Audience Atlas Victoria

Exploring the market for culture in Victoria

April 2014
Audience Atlas is fast becoming the international benchmark for audience market evaluation. Morris Hargreaves McIntyre launched Audience Atlas in the UK in 2011 and have since produced standardised, benchmarkable studies in Australia, Norway and key US markets such as New York and Chicago.

With our partners, Creative New Zealand and The British Council, there have been further studies in New Zealand, Brazil, Turkey, Germany and Israel, and now in partnership with Arts Victoria – the first state Audience Atlas.

Audience Atlas is a unique, international, databank of audiences for arts and culture. The data is collected with robust samples and is carefully weighted using local census data to ensure accuracy. It includes detailed information about audience demographics, behaviours, motivations and attitudes which enables us to accurately determine current, lapsed and potential market sizes for art forms and genres as well as individual organisations covered by the study. The study also has Morris Hargreaves McIntyre’s proprietary segmentation system, Culture Segments – rapidly becoming the international industry standard for cultural audience segmentation – built in, which gives even greater insight into audiences’ relationship with arts and culture, their values, propensity to give time and money, spend on cultural activities and even media habits. Most importantly it gives us greater insight into how to reach them, and what to tell them when we do.

Our partnership with Arts Victoria is breaking new ground with the most detailed Audience Atlas study undertaken anywhere in the world. The sample of almost 4,000 participants from across the State of Victoria means we have been able to delve deeper than ever before and provide accurate segmentation profiles for 60 organisations and venues; far more than we have been able to do in any single region before.

The potential for arts and cultural organisations and venues practising in Victoria is huge and this study will provide answers to some fundamental questions we must ask when developing our audiences. How big is the market? How much of it do we have? How much potential is there? How do we reach that potential? What should we say to them when we do?

The information in this report is the foundation for a new way of thinking about your audiences and we at Morris Hargreaves McIntyre are excited about the opportunities it creates for the arts and cultural sector in Victoria.

Cover image: Snuff Puppets at Big West Festival 2011. Photographer: Carla Gottgens
Audience Atlas Victoria maps out in detail the profile of the culture market in Victoria, examining not only demographic composition, but also attitudes, motivations, and behaviour.

Broken down by both artform and organisation, this report not only examines who is currently going to arts and culture events, it measures the lapsed and potential market to provide detailed audience insight. It helps you set realistic targets by identifying potential markets and partner organisations, providing powerful data for the sector.

It supports a deeper understanding of your market using data that’s rich, practical, and powerful.
How to read this report

This report examines the Victorian culture market (broken down by both region and artform), as well as examining the profile of each of the Culture Segments. National and state findings (compared to research conducted in 2011) and individual organisations’ profiles are reported on separately in Appendices 1 and 2.

Key terms

The report uses a number of key terms to describe the market throughout this report:

**Recent market** — people who have visited or attended the organisation / artform in the past 12 months.

**Current market** — people who have visited or attended the organisation / artform in the past three years. Note this includes the recent market.

**Lapsed market** — people who have visited or attended the organisation / artform at some point in their lives, but not in the past three years.

**Potential market** — people who have never visited or attended the organisation / artform, but have expressed an interest in doing so.

**Ever market** — everyone that has ever visited or attended an organisation / artform (and is the sum of the recent, current and lapsed markets).

**Culture Segments Pen Portraits key terms**

In the Pen Portraits, we have broadly classified publications into the following categories:

- **Tabloid** — The Herald Sun, the Sunday Herald Sun, MX
- **Regional paper (free or paid)** — Any free or paid regional or local papers
- **Magazines** — TV listings magazines, news or current affairs magazines, gossip or celebrity magazines, fashion/lifestyle/beauty magazines, home or gardening magazines, music or film magazines, computing or technology magazines, motoring or motorcycling magazines, men’s lifestyle magazines, gay or lesbian magazines, sports magazines, street press or other types of magazines.

Technical interpretation

Figures have been rounded throughout this report. In some instances this will mean that, for example, pie charts will not add to 100% due to rounding.
4,031,529 are in Victoria’s culture market

The current market for arts and culture in Victoria is large, with more than 9 in 10 adults stating that they have been to at least one cultural event or place within the past 3 years.

This market spends $421.5 million each month on cultural activities, totalling $5.1 billion per year.

Victorian’s support for the arts is also seen through their memberships, with 44% belonging to an arts and culture organisation, as well as through the 60% who donate money to arts, cultural or heritage organisations during visits and the 17% who currently volunteer their time.

Regional breakdown of Victoria’s culture market

94% of the adult (16+) population in Victoria are in the market for arts, culture and heritage 4,031,529 individuals

Victoria is a culturally active state

4.03 million people, or 94% of adults in Victoria (defined as those aged 16 and over) are in the current market for arts, culture and heritage. That is, they have attended at least one cultural event or site within the past three years. Of this population, 74% live in Melbourne while the remaining 26% live elsewhere in Victoria.
The demographic profile of the Victorian culture market

The Victorian culture market is made up of slightly more females than males (52% compared to 48%) and just over a quarter of this market is comprised of families that have children under the age of 16 living at home (26%).

The age distribution of Victoria is relatively normally distributed, with adults in their 50s making up nearly a third (29%) of the culture market, and adults in their 30s making up the second largest age group (21%).

Over a third of the culture market (38%) hold a university degree or higher, with another 30% holding a certificate / diploma or technical qualification, making this market relatively well-educated. Accordingly, a third of this market are in paid full-time employment with 19% employed part-time.

**Employment status and income of the Victorian culture market**

- 33% are in full-time paid employment
- 19% are in part-time paid employment
- 6% are self-employed
- 5% are unemployed
- 19% are retired
- 10% have home duties
- 7% are students
- 2% prefer not to say

- 29% earn under $20,800
- 38% earn between $20,800 – $65,000
- 26% earn more than $65,000
- 7% are not earning an income
- 7% are not earning an income

**Gender breakdown of Victoria’s culture market**

- 52% females
- 48% males

**Age breakdown of Victoria’s culture market**

- 16–19: 4%
- 20–29: 16%
- 30–39: 21%
- 40–49: 18%
- 50–59: 29%
- 60–69: 16%
- 70–79: 7%
- 80+: 1%
The Victorian market spends $5.1 billion per year on culture

The culture market in Victoria spends an average of $104.55 per person each month on cultural activities. Nearly half (48%) of this is on admission tickets, and nearly a quarter (24%) on food and drinks purchased at cultural events or places. In total, this equates to $421.5 million spent on arts, culture and heritage each month, or $5.1 billion each year.

Average monthly cultural spend

<table>
<thead>
<tr>
<th>State</th>
<th>Monthly cultural spend per person</th>
</tr>
</thead>
<tbody>
<tr>
<td>Admissions</td>
<td>$50.36</td>
</tr>
<tr>
<td>Food and drink at cultural events or places</td>
<td>$24.65</td>
</tr>
<tr>
<td>Transport / travel to cultural events or places</td>
<td>$19.88</td>
</tr>
<tr>
<td>Souvenirs / programs</td>
<td>$9.66</td>
</tr>
<tr>
<td>Total expenditure</td>
<td>$104.55</td>
</tr>
</tbody>
</table>

As predicted, nearly half (47%) of the Victorian culture market are likely to spend less on arts and culture in the next 12 months. 17% of the culture market don’t know how their spend will change in the next 12 months and 17% of the culture market are likely to spend more on arts and culture in the next 12 months. 47% of the culture market are likely to spend the same amount on arts and culture in the next 12 months.

17% of the culture market don’t know how their spend will change in the next 12 months
19% of the culture market are likely to spend less on arts and culture in the next 12 months
17% of the culture market are likely to spend more on arts and culture in the next 12 months
47% of the culture market are likely to spend the same amount on arts and culture in the next 12 months

1.3 million are likely to volunteer their time to an arts, cultural or heritage organisation in the future

Nearly a fifth of the Victorian culture market have volunteered their time to help an arts, cultural or heritage organisation (17%).

As predicted, 10% of the culture market reported being very likely to volunteer their time, with a further 22% reporting that it would be quite likely. This equates to 1.3 million people in Victoria who are likely to volunteer their time in the future to an arts, cultural or heritage organisation.

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Victoria’s support for the arts

Support for the arts is seen in a number of ways. In addition to transactional expenditure, support is also seen in activities such as membership and giving money and time.

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2.4 million donate money to the arts

60% of the Victorian culture market donate money to the arts, with 9% doing so on a regular basis and over a quarter (26%) on a more sporadic basis.

In addition to donating during visits to galleries, museums, exhibitions or heritage sites, people also reported donating to the arts in other ways. Specifically:

- **18%** donate to the arts through fundraising events
- **5%** donate to the arts in response to fundraising letters and emails
- **4%** donate to the arts through crowdfunding or microfunding initiatives, usually online through sites like Pozible, Kickstarter and Kiva
- **1.8 million are members of an arts or culture organisation**

Nearly half of the Victorian culture market (44%) are members of an arts or culture organisation.

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### Donation behaviour of the culture market in Victoria

#### By standing order
2% of the culture market donate by standing order

#### Never
42% never donate money to arts and culture

#### Rarely
25% rarely donate money when they visit a gallery, museum, exhibition or heritage site

#### Sometimes
26% sometimes donate money when they visit a gallery, museum, exhibition or heritage site

#### Always
7% of the culture market donate money every time they visit a gallery, museum, exhibition or heritage site

#### How often do you donate to arts and culture?

- **37%** are members of their local library
- **6%** are members of their state or national library
- **5%** are members of a museum
- **5%** are members of a theatre or theatre company
- **4%** are members of an art gallery
- **2%** are members of an orchestra or opera company
Regional disparities in the culture market

Differences across Victoria’s regions highlight the idiosyncrasy of the culture market. **Melbourne has a higher proportion of the more active Culture Segments**, for instance, and has greater levels of engagement across artforms compared to other regions.

The **Melbourne culture market also anticipates spending more** in the next 12 months, while those regions outside of Melbourne are more likely to anticipate spending less. They are, however, **more likely to volunteer** their time, particularly in Shepparton and Hume. Propensity to donate is also particularly pronounced in this region, as well as in Inner Melbourne.

**Melbourne has a greater proportion of the more culturally-active segments**

While many of the Culture Segments are present in broadly similar proportions across Victoria, there are a few marked differences within the State. In all areas Expression was the largest segment, typically accounting for around one in five of the market, but increasing to a quarter in Melbourne Inner.

Stimulation and Affirmation were the next two largest segments in the State as a whole, accounting for 16% and 15% of respondents respectively. However, when areas outside Melbourne are viewed in isolation Perspective forms the second largest segment (14%), followed by Stimulation (14%) and Affirmation (13%). In Melbourne, Perspective accounted for 8% of respondents, and was the second smallest segment after Entertainment.
These differences are likely to reflect demographic patterns to a large extent. Perspective is less likely to be found among the younger-than-average demographic found in Melbourne.

**Regional disparities in anticipated future spend on arts and culture**

Across the State, around half of respondents (47%) didn’t anticipate any change in their spending on arts and culture. A further 17% didn’t know if their spending would change, and this figure was higher in the areas outside Melbourne (20%).

Across the State, slightly more people anticipated spending less (19%) than more (17%). In Melbourne, this was split almost equally, with a slightly higher proportion anticipating a higher spend (19% compared with 18%). In the rest of the State, only 13% anticipated spending more compared with 22% spending less.

In Melbourne Inner, over a quarter of respondents (27%) anticipated spending more in the coming 12 months, more than twice the percentage that said they would spend less. These respondents were also the most certain about future spending, with only 10% saying...
they didn’t know. Other parts of the city had a pattern more like the rest of the State, with 23% of those in Melbourne South East and the Mornington Peninsula anticipating spending less compared with just 13% spending more.

A higher level of volunteering outside of Melbourne

Volunteering for arts or cultural organisations was highest outside Melbourne, with 20% of regional residents having volunteered at some time in the past compared with 16% in the State capital.

Despite this, Melbourne Inner had the highest proportion of volunteers, with 24% having done so at some time in the past. Melbourne Inner also had one of the highest proportions of people who had volunteered in the past 12 months (10%) and the highest proportion of people who were very likely to volunteer in the future (15%).
Melbourne South East and the Mornington Peninsula had the lowest proportion of arts and culture volunteers, with just 11% ever having done so.

Residents of Melbourne were slightly more positive than average about their likelihood to volunteer in the future, with 33% likely to do so compared to 30% of those outside of the city. However, this figure was again swayed by a high proportion in Melbourne Inner (40%).

### Relatively consistent levels of donating across the State

Typically around 58% of people across the State donated to the arts and culture at some time, and this was broadly consistent across most of the State. The highest proportion was in Shepparton and Hume where 69% donated, followed by Melbourne Inner at 63%.

By far the most common method of donation was at a site during a visit, and only 2% on average donated by standing order. Although the proportion donating by standing order in Melbourne Inner was twice as high as average, it was still small (4%).

An average of 7% donated every time they visited a site, and this ranged from 3% in Latrobe and Gippsland to 9% in Ballarat and Bendigo, Shepparton and Hume, and Melbourne Inner.

Around half of people said they donated either ‘sometimes’ or ‘rarely’ on site visits, and they were split relatively equally between the two. There was no clear regional pattern across the State. However, it may be that the frequency of donating,
in some cases, is linked to the frequency of visits to arts, cultural and heritage sites.

A separate question was asked about alternative ways of donating – such as in response to letters and emails or at fundraising events. Residents of Melbourne were twice as likely, as those living elsewhere in the State, to report having donated in this way (6%). They were also significantly more likely to have donated via Crowdfunding / Microfunding (5% compared to 1%) although the proportion was still small.

**Melbourne residents are more likely to have engaged in a range of artforms**

Residents in Melbourne were more likely than those in the rest of Victoria to have attended most artforms, with Melbourne Inner in particular having a consistently higher proportion of residents in the ever market for most artforms tested.

Overall, those in the culture market in Melbourne are more likely to have engaged in most artforms compared to those in Victoria as a whole, especially in less traditional art forms such as digital or video art and experimental theatre.

While people from across Victoria are equally likely to have been to live rock or pop events, engagement in other forms of music – such as classical or jazz – is greater in Melbourne.

The exception is craft exhibitions, which is the only area where the regions outside of Melbourne have more visitor experience than the capital.

When asked to include the types of art and culture they would be interested in experiencing, the proportion of people increased by a
disproportionately large number in areas outside Melbourne. For example, the proportion of people in Shepparton and Hume who had ever visited experimental theatre was 16%, but when asked if they were interested the figure trebled to 48%. That figure is still low compared with the State average of 55%, demonstrating that even in areas with relatively low levels of interest there can still be considerable potential demand.
Segmenting the Victorian culture market

**Culture Segments** is a universal, sector-specific segmentation system for arts, culture and heritage organisations.

The principle objective of Culture Segments is to provide you with a shared language for understanding audiences, with a view to targeting them more accurately, engaging them more deeply and building stronger relationships.

It helps arts organisations understand each segment’s needs, allowing them to design and select appropriate programming, carefully-judged combinations of products and services, make bespoke offers and transmit differentiated messaging.

Culture Segments helps you profile current and potential markets and identify opportunities for growth. By understanding more about different audiences - why they attend, what their expectations are, their core values and what needs they have - you can make confident, informed strategic decisions.
How to read this section

Comparisons
We have made comparisons throughout these pen portraits to the culture market average, so where a segment is described as significantly more or less likely to engage in a certain behaviour or hold a certain attitude, this is against the culture market average or, in other words, the average of all Culture Segments.

Supporting Data Tables
Demographic averages can be found in Appendix 2: Supplementary Demographic Tables, while further information about the media consumption of each culture segment can be found in Appendix 4: Supplementary Media Tables by Culture Segment.
The Essence segment tends to be well-educated professionals who are highly active cultural consumers and creators. They are leaders rather than followers, are confident in their own tastes, and will act spontaneously according to their mood.

682,410 people in Victoria have children under 16 years old at home.

Attitudes and life priorities
EXPLORING
ART & CULTURE
SELF DEVELOPMENT
LIFELONG LEARNERS
EXPERIENCE OVER MATERIAL GOODS
ADVENTURES

DISCERNING
SPONTANEOUS
INDEPENDENT
SOPHISTICATED
Culture is a hugely important part of life for members of the Essence segment. They are the most highly culturally engaged segments and invest the most in actively pursuing their eclectic tastes. Culture is something they can experience with or without others. Rather than simply being a social activity or a form of entertainment, their cultural consumption is a source of self-fulfilment and change; a means for experiencing life.

They are inner-directed, sophisticated and confident. What other people think is of little importance and they actively avoid the mainstream.

**Average annual spend**

$1,800

**Average monthly cultural spend**

- $73.37 on admission / tickets
- $33.95 on food and drink
- $32.91 on transport to the event
- $12.55 on souvenirs or programmes

**Cultural behaviour**

**Consumption and creation in the past 12 months**

More likely to have visited or done:
- Art galleries
- Museums
- Independent films
- Public libraries
- Live music events
- Theatre
- The coast or seaside
- Interesting cities
- Bought a novel / book
- Played an instrument
- Created visual arts
- Written poetry or prose

Less likely to have visited or done:
- Blockbuster or Hollywood films
- Theme parks
- Adventure sport
- Experimental theatre
- Opera or operetta

**16.4 average annual frequency of attendance**

**Artform attendance in Victoria**

Essence’s appetite for culture is highlighted in their artform attendance. More active than average across all artforms, their engagement with visual and performing arts is particularly noticeable.

<table>
<thead>
<tr>
<th>Artform</th>
<th>Ever</th>
<th>Recent (past 12 months)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Museums</td>
<td>69%</td>
<td>93%</td>
</tr>
<tr>
<td>Commercial theatre</td>
<td>52%</td>
<td>81%</td>
</tr>
<tr>
<td>Music</td>
<td>69%</td>
<td>71%</td>
</tr>
<tr>
<td>Visual arts</td>
<td>54%</td>
<td>67%</td>
</tr>
<tr>
<td>Library</td>
<td>38%</td>
<td>66%</td>
</tr>
<tr>
<td>Festivals</td>
<td>37%</td>
<td>60%</td>
</tr>
<tr>
<td>Theatre</td>
<td>26%</td>
<td>45%</td>
</tr>
<tr>
<td>Dance</td>
<td>14%</td>
<td>32%</td>
</tr>
<tr>
<td>Multi-art</td>
<td>11%</td>
<td>25%</td>
</tr>
<tr>
<td>Literature</td>
<td>6%</td>
<td>9%</td>
</tr>
</tbody>
</table>

**Average annual spend**

$1,800

**Recent (past 12 months)**

**Ever**
Essence are the most likely of all segments to have visited one or more venues or organisations in the past three years

Highlighting their adventurous side, and quest for quality visual and performing arts, Essence are significantly more likely than average to have recently visited La Mama, Australian Centre for Contemporary Art (ACCA) and, although the majority have yet to visit, they express particular interest in organisations such as Geelong Performing Arts Centre, Theatre Works, Wangaratta Jazz Festival and the Museum of Old and New Art in Tasmania.

Only 11% of Essence had not visited any of the venues or organisations tested within the past three years

1 in 4 Essence have volunteered at a cultural organisation in the past

Essence are significantly more likely to have volunteered time or financial support than average and they are one of the most open to doing so in the future.

Compared to most other segments they donate money relatively frequently – over 1 in 10 do this regularly.

Donate money?

11% Regularly
31% Rarely
37% Sometimes
24% Never

46% are quite or very likely to donate time in the future

Essence are significantly more likely to be members of a diverse range of organisations

Essence are significantly more likely to have ever donated time to an arts organisation and they are one of the segments most open to donating time in the future.

They are infrequent givers of money but are still one of the segments that are most likely to have donated in this way.

members of at least one organisation

67%

59% Have arts / cultural / heritage membership
20% Are members of wildlife or conservation charity / organisation
33% Are not members – the lowest proportion of any segment
Who are they?

<table>
<thead>
<tr>
<th>Age</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>16–34</td>
<td>31%</td>
</tr>
<tr>
<td>35–64</td>
<td>58%</td>
</tr>
<tr>
<td>65+</td>
<td>11%</td>
</tr>
</tbody>
</table>

People in the Essence segment are more likely to be female (63%) and highly educated, with 18% holding a post-graduate degree or diploma. 45% have a university degree or higher.

28% earn more than $65,000

74% live in Melbourne

How do we reach them?

91% proactively find out information about cultural events on a regular basis

Essence are highly proactive in keeping themselves up to date about cultural events. Pull marketing is particularly effective and they will often turn to local, metropolitan and national newspapers to find out what’s on. Venue websites, e-newsletters they subscribe to and social media are frequently used to find information online.

Essence consume a broad range of media that reflects their wide range of interests and the importance they place on keeping up to date with current affairs. Their consumption reflects their preference for ‘infotainment’ over pure entertainment and although the majority (90%) do watch TV, they’re significantly less likely than other segments to spend time doing this, highlighting their selective nature. They tend to favour state TV and radio channels over commercial channels.

ABC1 61%
Chan 7 56%
SBS One 56%

90% spent time watching tv in a week

ABC National 21%
Gold 104 20%
Nova 18%

84% spent time listening to the radio

Essence are most likely to listen to ABC National out of all of the Culture Segments.
86% have engaged with cultural content online

Essence actively use the Internet to support their cultural consumption – from helping them plan a trip through to seeking rich content post-visit to prolong their experience, or further explore topics. In fact, they’re the segment most likely to use the Internet in this applied way to satisfy their cultural appetite, with 46% visiting a site before a trip to access rich content and 34% using arts, cultural or heritage sites to expand their knowledge.

Whilst their independent nature means they don’t always welcome recommendations on what they should go and see, online reviews are useful to help convince them that they will have a quality experience. Essence tend to use the Internet for information rather than entertainment.

85% have spent time reading online or offline newspapers or magazines within a week

Essence gravitate towards broadsheets over tabloids, with the Age a particular favourite (40% read this compact broadsheet regularly). Free regional or local newspapers are also popular whilst they are the segment least likely to read the Herald Sun.

<table>
<thead>
<tr>
<th>Broadsheet</th>
<th>49%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tabloid</td>
<td>44%</td>
</tr>
<tr>
<td>Regional</td>
<td>41%</td>
</tr>
<tr>
<td>Magazines</td>
<td>53%</td>
</tr>
<tr>
<td>None</td>
<td>15%</td>
</tr>
</tbody>
</table>

**Most likely to see an article or advert in...**

- The Saturday Age: 24%
- The Age: 23%
- Free regional or local paper: 35%
- The Sunday Age: 20%

**How do we develop them?**

Marketing should focus on...

- Quality and sophistication
- Acknowledging their discerning knowledge and tastes
- Opportunities to develop their taste

Engaging with Essence is not difficult; they’re incredibly proactive when it comes to keeping themselves up to date with the cultural scene. Instead it’s a case of competing for their time and building their valuable loyalty and advocacy.

Pull marketing is most effective for this segment – they will come on their own terms and seek impartial reviews of quality. It’s important to provide them with all of the necessary facts in order for them to make their own judgements. Press coverage or editorial that surrounds a cultural proposition is likely to get their attention, but they may be cynical of ‘marketing speak’.
The Expression segment is in tune with their spiritual side. They are confident, fun-loving, self aware people who accommodate a wide range of interests, from culture and learning to community and nature.

28% have children under 16 years old at home

846,831 people in Victoria
Members of the Expression segment actively pursue life and place high value on their free time. Their openness to different experiences, cultures and new ideas means that their cultural consumption is broad and frequent – making them one of the most highly culturally-active segments.

Arts and culture are key elements of their lifestyle; a means of self-expression, a way of connecting with other like-minded individuals and fulfilling their need for a sense of community. Their cultural engagement meets a wide range of needs from creative inspiration through to pure entertainment.

**Average annual spend**

$1,900

**Average monthly cultural spend**

- $69.01 on admission / tickets
- $36.98 on food and drink
- $32.05 on transport to the event
- $19.03 on souvenirs or programmes

**16.4 average annual frequency of attendance**

**Artform attendance**

Expression’s broad cultural consumption is reflected in their artform attendance which is significantly above average across all artforms. Highlighting their appetite for creativity, Expression is the segment most likely to be in the current market for commercial theatre, libraries, dance, multi-artforms and literature.

**Aware of 30 out of 60 venues tested on average**

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<td>16%</td>
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<tr>
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<td>14%</td>
<td>22%</td>
</tr>
<tr>
<td>Literature</td>
<td>5%</td>
<td>11%</td>
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</tbody>
</table>
Expression are present at all the top venues across the State, but it is their engagement with some of the smaller venues and organisations which helps give a sense of their openness to a broad range of experiences. For example, festivals are particularly popular – meeting both their social and community-spirited needs and providing access to a broad range of artforms. Members of this segment are the most likely to have visited Castlemaine Festival, Melbourne Cabaret Festival and Melbourne Comedy Festival. Whilst their interests in ‘high arts’ is clear, they also clearly demonstrate an interest in popular culture, being the segment most likely to have seen a show at Crown Casino and visited the National Sports Museum in the past three years.

**Over 1 in 4 Expression have volunteered at a cultural organisation**

The Expression segment is the most likely to have volunteered time for an arts organisation in the past and is the most open to doing this in the future. Expression also donates money to arts and culture at the highest frequency of the segments, revealing their willingness to contribute and ‘be part of something’.

**Memberships allow Expression to contribute and support things that they’re passionate about**

Memberships allow Expression to contribute and support things that they’re passionate about.
Who are they?

Age

16-34 35%
35-64 49%
65+ 16%

People in the Expression segment are likely to be highly educated, with 25% holding a university degree and a further 15% also holding a post-graduate degree / diploma.

40% have a university degree or higher
25% earn more than $65,000
76% live in Melbourne

89% had proactively found out information about cultural events within the past 12 months

It is easy to reach Expression who are always on the look out for cultural events of interest in a variety of places. Rather than being cynical about marketing they see it as a tool for helping them prioritise their competing interests. They tend to be avid consumers of the media and, similarly to Essence, are significantly more likely than average to proactively use the media to keep up to date with what's on.

The TV and radio channels that Expression engage with emphasise their receptiveness to both mainstream entertainment and current affairs interests. State media channels – particularly ABC1 and News 24 – and commercial channels are all popular with this segment.

How do we reach them?

How do we reach them?

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40% have a university degree or higher
25% earn more than $65,000
76% live in Melbourne

spent time watching tv in a week

95%

spent time listening to the radio

86%
82% have ever engaged with cultural content online

Expression are avid users of the Internet. Whilst it serves a functional purpose for them, they have a higher than average tendency to use it as a form of entertainment or avenue for exploration, being more likely than average to search for a/v content on sites such as Vimeo and YouTube or keep up to date with current affairs.

This translates into their cultural consumption, with Expression turning to the Internet to both practically plan their trips and engage with richer content. Their online advocacy potential is also notable, with Expression being the segment most likely to mention a trip on Facebook, Twitter, Foursqaure or a blog.

Community-based applications like these provide this segment with the opportunity to share their experiences which is a key contributor to their enjoyment of, and engagement with, cultural activities.

87% are likely to spend time reading online or offline newspapers or magazines within a typical week

Expression have the highest consumption of print media of the segments. As is the case with their cultural activities, they have an appetite that takes in a broad range of publications. Members of the Expression segment are the most likely to engage with magazines and tabloid newspapers and the second most likely to engage with broadsheets. They like to keep up to date with current affairs both locally and abroad. Free and paid-for local papers are particularly effective in informing them about relevant cultural events.

<table>
<thead>
<tr>
<th>Broadsheet</th>
<th>Tabloid</th>
<th>Regional</th>
<th>Magazines</th>
<th>None</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>48%</td>
<td>63%</td>
<td>39%</td>
<td>55%</td>
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</tbody>
</table>

Most likely to see an article or advert in...

- 22% Herald Sun
- 20% Sunday Herald Sun
- 37% Free regional or local papers
- 23% Paid regional or local papers

How do we develop them?

Marketing should focus on...

- Debate and discussion
- Building networks that appeal to their community spirit
- Highlighting the opportunities for participation

Although they like adventure, innovation and discovery, members of the Expression segment like to know what they’re letting themselves in for. Their receptiveness to the views of others and popular or well-endorsed activities means they are open to reviews and recommendations, rather than being at the forefront of cutting-edge arts and culture.

Expression often offer organisations an extremely valuable source of advocacy – they enjoy sharing their experiences and helping spread the word. Bringing them closer and helping them feel part of a community – through, for example, membership schemes and participatory events – can be useful to maintain this sort of dialogue.
Affirmation

The Affirmation segment largely comprises young adults, often studying or looking after family at home. Arts is simply one of their many leisure choices. They are adventurous when it comes to their arts and cultural consumption.

613,822 people in Victoria

55%

29%

have children under 16 years old at home

Attitudes and life priorities

FAMILY NEEDS
PERSONAL DEVELOPMENT
QUALITY TIME WITH OTHERS
FAMILY AND POPULAR LEISURE ACTIVITIES
ENJOYABLE EXPERIENCES

SELF IDENTITY
ASPIRATIONAL
QUALITY TIME
IMPROVEMENT
Audience Atlas Victoria

The Affirmation segment welcomes cultural consumption as a way of enjoying quality time with friends and family, as well as developing their children’s knowledge and improving themselves as individuals. This segment makes considered decisions and is relatively risk-averse, attending large, mainstream events and activities that they can be sure will meet the needs of everyone in their group. As well as quality time and self-development, arts and culture also provide a means for them to validate themselves with their peers; they care what others think about them, and as a result want to be seen to be engaging with cultural activities.

Average annual spend $1,300

Average monthly cultural spend

- $54.09 on admission / tickets
- $26.64 on food and drink
- $16.66 on transport to the event
- $8.60 on souvenirs or programmes

11.7 average annual frequency of attendance

Arts and culture provide the means for them to spend quality time with their friends and family

Cultural behaviour

Consumption and creation in the past 12 months

More likely to have visited or done
- Museum
- Art gallery
- Music
- Public libraries
- Coast and seaside
- Sang to audience
- Played musical instrument as performance

Less likely to have visited or done
- Experimental Theatre
- Opera
- Ballet / classical dance
- Pantomime
- Multi-art
- Literature

Artform attendance in Victoria

Expression try a wide range of venues and organisations in their lifetime, but they tend to make more mainstream choices such as museums and commercial theatres. They exhibit slightly above average attendance in the past three years.

Aware of 27 out of 60 venues tested on average

Visited 14 of the tested venues/organisations in their lifetime

Visited 8 of the tested venues/organisations in the past three years on average

Museums 53% 87%
Commercial theatre 40% 70%
Music 23% 58%
Library 28% 58%
Visual arts 33% 49%
Festivals 23% 45%
Theatre 12% 31%
Dance 8% 22%
Multi-art 6% 15%
Literature 3% 4%
Affirmation visit a wide range of venues and organisations but tend to opt for low risk and more mainstream experiences.

Affirmation have slightly above average awareness of, and engagement with, the major cultural organisations within the State, but their preference for more mainstream activities becomes clear from their under-representation at some organisations, which may be deemed as more experimental, such as the Malthouse Theatre or those ‘off the beaten track’ such as Art Gallery of Ballarat. Instead, Affirmation are most likely to have visited three of Victoria’s most prominent organisations in the past three years: Melbourne Museum, State Library of Victoria and Arts Centre Melbourne.

Affirmation are most likely to say they have never been but are interested in going to the organisations.

Affirmation’s propensity to volunteer time in support of arts and culture is around the State average. Similarly their willingness to offer financial support is around average, although in reality (in terms of frequency) they rarely do this.

Around 1 in 6 Affirmation have donated time to arts or cultural organisations.

Memberships appeal to Affirmation for offering lower risk and better value.

Memberships

- Have arts / cultural / heritage membership: 45%
- Are members of wildlife or conservation charity / organisation: 13%
- Are not members: 46%

33% are quite or very likely to donate time in the future.
Who are they?

<table>
<thead>
<tr>
<th>Age</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>16–34</td>
<td>35%</td>
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<tr>
<td>35–64</td>
<td>54%</td>
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<tr>
<td>65+</td>
<td>11%</td>
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Affirmation tend to be more highly qualified than average, with 45% holding a university degree and 16% holding a post-graduate degree or diploma.

45% have a university degree or higher

28% earn more than $65,000

75% live in Melbourne

How do we reach them?

84% had proactively found out information about cultural events within the past 12 months

Affirmation tend to do their research when it comes to choosing what to do – this helps them plan from a practical point of view and reassures them that their needs will be met. As with other segments, print is a popular information source, however Affirmation are particularly encouraged to try things they come across in TV and radio coverage. Personal recommendations from trusted sources are also highly effective in engaging this segment.

As with their cultural engagement at a venue-level, Affirmation’s engagement with different media channels is relatively similar to the State average, with 95% spending time watching TV in a week.

95% spent time watching TV in a week

spent time listening to the radio 87%

Although their radio listening habits do set them apart with Affirmation being the segment most likely to listen to Nova and Mix FM.
78% have ever engaged with cultural content online

Affirmation are not as active as some of the other segments online – but the Internet does provide a useful planning tool and sites such as TripAdvisor can be particularly helpful in sourcing the opinion of others. Their online engagement is also about affirmation and they will use the Internet to reassure themselves about cultural attendance decisions.

Whilst they don’t tend to engage with cultural organisations’ rich content (such as having a virtual visit or exploring topics further), this type of activity could hold added value, particularly as a way to meeting their intellectual needs.

83% are likely to spend time reading online or offline newspapers or magazines within a typical week

Over half of Affirmation are likely to have read an online or print version of a tabloid paper within a typical week. In line with the average, they are most likely to read The Herald Sun.

Magazines are particularly popular with Affirmation; they are one of the segments most likely to have read one in the past week. Although, only in relatively small proportions, Affirmation are significantly more likely than average to read current affairs magazines (13%) or the Weekend Australian (8%).

<table>
<thead>
<tr>
<th></th>
<th>44%</th>
<th>53%</th>
<th>37%</th>
<th>54%</th>
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<td>Broadsheet</td>
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<td>Tabloid</td>
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<td>Regional</td>
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<td>Magazines</td>
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<td>None</td>
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Most likely to see an article or advert in...

- 18% The Age
- 17% The Saturday Age
- 31% Free regional or local papers
- 17% Paid regional or local papers

Marketing should focus on...

- Letting them know about events early
- Promoting benefits as being entertaining and educational
- Offering loyalty schemes, discount cards and clubs

Marketing for cultural venues, events and activities will be competing with other leisure activities, so needs to stand out from the crowd and grab their attention, as well as clearly demonstrating the benefits they will get from engaging. 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. Participatory events that encourage them to be active creators could be particularly successful in deepening engagement with Affirmation, but they may need coaxing to try something completely new.

Their attention can also be successfully gained through affiliate partnerships with trusted brands, or endorsements by well-known people.

Word of mouth is often crucial in galvanizing Affirmation into action, but, at the same time, Affirmation will often talk to others about their cultural experience; they wear their cultural consumption as a badge and want to be seen by others as ‘cultural consumers’. Venues should encourage Affirmation to help spread the word to people they know, unlocking more potential from a segment that will often opt for the ‘tried and tested’.
Enrichment

The Enrichment segment are characterised by older adults with time to spare who like spending their leisure time close to the home. They have established tastes and enjoy culture that links into their interests in nature, heritage and more traditional artforms.

Attitudes and life priorities

- NATURE, GARDENING, COUNTRYSIDE
- TRADITIONAL ARTFORMS
- HOME LIFE
- THE PAST
- FAITH
- ARTS AND CRAFTS

MATURE
TRADITIONAL
HERITAGE
NOSTALGIA

9%
356,771 people in Victoria

18%
have children under 16 years old at home
The Enrichment segment tends to be in the later stages of life. They are generally risk-averse with established and traditional tastes. They have relatively focused interests such as heritage, gardens and nature and these interests tend to drive their visits to cultural organisations. How often they engage and how much money they spend on cultural activities is lower than most other segments.

Rather than the opportunity to seek out new experiences, the arts provides this segment with a form of warm escapism, offering a means to reach even greater fulfilment within their lives. They are an inner-directed group; the opinions of others are irrelevant and they have no desire to follow fashions or trends.

**Enrichment are driven by their own interests**

**Cultural behaviour**

**Consumption and creation in the past 12 months**

<table>
<thead>
<tr>
<th>More likely to have visited or done</th>
<th>Less likely to have visited or done</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scenic countryside Large parks and heritage sites Coast and seaside Art gallery Public libraries Crafts</td>
<td>Music events Musicals Experimental theatre Contemporary dance Theme parks Zoos and safari parks</td>
</tr>
</tbody>
</table>

**Average annual spend $550**

**Average monthly cultural spend**

- **$23.53** on admission / tickets
- **$9.10** on food and drink
- **$8.00** on transport to the event
- **$5.01** on souvenirs or programmes

**Artform attendance**

Enrichment’s focused tastes are highlighted in their artform consumption; whilst they have around average engagement with museums and visual arts, they are the segment least likely to have attended a festival in the past three years, and their consumption of other artforms is generally below average.

**Average monthly cultural spend**

**Recent (past 12 months)**

- **Museums**: 55% / 92%
- **Commercial theatre**: 35% / 71%
- **Music**: 16% / 61%
- **Library**: 21% / 59%
- **Visual arts**: 30% / 52%
- **Theatre**: 7% / 28%
- **Festivals**: 10% / 26%
- **Dance**: 3% / 19%
- **Multi- art**: 4% / 16%
- **Literature**: 1% / 2%

**Ever**

- **Museums**: 55% / 92%
- **Commercial theatre**: 35% / 71%
- **Music**: 16% / 61%
- **Library**: 21% / 59%
- **Visual arts**: 30% / 52%
- **Theatre**: 7% / 28%
- **Festivals**: 10% / 26%
- **Dance**: 3% / 19%
- **Multi- art**: 4% / 16%
- **Literature**: 1% / 2%
Around 1 in 8 Enrichment have donated time to arts or cultural organisations

Donating money to arts and cultural organisations is not a thing that Enrichment make a habit of. Their interest in volunteering time to support cultural organisations is also relatively limited.

Enrichment tend to be attracted to value-based rather than support-based memberships

Around 1 in 8 Enrichment have donated time to arts or cultural organisations

Around 1 in 8 Enrichment have donated time to arts or cultural organisations

Enrichment tend to be attracted to value-based rather than support-based memberships

20% are quite or very likely to donate time in the future

60% members of at least one organisation

48% Have arts / cultural / heritage membership

44% Are members of their local library – the highest proportion of any segment

40% Are not members

49% Never

4% Regularly

28% Rarely

20% Sometimes

a core set of venues and destinations they frequent relatively regularly and have little need to explore further

Their engagement with specific venues tends to be around average or lower. Enrichment’s ‘top 10’ most visited venues in the past three years is relatively similar to the overall average except that, reflecting their preference for museums, the Immigration Museum and Sovereign Hill Gold Museum feature. With the latter Enrichment is actually the segment most likely to have visited at some point in the past.

Highlighting their lower than average engagement with the performing arts, resistance to risk and avoidance of mass, popular events, Enrichment are the least likely to have visited Sydney Opera House in the past three years along with the Melbourne Fringe Festival and seeing a show at Crown Casino.

Enrichment tend to be attracted to value-based rather than support-based memberships

Donate money?

49% Never

4% Regularly

28% Rarely

20% Sometimes

48% Have arts / cultural / heritage membership

44% Are members of their local library – the highest proportion of any segment

40% Are not members

members of at least one organisation

60%
Who are they?

Age

16–34 14%
35–64 55%
65+ 31%

With over 3 in 10 members of this segment aged 65 or above, Enrichment has an older age profile and are the least likely to have children at home. They have the lowest earnings of the segments, being the least likely to be in full-time employment.

36% have a university degree or higher
16% earn more than $65,000
72% live in Melbourne

77% had proactively found out information about cultural events within the past 12 months

Enrichment can be wary of marketing, but they will keep an eye out for cultural events that coincide with their interests. Offline sources are more likely to reach them than online sources with Enrichment having around average propensity to use local press, metropolitan newspapers and TV coverage to keep up to date with cultural events.

Enrichment’s TV viewing and radio habits are similar to average, although they’re the least likely of all the segments to watch paid TV (such as Foxtel) and the most likely to watch 7Two.

How do we reach them?

spent time watching tv in a week

Channelespentspent time listening to the radio

Channel 7 72% 95%
Channel 9 67%
Channel 10 66%

ABC Local 17%
ABC National 16%
Gold 104 14%

spent time listening to the radio 83%
65% have ever engaged with cultural content online

Enrichment are not particularly technologically-savvy; their internet usage tends to be functional, rather than to seek inspiration or entertainment. Although, a slight majority use social media sites (56%), they’re one of the segments least likely to do so and they tend to spend less time using social media. When it comes to using the Internet, for cultural consumption, their usage is dominated by sourcing practical planning information for a trip; they express little interest in extending a visit online, discussing trips or downloading or uploading related content. They are unlikely to become online ambassadors for any organisation and tend to prefer to access information from traditional sources.

83% are likely to spend time reading online or offline newspapers or magazines within a typical week

Just under half of Enrichment read a regional paper in a typical week – the highest proportion of the segments. They are most likely to read local free papers.

Meanwhile their readership of broadsheet titles is significantly lower than average and they are not particularly interested in keeping up with current affairs.

<table>
<thead>
<tr>
<th>Medium</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>Broadsheet</td>
<td>33%</td>
</tr>
<tr>
<td>Tabloid</td>
<td>51%</td>
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<td>Regional</td>
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<tr>
<td>Magazines</td>
<td>44%</td>
</tr>
<tr>
<td>None</td>
<td>17%</td>
</tr>
</tbody>
</table>

Most likely to see an article or advert in...

- **Herald Sun**: 18%
- **Sunday Herald Sun**: 15%
- **The Age**: 14%
- **Free regional or local papers**: 29%

Enrichment tend to have a core set of venues and destinations that they frequent and rarely explore further. They are risk averse and mature individuals who are not looking to broaden their horizons or to be taken outside their cultural comfort zone. Positioning events as contemporary, experimental or cutting-edge is likely to turn them off, instead venues need to appeal to their more traditional tastes that align with their interests in history, heritage and nature.

It’s important to remember that they are also more price-sensitive than other segments. They need reassuring that a visit is worthwhile, will meet their needs and interests, and it’s essential for them to have easy access to planning information ahead of a trip. But they also need space to make decisions for themselves – they are likely to see through a ‘hard sell’.

How do we develop them?

Marketing should focus on...

- **Nostalgia**
- **Highlighting the traditional and established**
- **Providing good value for money**
Stimulation

The Stimulation segment is an active group who live life to the full, looking for new experiences and challenges. They are open to a wide range of experiences, from culture to sports and music, but like to be at the cutting edge in everything they do.

630,163 people in Victoria have children under 16 years old at home.

16%

26%
Arts attendance is driven by their thirst for new experiences

This segment wants to live a varied, entertaining life of novelty and challenge. Stimulation are opinion-makers rather than followers. Their keen sense of adventure, appreciation of innovation and a desire to stand out from the crowd means that they are constantly on the lookout for new experiences. Their cultural consumption reflects this – revealing a broad range of interests and a segment that is prepared to take risks.

Their main reasons for attending arts events and activities tend to focus on opportunities to socialise and to ensure that they remain the ones ‘in the know’ amongst their peer group.

Average annual spend $1,400

Average monthly cultural spend

🌟 $58.79 on admission/tickets
🍴 $28.23 on food and drink
🚗 $20.24 on transport to the event
📍 $10.48 on souvenirs or programmes

Artform attendance

‘Live action’ is highly appealing to Stimulation, judging by their engagement with different artforms; they are one of the segments most likely to have engaged with festivals and theatre in the past three years. That is not to the expense of museums and visual arts which also feature highly in their consumption.

Consumption and creation in the past 12 months

More likely to have visited or done
- Art gallery
- Museum
- Rock and pop music festival
- Live music events
- Play/drama
- Independent film
- Coast and seaside
- Adventure sport

Less likely to have visited or done
- Pantomime
- Dance

Aware of 30 out of 60 venues tested on average
Visited 16 of the tested venues / organisations in their lifetime
9 of the tested venues / organisations in the past three years on average

Museums: 62% / 88%
Commercial theatre: 69% / 78%
Music: 30% / 64%
Library: 29% / 61%
Festivals: 35% / 55%
Visual arts: 40% / 53%
Theatre: 21% / 40%
Dance: 10% / 25%
Multi-art: 7% / 17%
Literature: 7% / 10%

15.3 average annual frequency of attendance
Stimulation enjoy going off the beaten track in search of contemporary experiences

Stimulation have a good understanding of the cultural offer throughout the State and, in particular, are more likely than average to be aware of contemporary and performing arts venues such as Forum Theatre, various festivals, Australian Centre for Moving Image and Malthouse Theatre.

Their varied art-form engagement and keen sense of adventure means that they enjoy going ‘off-piste’, being the segment most likely to have visited Melbourne Fringe Festival, Athenaeum Theatre, The Wheeler Centre and Red Stitch Actors Theatre in the past three years. They are also the segment most likely to have recently visited Her Majesty’s Theatre.

Around 1 in 6 Stimulation have donated time to arts or cultural organisations

The proportion of Stimulation who have volunteered for cultural organisations in the past is around average, although they are less likely than average to rule out doing this in the future.

Similarly, their financial support more or less matches the State average.

34% are quite or very likely to donate time in the future

Donate money?

- 38% Never
- 10% Regularly
- 24% Rarely
- 30% Sometimes

Stimulation are more likely to join memberships that mean they are first to know about things

- 43% Have arts / cultural / heritage membership
- 13% Are members of wildlife or conservation charity / organisation
- 46% Are not members

members of at least one organisation

54%
Who are they?

Members of the Stimulation segment are more likely than other segments to hold a post-graduate degree or diploma (18%) and earn over $65,000. They are also one of the younger segments with 37% aged under 35.

42% have a university degree or higher
30% earn more than $65,000
76% live in Melbourne

How do we reach them?

83% had proactively found out information about cultural events within the past 12 months

Being early-adopters, Stimulation naturally take an active approach to keeping themselves up to date with the latest cultural activities. Print and online sources are particularly useful for reaching this segment. Organisations targeting Stimulation should ensure a presence on online ‘what’s on’ listings, and encourage them to sign up to e-newsletters.

Stimulation’s TV viewing habits are similar to the State average. Their interest in alternative music is emphasised by their radio channel preferences with Stimulation being the segment most likely to tune into Triple J. They are also likely to be loyal followers of Triple M.

95% spent time watching TV in a week

spent time listening to the radio 84%

Enrichment are most likely to listen to FOX and Gold 104 and are the segment most likely to listen to Triple J.
78% have ever engaged with cultural content online

Stimulation are highly digitally engaged, using the Internet for a wide variety of reasons, usually across several different devices. They are avid users of social media and music or video content sharing sites like YouTube, Vimeo and iTunes. Much like their relationship with arts and culture their online engagement is centred on seeking innovative, entertaining and interesting content that is refreshed daily.

Interestingly, their general digital behaviour doesn’t necessarily translate across to how they interact with cultural venues online; they are no more likely to share and explore the content-rich offer of a cultural venue than average, suggesting that there is untapped potential to develop this type of online relationship.

87% are likely to spend time reading online or offline newspapers or magazines within a typical week

Stimulation’s readership of broadsheet and tabloids is slightly above average. Whilst the Herald Sun is their most popular choice of title – in line with the State average – they are significantly more likely than average to read The Age (38%), MX (15%) and sports magazines (9%).

Although Stimulation don’t tend to read local newspapers habitually, this can be a useful source of information if they want to find out about cultural events specifically.

| Broadsheet | 45% |
| Tabloid     | 57% |
| Regional    | 30% |
| Magazines   | 49% |
| None        | 13% |

Most likely to see an article or advert in...

- The Age 18%
- Herald Sun 18%
- Free regional or local papers 27%
- Paid regional or local papers 19%

Marketing should focus on...

- Offering events and activities on weekends and evenings
- Riskier, less well known activities
- Promoting the social element

Stimulation can be relatively straightforward to engage as they are already proactively looking out for new and interesting ways to spend their spare time. Alerting them to potentially interesting arts events at a sufficiently early juncture and focusing on the new, experimental, quirky and one-off will encourage their 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.

Capitalise on Stimulation’s desire to get ‘hands on’ and be active creators, particularly using audio / visual techniques. They have an around average propensity to have been active creators in the past, but tend to be more interested in doing so in the future than the other segments. Participatory experiences can be particularly appealing for them.
The Release segment tends to be younger adults with busy lives that used to enjoy relatively popular arts and culture. Consequently they feel they have limited time and resources to enjoy the arts and culture, although they would like to do more.
Audience Atlas Victoria

The Release segment is preoccupied with meeting life’s demands and seeks opportunities for relaxation, entertainment and socialising in their leisure time. They need to be encouraged to view the arts as a social activity and another means of taking time out from their stressful and busy lives; currently they do not perceive they can get this from engaging with arts and culture and therefore look elsewhere.

Their spend and engagement with culture is relatively low and they may feel ‘out of the loop’ when it comes to the arts. Consequently they will often opt for relatively low-risk activities – time is precious and they want a guaranteed return on their engagement.

### Cultural behaviour

**Consumption and creation in the past 12 months**

- **More likely to have visited or done**
  - Rock and pop music events
  - Blockbuster and Hollywood films
  - Theme parks
  - Zoos and safari parks
  - Animal sanctuaries and nature reserves
  - Independent films
  - Opera
  - Ballet and classical dance
  - Parks and gardens
  - Scenic countryside

- **Less likely to have visited or done**
  - Museums
  - Commercial theatre
  - Music
  - Library
  - Visual arts
  - Festivals
  - Theatre
  - Dance
  - Multi-art
  - Literature

- **Average monthly cultural spend**
  - $28.14 on admission/tickets
  - $15.94 on food and drink
  - $10.18 on transport to the event
  - $4.35 on souvenirs or programmes

### Artform attendance

Release’s relatively low cultural engagement is highlighted by the fact that they are significantly less likely than average to have engaged with all artforms.

Their tendency to default to mainstream cultural activities is also highlighted in their artform consumption and venue engagement.

<table>
<thead>
<tr>
<th>Artform</th>
<th>Recent (past 12 months)</th>
<th>Ever (past 3 years)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Museums</td>
<td>43%</td>
<td>79%</td>
</tr>
<tr>
<td>Commercial theatre</td>
<td>32%</td>
<td>60%</td>
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<tr>
<td>Music</td>
<td>15%</td>
<td>47%</td>
</tr>
<tr>
<td>Library</td>
<td>22%</td>
<td>45%</td>
</tr>
<tr>
<td>Visual arts</td>
<td>19%</td>
<td>37%</td>
</tr>
<tr>
<td>Festivals</td>
<td>23%</td>
<td>38%</td>
</tr>
<tr>
<td>Theatre</td>
<td>8%</td>
<td>23%</td>
</tr>
<tr>
<td>Dance</td>
<td>3%</td>
<td>11%</td>
</tr>
<tr>
<td>Multi-art</td>
<td>4%</td>
<td>8%</td>
</tr>
<tr>
<td>Literature</td>
<td>3%</td>
<td>4%</td>
</tr>
</tbody>
</table>

**Average annual spend $700**

**Average monthly cultural spend**

- $28.14 on admission/tickets
- $15.94 on food and drink
- $10.18 on transport to the event
- $4.35 on souvenirs or programmes
Arts and culture are relatively low priority for Release

Being out of the cultural ‘loop’, their awareness of venues is significantly lower than average. For example, although the majority has heard of the Melbourne Museum, at 80% this is the lowest level of awareness of the segments. Reflecting this lower awareness, and the lower priority they tend to place on culture, their engagement with specific venues is lower than average across the board.

Release’s ‘top 10’ most visited venues in the past three years is relatively similar to the overall average except that Sovereign Hill Gold Museum and the Sydney Opera House feature.

When Release do decide to engage culturally it is often for one-off or well endorsed experiences

Around 1 in 8 Release have donated time to arts or cultural organisations

Release are relatively closed to the idea of offering financial support to or volunteering for arts and cultural organisations. Scope for developing future support from Release in this respect is limited.

Donate money?

Never 55%

Rarely 25%

Sometimes 14%

Regularly 7%

20% are quite or very likely to donate time in the future

Fewer than 4 in 10 are members of an organisation – significantly lower than average

33% Have arts / cultural / heritage membership

6% Are members of wildlife or conservation charity / organisation

62% Are not members

members of at least one organisation

38%
Who are they?

Release are the least likely to listen to the radio overall, but are most likely to listen to FOX and Gold 104.

How do we reach them?

64% had proactively found out information about cultural events within the past 12 months

Release are not particularly proactive in keeping themselves up to date with what’s on. For example, they are significantly less likely than average to search for activities through online listings or subscribe to venue mailing lists. Instead they tend to rely on coming across things in the press.

Broadcast media provide Release a route for escapism and it is entertainment that they seek, rather than keeping abreast of current affairs. Correspondingly they are the segment least likely to tune into ABC News 24, but the most likely to watch Eleven.

They are the segment least likely to spend time listening to the radio although they have around average engagement with the State’s most popular stations.

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Release are not particularly proactive in keeping themselves up to date with what’s on. For example, they are significantly less likely than average to search for activities through online listings or subscribe to venue mailing lists. Instead they tend to rely on coming across things in the press.

Broadcast media provide Release a route for escapism and it is entertainment that they seek, rather than keeping abreast of current affairs. Correspondingly they are the segment least likely to tune into ABC News 24, but the most likely to watch Eleven.

They are the segment least likely to spend time listening to the radio although they have around average engagement with the State’s most popular stations.
61% have ever engaged with cultural content online

The way that Release uses the Internet demonstrates how they go elsewhere, opting for different activities over arts and culture in their spare time. They are the segment most likely to go online for gaming in a typical week – one-third do this, significantly above average (23%).

Given their lower engagement with the arts and culture is it perhaps unsurprising that they are less likely than average to seek cultural content or planning information online. They are more likely to use social media than most other segments in a week, but they tend to be less engaged with it. Encouraging them to follow and accept direct contact or notifications means they are more likely to see particular content each time they dip in.

74% are likely to spend time reading online or offline newspapers or magazines within a typical week

Release don’t find as much time to read newspapers as many of the other segments. When they do they’ll tend to opt for national tabloids over broadsheets or local papers.

They’re less likely than average to see an advert or article relating to cultural activities in the press, but when they do use the press, in this way, they tend to turn to free local papers.

<table>
<thead>
<tr>
<th>Broadsheet</th>
<th>Tabloid</th>
<th>Regional</th>
<th>Magazines</th>
<th>None</th>
</tr>
</thead>
<tbody>
<tr>
<td>31%</td>
<td>41%</td>
<td>26%</td>
<td>39%</td>
<td>26%</td>
</tr>
</tbody>
</table>

Most likely to see an article or advert in...

- 11% The Age
- 9% Herald Sun
- 17% Free regional or local papers
- 10% Paid regional or local papers

How do we develop them?

Marketing should focus on...

Special offers and voucher codes
Packaging experiences – on a plate, easy to consume
Endorsements through known brands

Release is not averse to consuming arts and culture, but need to be reactivated. Remind these lost cultural consumers of what they are missing out on and reinforce the idea that time spent enjoying the arts and culture is time well spent.

Their time is precious so they invest little time in actively seeking out new things to do, instead tending to stick to what they know. Risk reduction is key for this segment; they want assurances of a guaranteed good time.

Release are externally referenced so will respond to things that are well recommended and endorsed. 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.

Making a trip as ‘efficient’ as possible (ie, simple booking process, upfront information) and ‘packaged up’ experiences, special offers and vouchers might persuade them to take more of a gamble.
Perspective

The Perspective segment is settled, fulfilled and home-orientated. Arts and culture are low among their priorities, however their underlying spontaneous nature and desire to learn provides a focus for engaging with arts and culture.

380,873 people in Victoria

22% have children under 16 years old at home

Attitudes and life priorities

- Optimistic
- Their own needs are important
- Inner directed
- Reading
- Learning
- The outdoors

Settled
- Self-sufficient
- Focused
- Contented
The Perspective segment has an optimistic outlook, they are inner-directed and prioritise their own needs above others. They tend to gravitate to a limited ‘days out’ focus in their leisure time, based around a small number of interests that have become habitual over time.

Perspective don’t see the arts as essential; culture for them is not part of their identity. Nevertheless they do see cultural activities as opportunities to broaden their horizons or pursue particular interests they may have.

**Average annual spend**

$700

**Average monthly cultural spend**

- $30.19 on admission/tickets
- $11.80 on food and drink
- $11.15 on transport to the event
- $4.43 on souvenirs or programmes

**Cultural behaviour**

**Consumption and creation in the past 12 months**

More likely to have visited or done:
- Coast and seaside
- Picturesque towns and cities
- Scenic countryside
- Public libraries
- Art gallery
- Museum
- Music events
- Experimental theatre

Less likely to have visited or done:
- Museums
- Commercial theatre
- Music
- Art gallery
- Museum
- Music events
- Experimental theatre

**Artform attendance**

Perspective is one of the least culturally-active segments and their behaviour is dominated by more mainstream activities such as visiting museums – just under half have done this in the past three years.

<table>
<thead>
<tr>
<th>Artform</th>
<th>Average annual frequency of attendance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Museums</td>
<td>47%</td>
</tr>
<tr>
<td>Commercial theatre</td>
<td>31%</td>
</tr>
<tr>
<td>Music</td>
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</tr>
<tr>
<td>Multi-art</td>
<td>2%</td>
</tr>
<tr>
<td>Literature</td>
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</tr>
</tbody>
</table>

**Average monthly cultural spend**

- $30.19 on admission/tickets
- $11.80 on food and drink
- $11.15 on transport to the event
- $4.43 on souvenirs or programmes

**7.3 average annual frequency of attendance**

**Artform**

- Museums
- Commercial theatre
- Music
- Art gallery
- Museum
- Music events
- Experimental theatre
Although Perspective have average levels of awareness it does not translate into average attendance

Perspective have around average, or lower, levels of awareness of the cultural offer throughout the State. They tend to be better informed on venues with a more traditional offer; more contemporary organisations are less likely to be on their radar.

Like the other segments, Melbourne Museum was the venue that the highest proportion of Perspective had visited in the past three years, followed by Scienceworks. This is unsurprising as museums have a broad potential market.

Reflecting their comparatively narrower interests, Perspective are one of the segments least likely to have visited Arts Centre Melbourne, State Library of Victoria and Her Majesty’s Theatre.

Around 1 in 12 Perspective have donated time to arts or cultural organisations

Perspective are one of the segments least likely to have donated time to an arts organisation and the majority say they are not open to donating time in the future.

They are infrequent givers of money and 59% have never donated anything to an arts or cultural organisation.

Perspective can be attracted by the value for money benefit of membership schemes

11% are quite or very likely to donate time in the future

Have arts / cultural / heritage membership: 31%
Are members of wildlife or conservation charity / organisation: 9%
Are not members: 60%
Who are they?

16–34 20%
35–64 56%
65+ 24%

Members of the Perspective segment tend to be older and are the most likely to live outside Melbourne (39%). They have lower than average qualifications and around average incomes.

28% have a university degree or higher
24% earn more than $65,000
61% live in Melbourne

How do we reach them?

60% had proactively found out information about cultural events within the past 12 months

Communicating with Perspective can be challenging, they are not proactive when it comes to seeking out cultural activities and events, and their inner-directed nature means that they will ‘see through’ explicit marketing and publicity. In addition, their media consumption is significantly below average. Strategically-placed articles in mainstream media which draw reference to their interests, however, can be effective.

They have around average engagement with TV channels, although are more likely to watch Southern Cross Television and WIN Television channels than other segments, reflecting the fact that over a third live outside of Melbourne. They are the segment most likely to spend time listening to ABC Local.

Chan 7 66% Chan 9 62% Chan 10 61% 95% spent time watching tv in a week

spent time listening to the radio 83%
Gold 104 22% ABC Local 18% FOX 13%

Perspective are most likely to listen to Gold 104 and ABC Local.
60% have ever engaged with cultural content online

Perspective are relatively light users of the Internet. They are the second least likely to use social media (after Enrichment); although nearly 6 in 10 use Facebook this is the lowest of the segments.

Their scope for engaging with cultural organisations online is limited to sourcing practical planning information such as looking for maps or event details (48%) and / or booking tickets (26%), however both are significantly lower than the average.

Their relationship with online and social media means it is rarely a primary source of information for them and they can be reached more easily through mainstream media such as print and television.

77% are likely to spend time reading online or offline newspapers or magazines within a typical week

Nearly half of Perspective are likely to have read an online or print version of a tabloid newspaper within a typical week. In line with the average, they are most likely to read The Herald Sun.

Perspective are slightly more likely than average to read local papers – along with Herald titles these are the most effective methods of reaching them through the press.

| Broadsheet | 29% |
| Tabloid    | 49% |
| Regional   | 42% |
| Magazines  | 43% |
| None       | 23% |

Most likely to see an article or advert in...

- 15% Herald Sun
- 12% Sunday Herald Sun
- 23% Free regional or local papers
- 14% Paid regional or local papers

57% used a social media platform in the last week

How do we develop them?

Marketing should focus on...

- Tapping into and building on existing interests
- Tapping into and building on existing interests
- Respecting their individuality and encouraging exploration

The Perspective segment’s interest in culture seems to have dissipated, and they need to be tempted from their homes and countryside visits and convinced that the arts and culture have something to offer them. They are not proactive when it comes to seeking out cultural activities and events, thus push rather than pull marketing will be key to reaching them. Their inner-directed and independent nature, however, means that forming effective marketing messages can be a challenge; they will see through explicit marketing and publicity. Instead they need to feel that they are making their own discoveries and acting on their own terms.

They tend to have a small set of venues that they turn to for their cultural needs, so their loyalty is relatively valuable.
The Entertainment segment tends to be conventional, younger adults for whom the arts are on the periphery of their lives. Their occasional forays into culture are usually for spectacular, entertaining or must-see events.
Audience Atlas Victoria

Entertainment looks for escapism and thrill in their leisure activities. Leisure time is for fun, not for being challenged, for learning, or applying oneself intellectually. They are largely socially motivated, looking to pass time in an enjoyable and fun way with friends and family. For the most part they cannot envisage that they will meet these needs through engaging with arts and culture.

The Entertainment segment prefers to stick to the tried and tested when it comes to leisure pursuits and are unlikely to take risks in discovering something new. They are outer-directed, caring about what others think of them, and don’t like to be seen as going ‘against the grain’. Arts and culture compete against a wide range of leisure activities and are not a priority for Entertainment, who have the lowest engagement of the segments. Whilst they attend infrequently, they will splash out on significant events, with associated spend per trip higher than average.

Average monthly cultural spend

- **$21.85** on admission / tickets
- **$10.19** on food and drink
- **$8.28** on transport to the event
- **$2.53** on souvenirs or programmes

Average annual spend **$500**

5.8 average annual frequency of attendance

Artform attendance

The lower priority given to arts and culture is highlighted in Entertainment’s artform engagement which is the lowest of the segments across the board. They are most likely to have visited museums, but only one-third have done this in the past three years.

Cultural behaviour

Consumption and creation in the past 12 months

More likely to have visited or done:
- Blockbuster or Hollywood films
- Theme parks
- Rock/pop music event
- Coast and seaside

Less likely to have visited or done:
- Art gallery
- Contemporary dance
- Opera
- Experimental theatre
- Play/drama

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Artform attendance

The lower priority given to arts and culture is highlighted in Entertainment’s artform engagement which is the lowest of the segments across the board. They are most likely to have visited museums, but only one-third have done this in the past three years.
Entertainment are the least aware of the cultural offer throughout the State. They were the segment least likely to have visited any of the venues or organisations. Like the other segments, Melbourne Museum was the venue that they were most likely to have visited although only 1 in 5 have done this in the past three years.

Their top ten most visited venues reveals their preference for popular, mainstream events with the Sidney Myer Music Bowl and Comedy Theatre both present—venues that are absent from the most other segments’ ‘top tens’.

5% of Entertainment had not heard of any of the venues or organisations tested within the past three years.

1 in 100 Entertainment have donated time to arts or cultural organisations

Entertainment offer venues very little potential in terms of financial support or volunteering; the majority are unlikely to do either.

Donate money?

9% are quite or very likely to donate time in the future

Never 80%
Regularly 2%
Sometimes 5%
Rarely 13%

members of at least one organisation 29%

- Have arts / cultural / heritage membership the lowest proportion of any segment
- Are members of wildlife or conservation charity / organisation
- Are not members 71%
Who are they?

- 16–34: 34%
- 35–64: 52%
- 65+: 14%

People in the Entertainment segment are the least likely to have higher level qualifications and have lower than average earnings. They are the segment most likely to have been born in Australia and nearly two-thirds are male; considerably more than the average (48%).

- 24% have a university degree or higher
- 21% earn more than $65,000
- 74% live in Melbourne

How do we reach them?

47% had proactively found out information about cultural events within the past 12 months

Very few members of this segment would actively engage with culture online; they are the segment least likely to virtually explore a venue before or after making a trip and the least likely to leave an online review.

Being particularly keen on home-based leisure, this segment has relatively high TV viewing, although this doesn’t necessarily translate across into Radio consumption.

They are unlikely to engage with state-run channels such as ABC 1 and 2, instead preferring commercial digital channels with a focus on entertainment like channels Nine, Ten and Eleven.

- Chan 9: 74%
- Chan 7: 72%
- Chan 10: 72%
- 96% spent time watching tv in a week

- FOX: 23%
- Gold 104: 23%
- Nova: 18%
- 77% spent time listening to the radio

Entertainment are most likely to listen to Fox and Gold 104.
39% have ever engaged with cultural content online

They are relatively low internet-users, and usage tends to be passive; they are unlikely to actively use the web as a resource to fill their leisure time, preferring experiences offline to satisfy their social needs.

Consequently, Entertainment are the least likely to have engaged with cultural content online. Obtaining planning information such as looking for maps or event details is the main reason they would go online for cultural content (32%), but this is significantly lower than the average (60%). Direct contact online will be a more effective way of reaching Entertainment as they are unlikely to find content on their own.

68% are likely to spend time reading online or offline newspapers or magazines within a typical week

Most members of this segment are unlikely to proactively keep themselves up to date with what’s on. For those who do, TV and radio are generally relied on, alongside local newspapers and recommendations from others.

Entertainment are the segment least likely to spend time reading newspapers or magazines. Just under half are likely to have read an online or print version of a tabloid paper within a typical week. In line with the average, they are most likely to read The Herald Sun and the Sunday Herald Sun. They also read a limited range of newspapers and magazines. They were most likely to see an article or advert in the Herald Sun, Sunday Herald Sun and local free papers.

### Most likely to see an article or advert in...

- **Herald Sun**: 8%
- **Sunday Herald Sun**: 8%
- **The Saturday Age**: 3%
- **Free regional or local paper**: 11%

<table>
<thead>
<tr>
<th>Broadsheet</th>
<th>Tabloid</th>
<th>Regional</th>
<th>Magazines</th>
<th>None</th>
</tr>
</thead>
<tbody>
<tr>
<td>19%</td>
<td>47%</td>
<td>24%</td>
<td>35%</td>
<td>32%</td>
</tr>
</tbody>
</table>

Marketing should focus on...

- **Mainstream through TV, sports and celebrity**
- **One off, must-see events and shows**
- **Promoting escapism and excitement**

The Entertainment segment is only willing to spend on leisure and recreation if they believe it will meet all of their needs. While they may not see a 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. Their children also influence their behaviour so pester power would work on this segment. ‘Culture’ needs to be downplayed in the marketing, with messaging emphasising the ‘must-see’, ‘thrill’ and ‘blockbuster’ elements of the offer.

Endorsements through well-known personalities or celebrities that the Entertainment segment is already engaged with will be key to reaching them.
Victoria’s artform markets

The following sections examine the Victorian culture market broken down by the markets for the main artforms. Each section examines the penetration of that artform into the culture market, as well as the size of the current, lapsed and potential market of each artform. The culture segment breakdown and expenditure for each artform market is also examined, alongside a more specific look at specific venues’ penetration into each market.

Further information about individual organisations can be found in Appendix 1: Breakdown by Organisation.
3 million are in the dance market

Overall, 75% of the culture market in Victoria can be considered part of the dance market, representing 3 million people.

Classical dance or ballet is the most popular form of dance within the cultural market, however there is a significant amount of crossover between the different dance forms.

Essence and Expression dominate the dance market. This may explain why adults within this market tend to be extremely culturally active and have a significantly higher than average cultural spend.

Half of the culture market have ever been to a dance event or performance

75% of the culture market can be considered to belong to the dance market, while 25% of the culture market can be considered to be in the current market for dance. Just over half of the current dance market have been to a dance performance within the past 12 months (52%).

Defining the dance market

To understand the dance market, we combined the markets for ballet, classical, contemporary and other live dance.

The potential market for dance is significant, representing approximately a quarter of the cultural market (27%).

Dance market penetration

13% visited in the past 12 months
12% visited 1–3 years ago
24% visited 3+ years ago
27% never been and interested
25% never been and not interested
Classical dance has the highest penetration

Classical dance has a slightly larger market compared to the other two dance forms. **66%** of the cultural market are considered to be part of the classical market, in comparison to the **63%** that belong to the contemporary dance market or **65%** that are part of the other live dance market. Whilst having the largest market penetration, classical dance actually has the smallest potential market (27%).

Significant crossover

**36%** of the current dance market are in the current market for all three dance forms

**19%** of the current dance market are in the current contemporary / live other dance market

**23%** of the current dance market are only in the current classical / ballet dance market

There is significant crossover between the different dance forms, especially within the current market. **73%** of the current dance market attended performances of at least two of the dance forms, suggesting that the majority of the dance market have quite diverse tastes and do not restrict themselves to one specific form of dance.

However, **27%** of the current dance market have attended only one type of dance show, with the majority having only gone to see a ballet / classical performance (24%) suggesting there is less crossover between this type of dance and the others.

![Penetration by dance form](image.png)
Essence and Expression dominate the dance market

The model demonstrates the Culture Segment profile of adults that have ever attended a dance performance.

The dance market is obviously very successfully attracting Essence and Expression as there is a much higher proportion of these two segments in this market compared to the culture market. In contrast, there is a significantly lower proportion of the less culturally-active segments; Enrichment, Release, Perspective and Entertainment.

This trend is even more pronounced when considering the profile of adults that have attended a dance performance within the past three years; Essence and Expression make up 50% of this market.
The Culture Segment profile of the different dance forms is very similar

Considering the amount of crossover between the three different dance forms, it is unsurprising that the Culture Segment profile of adults that have ever attended performance for these art forms is extremely similar.

One of the key differences by dance form is that classical / ballet attracts an average proportion of Enrichment, whilst there was a significantly lower proportion of Enrichment than average that had ever attended contemporary and other live other dance.
The potential dance market has a more diverse Culture Segment profile

As expected, the potential dance market has a more diverse Culture Segment profile. Affirmation represent 22% of this market, however they tend to be quite an aspirational segment and it can be difficult to convert their interest into attendance. It also appears that there is more opportunity to attract a higher proportion of Essence and Expression to dance, these two segments represent 33% of the potential market.

They are extremely culturally active and have above average spend

Adults in the dance ever market tend to be extremely culturally active, with the majority having engaged in some way with the different types of artforms tested. This trend is even more pronounced when considering what other artforms the current dance market have engaged with in the past three years.

79% of the current dance market are also in the current visual arts market

76% are also in the current museum market

61% are also in the current play / drama market.

As Essence and Expression dominate the market of adults that have ever attended a dance performance, it makes sense that this market is particularly culturally active. In comparison, the potential dance market is significantly less likely to be as culturally active than average. A much lower proportion of this market are in the current market for the majority of artforms tested, suggesting this might be a challenging market to convert interest into attendance due to general inactivity within the cultural market, but this could be achieved through targeting marketing at the key segments comprising this market.

### Average monthly cultural spend

<table>
<thead>
<tr>
<th>Artform</th>
<th>Cultural average</th>
<th>Current dance</th>
<th>Ever dance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Museum</td>
<td>$50.36</td>
<td>$76.58</td>
<td>$64.54</td>
</tr>
<tr>
<td>Visual Arts</td>
<td>$24.65</td>
<td>$37.20</td>
<td>$31.84</td>
</tr>
<tr>
<td>Plays/Drama</td>
<td>$19.88</td>
<td>$31.31</td>
<td>$25.71</td>
</tr>
<tr>
<td>Music</td>
<td>$9.96</td>
<td>$18.27</td>
<td>$13.29</td>
</tr>
</tbody>
</table>
Considering how culturally active the dance ever and current market is, it's not surprising that they have above average monthly cultural spend.

**The Australian Ballet company has the highest awareness and penetration into the dance market**

75% of the ever dance market are aware of The Australian Ballet

9% are aware of Chunky Move

2% are aware of Lucy Guerin Inc

The Australian Ballet enjoys the highest level of awareness within the dance market (adults that had ever attended a dance performance), whilst only a very small proportion of the dance market were aware of Chunky Move or Lucy Guerin Inc.

As expected, The Australian Ballet has the highest level of market penetration: 40% of the ever dance market have ever seen a performance and a further 22% can be considered to be in the potential market.

3% of the dance market have either attended a Lucy Guerin performance, or were interested in attending in the future. Chunky Move has a slightly larger share of the dance market: 12%.
3.5 million are in the festival market

Overall, 88% of the culture market is in the festival market, representing 3.2 million people.

Given the nature of this market, incorporating a variety and depth of events across a number of different artforms, it is not surprising that this artform is particularly attractive to the more culturally-active segments – Essence, Expression, Stimulation and Affirmation.

The current festivals market spends around 78% more than average, with the most significant differences in spend seen for food and drink and transport.

**Festivals have one of the largest lapsed markets**

The market for festivals is large, with 88% of the culture market having either been or are interested in attending. Interestingly, the proportion who haven’t been but are interested is only 8%, meaning that most of those in the market for festivals have attended before.

Defining the festival market

To understand the festival market, we combined the markets for festivals with multiple ticketed events, and excluded festivals which involve purchasing a single ticket to attend.

Compared to other artforms, festivals has the largest lapsed market (32%) suggesting that organisations would benefit from targeting those individuals who have become inactive.

**Festival market penetration**

- 28% visited in the past 12 months
- 20% visited 1-3 years ago
- 32% visited 3+ years ago
- 8% never been and interested
- 12% never been and not interested

Base [3841]
The festival ever market looks similar to the culture market

Given the nature of festivals (events with a diverse range of events attempting to cater to a wide audience within an area of interest) and the size of the market itself, it’s unsurprising that the festivals ever market looks similar to the culture market in general.

Festivals attract a slightly higher proportion of three of the more culturally-active segments – Expression, Essence and Affirmation – and a lower proportion of Entertainment.

Expression and Essence are prominent in the current market

Of those who have attended a festival in the past three years, Essence and Expression feature strongly, making up 17% and 25% of the current market respectively, which is 4 percentage points higher than the culture market overall for both segments. As both these segments enjoy communal experiences and are open to a wide range of artforms, festivals are a good fit for them culturally.

The proportion of less culturally-active segments (Enrichment, Release, Perspective and Entertainment) is low in both the current and ever market for festivals.

Attracting the potential market will help diversify festivals’ Culture Segment profile

The Culture Segment profile of the potential festivals market is significantly different to the current and lapsed markets for festivals, which are broadly distributed in a similar manner to the culture market overall. Of those who are interested in attending a festival but have not, Essence makes up a very small proportion (2%), suggesting that those who are interested have already attended. Similarly, the other more active Culture Segments – Expression, Stimulation and Affirmation – are all significantly smaller in size than that seen in the culture market (5, 10 and 10 percentage points lower respectively).

Entertainment and Perspective make up close to half this market (42%), 14 and 11 percentage points higher than the culture
market average. This suggests that these two segments, which tend to be less culturally active, have an interest in attending festivals, even if only a small proportion have visited previously, likely due to their broad appeal.

The festival market is a very culturally-active market

Given who it attracts and the nature of the market – incorporating a wide range of artforms – it is unsurprising that the festival ever market is a culturally-active market, with the majority having engaged with other artforms as well.

79% of the current festivals market was in the current market for visual arts (cultural average 65%)

77% were in the current museums market (cultural average 68%)

60% were in the current play/drama market (cultural average 47%)

Although the overlap with the music festivals market is not as large, it is still substantial, with

42% of the current festival market also in the current music festivals market.

The festival current market tends to spend more than average, with those in this market spending 30% more, on average, on admission, food and drink, transport and souvenirs and programs.

Those in the ever market, however, spend only slightly more than the culture average, which is likely to be a reflection of the fact that this market is large and has broad appeal.
Melbourne Comedy Festival has the highest penetration into the festivals ever market

At 91% awareness and 44% attendance within the festivals ever market, Melbourne Comedy Festival commands the greatest level of penetration of all the festivals.

91% are aware of Melbourne Comedy Festival

73% are aware of Melbourne International Film festival

63% are aware of Melbourne Festival

62% are aware of Melbourne Fringe Festival

39% are aware of Melbourne International Jazz Festival

38% are aware of Melbourne Writers Festival

30% are aware of Wangaratta Jazz Festival

24% are aware of Castlemaine Festival

14% are aware of Melbourne Cabaret Festival
Awareness of five out of the nine festivals tested was around 40% or below suggesting that building awareness of these festivals should be a priority for these organisations.

While some festivals have high conversion rates – 48% of people who are aware of Melbourne Comedy Festival have attended an event, for example, while this figure is 38% for Castlemaine Festival – most markets have a larger potential market than their current and lapsed markets combined. Melbourne International Film Festival, for instance, has nearly twice as many people who are interested in attending than those who have actually been. Targeting these interested but inactive festival attendees is therefore a key strategy for significant growth.
3.8 million are in the libraries market

Overall 95% of the culture market in Victoria can be considered to be part of the public libraries market, representing 3.8 million people.

The recent market for libraries is substantial, with over half of the cultural market visiting a library within the past 12 months.

The Culture Segment profile of those who have ever been to a public library is very similar to the culture market overall, with only Expression and Affirmation very slightly over-represented.

Public libraries have a very large recent market

95% of the culture market can be considered to belong to the public library market. This includes 4% of the culture market who have never been to a public library, but would be interested in doing so in the future.

71% of the culture market are in the current market for public libraries, and of this current market, almost four in five are very recent visitors having been to a public library within the past 12 months (79%).

The lapsed market for public libraries is significant, and represents a fifth of the culture market (20%). The potential market is much smaller, at only 4% of the culture market.

Library market penetration

56% visited in the past 12 months
15% visited 1–3 years ago
20% visited 3+ years ago
4% never been and interested
5% never been and not interested
The Culture Segment profile of the public library ever market is very similar to the culture market overall.

The model demonstrates the Culture Segment profile of adults that have ever visited a public library.

The largest segments in the market of adults who have ever been to a public library, are Expression (22%), Affirmation (16%) and Stimulation (16%), mirroring the overall culture market. Expression and Essence are slightly over-represented in the ever library market compared to the whole culture market. In contrast Entertainment, a less culturally-active segment, is slightly under-represented.

Looking at the profile of adults who have been to a public library in the past three years, Expression make up 25% of the market, compared to 21% in the culture market as a whole. Essence (14%) and Affirmation (16%) are also very slightly over-represented, at 1% more than the culture market average each.
The less culturally-active segments are more prominent in the lapsed market

The lapsed library market is significant representing 20% of the culture market.

Looking at the Culture Segment profile of the lapsed library market, a higher proportion belong to the less culturally-active segments; Release, Perspective, Enrichment and Entertainment compared to the overall culture market. These segments can be challenging to attract, as their interest can be difficult to translate into engagement, but the fact that they have previously visited is promising.

However, the more active Stimulation (17%), Affirmation (15%) and Expression (13%) are still the largest segments in the lapsed market in overall.

Stimulation is the largest segment within the potential market

Looking at the 4% of the culture market who are potential library visitors, 22% are Stimulation (who are only 16% of the overall culture market), and 17% are Affirmation (only 15% of the culture market). A couple of the less culturally-active segments are also over-represented: Release are 14% (vs 9% of the culture market) and Entertainment are 12% (vs 8% of the culture market). However, these less culturally-active segments’ interest can be more difficult to convert to attendance.
Library visitors are slightly more culturally active than the culture market overall

We found that the adults that have ever visited a public library were slightly more likely than average to have engaged with a variety of artforms tested. Over two-thirds were in the current art gallery or exhibition or museum market, and almost half (49%) were in the current theatre market. For the current public library market, the trend for above average engagement is even more pronounced:

- 75% of the current public library market are also in the current museum market
- 72% of the current public library market are also in the art gallery or exhibition market
- 52% of the current public library market are also in the current play / drama market

The current public library market are also considerably more likely to be in the current market for heritage, natural and scientific cultural sites, such as large parks / heritage sites, formal / landscape gardens, zoos / safari parks and science centres.

As Expression dominates the current public library market, it is understandable that this market is more culturally active. In comparison, the lapsed and potential public library markets are significantly less likely than average to be culturally active, with a much lower proportion of both these markets in the current market for the artforms tested. This adds to the evidence that converting their interest to public library attendance could be challenging.

Whilst the adults that have ever attended a library are slightly more culturally active than average, their cultural spend does not differ significantly from the average. This suggests that this market tends to gravitate towards free venues or activities.
The State Library of Victoria has very high awareness and high penetration into the libraries market. 83% of those who have ever visited a public library are aware of the State Library of Victoria.

The library has a high level of market penetration: 60% of those who had ever been to a public library had visited the State Library of Victoria, and a further 17% can be considered to be in their potential market.
3 million are in the literature market

Overall, **75% of the culture market** in Victoria are in the market for events connected with books or writing, though this includes a high proportion of potential and lapsed visitors.

As in other less mainstream artforms, **the literature market is dominated by the more culturally-active segments Expression, Stimulation, Essence and Affirmation.** Making up 82% of the current market, this also explains why **this market is highly active across artforms and spend 60% more than the culture market average.**

**The literature market has a larger lapsed and potential compared to the size of the current market**

75% of the culture market in Victoria are in the literature market, meaning they have either attended an event connected with books or literature or are interested in doing so.

Just over one in ten of the culture market (13%) have been to a literature event within the past 12 months which means that this artform has one of the smallest recent markets along with festivals and dance.

**Defining the literature market**

To understand the literature market, we looked at the market for any events connected with books or writing.

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13% visited in the past 12 months ago
16% visited 1–3 years ago
18% visited more than 3 years ago
28% never been and interested
25% never been and not interested

**Literature market penetration**
Over half (53%) of the people in the culture market have never been to a literature event, with a further 18% attending more than three years ago. Encouraging the lapsed and potential markets to attend literature events would therefore be worthwhile since they make up such a significant proportion of the literature market.

**Expression especially dominates the literature market**

As is often the case for less mainstream artforms, the more culturally-active segments (Expression, Stimulation, Essence and Affirmation) dominate the literature market, making up 82% of the current market and 79% of the ever market.

Expression, who make up 21% of the culture market, are a much larger proportion of both the literature ever market (28%) and especially the current literature market (31%). This is unsurprising as these sorts of events are an opportunity for them to indulge their particular passions of receiving new ideas, and sharing and discussing culture with others.
The potential literature market has a more diverse Culture Segment profile

The potential literature market has a Culture Segment profile more similar to the culture market average, particularly when compared to the current and lapsed literature markets. Affirmation are the largest segment within the potential literature market (19%) suggesting that attracting this segment may be a key strategy for growth.

Whilst Release are slightly under-represented in the current and lapsed literature market there are 11% of this segment within the potential market, three percentage points higher than the culture market as a whole. Whilst they can be quite a difficult segment to convert from interest to attendance it does indicate that Release have an underlying interest in attending literature events.
The current literature market is highly active in the culture market

Adults in the ever literature market are very likely to have taken part in other cultural activities, with over 95% having also been to an art gallery or museum at least once in their life. Those currently in the literature market are very likely to be in the current market for the different types of artforms tested:

- **90%** of the current literature market are also in the current art gallery market
- **90%** of the current literature market are also in the current museum market
- **70%** of the current literature market are also in the current play / drama market

This high engagement with other artforms is understandable as the ever and current markets are dominated by culturally-active segments, especially the culturally-voracious Expression.

The potential literary events market are also likely to be in the current market for these artforms, with 63% in the current museum market, 61% in the current art gallery market, and 39% in the current play / drama market, suggesting they could be persuaded to broaden their repertoire to include literary events.

Those in the literature ever market spent over a third more than the average at cultural events. However, those in the current literature market spent over 60% more overall, including 78% more on transport, 71% more on souvenirs and programs, and 53% more on both admission and food and drinks. This again is likely a reflection of the dominance of the more culturally-active segments this market attracts, particularly, Expression.

### Average monthly cultural spend

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<th></th>
<th>Cultural average</th>
<th>Current literature</th>
<th>Ever literature</th>
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</thead>
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<tr>
<td>Admission</td>
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<td>$67.32</td>
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<tr>
<td>Food and drinks</td>
<td>$24.65</td>
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<tr>
<td>Transport</td>
<td>$19.88</td>
<td>$35.45</td>
<td>$28.90</td>
</tr>
<tr>
<td>Souvenirs and programs</td>
<td>$9.96</td>
<td>$17.07</td>
<td>$14.13</td>
</tr>
</tbody>
</table>
Increasing awareness of organisations will foster audience growth

18% of those who have ever visited a literary event are aware of the Wheeler Centre

17% of those who have ever visited a literary event are aware of the Melbourne Writers Festival

Awareness of both the Wheeler Centre and Melbourne Writers Festival is relatively low, although 90% of those aware of either organisation are in the market for them, having either been or are interested in going.

For the Wheeler Centre, this low awareness maybe due in part to it being established in 2010, which will also be contributing to its high retention rate. While the Melbourne Writers Festival may also be limited as they operate for only two weeks of the year, both organisations would benefit from developing their audience through a three-pronged approach of targeting those who are unaware, those who are aware and interested, and those who have lapsed.
Overall 95% of the culture market in Victoria can be considered to be part of the live music market, representing 3.8 million people. Music has one of the largest markets overall as 86% of the culture market have ever attended a live music performance. As the current and lapsed music market is so large, this art form has a smaller potential market.

The Culture Segment profile of those who have ever been to see live music is very similar to the culture market overall, but there are some differences between the Culture Segment profiles of different music genres.

The live music market is huge
Live music has one of the largest markets overall (95%), and is similar in size to the library market. 86% of the culture market have ever been to see live music, and 64% of the culture market are in the current market for live music, having been to a performance in the last three years. The lapsed market for live music is substantial, representing just over a fifth of the culture market (22%). The potential market is considerably smaller as such a high proportion of the market is either in the current or lapsed music market (9%).

Music market penetration

41% visited in the past 12 months
23% visited 1–3 years ago
22% visited 3+ years ago
9% never been and interested
5% never been and not interested
**Rock and pop has the highest market penetration**

86% of the cultural market are part of the rock and pop market, compared to the 67% in the classical music market and the 64% in the opera market. 40% of the cultural market have been to see live rock and pop in the past three years, whereas the current markets for classical music and for opera are each roughly half the size in comparison.

**Limited crossover**

5% of the current live music market are in the current market for all three live music forms

9% of the current live music market are in the current market for both classical music and opera

59% of the current live music market are only in the current market for rock and pop

There is very limited crossover between the different music genres within the current music market; 78% of the current live music market only went to see one of the three genres of music. It appears that the majority of current rock and pop visitors restrict themselves to that genre alone (59%).

A higher proportion of the current music market attend classical music and opera (9%), than the proportion that attend just opera (7%). However, there appears to be less crossover amongst the classical market, as a higher proportion just visit that genre only (12%).

This shows that the live music market is relatively focused on particular music genres, and are generally not willing to attend performances of other music forms.
The Culture Segment profile of the music ever market is very similar to the culture market overall

The two largest segments in the music ever market are Expression (22%) and Stimulation (17%) and these are also the two largest segments within the culture market overall. As often found, there is a slightly lower proportion of the less culturally interested segments within the ever music market, namely Entertainment and Enrichment.

Expression dominate the classical and opera ever markets

As the rock and pop market constitutes such a high proportion of the music ever market, it is unsurprising that the rock and pop ever Culture Segment profile is very similar to the music ever market as a whole. There is a significantly higher proportion of Stimulation within this market, which is to be expected as this segment tend to have high levels of interest in more contemporary genres of music.

The classical and opera ever markets have very similar Culture Segment profiles in comparison to each other. Expression dominate both of these markets compromising 27% of the classical ever market and 28% of the opera ever market. There is also a higher than average proportion of Essence within these markets compared to the culture market overall. As expected, Entertainment only represents a very small proportion of the classical and opera ever markets, 1% and 2% respectively.

In contrast, rock and pop clearly has a more mainstream Culture Segment profile in comparison to classical and opera, with a higher proportion of the less culturally-active segments, Release, Perspective and Entertainment.

Culture Segment profile of the ever music market compared against the profile of the culture market

Percentage point difference between the market of adults that have ever attended music and the culture market

<table>
<thead>
<tr>
<th>Segment</th>
<th>Difference</th>
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<tr>
<td>Essence</td>
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<tr>
<td>Expression</td>
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<tr>
<td>Affirmation</td>
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</tr>
<tr>
<td>Enrichment</td>
<td>+1</td>
</tr>
<tr>
<td>Stimulation</td>
<td>+1</td>
</tr>
<tr>
<td>Release</td>
<td>0</td>
</tr>
<tr>
<td>Perspective</td>
<td>0</td>
</tr>
<tr>
<td>Entertainment</td>
<td>-2</td>
</tr>
</tbody>
</table>

Base [3574]
Higher proportion of Affirmation in the potential market of all three music genres

There is a significantly higher proportion of Affirmation within the rock and pop (21%), classical (20%) and opera (22%) potential markets, suggesting that this segment have a greater interest in engaging with more live music generally. Whilst Affirmation are culturally interested, they tend to be quite an aspirational segment and are sometimes slow to act on their interests. They often have more mainstream tastes and can be quite risk averse, so need to be reassured that an organisation’s programming, work and brand is worth their trust.

There is also a significantly higher proportion of Stimulation within the potential market for classical music (18%), with an even higher proportion of this segment within the opera potential market (19%). In contrast to Affirmation, Stimulation are very open to risk and look for ways to break away from the crowd. Their early adopter nature means they are more interested in the less well-known, riskier aspects of the program, world premieres, new
approaches, one off unique events and activities should all be highlighted to this segment.

Similar to the ever market for classical and opera, Entertainment only compromise 2% of the potential market for these two music genres.

**Adults that are in the market for opera and classical are more active than those in the rock or pop market**

The majority of adults that had ever been to see live music had engaged in some way with the other types of artforms tested. Those in the current live music market are even more likely to have engaged with the other artforms analysed:

- **76%** of the current live music market are also in the current museum market (68% culture market average)
- **75%** of the current live music market are also in the current visual arts market (65% culture market average)
- **61%** of the current live music market are also in the current play / drama market (47% culture market average)

Looking at the different music genres, the current classical music and opera markets are generally more culturally active than the current rock and pop market, and are far more likely to also be in the current market for these other artforms:

- **92%** of the current opera market and **91%** of the current classical music market are also in the current visual arts market
- **89%** of the current opera market and **87%** of the current classical music market are also in the current museums market
- **80%** of the current opera market and **76%** of the current classical music market are also in the current market for plays / drama.

This is far above the average, and ties in with the high proportion of the culturally-active Expression and Essence that opera / operetta and classical music currently attract.

Those who have ever attended a live music performance have an extremely similar monthly average spend to the culture market average. However, those in the current live music market spend 24% to 30% more on aspects of their visit compared to the average. One of the greatest differences in their spend is on admission / tickets and transport, where they spend 30% more on average. The live music market is more likely to be in the current markets for other artforms, which would explain this higher average spend.

<table>
<thead>
<tr>
<th>Average monthly cultural spend</th>
<th>Cultural average</th>
<th>Current music</th>
<th>Ever music</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Food</strong></td>
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<td><strong>$65.30</strong></td>
<td><strong>$55.05</strong></td>
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<td><strong>Transport</strong></td>
<td><strong>$19.88</strong></td>
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<td><strong>Gifts</strong></td>
<td><strong>$9.96</strong></td>
<td><strong>$12.32</strong></td>
<td><strong>$10.38</strong></td>
</tr>
</tbody>
</table>
Sidney Myer Music Bowl has the highest penetration into the music market

80% of the live ever music market were aware of Sidney Myer Music Bowl

77% were aware of Melbourne Symphony Orchestra

52% were aware of Opera Australia

50% were aware of Victorian Opera

27% were aware of the Melbourne Recital Centre

Though awareness levels and current market size are similar for Sidney Myer Music Bowl and Melbourne Symphony Orchestra, the size of the market that have ever attended the Sidney Myer Music Bowl (75%) is much larger in comparison to the Melbourne Symphony Orchestra (58%). The difference is mostly in the size of the Sidney Myer’s lapsed market: 37% of the music ever market had attended more than three years ago, a considerable
market that could be ripe for reactivation. Both venues also have large potential markets.

Over a tenth of the music ever market are aware of both the opera companies and Melbourne Symphony Orchestra, but are not interested in attending. In contrast, this figure is 5% for the Sidney Myer Music Bowl and 4% for the Melbourne Recital Centre, suggesting the broader appeal of these venues. At the same time, it also suggests that the opera and classical music companies could widen their audience appeal by targeting those markets who may not immediately be attracted to their offering.
Overall, 97% of the culture market in Victoria can be considered to be part of the museum market, representing 3.9 million people.

Some of the organisations within the museum market have the highest awareness and penetration into the culture market as a whole. This clearly demonstrates the popularity of museums within Victoria.

The Culture Segment profile of the museum market is very similar to the average profile.

The museum market is the largest of all the artforms

97% of the culture market in Victoria are within the museum market, making it the largest artform market overall. Breaking this down further, 93% of the culture market have been to a museum at some point in their lives and 68% have been in the past three years.

Museum visitors make multiple visits

An average of 2.37 visits were made by visitors who had been to a museum in the past year, indicating that museum visitors are likely to make more than one visit over a relatively short time frame.
This is further supported by the fact that of the 59% in the current paid-for exhibition market, 36% have been to at least one paid exhibition in the past year, 11% have attended between two and five, and 3% have attended more than six.

The Culture Segment breakdown of the museum market is similar to the culture market as a whole

Given its high penetration into the culture market, it is unsurprising that the Culture Segment breakdown of the museum market is very similar to the culture market as a whole.

Over one-fifth of the museum market is made of Expression (22%), followed by Stimulation (16%), Affirmation (15%) and Essence (13%).

Higher proportion of the less culturally-active segments in the lapsed and potential museum markets

While the segment breakdown for the current museum market is also fairly similar to the culture market, there are significant differences when looking at the lapsed and potential museum markets.
The more culturally-active segments are less prominent in the lapsed and potential museum markets

Interestingly, the Culture Segment breakdown for the lapsed and potential museum market appears to reflect those segments’ tendency to engage in cultural activities in general, likely the result of both the high penetration of the museum market into the culture market and the fact that this market has broad appeal.

Those segments that tend to be more culturally active make up a smaller proportion of these less culturally-active markets: Essence and Expression make up 23% and 27% of the lapsed and potential museum markets respectively, whereas they make up 39% in the current museum market and 33% in the culture market overall.

Similarly, less culturally-active segments like Release, Perspective and Entertainment make up a smaller proportion of the lapsed and potential museum market compared to the culture market average. The combined proportion of these segments make up 34% and 39% in the lapsed and potential museum market respectively, whereas they are 21% in the current museum market and 27% in the culture market overall.

What this indicates is that the current museum market has a larger proportion of more culturally-active segments than the culture market as a whole. This is presumably due to its broad appeal, attracting more of the culture market overall, and in particular the more culturally-active segments.

The current museum market are extremely active in the culture market

Adults in the current museums market are also active across a range of cultural activities, with many of them also having engaged with other artforms in the past three years, more so than the museum market as a whole.

80% of the current museum market are also in the current visual arts market (average 65%)

79% are in the public libraries current market (average 56%)

57% are in the play or drama current market (average 47%)

Given the high market penetration into the culture market it’s unsurprising that the museum market looks very similar to the overall market in terms of their spend. Notably, however, culture expenditure by the current museum market is between 19 to 25% higher across each type of expense, compared to the average expenditure for the culture market as a whole.
Melbourne Museum has the highest levels of awareness and penetration in the museum market

90% of the ever museum market were aware of Melbourne Museum

86% were aware of Sovereign Hill Gold Museum

85% were aware of Scienceworks

67% were aware of Immigration museum

65% were aware of the National Sports Museum

53% were aware of the Australian Centre for the Moving Image

17% were aware of Koorie Heritage Trust

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<thead>
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<th>Museum</th>
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<th>Never been not interested</th>
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<td>10%</td>
<td>9%</td>
<td>36%</td>
<td>44%</td>
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<tr>
<td>Sovereign Hill Gold Museum</td>
<td>14%</td>
<td>15%</td>
<td>49%</td>
<td>19%</td>
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</tr>
<tr>
<td>Scienceworks</td>
<td>15%</td>
<td>19%</td>
<td>36%</td>
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<tr>
<td>Immigration Museum</td>
<td>33%</td>
<td>7%</td>
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<td>4%</td>
<td>10%</td>
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Base [3574]
Looking at individual venues, 90% of the museum market have heard of Melbourne Museum, and 79% have ever visited. This makes Melbourne Museum the organisation with the greatest awareness and penetration - not only within the museum market, but within the cultural market as a whole.

The market penetration of Sciencesworks and Sovereign Hill Gold Museum, on the other hand - high awareness with a much larger lapsed market than current market - reflects the nature of their visitor profile. As both these venues cater primarily to families, it is expected that retention rates for these venues will be low.

have issues with retention, as evidenced by the larger size of their lapsed markets compared to their current markets. This is unsurprising, however, given the nature of their market. Because they cater largely to families, it is expected that retention rates for this venue would be low.

The Immigration Museum and the National Sports Museum, on the other hand, have smaller current and lapsed markets compared to their potential market, with over a quarter of the museum market not having attended either venue but are interested in doing so.

Finally, the greatest avenue for growth for the Australian Centre for the Moving Image (ACMI) is through increasing awareness, as their retention rates are higher compared to other museum venues, but this is partially due to lower levels of awareness.
Overall, 89% of the culture market in Victoria can be considered to be part of the theatre market, representing 3.6 million people.

Theatre has a large current market, with just under half of the culture market having attended a play within the past three years.

The Culture Segment profile of those who have ever been to a play is very similar to the culture market overall, with a higher proportion of the more culturally interested segments, Expression, Affirmation, Essence and Stimulation.
The theatre ever market has a less diverse Culture Segment profile

There are significantly higher proportions of the more culturally-active segments Expression (23%), Affirmation (16%), Essence (15%) and Stimulation (17%) in the theatre ever market, while the less culturally-active segments Release, Perspective and Entertainment are underrepresented, compared to their composition in the culture market.

In contrast to the ever market, the Culture Segment profile of the current market for theatre differs quite significantly in comparison to the culture market. Expression dominate here, comprising a quarter of the current theatre market (26%). Essence and Stimulation also tend to be more active theatre attendees and together make up 35% of the current market (whereas they make up 28% of the culture market).

Finally, as expected, there is only a small proportion of Entertainment in the current theatre market (3%). This segment tends to be attracted to more mainstream, popular cultural events and activities such as major international musicals and shows.

There is a significantly higher proportion of Enrichment within the lapsed market

The profile of the lapsed theatre market is quite similar to the profile of the culture market overall apart from a few exceptions. Expression are active theatre attendees, as there is a significantly lower proportion of this segment within the lapsed market (17%). However, they still represent one of the largest segments within this market, along with Affirmation (17%).

There is a significantly higher proportion of Enrichment within the lapsed market (12%), suggesting that they need more targeted marketing to encourage reactivation.
Expression make up over a fifth of the potential theatre market

The potential market contains more Release (15%) and less Essence (8%) than the culture market as a whole. While showing potential, Release is less culturally active overall, and would require focused marketing to attract and convert them.

Theatre visitors are more culturally active and spend considerably more than the culture market average

Adults in the current theatre market are far more likely than average to have engaged with the other types of artform tested:

- 82% of the current theatre market are also in the current visual arts market (average 65%)
- 73% of the current theatre are also in the market for musical / cabaret (average 43%)
- 60% of the current theatre market are also in the current market for comedy (average 41%)

In comparison, the lapsed and potential theatre markets are less likely to be culturally active, with a much lower proportion of both these markets also in the current market for museums or visual arts. This suggests that their non-attendance is connected to not attending cultural venues in general, rather than specific to their interest in attending theatre.

Those who have ever attended a play do not show much of a difference in average monthly cultural spend when compared to the culture market average. However, when looking at the spend of the current theatre market, current visitors spend 45% more on admission and tickets, 40% more on transport, 37% more on souvenirs and programs, and 35% more on food and drink than the culture market average.
The Melbourne Theatre Company has the highest awareness and penetration into the play / drama market

74% of the ever play / drama market are aware of The Melbourne Theatre Company

52% are aware of Malthouse Theatre

28% are aware of Theatre Works

27% are aware of La Mama

7% are aware of Red Stitch Actors Theatre

As well as having the highest levels of penetration, Melbourne Theatre Company has a very large potential market, similar to the proportion that have ever attended the theatre within the play / drama ever market (31%).

Whilst having the lowest levels of awareness and penetration, Red Stitch Actors Theatre has good awareness to attendance conversion levels. 48% of those that are aware have attended Red Stitch.
Overall, 91% of the culture market in Victoria can be considered to be part of the visual arts market, representing 3.7 million people.

The visual arts market is significant, over four in five of the culture market has been to a gallery or exhibition in the past.

There is a much smaller proportion of Entertainment in the visual arts market, however, this is supplemented by a slightly higher proportion of the more culturally interested segments, Essence, Expression, Affirmation and Stimulation.

**Nine in ten of the culture market are in the visual arts market**

91% of the culture market are in the visual arts market. That is, they have been to, or are interested in visiting, an art gallery or exhibition.

65% of the culture market are in the current visual arts market, and the majority of those in the current market have engaged very recently by visiting an art gallery or exhibition within the past 12 months (40%). The lapsed market for art galleries or exhibitions is significant, representing a fifth of the culture market (19%).

**Visual art market penetration**

- 40% visited in the past 12 months
- 25% visited 1–3 years ago
- 19% visited 3+ years ago
- 7% never been and interested
- 9% never been and not interested

Defining the visual arts market

To understand the visual arts market, we looked at the market for both free and ticketed visual art galleries or exhibitions.
Much lower proportion of Entertainment in the visual arts market

The largest segments in the visual arts ever market are Expression (23%), Affirmation (17%) and Stimulation (17%), mirroring the overall culture market. Overall, there are a slightly higher proportion of the more culturally interested segments (Expression, Affirmation, Essence and Stimulation) in this market compared to the overall culture market.

Interestingly, Entertainment only comprise 2% of the ever market, which is a significantly lower proportion compared to the culture market overall (8%). This is one of the lowest proportions of Entertainment recorded across all main artforms, though a similar proportion of Entertainment can be found in the dance and literature ever markets (2%). This is, however, surprising considering visual arts commands a larger proportion of the cultural market compared to these two markets, suggesting that more could be done to attract this segment to visual arts.

These results are more pronounced when looking at the current market. There is an ever higher proportion of the more culturally-active segments here, with Expression, Stimulation, Affirmation and Essence making up three quarters of the current market (76%), and Entertainment only making up 1% of this market.

Less culturally-active segments are prominent in the lapsed visual arts market

The lapsed market for visual arts represents 19% of the culture market. Looking at the Culture Segment profile of the lapsed market, a greater proportion belong to the less culturally-active segments, Enrichment, Release and Perspective, compared to the overall culture market. These segments can be challenging to attract, as their interest can be difficult to translate into activity, but the fact that they have previously visited is promising.
Audience Atlas Victoria

Expression and Release are the largest segments in the potential market

Looking at the 7% of the culture market who are in the potential visual arts market, 19% are Expression (who compromise 21% of the overall culture market), and 17% are Release (only 9% of the culture market). The less culturally-active segments like Release can be more difficult to convert from interest into attendance, and will require tailored marketing strategies in order to attract successfully.

Visual arts visitors are slightly more culturally active than average

Some of the less culturally-active segments – in particular Entertainment – are less likely to attend visual arts organisations and events. As a result adults that have visited an art gallery or exhibition were slightly more likely than average to have engaged with a variety of different artforms:

83% of the current visual arts market are also in the current museum market (cultural average 68%)

59% are also in the current theatre market (cultural average 47%)

53% were also in the current market for musicals and cabaret (cultural average 43%)

Considering there are a higher proportion of the more culturally interested segments within this market it’s unsurprising they are more active than average. In comparison, adults in the lapsed

Average monthly cultural spend

<table>
<thead>
<tr>
<th></th>
<th>Cultural average</th>
<th>Current visual art</th>
<th>Ever visual art</th>
</tr>
</thead>
<tbody>
<tr>
<td>People</td>
<td>$50.36</td>
<td>$63.38</td>
<td>$55.12</td>
</tr>
<tr>
<td>People</td>
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<td>$30.47</td>
<td>$26.73</td>
</tr>
<tr>
<td>People</td>
<td>$19.88</td>
<td>$25.41</td>
<td>$21.84</td>
</tr>
<tr>
<td>People</td>
<td>$9.96</td>
<td>$12.33</td>
<td>$10.64</td>
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</tbody>
</table>
and potential visual arts markets tend to be less culturally active, with a much lower proportion of adults also in the current market for the other artforms tested. Converting these markets’ interest to art gallery or exhibition attendance could therefore be challenging.

Overall, the visual arts market has a slightly higher than average spend, 7 to 10% more on cultural expenses compared to the mean, but these differences are more pronounced when looking at the current visual arts market. People in this market, compared to the cultural average, spend between 24 to 28% more on expenses related to cultural consumption.

**Awareness of all of the visual art venues is relatively low**

64% of the market who have ever attended a gallery or exhibition were aware of the National Gallery of Victoria

47% were aware of the Bendigo Art Gallery

38% were aware of the Australian Centre for Contemporary Art

17% were aware of McClelland Gallery and Sculpture Park

8% were aware of Tarrawarra Museum of Art

Considering the size of the visual arts market, awareness, of these galleries amongst adults that have ever attended an art gallery or exhibition, is relatively low. This suggests that these venues would benefit from increasing their profile within the Victoria area. Greater awareness should increase the potential market considerably.
4 million in the commercial theatre market

Victoria’s commercial theatres’ programs are diverse, covering a range of different cross-arts events. This means that the majority of the artforms covered within this research form the bulk of the commercial theatre artform market.

This means that the overall market for commercial theatre is very large, representing 99% of the culture market overall. It has an extremely large recent market, with 59% of the culture market having attended one of the commercial theatre artforms within the past 12 months.

The commercial theatre market includes almost the entire market for culture

However, in reality a considerable proportion of the individuals within the commercial theatre market will not be willing or interested in attending the full range of different events currently programmed by the commercial theatres. The live music, theatre, dance and literature sections within this report should therefore be referred to in order to understand the size of the market of these artforms.

59% visited in the past 12 months
22% visited 1–3 years ago
14% visited 3+ years ago
4% never been and interested
1% never been and not interested

Commercial theatre market penetration

Base [3841]
Musicals and cabaret have a large ever market

The musicals and cabaret market is sizeable, with 86% of the culture market belonging to it. 70% of the culture market have ever been to a musical or a cabaret performance, which makes it one of the artforms with the largest ever markets; behind museums (93%), visual arts (84%) and theatre (74%).

The majority of the musicals and cabaret market are actually current attendees, having been to a performance within the past three years (43%). Nevertheless, the proportion of lapsed attendees within this market is significant (27%).

Above-average proportions of Essence, Expression and Affirmation in the ever market

Essence, Expression and Affirmation are very slightly over-represented in the ever musicals and cabaret market in comparison to the culture market overall. As perhaps expected, Entertainment comprise a lower proportion of the ever musical and cabaret market (5%) than the culture market (8%).

The Culture Segment profile of the musicals and cabaret ever market is actually very similar to the profile of the theatre ever market. Essence, Expression and Affirmation make up similar proportions of both artforms, with only slight

Defining the musicals and cabaret market

To understand the musicals and cabaret market, we combined the markets for both musicals and cabaret performances.

<table>
<thead>
<tr>
<th>Culture Segment</th>
<th>Ever musical and cabaret</th>
<th>Culture market</th>
</tr>
</thead>
<tbody>
<tr>
<td>Essence</td>
<td>15%</td>
<td>13%</td>
</tr>
<tr>
<td>Expression</td>
<td>23%</td>
<td>21%</td>
</tr>
<tr>
<td>Affirmation</td>
<td>16%</td>
<td>15%</td>
</tr>
<tr>
<td>Enrichment</td>
<td>9%</td>
<td>9%</td>
</tr>
<tr>
<td>Stimulation</td>
<td>16%</td>
<td>16%</td>
</tr>
<tr>
<td>Release</td>
<td>8%</td>
<td>9%</td>
</tr>
<tr>
<td>Perspective</td>
<td>8%</td>
<td>9%</td>
</tr>
<tr>
<td>Entertainment</td>
<td>5%</td>
<td>8%</td>
</tr>
</tbody>
</table>
differences in the proportion of Stimulation and Entertainment (one percentage point). There are also high amounts of crossover between these artforms with 80% of the current musicals and cabaret market also belonging to the current theatre market.

Higher than average proportion of Enrichment in the lapsed market

There is a much lower proportion of Expression within the lapsed market (18%) compared to the current (27%) suggesting that they are quite an active segment within the musicals and cabaret artform.

The lapsed musicals and cabaret market is in line with the profile of the culture market profile of Victoria overall, the only significant difference is that there is an above average proportion of Enrichment within the lapsed market.

Affirmation and Stimulation are key segments within the potential market

Affirmation usually comprise 15% of the culture market, but they represent a significantly higher proportion in the potential musical and cabaret market (19%). There is also a significantly higher proportion of Stimulation within the potential market for this artform (20%), suggesting that targeting these two segments could be a key strategy for growth.
The comedy market is sizeable

89% of the culture market belongs to the comedy market which is therefore similar in size to the theatre market.

The comedy market is relatively active, with four in ten individuals within the culture market having been to a performance within the past three years (41%). The lapsed and potential markets compromise half of the culture market (48%) suggesting that there is significant potential to attract larger audiences to comedy.

Entertainment and Enrichment are less prominent within the ever comedy market

Despite being quite an accessible and social artform, there is still a significantly lower proportion of Entertainment within the comedy ever market (6%). This trend is even more pronounced when the profile of the current comedy market is considered; they compromise 5% of this market (average 8%).

21% visited in the past 12 months
20% visited 1–3 years ago
27% visited 3+ years ago
21% never been and interested
11% never been and not interested

There are also lower proportions of Enrichment within the comedy ever market (7%) which may not be surprising considering they tend to gravitate towards activities that offer the opportunity for intellectual stimulus or self-development. Similar to Entertainment, they only make up 5% of the current comedy market.

Culture Segment profile of the comedy ever market compared to the culture market

<table>
<thead>
<tr>
<th>Culture Segment</th>
<th>Ever comedy market</th>
<th>Culture market</th>
</tr>
</thead>
<tbody>
<tr>
<td>Essence</td>
<td>15%</td>
<td>13%</td>
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<td>9%</td>
</tr>
<tr>
<td>Entertainment</td>
<td>6%</td>
<td>8%</td>
</tr>
</tbody>
</table>
Expression and Stimulation are the largest segments within the ever comedy market, (23% and 17% respectively). They compromise an even larger proportion of the current comedy market (25% and 20% respectively). In contrast, the Culture Segment profile of the lapsed and potential comedy markets are comparable to the profile for Victoria as a whole.
Pantomime has significant lapsed and potential markets

Perhaps surprisingly, 65% of the culture market are in the pantomime market, and is therefore comparable in size to the market for ballet or classical dance (66% of the culture market).

There are a much higher proportion of lapsed (24%) or potential (30%) pantomime attendees within this market, compared to the proportion of individuals that had attended a pantomime performance within the past three years (10%).

Expression dominates the pantomime current and ever markets

Pantomime is clearly very successful at attracting the Expression segment; they make up 38% of the current and 26% of the ever pantomime market.

There are a much lower proportion of the less culturally-active segments within the pantomime ever market, particularly Entertainment (3%) and Perspective (5%). This trend is even more pronounced within the current market, where they only comprise 2% respectively.

4% visited in the past 12 months
7% visited 1–3 years ago
24% visited 3+ years ago
30% never been and interested
35% never been and not interested

Defining the pantomine market
To understand the pantomine market, we looked at the market for pantomime shows.
Significantly higher proportion of Essence and Enrichment within the lapsed market

Whilst Expression is the largest segment within the lapsed market (21%), there are a significantly higher than average proportion of Essence (17%) and Enrichment (11%).
Her Majesty’s Theatre has the highest awareness and penetration into the commercial theatre ever market

80% of the market who have ever attended a commercial theatre were aware of Her Majesty’s Theatre

76% were aware of Princess Theatre

76% were aware of Regent Theatre

74% were aware of Comedy Theatre

69% were aware of the shows at the Crown Casino

60% were aware of Athenaeum Theatre

47% were aware of Forum Theatre
4 million are in the multi-artform venue market

Victoria’s multi-artform market is large, comprising 98% of the culture market, though the penetration for individual multi-artform organisations is low, indicating that heightening awareness and converting the potential market are key avenues for audience growth.

Within each organisation, there is relatively high crossover in main artform consumption, indicating that the current market for these organisations are also in the current market for a number of their main artforms.

The multi-artform venue market includes almost the entire market for culture

The multi-artform market includes nearly the entire culture market, which is unsurprising given the number of artforms encompassed within it. As with the commercial theatre market, it’s likely that a significant proportion of the market are unlikely to be attending, or willing to attend, the full range of artforms programmed by a multi-artform organisation. In this chapter, the amount of artform crossover for each venue is examined, though to understand each type of market, reference should be made to the appropriate chapter in this report.

Multi-artform market penetration

- Visited in the past 12 years ago: 4%
- Visited 1–3 years ago: 15%
- Visited more than 3 years ago: 22%
- Never been and interested: 57%
- Never been and not interested: 2%
Though the market for multi-arts is large, penetration for individual organisations is low

Although nearly the entire culture market is in the market for one of the artform types programmed by the multi-artform venues, the penetration for the venues themselves is relatively low.

34% of the multi-artform ever market are aware of Geelong Performing Arts Centre

30% are aware of Meat Market

16% are aware of Arts House North Melbourne

The size of the potential market for each of these venues matches or exceeds their combined current and lapsed market, suggesting that a key strategy for audience growth would involve targeting this market and converting their intention into action.
**Artform market crossover for Geelong Performing Arts Centre’s current market**

- **16%** Music and theatre
- **7%** Music and dance and theatre
- **1%** Dance and theatre
- **7%** Theatre
- **17%** Music and theatre and comedy
- **36%** Music, dance, comedy and theatre
- **1%** Dance and comedy
- **5%** Theatre and comedy
- **2%** Music and comedy
- **0%** Music and dance and comedy
- **0%** Dance and comedy
- **0%** Comedy
- **1%** Music and dance and theatre
- **0%** Music and dance and comedy
- **0%** Dance and theatre
- **0%** Dance and comedy
- **4%** None of these

**Geelong Performing Arts Centre has relatively high artform crossover**

- **36%** of Geelong Performing Arts Centre’s current market are in the current market for music, dance, comedy and theatre
- **17%** are in the current market for music, theatre and comedy, but not dance
- **16%** are in the current market for theatre and music
- **7%** are in the current market for theatre only
- **5%** are in the current market for music only

Note: the figures in the model do not add to 100% due to rounding

**Defining theatre and performing arts**

Note that ‘theatre and performing arts’ as used in the venn diagrams include the combined markets for theatre, musicals or cabaret, pantomine, comedy and literature.
Meat Market has high artform crossover

45% of Meat Market’s current market are in the current market for music, dance, visual arts and theatre

26% are in the current market for music, theatre and visual arts

3% are in the current market for dance and theatre

4% are in the current market for theatre only

4% are in the current market for music only

45% of Meat Market’s current market are in the current market for music, dance, visual arts and theatre

26% are in the current market for music, theatre and visual arts

3% are in the current market for dance and theatre

4% are in the current market for theatre only

4% are in the current market for music only
As a multi-arts venue and presenter, Arts Centre Melbourne shares significant audience with a range of organisations and - like its other venue Sidney Myer Music Bowl - it is particularly important to the performing arts sector and the organisations that use Arts Centre Melbourne as a venue. 76% of the culture market is aware of it and 53% have attended a show or event at some point in their lives.

They attract higher proportions of the more culturally-active segments – that is, Essence, Expression and Stimulation – and so, unsurprisingly, their current market spend 60% more than the culture market average.

Arts Centre Melbourne has high awareness and penetration

Compared to other multi-artform organisations, Arts Centre Melbourne enjoys high market awareness and penetration, with 76% of the culture market having heard of them before and 53% having been to a show.

As discussed earlier, Sidney Myer Music Bowl also has high penetration, with 80% being aware of them and 75% having been to a show.

The more culturally-active segments are attracted to Arts Centre Melbourne

The three most culturally-active segments – Essence, Expression and Stimulation – make up more than two-thirds of Arts Centre Melbourne’s current market (67%), with these proportions being larger than the average for the multi-artform market in general.
There is high crossover across artform markets

Looking at the artform crossover for Art Centre Melbourne’s current market, there are high levels of crossover across the four main artforms: theatre and performing arts, visual arts, dance and music.

38% were in the current market for all four of Arts Centre Melbourne’s main artforms

37% were in the current market for music, theatre and visual art

7% were in the current market for theatre and visual art

The high crossover figures indicate that Arts Centre Melbourne is serving audiences with high levels of cultural engagement across the main artforms that make up their programming schedule. Indeed, not only do three-quarters of their audience engage in at least three of the main artforms, but the proportion of their audience who are only consuming one artform category is very low.

This is supported when examining organisation crossover, with their current market making up:

87% of Theatre Works’ current market

82% of the The Australian Ballet’s current market

80% of Victorian Opera’s current market

Arts Centre Melbourne’s current market spends significantly more than average

Given their higher-than-average appeal to the more culturally-active segments, it’s not surprising that the average spend of the current Arts Centre Melbourne market is 60% higher than the culture market average at $168.39. The greatest difference is in expenditure on admission, which at $85.82 is 70% higher than the culture market average.
Research parameters

This study examining the profile of the culture market in Victoria was carried out for Arts Victoria by Morris Hargreaves McIntyre.

Sample size We collected 3,841 responses to the Audience Atlas Victoria survey. This was also compared to the Victoria sample of the Audience Atlas Australia project completed in 2011, which included a sample size of 1,420.

Date of fieldwork Collection ran from 24 October 2013 to 24 November 2013.

Data collection method Respondents were recruited by an external panel company and responded to an online questionnaire.

Weighting procedures Responses were weighted to be representative of the population of Victoria according to age, gender, income level and location. These distributions were calculated based on 2011 Census data.

Reliability of findings At a 95% confidence level, the maximum confidence interval or margin of error is 1.58%. So at 50%, the actual figure could range from 48.42% to 51.58%.