



Audience Atlas Victoria

Appendix 3:
Comparisons to the 2011 National
Audience Atlas

April 2014

**ARTS
VICTORIA**



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The Australian culture market is large

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

Overall, **87% of adult Australians** (16 and over) which equates to **13.73 million** people are in the current market for arts, culture and heritage.

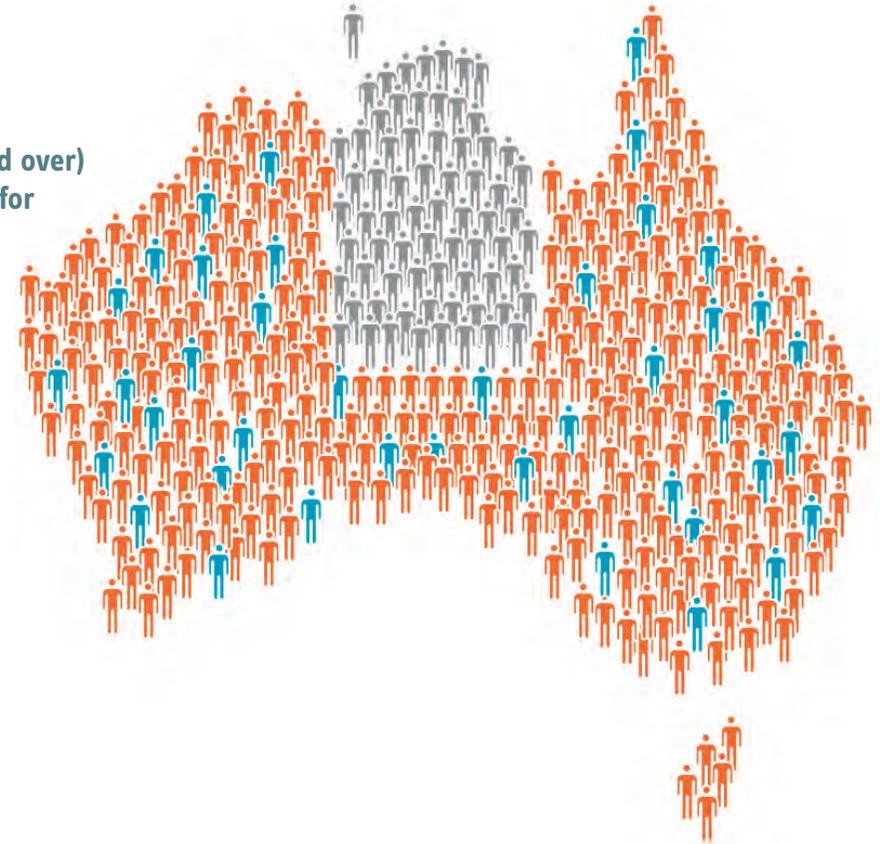
This compares with **95%** of adults in the **New Zealand market** and **85%** of adults in the **United Kingdom** market.

State market size ranges from a high of **93%** of the adult population in **Australian Capital Territory**, who have taken part in at least one cultural activity within the past three years, to **84%** of the adult population in **South Australia**.

87%

of the Australian adult (16 and over) population are in the market for arts, culture and heritage

13,729,100 individuals



Note: Northern Territory was not surveyed in the 2011 Audience Atlas Australia

Australians spend \$11.7 billion on culture

Just under half of those in the culture market (46%) stated they had **personally spent money** on going to cultural events or places within the past month.

Across the culturally active market this gives an **average monthly individual expenditure of \$71** on attending cultural events, activities, or places **per culturally active adult**. This breaks down to \$44 on admissions or tickets, \$18 on food and drink at cultural events or places and \$9 on souvenirs and programs.

Factoring up this monthly average across the total population gives a figure of just under **\$12 billion spent on consuming culture** in Australia per year.

The level of **expenditure varies greatly by region**, from a high of **\$83 per person in Australian Capital Territory** to just **\$52 in Tasmania**. Arts and culture attenders in three states – ACT, Western Australia and New South Wales – spent more than the **national monthly average of \$71**, while arts and culture attenders in Victoria spent \$70, just under the national average.

Together they spent:

\$11.7 billion

On arts, culture and heritage in the past 12 months



Admission



Food & drink



Shopping

Average monthly cultural spend by state

State	Monthly cultural spend per person
Australian Capital Territory	\$83
Western Australia	\$81
New South Wales	\$75
Victoria	\$70
Queensland	\$67
South Australia	\$58
Tasmania	\$52

National support for the arts is significant

67% of the culture market donates to arts and cultural organisations. **12% are regular donors** and 55% occasionally donate. 33% of the culture market have never donated to an arts and cultural organisation.

Market support for the arts takes a number of forms. Support ranges from purely **transactional expenditure** and **membership**, through to **giving money and time**.

More information about the ways that different people donate their time and money can be found in the Culture Segments pen portraits. The following charts and tables outline the proportion of the culture market that support the arts in each way at a national and regional level.

Taken together the charts demonstrate that **support for the arts is significant** across the cultural market at a national level, and that there are some interesting differences in support for the arts at a state and city level.

Frequency of donation to the arts by state

State	Regularly	Occasionally	Never
Western Australia	17%	52%	31%
ACT	15%	60%	25%
New South Wales	12%	55%	33%
Tasmania	12%	60%	27%
Queensland	12%	57%	31%
South Australia	11%	51%	38%
Victoria	10%	53%	36%

People are most likely to donate regularly to arts and cultural organisations in Western Australia and Australian Capital Territory, and least likely in South Australia and Victoria.

26% of the culture market are Expression

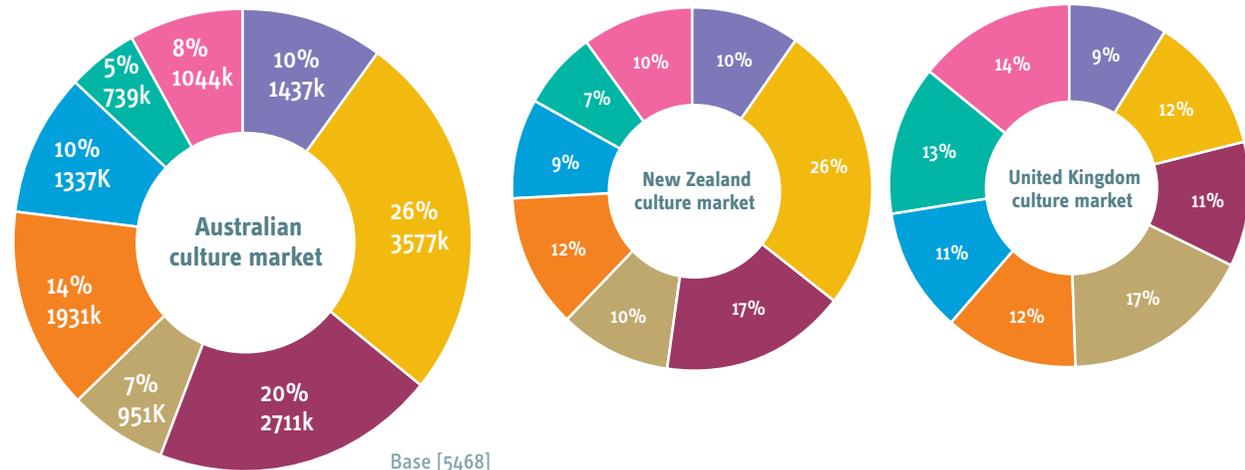
The national Culture Segment profile at the time of the **Audience Atlas Australia** survey in 2011, showed that **70% of the culture market** were in the **four most culturally active segments**; Expression, Essence, Stimulation and Affirmation.

More than 1 in 4 adult Australians (15+) in the current market for culture are in the highly culturally-active Expression segment, making it an important segment for most arts, cultural and heritage organisations.

The Culture Segment profile for the culture market in Australia is broadly similar to New Zealand, but there are significant differences between Australia and New Zealand and the UK segment profile. In particular the Expression segment is proportionally more than double the UK in both Australia and New Zealand.

It is heartening for arts organisations in Australia that the segment profile of arts attenders in Australia is more culturally active and less risk averse compared to the UK market as a whole.

Culture Segment profile of the Australian culture market compared to the New Zealand and UK culture market segment profiles

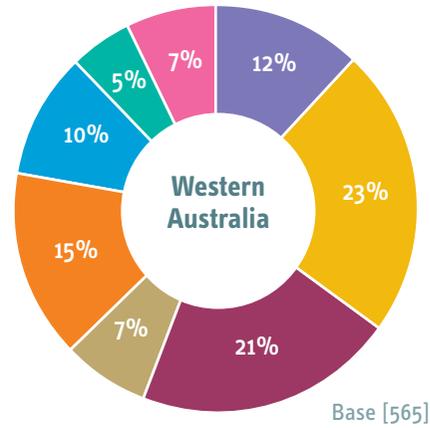
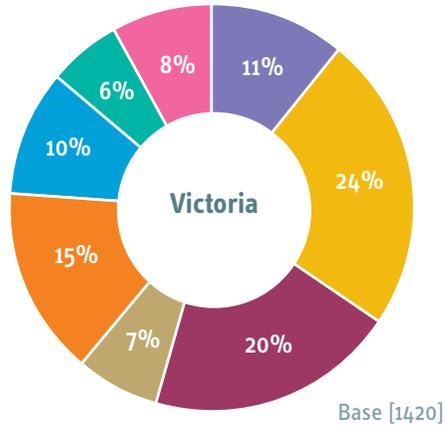
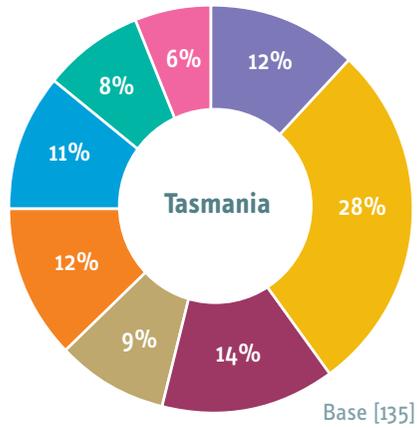
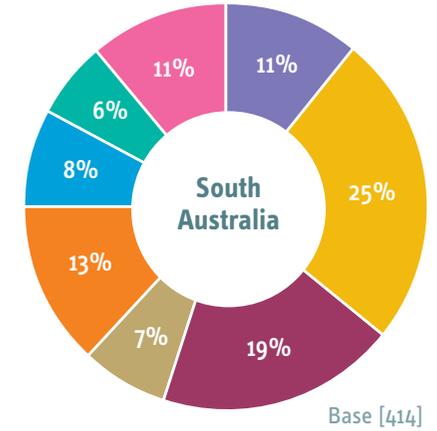
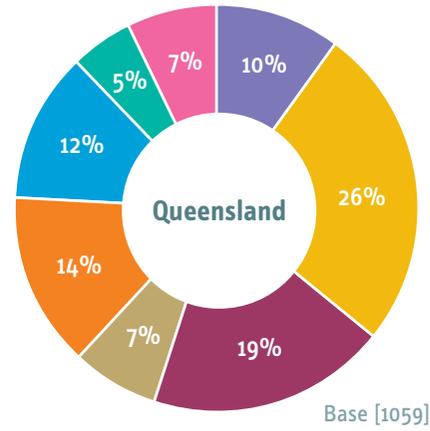
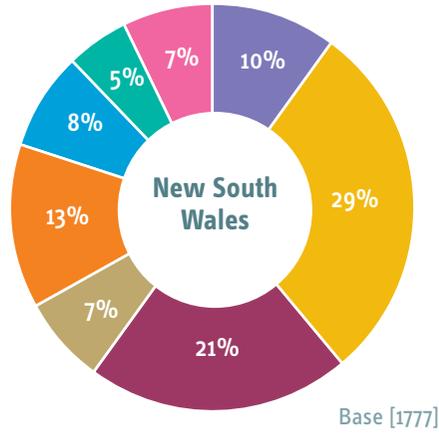
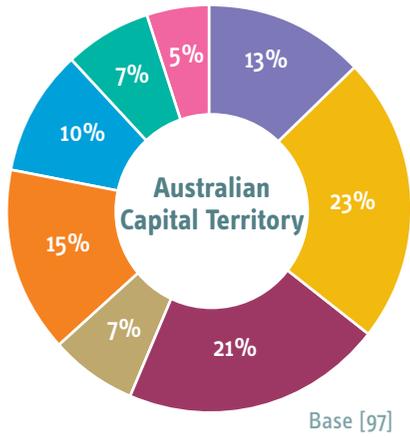


- Essence
- Expression
- Affirmation
- Enrichment
- Stimulation
- Release
- Perspective
- Entertainment

The charts on the following page are the individual state Culture Segment profiles which highlights some interesting differences across the states.

Unsurprisingly, the states with the smallest populations (Australian Capital Territory and Tasmania) exhibit the most significant differences to the national profile.

Culture Segment by state



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

Changes to the Victorian culture market

The Victorian culture market has **changed slightly** over the past two years. Most likely due to changes to the demographic profile of the population; both the mean age and education levels have increased.

However **the largest segments remain the most culturally active**: Essence, Expression, Affirmation and Stimulation.

There has also been an **increase in cultural engagement** with the proportion of people in the current market for culture up 4% since 2011.

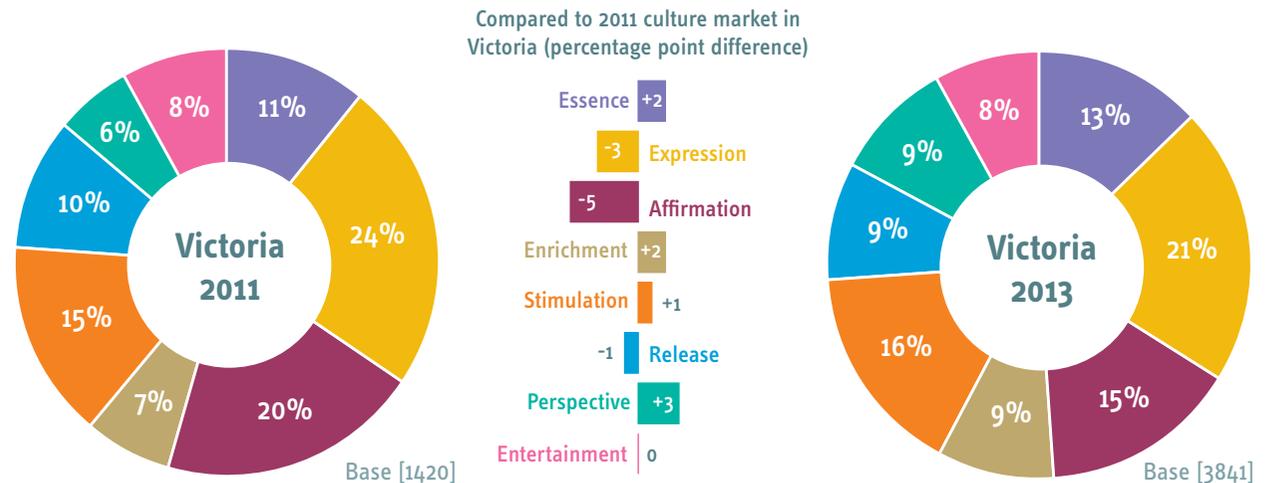
Stimulation is now the second-largest segment in the Victorian culture market

In the 2011 Audience Atlas report, the segment profile of Victoria was broadly in line with the national average. Expression was the largest segment, accounting for around a quarter of the market (24%), followed by Affirmation at 20% for both Victoria and Australia as a whole.

Over the past two years, the proportion of the culture market accounted for by these two groups

has fallen slightly, with Expression dropping three percentage points to 21% and Affirmation experiencing the most significant change by dropping five percentage points to 15%. As a result there are very small changes to the other segment proportions; Stimulation is now the second largest segment in Victoria proportionally, rising to 16%, while Perspective and Enrichment both grew to become the fifth-equal largest segments at 9%.

2011 and 2013 Culture Segment breakdown for Victoria



Average monthly cultural expenditure by the Victorian culture market

	Admission	Food and drink	Transport	Souvenirs and programs	Total
Culture Market	\$50.36	\$24.65	\$19.88	\$9.96	\$104.85
Essence	\$73.37	\$33.95	\$32.91	\$12.55	\$152.78
Expression	\$69.01	\$36.98	\$32.05	\$19.03	\$157.07
Affirmation	\$54.09	\$26.64	\$16.33	\$8.60	\$105.99
Enrichment	\$23.53	\$9.10	\$8.00	\$5.01	\$45.64
Stimulation	\$58.79	\$28.23	\$20.24	\$10.48	\$117.74
Release	\$28.14	\$15.94	\$10.18	\$4.35	\$58.61
Perspective	\$30.19	\$11.80	\$11.15	\$4.43	\$57.57
Entertainment	\$21.85	\$10.19	\$8.28	\$2.53	\$42.85

Although it isn't clear what factors have contributed to these shifts in segment sizes, when we compare the demographic data from 2011 to 2013, we see slight changes in age and employment status that indicate that the 2013 Victorian culture market is older, more highly educated, and have higher incomes.

Specifically, the 2011 data showed that the broad age cohort profile of Victoria was identical to Australia as a whole, with 37% in the 16–34 age bracket and 47% in the 35–64 age bracket. In the 2013 data, this former group has decreased in size to 32% while the latter has risen to 54%.

Building on this, we have also seen an increase in people with higher educational qualifications and those in part-time or full-time employment, coupled with a fall in the proportion of students, which may likely be contributing factors to the changes in Victoria's Culture Segment breakdown.

More than half of all cultural expenditure is on admission

The average monthly spend within the Victorian culture market was \$104.85, with nearly half this

amount being spent on admission and a quarter on food and drink.

Across the Culture Segments, total expenditure varied significantly. The highest spenders were Expression and Essence, whose monthly expenditure was in excess of \$150, while Entertainment and Enrichment spent the least (\$42.85 and \$45.64 respectively).

Although the overall amount spent varied between segments, the proportion of the total spent on

different components was broadly similar. The proportion spent on admission, for instance, ranged from 44% (Expression) to 52% (Perspective and Enrichment). All segments spent the largest amount on admission, followed by food and drink, transport, and souvenirs in that order. It would therefore be inaccurate to think of any segment as only attending free events or events close to home, although there may be tendencies towards this. For more detailed information regarding the segments' attitudes, preferences, needs and

behaviours please refer to Appendix 2: Culture Segments Victoria.

While the 2011 survey produced data on average monthly spend for Australia, this excluded the travel component. It did show, however, that the \$70 monthly cultural spend of the Victoria arts and culture market was the nearest of any state or territory to the national average (\$71). The proportions spent on the different components by the Victoria arts and culture market in 2013 has increased slightly to \$84.97 (excluding transport). The figures suggest that Victorians may spend a higher proportion on food and drink and slightly less on admission and souvenirs.

The two segments who spend the most – Essence and Expression – are more likely to spend more in the coming year

Just under half of the Victorian culture market said they would spend a similar amount on arts and culture in the next 12 months compared to the previous 12 months, with 19% saying they would spend less and 17% anticipating a higher spend.

Essence and Expression were the two segments most likely to anticipate spending more in the

Intended expenditure on arts and culture over the next 12 months

	I'm likely to spend less	I'm likely to spend more	I'm likely to spend the same amount	Don't know
Culture Market	19%	17%	47%	17%
Essence	11%	27%	51%	11%
Expression	16%	27%	46%	12%
Affirmation	21%	18%	46%	16%
Enrichment	17%	9%	47%	28%
Stimulation	19%	19%	50%	12%
Release	24%	11%	39%	27%
Perspective	22%	5%	49%	24%
Entertainment	27%	4%	45%	24%

next 12 months, while the segments least likely to anticipate spending more (Entertainment, Perspective, Enrichment and Release) did not necessarily anticipate spending *less*, but were less certain about future spending than other groups.

Over half of the culture market donate money to the arts

Around 8% of the culture market donate regularly to arts and culture, either by standing order or whenever they visit a cultural site. A further 51% reported donating occasionally, with the remaining 42% never donating. These figures suggest that tendency to donate has declined since the 2011 study, where 10% gave regularly and a further 53% occasionally. Although national figures are unavailable for 2013, the 2011 study showed that Victorians were the Australians least likely to donate regularly, and among the most likely never to do so.

The segments most likely to donate money regularly were Expression (14%) and Essence (11%). These two segments were also the least likely never to give.

Nearly a third of the culture market are likely to volunteer for an arts and culture organisation in the next year

Around one in six respondents (17%) had volunteered their time to help arts or culture at some time in the past, with 6%

Donation behaviour of the culture market in Victoria

By standing order

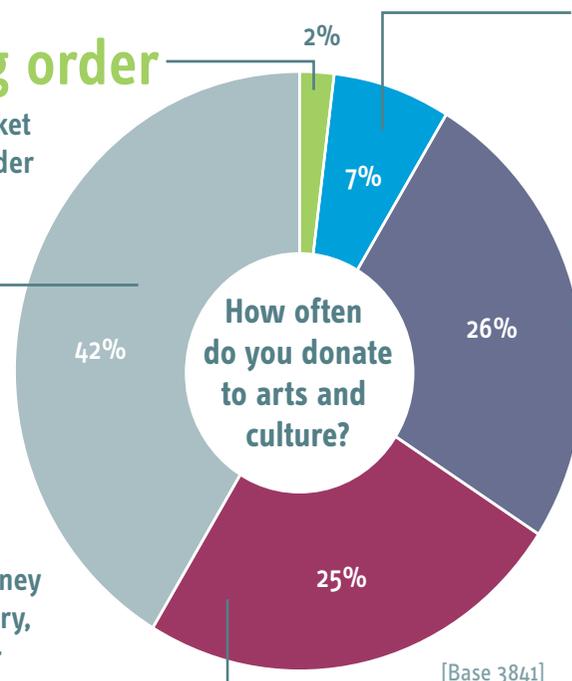
2% of the culture market donate by standing order

Never

42% never donate money to arts and culture

Rarely

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



Always

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

Sometimes

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

having done so in the previous 12 months. Almost a third of respondents (32%) said they would be either very or quite likely to volunteer at some time in the future.

Expression and Essence were the segments most likely to have volunteered, with around a quarter having done so at some time previously (Essence 25%, Expression 28%). They were also the most

likely to anticipate volunteering in the next 12 months and the least likely to rule it out altogether.

**ARTS
VICTORIA**



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