Of those who do...	Perspective
Facebook	90%
YouTube	57%
Instagram	57%
Spotify	41%
Snapchat	32%

How Entertainment engage with the arts online:

Seeking highlights – will only connect if our content gets on the populist radar.

For Entertainment, online is just another provider of entertainment. Fill your website with social proof to convince them this is worthwhile; state your popularity and evidence of mass endorsement to convince them.

Building relationships with them

Entertainment are not natural supporters and have comparatively low propensity to donate or volunteer.

Entertainment very rarely invest in a supportive way, and therefore should not be targeted for membership. They don't see culture as contributing to the community or society at large. Benefits-driven transactional membership schemes aren't going to work either – purely because they wouldn't make much use of it so it's unlikely to feel relevant or worth it.

2% are an active member / subscriber or friend of an arts or cultural organisation, compared to 9% for the culture market overall.

3% have donated money to an arts or cultural organisation in the past 3 years, compared to 12% for the culture market overall.

Entertainment is the segment least likely to have ever made donation to an arts or cultural organisation and the least open to doing so.

Top reasons for donating money to the arts

	Entertainment	Total market %
Support the organisation	38%	43%
Make a difference	27%	41%
Tax deduction	25%	16%
Contribute to something I'm personally interested in	19%	41%
Show people I care about the arts	18%	17%

How do you develop them

The Entertainment segment is only willing to spend on leisure and recreation if they believe it will meet all of their needs. The deciding factors are most likely to be around 'will it be entertaining?', 'do the facilities meet our needs?' - fairly simple hygiene factors. While they may not see value in the arts and culture per se, the right type of event has the potential to provide exactly what they want – primarily escapism and thrill. They are heavily influenced by advertising via mainstream media. 'Culture' needs to be downplayed in the marketing, with messaging emphasising the 'must-see', 'thrill' and 'blockbuster' parts of the offer.

Key focuses:

Mainstream through TV, sports and celebrity

One-off, must-see events

Promoting escapism and excitement

Research parameters

This study was carried out for Creative Victoria by Morris Hargreaves McIntyre. It was commissioned in April 2024.

Target group for the research The culture market in Victoria, Australia.

Date of fieldwork: 06–29 June 2024. Fieldwork for the 2013 study was conducted between 24 October and 24 November 2013, and the 2019 study between 11 April and 13 May 2019.

Data collection method Respondents were recruited by PureProfile. In order to qualify, respondents had to be aged 18 or over and live in Victoria. Responses were collected online.

Weighting procedures Responses were weighted to be representative of the population; based on Census data. Data was weighted according to age band, gender, educational attainment and location.

Sample size 2,876 (intrastate). Initial regional sampling was based on the 2021 Census. Any imbalance was corrected post-collection, with weighting methods applied to match the demographic breakdown of the population.

Population estimates: For all three editions of Audience Atlas data cited in this report, real figure estimates have been generated using population estimates released by the Australian Bureau of Statistics. The source for this data can be found here: https://tinyurl.com/nhbpzt7m. Please note that we deduct children, those not in the culture market and those in areas 'outside Victoria' 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 Victorian culture market has a confidence interval (margin of error) of +/-1.83% at 50% (ie, where the result is 50%, the actual result may fall between 48.17% and 51.83%).

Results based on sub-groups Where results are based on sub-groups of respondents, this is clearly indicated in the body of the report.

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Morris Hargreaves McIntyre is an international consultancy. We work with charities, heritage and cultural organisations of all sizes.

We're fascinated by what makes people and organisations tick. Our strategic thinking, insight and creativity transform how our clients see their world.

Our clients use our work to connect more people, more deeply, with their causes, fuelling their success.