Audience Atlas Victoria 2019

Audience Atlas Victoria maps out, in detail, the profile of the culture market in Victoria, Australia. It not only examines demographic composition, but also the attitudes, motivations and behaviours of this market. Broken down by both artform and organisation, this report examines who is currently attending arts and cultural events in the state and measures the lapsed and potential market. It provides a deep understanding of this market, using data that is rich, practical and powerful. The aim of this study is to help Victorian arts organisations understand their audiences and potential audiences. This will enable them to set realistic targets, along with opportunities for collaboration within the sector.

This is the second edition of Audience Atlas Victoria. The first edition was completed in 2014. The 2019 survey is based on 4,058 responses collected between 11 April and 13 May 2019, from adults (people aged 16 years old and over). The survey sample was provided by the online panel provider The Online Research Unit.

Please refer to the research parameters at the end of this report for more detailed information on sampling, methodology and confidence intervals.

Please note that figures may not always total 100% due to rounding. In several places throughout the report, population estimates were used to convert percentages into real figure estimates. Please refer to the research parameters for further information.

Audience Atlas and Culture Segments are © Morris Hargreaves McIntyre, 2019

Cover image: Those Who Rock, Betty Amsden Participation Program 2019 Arts Centre Melbourne. Photo: Tobias Titz
A growing wealth of insight

**Audience Atlas** is a unique way of understanding the market for arts and culture, measuring and exploring the current, lapsed and potential markets across more than 25 artforms in Victoria. Audience Atlas studies have been undertaken across the globe, from New York to China. Victoria is the only Australian state to have invested in two studies, with Audience Atlas Victoria 2019 being the second iteration. This investment results in a growing databank of comprehensive data that helps Victorian arts organisations of all shapes and sizes better understand their audiences.

**A robust, representative picture**

Audience Atlas data is collected with robust samples and is carefully weighted using census data to ensure accuracy. It includes detailed information about audience demographics, behaviours, motivations and attitudes enabling us to accurately determine active, lapsed and potential market sizes for artforms.

**Powered by psychographic segmentation**

Audience Atlas segments the population using Culture Segments, a universal psychographic cultural segmentation system for arts, culture and heritage organisations. There are eight distinct segments in this system, each differentiated by a deeply-held belief about the role that arts and culture play in people’s lives. The system provides a powerful tool to understand and engage audiences by targeting them more accurately, engaging them more deeply and building mutually beneficial relationships.
Four ways to understand the market

This report offers a ‘roadmap’ of cultural attendance across the State. We take both a macro view, talking about the culture market across Victoria, and a micro view by artform, audience segment and organisation. The Audience Atlas supports deeper understanding of the arts and culture market through powerful segmentation.

This report is divided into 4 sections:

Section 1 – Victoria’s culture market
This section gives a broad overview of Victoria’s culture market, exploring the overall size and how this has changed over time. We summarise attendance levels across core artform categories, and the overall market profile.

Section 2 – Spend and support
This section comprises three areas of focus: appetite for memberships, volunteering and donating. For each area, we explore trends in engagement and look at which parts of the market offer greatest potential.

Section 3 – Culture Segments in focus
This section paints a rich picture of Culture Segments. Each of the eight segments is brought to life through a detailed data portrait. The section serves as a strategic tool that will help organisations take forward relevant insights presented throughout this report.

Section 4 – Arts attendance
This part of the report covers 12 core artforms in depth, exploring trends in attendance over time, market penetration for different sub-artforms, alongside each market’s Culture Segments profile. This part of the report is a rich data directory for arts organisations to pinpoint the market data most relevant to them.

Appendices
This report is accompanied by five appendices:

1. Individual organisations
Succinct summary of the market profile for 58 individual organisations with a sub-sample of 150 or more.

2. Demographics
Key demographics such as gender, age, employment status and more, broken down by Culture Segment.

3. Media
Explores the media consumption of the culture market, examining frequency and preferred channels by Culture Segment.

4. National comparisons
Using data collected from a short, nationally representative survey of the Australian population, this explores how Victoria differs from the national average on Culture Segment and arts and culture spend.

5. Regional comparisons
Explores significant differences across key data points by region.
Key terms

There are a number of key terms used throughout this report:

Artform
The report covers 12 core artforms: craft, commercial theatre, dance, festivals (not film or music), film, libraries, literature, live music, multi-arts (a combination of live music, theatre, dance, visual arts and literature), museums, theatre and visual arts. Most artform groups encompass a range of genres / formats, for example, dance includes ballet, contemporary dance and 'other live dance'.

Engagement
Attendance at arts and cultural events (not participation).

Culture market
Victorian adults aged 16 years old and over who have attended at least one cultural activity within the past three years. This is different to the 'current market' which is used when talking about a specific artform. The overall definition of the culture market is inclusive. It’s defined in its broadest sense, as anything from attending the opera or an art exhibition, to going to see a movie or popular music concert.

Current market
Attended an artform in the past three years.

Lapsed market
Last attended an artform over three years ago.

Potential market
Would consider attending in the future, but hasn’t previously attended.

Ever market
Everyone that has ever visited or attended (the sum of current and lapsed markets).

Not in the market
Has not previously attended and would not consider attending in the future.

Visitor attraction
A visitor attraction is defined as a place of interest that attracts tourists and locals, and may have an admission charge. This is not included in the definition of the culture market. An example of this might be a zoo, a theme park or botanic gardens.
Rapid growth, in a changing landscape

Victoria has experienced rapid population growth driven by net migration, which has led to a more culturally diverse population. In 2017/18 Melbourne was Australia’s fastest growing State capital.

Rapid population growth in the State

Victoria’s population has been growing rapidly. Between the past two census periods (2011 and 2016), Victoria’s population has increased by 10%; up on 9% for the national average. Growth was driven by Greater Melbourne which grew by 12% during this period versus 7% for the rest of the State. Between 2017 and 2018, Melbourne was Australia’s fastest growing State capital. In 2018 the city’s population reached 4.9 million; just 200k behind Sydney (5.1 million).

Geelong, Ballarat and Bendigo have also been experiencing enhanced growth. These areas have grown faster than the national regional growth average: Ballarat (1.9%), Bendigo (1.6%), and Albury / Wodonga (1.5%).

The State became more diverse and median age for those outside Greater Melbourne rose

Between the 2011 and 2016 censuses, Victoria has become more 'multicultural'; there was a 20% increase in the number of Victorians born overseas (1.7 million in 2016). Nearly 8 in 10 of those born overseas were from a country where English was not the main spoken language (78%); the highest for all Australian States and Territories.

Excluding Greater Melbourne, the median age of Victorians increased between census periods up from 41 in 2011 to 43 in 2016. Median age remained unchanged for Greater Melbourne (36).

The world’s most livable city

Melbourne has been ranked the world’s most livable city for the past six years – only narrowly losing out to Vienna in 2018. Cities are rated on five broad categories including ‘culture and environment’; Melbourne has scored 95.1 out of 100 for this measure across the past seven years but increased to 96.3 for ‘culture and environment’ in 2018.

Strong economic growth sees Victoria take first place as Australia’s top performing State

In July 2019, findings from CommSec reported that Victoria has the single best performing economy in Australia. In 2018, New South Wales tied for the top spot, but has now slipped to the second ranking. Amongst the eight key indicators used, Victoria ranked the highest for economic growth, job market, retail spending, and construction.

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3 ibid
4 ibid
6 The age at which half the population is older and half is younger. Data from ABS
7 www.eiu.com
Harry Potter changes Victoria’s theatre landscape

*Harry Potter and the Cursed Child* opened at Melbourne’s Princess Theatre in January 2019 and will run for a minimum of 18 months. Victoria is currently the only state in Australia where this is being performed – a major coup.

Results from successful runs on Broadway and the West End revealed an audience dominated by the under 35s and also those new to live theatre experiences. Results also showed 15% of this first-time audience were converted to attend future stage productions which hold promise for Melbourne’s theatre scene in the future.

Section 1: Victoria’s culture market

Cover image: Nocturnal at Melbourne Museum, April 2018.
Photo by Cesur Sanli.
4.4 million in the market for culture

Over **9 in 10** Victorian adults are in the *market for culture*; proportionally in line with the 2014 Victorian Audience Atlas results. This equates to a real figure estimate of **4.4 million**; an increased volume, reflecting Victoria’s overall population growth since the last study. In 2019, the profile of the culture market is *broadly comparable* to the *population*.

**93% of Victoria is in the market for culture**

In 2019, 93% of adult Victorians were in the market for culture, comparable to 94% in 2014. This equates to 4.4 million adults.

**8 in 10 based in Melbourne**

Looking at the culture market by regions in Victoria, the majority live in Greater Melbourne at 77%, and a further 23% live elsewhere. This geographical distribution is broadly in line with the population of Victoria overall. The highest concentrations of those in the culture market are within Inner-Melbourne at 25%, followed by Melbourne South East and West at 11% each.

The above regions are categorised using Statistical Area Level 4 geographical coding. The [ABS Mapping Tool](https://www.abs.gov.au) can be used to find out more and explore the boundaries of these areas.
Real figure growth reflects population increase

In real terms, the culture market has grown; up 400k from 4 million in 2014 to 4.4 million in 2019. Rather than a shift in propensity to be in the culture market, this real figure growth is reflective of population growth in the State – which grew by 480k, from 4.3 million in 2014 to 4.8 million in 2019.

A well-balanced age profile

The culture market is well-balanced in terms of age profile, with representation from across the age bands.

Cultural background

8 in 10 born in Australia

Close to 8 in 10 of those in the culture market were Australian born and the large majority speak only English at home. The proportion of those in the culture market who speak only English at home is 93%.

1% of Victoria’s culture market identifies as Aboriginal or Torres Strait Islander
Gender split aligns with Victorian population

The gender split of those in the culture market is well balanced at 48% male and 52% female. This is reflective of the overall Victorian population, where 49% of the population identifies as male and 51% identifies as female.

4 in 10 in full-time employment

42% of the culture market are in full-time employment and 19% retired.

Employment

- Full-time employment: 42%
- Part-time employment: 15%
- Self-employed: 6%
- Not employed: 5%
- Retired: 19%
- Home duties: 7%
- High school student: –
- Full-time student: 4%
- Don’t know: <1%

(Base 3993, ‘Prefer not to say’ removed)

Personal income

- 29% Earn over $1,500 per week
- 35% Earn between $500 per $1,499 a week
- 13% Earn between $1 and $499 a week
- 3% Don’t earn an income
Current markets for artforms

The **current market** for culture is defined as those who have **attended an arts or cultural event** within the **last three years**. The artforms with the **largest current markets** are film, multi-arts and theatre.

### Almost all in the current market for film

The current market for film (which includes film at a cinema or as part of a film festival) has the largest current market of all artforms tested, with 94% of the culture market having attended a film event in the last three years. This is consistent across all regions in Victoria, which is uncommon compared to the other artforms and is likely due to availability – more remote areas are likely to have at least a cinema, whereas a theatre or a gallery may be more unlikely.

### Young people more likely to be in the film market

Across age groups, young people (aged 16–34) are significantly more likely to be in the current market for film compared to those aged 65+ (98% versus 90%).

### Current film market remains stable

The proportion of those in the current market for film has remained unchanged since the 2014 Audience Atlas. As per the overall market, the current film market has grown in real figures due to overall population growth (up 414k).

<table>
<thead>
<tr>
<th>Artform</th>
<th>Current market (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Film</td>
<td>94%</td>
</tr>
<tr>
<td>Multi-arts</td>
<td>89%</td>
</tr>
<tr>
<td>Commercial theatre</td>
<td>71%</td>
</tr>
<tr>
<td>Live music</td>
<td>68%</td>
</tr>
<tr>
<td>Museums</td>
<td>67%</td>
</tr>
<tr>
<td>Libraries</td>
<td>64%</td>
</tr>
<tr>
<td>Visual arts</td>
<td>63%</td>
</tr>
<tr>
<td>Theatre</td>
<td>56%</td>
</tr>
<tr>
<td>Craft</td>
<td>36%</td>
</tr>
<tr>
<td>Festivals</td>
<td>34%</td>
</tr>
<tr>
<td>Dance</td>
<td>27%</td>
</tr>
<tr>
<td>Literature</td>
<td>24%</td>
</tr>
</tbody>
</table>

**Current market**

Attended in the last 3 years

[Base 4058]
Multi-arts and commercial theatre also have large current markets

Following film, the next two largest current markets are multi-arts (89%) and commercial theatre (71%). Multi-arts is defined as a combination of the market for live music, theatre, dance, visual arts or literature, and commercial theatre includes musicals, cabaret, and comedy.

Commercial theatre market sees significant growth

The current market for commercial theatre experienced the largest proportional growth out of any artforms tested, up from 57% in 2014 to 71%. This represents an increase of 848k, or 37%.

Current festival market grows by 373k

The festival market was the only other artform that saw a significant proportional increase in the current market, from 28% in 2014 to 34% in 2019. The festival market includes any festival apart from film, literature or music festivals.

Literature has the smallest current market

The artform with the smallest current market in 2019 is the literature market (those in the market for events related to books or writing). Just under a quarter (24%) are in the current market for literature, a significant decrease from 29% in 2014. This decrease means that the literature market has replaced dance in having the smallest current market.

Craft sees the most significant decrease in current market size

The current market decreasing the most compared to 2014 is the market for craft, from 46% in 2014 to 36% in 2019.

Regional Victorians more likely to be in the market for craft

Those based in regional Victoria were significantly more likely to be in the current market for craft at 39%, compared to 36% overall.

<table>
<thead>
<tr>
<th>Current market for...</th>
<th>2014</th>
<th>2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Film</td>
<td>94%</td>
<td>94%</td>
</tr>
<tr>
<td>Multi-arts</td>
<td>88%</td>
<td>89%</td>
</tr>
<tr>
<td>Libraries</td>
<td>71%</td>
<td>64%</td>
</tr>
<tr>
<td>Commercial theatre</td>
<td>57%</td>
<td>71%</td>
</tr>
<tr>
<td>Live music</td>
<td>67%</td>
<td>68%</td>
</tr>
<tr>
<td>Museums</td>
<td>68%</td>
<td>67%</td>
</tr>
<tr>
<td>Visual arts</td>
<td>67%</td>
<td>63%</td>
</tr>
<tr>
<td>Theatre</td>
<td>51%</td>
<td>56%</td>
</tr>
<tr>
<td>Craft</td>
<td>46%</td>
<td>36%</td>
</tr>
<tr>
<td>Festivals</td>
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<td>34%</td>
</tr>
<tr>
<td>Dance</td>
<td>25%</td>
<td>27%</td>
</tr>
<tr>
<td>Literature</td>
<td>29%</td>
<td>24%</td>
</tr>
</tbody>
</table>

Base [3841] [4058]

% significantly higher than previous period
% significantly lower than previous period
This chapter explores **growth prospects** through the **lapsed markets**; those who last attended something over three years ago, and **potential markets**; those who have never attended something, but would be open to doing so. These markets represent **opportunities** for organisations to **re-engage** or **reach out** to new audiences.

### Strong potential markets for festivals, dance and literature

The chart to the right shows the size of the lapsed and potential markets for each artform tested, along with the proportion of those who are not in the market.

Although it has the smallest current market of artforms tested, the market for literature has the greatest potential, with 27% or 1.2 million Victorians willing to give it a try.

Festivals and dance have large potential markets: 23% or 1 million Victorians are in the market for festivals and 22% or 961k Victorians are in the market for dance.

### Decline in potential markets reflects artform success

The table overleaf shows the difference in size of the potential markets from 2014 to 2019. Significant growth in the current markets for festivals, commercial theatre and theatre have caused the potential markets to shrink, reflecting their success in increasing penetration.

### Lapsed markets shrink as current markets grow

Like the potential markets, the lapsed markets of several artforms have shrunk as they succeeded in re-engaging their market and converting them to current audiences. This is true for commercial theatre and festivals, who have seen
significant declines in lapsed markets since 2014 and attendant increases in current markets.

**Lapsed library market grows as current market drops**

The lapsed market for libraries is sizeable. At 25%, this represents the largest lapsed market compared to all other artforms. This lapsed market has also grown markedly since 2014, up 300k or 5 percentage points proportionally. There has been an attendant decrease in the current market (from 71% to 64%) showing that library visitors have lapsed in the past 5 years.

**Museums have potential to re-engage lapsed audiences**

Similar to the library market, there is a sizeable lapsed market for museums (24%). Although this is broadly comparable to lapsed levels in 2014 (25%), this does illustrate an

**Something to think about**

Organisations mustn’t lose sight of the fact that it is easier and more cost effective to re-engage a lapsed audience than acquire a new one i.e. attract the potential audience. Strategies to maximise lapsed market opportunities should be explored fully, before looking at ways to engage the potential market.
opportunity for museums to reach out to lapsed audiences as part of a growth strategy.

**More rejectors for more artforms**

Whilst there has been significant movement between the current, lapsed and potential markets, there has also been a marked increase in the proportion of those reporting that they are not in the market for specific artforms, known as ‘rejectors’.

The proportion of these rejectors has increased significantly across the library, visual arts, craft, literature, festival and dance markets. This is largely driven by those in the outer Melbourne areas (Melbourne South East, Melbourne West) and regional Victoria.

### Not in the market for...

<table>
<thead>
<tr>
<th>Artform</th>
<th>2014</th>
<th>2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Literature</td>
<td>25%</td>
<td>37%</td>
</tr>
<tr>
<td>Festivals</td>
<td>25%</td>
<td>30%</td>
</tr>
<tr>
<td>Dance</td>
<td>25%</td>
<td>29%</td>
</tr>
<tr>
<td>Craft</td>
<td>18%</td>
<td>27%</td>
</tr>
<tr>
<td>Theatre</td>
<td>10%</td>
<td>10%</td>
</tr>
<tr>
<td>Visual arts</td>
<td>8%</td>
<td>11%</td>
</tr>
<tr>
<td>Libraries</td>
<td>5%</td>
<td>7%</td>
</tr>
<tr>
<td>Music</td>
<td>4%</td>
<td>5%</td>
</tr>
<tr>
<td>Commercial theatre</td>
<td>7%</td>
<td>4%</td>
</tr>
<tr>
<td>Museums</td>
<td>3%</td>
<td>4%</td>
</tr>
<tr>
<td>Multi-arts</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>Film</td>
<td>0%</td>
<td>1%</td>
</tr>
</tbody>
</table>

*Base [3841] [4058]*

- **% significantly higher than previous period**
- **% significantly lower than previous period**

### Something to think about

Whilst there is no definitive answer through this study as to why the number of rejectors has increased, there is a troubling trend that those already less engaged are narrowing their considerations in other artforms. Organisations in artforms with an increasing number of rejectors may want to consider more direct outreach to communities whose interests may be waning; working to showcase the breadth of the artform and alter perceptions of what engagement might be like.
A quarter have appetite for more culture

While the majority report being unlikely to alter their levels of cultural consumption, when asked to consider their future attendance, 1.1 million Victorians reported that they intended to increase this in the next 12 months. Only a small minority plan to do less in the next year. 8 in 10 are highly engaged, having attended over 3 artforms in the last three years.

1 in 4 intend to do more in the next 12 months

When asked about their cultural consumption intentions, close to a quarter reported being likely to attend more in the next year. That’s roughly 1.1 million adults who plan to increase the amount of arts and culture they consume in the next year.

1 in 10 suggest they’ll do less in the year to come

There is a relatively small proportion of the culture market who report being likely to consume less. Just over 1 in 10 report that they’re likely to reduce their arts and culture consumption (11%).

Those who live in the city are more likely to plan to do more

There is a clear link between the likelihood to do more and where people live. Those in the inner city are significantly more likely to want to do more (32%) than those who live in regional Victoria (19%). Additionally, those who live in regional Victoria were significantly more likely to be unsure about their consumption for the year ahead, than those who live in the inner-city (24% versus 12%). This can be reflective of multiple factors. Firstly, it may suggest that there may be a correlation between consumption and availability – those with easier access to the arts are more likely to want to do more. However, this could also reflect the role arts play in their lives. There may be a relationship between where people choose to live and propensity to engage with the arts.
**Young people want to do more...**

Those aged 16–34 were significantly more likely to suggest they would do more in the next 12 months, compared to the average (32% versus 24%).

...whereas those aged 65+ are significantly less likely

Conversely, those aged over 65 were significantly less likely than average to report the intention to attend more arts and culture in the next 12 months (17% compared to 24% overall). This age group was most likely to be uncertain about their plans at 23% ‘don’t know’ versus 18% overall.

**Families report being likely to do less next year**

Another notable difference in cultural consumption intention is between those with children at home and those without. Families (those with children under 16 at home) were significantly more likely to think they’d do less this year than those who did not have children (14%, compared to 10% respectively). This illustrates that life stage has an impact on intention.

**Intention to attend arts and culture events in next 12 months**

<table>
<thead>
<tr>
<th></th>
<th>Total</th>
<th>16 to 34</th>
<th>35 to 64</th>
<th>65+</th>
</tr>
</thead>
<tbody>
<tr>
<td>Likely to attend more</td>
<td>24%</td>
<td>32%</td>
<td>22%</td>
<td>17%</td>
</tr>
<tr>
<td>Likely to attend less</td>
<td>11%</td>
<td>13%</td>
<td>10%</td>
<td>10%</td>
</tr>
<tr>
<td>Likely to attend the same amount</td>
<td>47%</td>
<td>40%</td>
<td>49%</td>
<td>51%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>18%</td>
<td>15%</td>
<td>19%</td>
<td>23%</td>
</tr>
</tbody>
</table>

Base [4058] [1181] [2156] [720]

Something to think about

There are two interesting pressures on families which represent opportunities for organisations to increase engagement with this cohort.

1. Economics - now more than ever, families are looking for value for money. Arts and cultural organisations are often able to position themselves as the cost effective option in market - something that will resonate with this group.

2. The intrusion of technology on family time. There is a meta-trend internationally demonstrating the increasing infringement of technology on family time and the move amongst parents and caregivers to seek out opportunities in which this is not the focus of an experience. Propositions that put an emphasis on quality, tech-free time have become increasingly compelling.
Nearly 9 in 10 attend at least three different artforms

The graph below explores how many different artforms those in the culture market attended in the past three years. The majority fall into the 'engaged' category – attending at least three or more artforms (86%). Just short of 1 in 5 have low engagement, attending 1–3 artforms in the past three years. A small core, just over 1 in 10, are highly engaged, having attended 9+ artforms in the past three years.

**Age and location play a role in artform engagement**

The highly engaged group are significantly more likely to be aged between 16-34 and live in Inner-Melbourne. The low engagers are more likely than average to be aged 35-64, and live in Melbourne’s outer regions or regional Victoria.

**Those most engaged are planning to do even more**

Perhaps unsurprisingly, those who are likely to attend more arts and culture in the next 12 months are significantly more likely to have engaged in nine or more artforms in the last three years (14% versus 7% overall).

**4.89**

The average number of artforms engaged in the last three years
Section 2: Spend and support for arts and culture

Cover image: Punters at Live At The Steps, co-presented with Parliament of Victoria, The Push and triple j Unearthed. Photo by Jess Middleton
4 in 10 Victorians reported to have spent money on arts and culture in the previous four-week period, representing 1.8 million adults. On average, they spent $67.80 in the last four-weeks; the most on tickets and admission, and the least on souvenirs and programs. Half of the market report being likely to keep their arts and culture spend consistent, with 1 in 10 planning to spend more.

1.8 million spent money on arts and culture

The Victoria culture market was asked if they spent money on arts and culture events in the past four-weeks. 4 in 10 said they had, equating to 1.8 million adults. Those based in Inner-Melbourne were significantly more likely to have spent, at 56% compared to 40% on average. Conversely, those based in regional Victoria were significantly less likely to have done so, at 27%.

Young people more likely to spend

Looking at results by age group, those aged 16-34 were most likely to have spent money on culture in the last four-weeks, with half of this group reporting to have done so. Comparatively, those aged 35-64 and over 65 were much less likely, with only 36% and 33% respectively doing so.

Greatest spend is on tickets and admission

For those who did spend money on arts and culture in the specified four-week period, the average spend was $67.80. They spent the most on tickets and admission, averaging $35.15. Food and drink purchased at the venue had the next highest average spend, at $15.13, and souvenirs and programs the lowest at $3.14.

Differences in value by age

Although fewer people aged over 65 spent on arts and culture in the past four-weeks, they tended to spend more on tickets than any other age group, averaging $39.35. They spent markedly less however on food and drink, transport and souvenirs than the average. While young people’s highest spend was on tickets, they were also much more likely than others to have a high secondary spend.

‘Have you personally spent money going to arts and culture events in the last 4 weeks?’

<table>
<thead>
<tr>
<th></th>
<th>No</th>
<th>Yes</th>
</tr>
</thead>
<tbody>
<tr>
<td>60%</td>
<td></td>
<td>40%</td>
</tr>
</tbody>
</table>

Average spend on arts and culture (past 4 weeks)

<table>
<thead>
<tr>
<th>Spend</th>
<th>Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tickets and admission</td>
<td>$35.15</td>
</tr>
<tr>
<td>Food and drink</td>
<td>$15.13</td>
</tr>
<tr>
<td>Transport and parking</td>
<td>$14.38</td>
</tr>
<tr>
<td>Souvenirs and programs</td>
<td>$3.14</td>
</tr>
<tr>
<td>Overall</td>
<td>$67.80</td>
</tr>
</tbody>
</table>

A note on spend comparisons: this spend dataset is not directly comparable to the 2014 iteration and therefore no historical comparisons have been made.
Regional differences in spend

Inner-city locals spend the most

In addition to being the most likely to have spent on arts and culture, those living in Inner-Melbourne also spent the most. On average, they spent $50.91 on tickets in the previous four-week period – nearly $16 above the ticket spend average. Spend was also higher than average for food and drink and parking.

Melbourne South East also likely to spend more than average

Those living in Melbourne South East were slightly more likely than average to have spent money in the previous four-week period (44%), and tended to spend more on average. They also spent the most comparatively, on souvenirs and programs, at $6.55 versus $3.14 on average.

Regional Victoria has the lowest spend

Those based in Mornington Peninsula and regional Victoria were least likely to have spent on arts and culture, and had the lowest value spend when compared to other areas. On average, those who spent money on arts and culture living in regional Victoria spent $20.35 on tickets – the lowest amount of all regions.

Spend by location

<table>
<thead>
<tr>
<th></th>
<th>Average</th>
<th>Melbourne</th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th>Regional Victoria</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Inner</td>
<td>North East</td>
<td>North West</td>
<td>Outer East</td>
<td>South East</td>
<td>West</td>
<td></td>
</tr>
<tr>
<td>Admission</td>
<td>$35.15</td>
<td>$50.91</td>
<td>$25.47</td>
<td>$22.90</td>
<td>$40.23</td>
<td>$45.42</td>
<td>$33.60</td>
<td>$22.42</td>
</tr>
<tr>
<td>Food and drink</td>
<td>$15.13</td>
<td>$22.08</td>
<td>$18.04</td>
<td>$22.61</td>
<td>$10.03</td>
<td>$17.30</td>
<td>$9.04</td>
<td>$10.53</td>
</tr>
<tr>
<td>Parking and transport</td>
<td>$14.38</td>
<td>$18.64</td>
<td>$10.61</td>
<td>$2.42</td>
<td>$7.58</td>
<td>$12.34</td>
<td>$35.34</td>
<td>$9.96</td>
</tr>
<tr>
<td>Souvenirs / programs</td>
<td>$3.14</td>
<td>$3.19</td>
<td>$2.03</td>
<td>$2.06</td>
<td>$2.96</td>
<td>$6.55</td>
<td>$3.31</td>
<td>$1.93</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th></th>
<th>Mornington Peninsula</th>
</tr>
</thead>
<tbody>
<tr>
<td>Admission</td>
<td>$22.42</td>
<td>$20.35</td>
</tr>
<tr>
<td>Food and drink</td>
<td>$10.53</td>
<td>$9.10</td>
</tr>
<tr>
<td>Parking and transport</td>
<td>$9.96</td>
<td>$9.05</td>
</tr>
<tr>
<td>Souvenirs / programs</td>
<td>$1.93</td>
<td>$2.36</td>
</tr>
</tbody>
</table>
Future spend intention is stable

The culture market was asked about their intentions to spend money on arts and culture in the next 12 months. Just under half suggested they’d spend the same amount (49%). Just over 1 in 10 said they’d be likely to spend less, and 1 in 5 would be likely to spend more.

Age has a bearing on intention to spend

Similar to intention to consume culture in the next 12 months, there were clear differences by age in the intention to spend on arts and culture. Those aged 16-34 were significantly more likely to intend to spend more in the next 12 months (24% versus 18%), whereas those aged over 65 were significantly less likely to have intentions to spend more (14%).
Support for the arts is consistent

The culture market was much more likely to have made a donation than volunteered, although there is greater potential for volunteering than donating. Support for the arts, either through volunteering or donating, remained consistent with the 2014 results.

406k have volunteered recently

1 in 10 of the culture market have volunteered in the past three years. This equates to 406k Victorian adults. A further 8% or 336k have volunteered in the past, but not recently. The majority (3.7 million) have never volunteered.

Strong potential to tap into

Of those who have never volunteered for an arts, culture or heritage organisation, 1.3 million are open to doing so in the future.

Volunteering behaviour

<table>
<thead>
<tr>
<th>Volunteered – ever</th>
<th>83%</th>
<th>17%</th>
</tr>
</thead>
<tbody>
<tr>
<td>No</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Yes</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Yes, in the past 12 months
Yes, in the past 1–3 years
Yes, but over three years ago
No, but would be interested
No, not interested

Young people significantly more likely to volunteer

Looking at volunteering behaviour by age, those aged 16–34 were significantly more likely to have done so (24% ever) and 30% would be interested in doing so. Those aged over 65 were significantly less likely to have volunteered, at only 13%.

Something to think about

In recent years, traditional, periodic volunteering had been in decline, with more interest now in ad hoc, flexible ‘micro volunteering’ i.e. volunteering that is less structured and in short bursts. This is particularly the case for non-traditional volunteers, including younger people and those with children. One of the most obvious opportunities for making the most of this pool of willing and able ‘micro-volunteers’, is in marketing and communications; especially digital marketing. There are a significant number of willing participants, not only skilled and experienced in social media, but more than willing to help promote their favourite cultural institutions in the online space. If organisations can tap into this skill set – for example, strategically mobilising influencers to promote them on social media in a voluntary capacity – they can effectively create a ‘virtual marketing team’ to amplify their reach.
Libraries and streaming services have highest membership uptake

Respondents were shown a list of services and organisations and asked whether or not they were a current or lapsed member, or willing to become one. Streaming services and libraries had the greatest uptake, with close to half of the market being a current member or subscriber. Families were significantly more likely to be a current library member than those who don’t have children under 16 in the household – at 51% compared to 43%.

Young people less likely to retain library membership

There are some marked differences in library membership by age group in the culture market. Those aged 16–34 were most likely to have let their membership lapse, whereas those aged over 35 were comparatively much more likely to be current members.
Comparatively low appetite for cultural institution membership

Compared to streaming services and libraries, the proportion of those reporting to be a current member of a cultural organisation (museums, galleries, theatre or other cultural organisations) was significantly lower at 5%. However, nearly a quarter of the culture market are open to the idea, indicating opportunity to convert.

1.2 million have donated recently

Compared to volunteering, donating money to arts and cultural organisations was much higher, with 1.2 million Victorians having made either a standing donation, one-off donation or bequest in the last three years. The potential market for philanthropy is lower than volunteering, at roughly 1 in 10 interested in doing so in the future.

One-off donation the most popular way to give

Those who have made a donation to an arts or cultural organisation are most likely to have made a one-off donation, with a quarter of the market having done this ever. A further 14% would be interested in doing so.

Donation behaviour key stats

Donated – ever

<table>
<thead>
<tr>
<th></th>
<th>No</th>
<th>Yes</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>60%</td>
<td>40%</td>
</tr>
</tbody>
</table>

Made a standing donation

<table>
<thead>
<tr>
<th></th>
<th>Yes, in the past 12 months</th>
<th>Yes, in the past 1–3 years</th>
<th>Yes, but over three years ago</th>
<th>No, but would be interested</th>
<th>No, not interested</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>77%</td>
<td>14%</td>
<td>14%</td>
<td>11%</td>
<td>14%</td>
</tr>
</tbody>
</table>

Made a bequest

<table>
<thead>
<tr>
<th></th>
<th>Yes, in the past 12 months</th>
<th>Yes, in the past 1–3 years</th>
<th>Yes, but over three years ago</th>
<th>No, but would be interested</th>
<th>No, not interested</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>77%</td>
<td>22</td>
<td>3</td>
<td>11%</td>
<td>14%</td>
</tr>
</tbody>
</table>

Made a one-off donation

<table>
<thead>
<tr>
<th></th>
<th>Yes, in the past 12 months</th>
<th>Yes, in the past 1–3 years</th>
<th>Yes, but over three years ago</th>
<th>No, but would be interested</th>
<th>No, not interested</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>47%</td>
<td>14%</td>
<td>14%</td>
<td>11%</td>
<td>14%</td>
</tr>
</tbody>
</table>

1.2m

Donated in the past three years

680k

Have not left a gift in their will, but are interested

616k

Have not ever made a one-off donation, but would be interested

508k

Have not ever made a standing donation, but would be interested
Contributing to a passion
the main driver for support

The culture market was shown a list of possible reasons why one might support an arts or cultural organisation with their time or money, and asked to select which reasons would drive them to do so. Overall, the most commonly cited statement was ‘it allows me to contribute to something I’m personally passionate about’, with 1 in 5 citing this as a reason to support the arts.

Young people donate to feel good and seek personal growth

For those aged between 16–34, the most common reason for support was ‘makes me feel good about myself’ at 24%. Additionally, this group also identified ‘helps me develop and grow as a person’ as one of the top five drivers.

Those aged 35–64 are keen to make a difference

For those aged 35-64, the feeling that ‘I can make a difference’ was the main driver, followed by being able to contribute to something they’re passionate about.

The 65+ culture market also see support as a chance to meet peers

In addition to being able to contribute to something they’re passionate about, those aged over 65 were more likely than others to identify ‘it enables me to socialise and meet with other like-minded people’ as a reason for supporting, suggesting that volunteering or becoming a donor fills a social need within this group.
Increasing access is important to many...

When asked to rank reasons for supporting the arts, 7 in 10 felt that helping arts organisations increase their access – both to disadvantaged people and children – were most important. This has key implications for organisations with support campaigns.

...particularly for those aged 16–34

Those aged 16–34 were significantly more likely to agree that enabling organisations to increase access was important. 75% of this group felt increasing access for children was important, and 73% for disadvantaged communities.

Aiding capacity to tour internationally is not a strong driver for support

The least important reason for supporting arts and cultural organisations was to help organisations take their work on tour internationally. This should be borne in mind as campaigns that focus on this goal may resonate less than those that aim to increase access.

Importance of supporting arts and culture organisations to...

<table>
<thead>
<tr>
<th>Reason</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enable children and young people to access arts and cultural experiences</td>
<td>70%</td>
</tr>
<tr>
<td>Enable disadvantaged people to access arts and cultural experiences</td>
<td>68%</td>
</tr>
<tr>
<td>Support up and coming artists and practitioners</td>
<td>61%</td>
</tr>
<tr>
<td>Help maintain venues and rehearsal spaces (e.g. through major building works or repair)</td>
<td>61%</td>
</tr>
<tr>
<td>Help to take their work on tour to regional/rural communities</td>
<td>57%</td>
</tr>
<tr>
<td>Help to attract and build new audiences</td>
<td>55%</td>
</tr>
<tr>
<td>Help develop their collections or artistic works</td>
<td>52%</td>
</tr>
<tr>
<td>Help to take their work on tour internationally</td>
<td>41%</td>
</tr>
</tbody>
</table>

Something to think about

There is real opportunity for organisations to increase their Brand Equity by overtly and deeply aligning their values with those their core audience. This is likely to be Expression given its prevalence in the market overall. This will not only increase the depth of connection this audience has to the organisation, but can form the foundation for ambassadorship and membership opportunities, as well as driving repeat visits.
Section 3: Culture Segments in focus

Segmenting the Victoria culture market

**Culture Segments** is an international, sector specific segmentation system for arts, culture and heritage organisations. Culture Segments provides arts and cultural organisations with a shared language for understanding audiences. It helps target them more accurately, engage them more deeply and build stronger relationships.

Through enhanced understanding of audience needs, Culture Segments helps organisations design appropriate programming, craft combinations of products and services, make bespoke offers and transmit differentiated messaging. It helps profile current and potential markets to identify opportunities for growth.

Culture Segments spans all demographics and behaviours, but it takes understanding further: by exploring why audiences attend, what their expectations are and their core values and needs, organisations can make confident, informed decisions. The ultimate aim is to increase audience engagement.
A balanced segment profile

The Culture Segment profile for the Victoria culture market reveals a well-balanced distribution of the segments. Expression is the single largest segment at 22% or 963k, and has grown by 116k since 2014, although has stayed proportionally consistent. The rest of the segments represent roughly 1 in 10. The diversity of this profile reflects how broad and inclusive the definition of culture is. Overall, the proportions and pattern of the segment profile have remained comparable to the 2014 Audience Atlas.

Something to think about
As a values-driven segmentation system, we generally wouldn’t expect to see much change in the Culture Segment profile. The relatively stable profile in 2019 compared to the profile 5 years ago confirms this.

More conservative segments see strongest growth...

The segments seeing the most notable growth from 2014 are Release and Entertainment.

These two segments tend to be more risk averse than others, needing firm guarantees about whether or not an event will meet their needs before committing. Release has increased by 147k or 2 percentage points, and Entertainment has grown by 139k or 3 percentage points.

...with attendant decreases in risk-embracing Stimulation and Essence

Interestingly, there has been an attendant decrease in the more culturally confident segments, Essence and Stimulation. Proportionally, the decreases are significant, but the real figure difference lies under 100k.
Culture Segment breakdown by region

<table>
<thead>
<tr>
<th>Culture Segment</th>
<th>Overall average</th>
<th>Inner-Melbourne</th>
<th>Melbourne - North East</th>
<th>Melbourne - North West</th>
<th>Melbourne - Outer East</th>
<th>Melbourne - South East</th>
<th>Melbourne - West</th>
<th>Mornington Peninsula</th>
<th>Regional Victoria</th>
</tr>
</thead>
<tbody>
<tr>
<td>Essence</td>
<td>10%</td>
<td>10%</td>
<td>11%</td>
<td>8%</td>
<td>9%</td>
<td>9%</td>
<td>7%</td>
<td>7%</td>
<td>11%</td>
</tr>
<tr>
<td>Expression</td>
<td>22%</td>
<td>23%</td>
<td>26%</td>
<td>29%</td>
<td>18%</td>
<td>23%</td>
<td>23%</td>
<td>19%</td>
<td>18%</td>
</tr>
<tr>
<td>Affirmation</td>
<td>13%</td>
<td>16%</td>
<td>14%</td>
<td>14%</td>
<td>17%</td>
<td>11%</td>
<td>13%</td>
<td>16%</td>
<td>10%</td>
</tr>
<tr>
<td>Enrichment</td>
<td>11%</td>
<td>9%</td>
<td>8%</td>
<td>6%</td>
<td>11%</td>
<td>14%</td>
<td>9%</td>
<td>9%</td>
<td>14%</td>
</tr>
<tr>
<td>Stimulation</td>
<td>13%</td>
<td>18%</td>
<td>13%</td>
<td>10%</td>
<td>11%</td>
<td>11%</td>
<td>14%</td>
<td>10%</td>
<td>11%</td>
</tr>
<tr>
<td>Release</td>
<td>12%</td>
<td>10%</td>
<td>13%</td>
<td>11%</td>
<td>11%</td>
<td>13%</td>
<td>12%</td>
<td>12%</td>
<td>11%</td>
</tr>
<tr>
<td>Perspective</td>
<td>9%</td>
<td>7%</td>
<td>6%</td>
<td>9%</td>
<td>12%</td>
<td>6%</td>
<td>8%</td>
<td>9%</td>
<td>14%</td>
</tr>
<tr>
<td>Entertainment</td>
<td>10%</td>
<td>6%</td>
<td>8%</td>
<td>12%</td>
<td>11%</td>
<td>14%</td>
<td>13%</td>
<td>17%</td>
<td>10%</td>
</tr>
</tbody>
</table>

Base [4058] [1008] [355] [238] [380] [446] [438] [243] [950]

- Indicates a significant increase on the culture market average
- Indicates a significant decrease on the culture market average
Culture Segments in focus

The final section of this report includes detailed _pen portraits_ for each of the eight Culture Segments. Here, we’ve pulled together _key information_ to help you really _get to know each segment in turn_, and use the system for _strategic audience development_ activity.

**Getting to the heart of why people engage in order to influence them**

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

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

**The system includes everyone in the culture market**

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

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

**A system designed for practical application**

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

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

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

Culture Segments is easily adopted; you can segment yourself and your team¹, use these pen portraits as a daily ready reckoner to always have your priority audiences in mind, tag your database records affordably, brief your media buyer, optimise your copy. The system uses a small set of Golden Questions, which can easily be included in audience surveys or databases to evaluate the success of campaigns and better understand your existing audiences.

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

¹ To segment yourself, answer the short set of questions found here: https://mhminsight.com/culture-segments/survey
Discerning
Confident
Independent
Arts-essential

ESSENCE
core cultural attenders

Who are they?

Essence consider the arts and culture essential to their very being.
They are highly discerning and confident – high quality culture is their primary concern.

Essence is the segment most likely to say...

‘I’ll be the judge of that’

... and least likely to say...

‘What would you recommend?’

Attitudes and life priorities

Exploring
Arts and culture
Lifelong learners
Important experiences

10% or 427k
of adult Victorians

33% (26%)
have a university
degree or higher

21% (23%)
have children in household

79% (77%)
born in Australia

40% (43%)
are in full-time employment

20% (20%)
are retired

3% (7%)
speak a language other than English at home

1% (1%)
are Indigenous Australians

16–25
5%

25–34
19%

35–54
36%

55–64
22%

65+
18%

Culture market averages are shown in brackets

Culture market average

Essence

Art is everything
What role does culture play?

Culture is an essential part of their lives

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

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

What do they do in Victoria?

Reflecting the key role arts and culture play in their lives, Essence are highly engaged, with 1 in 5 having engaged with 9+ artforms in the last three years.

After Expression, Essence are the second most likely to be ‘highly engaged’ at 21% versus 14% average.

How do they approach culture?

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

Spend

Essence are willing to pay more for arts experiences, and have the second highest spend on admission.

Of the eight Culture Segments, Essence have...

- the second highest spend on admission
- fourth highest spend on food and drink at cultural events
- fourth highest spend for souvenirs / programs

<table>
<thead>
<tr>
<th>Category</th>
<th>Essence</th>
<th>Culture market average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Film</td>
<td>97%</td>
<td>94%</td>
</tr>
<tr>
<td>Multi-arts</td>
<td>96%</td>
<td>89%</td>
</tr>
<tr>
<td>Commercial theatre</td>
<td>81%</td>
<td>71%</td>
</tr>
<tr>
<td>Live music</td>
<td>71%</td>
<td>83%</td>
</tr>
<tr>
<td>Museums</td>
<td>82%</td>
<td>68%</td>
</tr>
<tr>
<td>Libraries</td>
<td>82%</td>
<td>67%</td>
</tr>
<tr>
<td>Visual arts</td>
<td>74%</td>
<td>64%</td>
</tr>
<tr>
<td>Theatre</td>
<td>75%</td>
<td>63%</td>
</tr>
<tr>
<td>Craft</td>
<td>35%</td>
<td>56%</td>
</tr>
<tr>
<td>Festivals</td>
<td>41%</td>
<td>35%</td>
</tr>
<tr>
<td>Dance</td>
<td>41%</td>
<td>35%</td>
</tr>
<tr>
<td>Literature</td>
<td>35%</td>
<td>35%</td>
</tr>
</tbody>
</table>
How do we reach them?

How do they choose?

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

Media consumption in a typical week

<table>
<thead>
<tr>
<th>Activity</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Watching free-to-air TV</td>
<td>89%</td>
</tr>
<tr>
<td>Listening to the radio</td>
<td>88%</td>
</tr>
<tr>
<td>Reading a print newspaper</td>
<td>46%</td>
</tr>
<tr>
<td>Watching subscription TV service</td>
<td>65%</td>
</tr>
<tr>
<td>Watching on-demand TV</td>
<td>83%</td>
</tr>
</tbody>
</table>

How do they consume media?

Their appetite for media is broad. This reflects their wide range of interests, and preference for ‘infotainment’. They highly value content that provides an opportunity to learn something new. They watch TV, listen to the radio and read newspapers as much as the average, but are significantly more likely to listen to podcasts.

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

Key messages

The programming team has credentials

It’s seriously high quality

It has depth, substance and intellectual rigour

Not mainstream entertainment

Essence’s top five channels

<table>
<thead>
<tr>
<th>Source</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recommendation</td>
<td>65%</td>
</tr>
<tr>
<td>Social media</td>
<td>37%</td>
</tr>
<tr>
<td>E-news / listings</td>
<td>36%</td>
</tr>
<tr>
<td>Brochures / flyers / posters</td>
<td>33%</td>
</tr>
<tr>
<td>Radio</td>
<td>31%</td>
</tr>
</tbody>
</table>

83% spent time on social media of those who do...

- Facebook: 89%
- Instagram: 51%
- YouTube: 44%

Although Essence’s social media consumption is broadly reflective of the culture market, what they want out of it is different. Essence see social media as a way to get the inside scoop on arts and culture, and will highly value exclusive content such as live streams of lectures or talks, and Q&As with a curator or director.

65% watched on-demand TV

67% watched a subscription TV service
Donating and volunteering

Essence are significantly more likely to have donated in the past, reflecting the importance of arts and culture in their lives.

Reasons for donating time or money to the arts

- To contribute to something I’m passionate about: 41%
- Makes me feel I can make a difference: 31%
- Lets me be part of something bigger than myself: 28%
- Helps me develop and grow as a person: 22%
- Enables me to socialise and meet like-minded people: 22%
- Makes me feel good about myself: 19%

1 in 5 Essence have volunteered at a cultural organisation in the past

Membership

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

- 60% An active member of a library (44%)
- 29% An active member of a sports club (31%)
- 22% An active member of a cultural organisation (14%)
- 18% An active member of a conservation or activist organisation (8%)

How do we develop them?

Marketing should focus on...

Quality and sophistication

Acknowledging their discerning interests

Opportunities for taste development and challenge

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

**Who are they?**

Creative Expression see culture as a way of broadening horizons and expressing themselves.

They are community-minded and like to be sure everyone can enjoy the benefits of arts and culture.

Expression are the segment most likely to say...

### ‘Art’s for everyone’

... and least likely to say...

### ‘But what’s in it for me?’

#### Attitudes and life priorities

**Living life to the full**

- Community and family
- Arts, crafts, culture, creativity
- Nature

---

#### Receptive

- Community
- Expressive
- Nurturing
- Generous
- Committed

---

#### Expression

- ‘people’ people

---

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Expression</th>
<th>Culture market average</th>
</tr>
</thead>
<tbody>
<tr>
<td>16-25</td>
<td>7%</td>
<td>7%</td>
</tr>
<tr>
<td>25-34</td>
<td>27%</td>
<td>22%</td>
</tr>
<tr>
<td>35-54</td>
<td>37%</td>
<td>38%</td>
</tr>
<tr>
<td>55-64</td>
<td>12%</td>
<td>16%</td>
</tr>
<tr>
<td>65+</td>
<td>16%</td>
<td>18%</td>
</tr>
</tbody>
</table>

Culture market averages are shown in brackets

---

**Audience Atlas Victoria October 2019**

---

22% or 963k of adult Victorians

26% (23%) have children in household

27% (26%) have a university degree or higher

44% (43%) are in full-time employment

17% (20%) are retired

73% (77%) born in Australia

10% (7%) speak a language other than English at home

2% (1%) are Indigenous Australians

---

Creative Expression see culture as a way of broadening horizons and expressing themselves.

They are community-minded and like to be sure everyone can enjoy the benefits of arts and culture.

Expression are the segment most likely to say...

### ‘Art’s for everyone’

... and least likely to say...

### ‘But what’s in it for me?’

#### Attitudes and life priorities

**Living life to the full**

- Community and family
- Arts, crafts, culture, creativity
- Nature
What role does culture play?

Culture is a communal experience

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

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

What do they do in Victoria?

Expression’s broad cultural consumption is reflected in their artform attendance which is significantly above average. This segment is over-represented in the current market for all artforms.

Expression have the highest level of engagement out of all segments at 27% versus 14% average.

Spend

Expression have an average spend for admission - highlighting their interest in free events – but have a much higher secondary spend than other segments.

Of all the Culture Segments, Expression have...

- the fourth highest spend on admission
- highest spend on food and drink at cultural events
- highest spend for souvenirs / programs

How do they approach culture?

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

Key messages

It will be immersive, emotional escapism

Everyone will enjoy a shared experience

It will be something to discuss

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

Expression’s top five channels

<table>
<thead>
<tr>
<th>Channel</th>
<th>Forwards</th>
<th>Backwards</th>
</tr>
</thead>
<tbody>
<tr>
<td>Television</td>
<td>43%</td>
<td>36%</td>
</tr>
<tr>
<td>Recommendation</td>
<td>36%</td>
<td>33%</td>
</tr>
<tr>
<td>Print newspapers</td>
<td>32%</td>
<td>26%</td>
</tr>
<tr>
<td>E-news / listings</td>
<td>31%</td>
<td>27%</td>
</tr>
<tr>
<td>Radio</td>
<td>30%</td>
<td>27%</td>
</tr>
</tbody>
</table>

Media consumption in a typical week

94% watching free-to-air TV of those who do...

71% Channel 7
56% Channel 9
50% Channel 10

88% listening to the radio of those who do...

25% Gold 104
24% Nova
24% Triple M

88% spent time on social media of those who do...

Facebook 87%
Instagram 46%
YouTube 64%

How do they choose?

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

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

How do they consume media?

The TV and radio channels that Expression engage with emphasise their receptiveness to both mainstream entertainment and current affairs. This reflects their broad-reaching interests, as well as their need to stay connected to the world around them. Expression are the most likely to read print newspapers of any segment.

60% read a print newspaper of those who do...

52% Herald Sun
36% Sunday Herald Sun
31% The Age

60% read an online ‘paper’ of those who do...

42% Herald Sun
42% The Age
20% Huffington Post

Expression are the most likely to use social media out of all the segments, reflecting their social and communal nature. This group is significantly more likely to use YouTube, likely due to their interest in human stories and their highly visual nature. For arts and culture, YouTube and video content allow Expression to engage more deeply on a personal level with performers and the work itself.

71% watched on-demand TV
70% watched a subscription TV service
## Donating and volunteering

Expression are naturally hard-wired to support arts organisations and as such, are the most likely to have donated money or time in the past.

### Reasons for donating time or money to the arts

<table>
<thead>
<tr>
<th>Reason</th>
<th>Expression</th>
<th>Culture market average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Makes me feel I can make a difference</td>
<td>30%</td>
<td>21%</td>
</tr>
<tr>
<td>Makes me feel good about myself</td>
<td>28%</td>
<td>18%</td>
</tr>
<tr>
<td>Helps me develop and grow as a person</td>
<td>26%</td>
<td>16%</td>
</tr>
<tr>
<td>To contribute to something I’m passionate about</td>
<td>25%</td>
<td>19%</td>
</tr>
<tr>
<td>Gain a wider perspective of the world</td>
<td>24%</td>
<td>18%</td>
</tr>
<tr>
<td>Gives me a sense of belonging</td>
<td>26%</td>
<td>14%</td>
</tr>
</tbody>
</table>

### Membership

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

Expression are natural networkers and are more likely to be members of sports clubs and activist organisations than any other segment.

- **48%** An active member of a library (44%)
- **34%** An active member of a sports club (31%)
- **18%** An active member of a cultural organisation (14%)
- **11%** An active member of a conservation or activist organisation (8%)

### How do we develop them?

**Human stories behind the art**

**Opportunities to join in**

**A chance to meet like-minded people**

Expression talk about the arts organisations they love in terms of their diversity, creativity and inclusivity. They can be wary of organisations who may appear to place quality above inclusion, so organisations need to be conscious of the way they talk about upcoming shows and events so that this group feels that everyone is welcome, not just those in the know. Ensure marketing copy highlights the human stories behind the art in a way that everyone can understand – this will appeal to Expression’s human need to make emotional connections and they’ll feel everyone is welcome.
Affirmation believe that culture is an important and worthwhile activity, and makes their lives better. They make considered, measured choices and are adventurous in the arts, but need assurance they’ve done the right thing.

Affirmation is the segment most likely to say...

‘It’s on my bucket list’

... and least likely to say...

‘C’mon – let’s just take a punt!?’

Attitudes and life priorities

Personal development

Doing the right thing

Quality experiences

Learning

Enjoyment
What role does culture play?

Culture is self-improving

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

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

What do they do in Victoria?

Affirmation have an average level of engagement in the arts in that they don’t actively engage in as many artforms as Expression or Essence, but in the artforms they do connect with, they are over-represented, such as commercial theatre, libraries and theatre.

Affirmation have the fourth highest proportion of ‘highly engaged’ at 16% versus 14% average.

Spend

Affirmation have average spend on arts and culture in Victoria.

Of all the Culture Segments, Affirmation have...

- the third highest spend on admission
- third highest spend on food and drink at cultural events
- fourth highest spend for souvenirs / programs

How do they approach culture?

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

- It will be worth your while – good value for money
- It has good reviews
- You’ll get something out of it
- It is modern and relevant (but not ‘out there’)

How do they choose?

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

Media consumption in a typical week

- 94% watching free-to-air TV of those who do
  - 74% Channel 7
  - 65% Channel 9
  - 58% Channel 10
- 88% listening to the radio of those who do
  - 26% Nova
  - 24% Triple M
  - 24% FOX
- 46% read a print newspaper of those who do
  - 51% The Age
  - 36% Sunday Herald Sun
  - 32% Herald Sun
- 52% read an online ‘paper’ of those who do
  - 50% The Guardian
  - 44% The Age
  - 39% Herald Sun

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

How do they consume media?

Like their cultural consumption, their media consumption is broadly in line with the culture market. The exception to this is their TV and radio habits – they listen to Nova and watch ABC News 24 more than any other segment.

83% spent time on social media of those who do...

- 87% Facebook
- 53% Instagram
- 56% YouTube

This group’s social media use is broadly in line with the State average, however they are much more likely to use Pinterest and Snapchat than other segments. Affirmation seek out planning information on social media, to help them inform their decision-making process on what to do or see.

72% watched on-demand TV

72% watched a subscription TV service

Affirmation’s top five channels

- Television: Channel 9 36%, Channel 7 33%, SBS 27%
- Recommendation: Channel 9 39%, SBS 33%, Channel 7 27%
- Social media: Channel 9 32%, Channel 7 27%, SBS 24%
- Radio: Channel 7 30%, Channel 9 27%, SBS 24%
- E-news / listings: Channel 9 29%, Channel 7 27%
Donating and volunteering

Affirmation has an average propensity to donate, but are significantly more likely to be interested in volunteering than the average.

Reasons for donating time or money to the arts

<table>
<thead>
<tr>
<th>Reason</th>
<th>Affirmation</th>
<th>Culture market average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Makes me feel like I can make a difference</td>
<td>26%</td>
<td>20%</td>
</tr>
<tr>
<td>Be part of something bigger than myself</td>
<td>21%</td>
<td>18%</td>
</tr>
<tr>
<td>To contribute to something that I am passionate about</td>
<td>18%</td>
<td>20%</td>
</tr>
<tr>
<td>Makes me feel good about myself</td>
<td>20%</td>
<td>20%</td>
</tr>
<tr>
<td>Helps me develop and grow as a person</td>
<td>20%</td>
<td>20%</td>
</tr>
<tr>
<td>Gain a wider perspective of the world</td>
<td>18%</td>
<td>18%</td>
</tr>
</tbody>
</table>

Affirmation donation frequency

- **42%** Never, not interested
- **14%** In the past 12 months
- **13%** 1-3 years ago
- **15%** Over three years ago
- **16%** Never, but interested

Fewer than 1 in 5 Affirmation have volunteered at a cultural organisation in the past

Membership

Naturally loyal, Affirmation can make powerful advocates and keen members when an organisation has met their needs. They are significantly more likely to be members of libraries and cultural organisations than the culture market average.

<table>
<thead>
<tr>
<th>Membership</th>
<th>Affirmation</th>
<th>Culture market average</th>
</tr>
</thead>
<tbody>
<tr>
<td>An active member of a library (44%)</td>
<td>47%</td>
<td>31%</td>
</tr>
<tr>
<td>An active member of a sports club (31%)</td>
<td>31%</td>
<td>18%</td>
</tr>
<tr>
<td>An active member of a cultural organisation (14%)</td>
<td>18%</td>
<td>6%</td>
</tr>
<tr>
<td>An active member of a conservation or activist organisation (8%)</td>
<td>6%</td>
<td>4%</td>
</tr>
</tbody>
</table>

How do we develop them?

Marketing should focus on...

Promoting learning outcomes

Wraparound offers to plan their whole experience

Early notice for events

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

**Greatness stands the test of time**

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Enrichment</th>
<th>Culture market average</th>
</tr>
</thead>
<tbody>
<tr>
<td>16-25</td>
<td>4%</td>
<td>7%</td>
</tr>
<tr>
<td>25-34</td>
<td>13%</td>
<td>22%</td>
</tr>
<tr>
<td>35-54</td>
<td>35%</td>
<td>38%</td>
</tr>
<tr>
<td>55-64</td>
<td>17%</td>
<td>16%</td>
</tr>
<tr>
<td>65+</td>
<td>18%</td>
<td>31%</td>
</tr>
</tbody>
</table>

**Demographics**

- **11%** or 472k of adult Victorians
- **19%** (23%) have children in household
- **23%** (26%) have a university degree or higher
- **33%** (43%) are in full-time employment
- **34%** (20%) are retired
- **75%** (77%) born in Australia
- **9%** (7%) speak a language other than English at home
- **1%** (1%) are Indigenous Australians
- **23%** (26%) have a university degree or higher
- **33%** (43%) are in full-time employment
- **34%** (20%) are retired
- **75%** (77%) born in Australia
- **9%** (7%) speak a language other than English at home
- **1%** (1%) are Indigenous Australians

**Attitudes and life priorities**

- **Who are they?**

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

  Enrichment is the segment most likely to say...

  **‘It’s stood the test of time’**

  ... and least likely to say...

  **‘So much better than the original’**

- **Understanding the past**

  - History and heritage
  - Conservation
  - Nostalgia

- **Arts and crafts**

  - Tradition
  - History and heritage
  - Conservation
  - Nostalgia

- **Home life**

  - Learning

- **Lifelong learners**
What role does culture play?

Looking to the past to make sense of the world

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

Enrichment love to learn more about the areas they’re interested in. Cultural visits offer pleasant escapism as well as greater fulfillment within their lives.

What do they do in Victoria?

Enrichment have a lower appetite for arts and culture than some of the other segments, and tend to under-index in the current market for the majority of artforms. The only exception is libraries. Enrichment has the third lowest proportion of ‘highly engaged’ at 4% versus 14% average.

Spend

Enrichment tend to be price sensitive when it comes to arts and culture, and their spend in Victoria is lower than average.

Of all the Culture Segments, Enrichment have...

- the third lowest spend on admission to cultural events
- second lowest spend on food and drink at cultural events, after Entertainment with Perspective had the lowest spend for souvenirs / programs

How do they approach culture?

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

Media consumption in a typical week

<table>
<thead>
<tr>
<th>Activity</th>
<th>Enrichment</th>
<th>Culture market average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Watching free-to-air TV</td>
<td>96%</td>
<td>90%</td>
</tr>
<tr>
<td>of those who do...</td>
<td>72% Channel 7</td>
<td>72% Channel 7</td>
</tr>
<tr>
<td>64% Channel 9</td>
<td>56% Channel 10</td>
<td>56% Channel 10</td>
</tr>
<tr>
<td>Listening to the radio</td>
<td>86%</td>
<td>86%</td>
</tr>
<tr>
<td>of those who do...</td>
<td>22% Gold 104</td>
<td>22% Gold 104</td>
</tr>
<tr>
<td>21% ABC Local</td>
<td>11% ABC News</td>
<td>11% ABC News</td>
</tr>
</tbody>
</table>

How do they choose?

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

How do they consume media?

Like their appetite for culture, their media consumption is lower and narrower than the average. They’re as likely as average to watch TV and listen to radio, but engage with other media sources less than the culture market overall. They are much more likely toavour the mainstream channels on TV like Channel 7 and 9, reflecting their tendency toward the ‘tried and true’.

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

Key messages

- There are familiar or classic themes or features
- It offers good value for money
- It will evoke a sense of nostalgia
- It will be well done and enjoyable

Enrichment’s top five channels

<table>
<thead>
<tr>
<th>Channel Type</th>
<th>Enrichment</th>
<th>Culture market average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Television</td>
<td>32%</td>
<td>36%</td>
</tr>
<tr>
<td>Recommendation</td>
<td>31%</td>
<td>33%</td>
</tr>
<tr>
<td>Print newspapers</td>
<td>26%</td>
<td>26%</td>
</tr>
<tr>
<td>Radio</td>
<td>24%</td>
<td>27%</td>
</tr>
<tr>
<td>E-news / listings</td>
<td>23%</td>
<td>27%</td>
</tr>
</tbody>
</table>

69% spent time on social media of those who do...

<table>
<thead>
<tr>
<th>Social Media</th>
<th>Enrichment</th>
<th>Culture market average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Facebook</td>
<td>90%</td>
<td>90%</td>
</tr>
<tr>
<td>Instagram</td>
<td>35%</td>
<td>35%</td>
</tr>
<tr>
<td>YouTube</td>
<td>47%</td>
<td>47%</td>
</tr>
</tbody>
</table>

Enrichment are significantly less likely to engage with social media than average. Reflecting their disinterest in digital engagement, they tend to prefer more traditional sources.

45% read a print newspaper of those who do...

- 58% Herald Sun
- 37% Sunday Herald Sun
- 25% The Age

41% read an online ‘paper’ of those who do...

- 49% The Age
- 44% Herald Sun
- 14% Financial Review

60% watched on-demand TV

51% watched a subscription TV service

64% watched free-to-air TV

26% of those who do...

90% reading The Age

58% reading Herald Sun

37% reading Sunday Herald Sun

25% reading The Age

14% of those who do...

90% listening to the radio

86% of those who do...

22% of those who do...

27% of those who do...
**Donating and volunteering**

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

**Reasons for donating time or money to the arts**

- Gain a wider perspective of the world (17% Enrichment, 18% average)
- Makes me feel I can make a difference (13% Enrichment, 20% average)
- Be part of something bigger than myself (13% Enrichment, 18% average)
- Satisfies my social conscience / responsibility (12% Enrichment, 15% average)
- Contribute to something that I am passionate about (11% Enrichment, 15% average)
- Makes me feel good about myself (11% Enrichment, 19% average)

**Membership**

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

- 46% An active member of a library (44% average)
- 25% An active member of a sports club (31% average)
- 8% An active member of a cultural organisation (14% average)
- 5% An active member of a conservation or activist organisation (8% average)

**How do we develop them?**

Marketing should focus on...

**Nostalgia**

Highlighting the traditional and established

Providing good value for money

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

Who are they?

Stimulation are highly active and love new experiences. They’re after the big ideas and out of the ordinary experiences.

They like to make their own discoveries and want to be ahead of the curve.

Stimulation is the segment most likely to say...

‘What’s the big idea?’

... and least likely to say...

‘Are you sure it’s safe?’

Attitudes and life priorities

Enjoying life, going out
Taking risks
Contemporary culture
Food & drink
Live music
New perspectives

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

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

What do they do in Victoria?

Stimulation are culturally promiscuous – they like to try new things and don’t feel loyal to particular artforms or organisations. They’re highly engaged and over-index in the current market for all artforms.

Stimulation are the third most likely to be ‘highly engaged’ at 19% versus 14% average.

How do they approach culture?

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

Stimulation in the current market for...

<table>
<thead>
<tr>
<th>Artform</th>
<th>Culture market average</th>
<th>Stimulation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Film</td>
<td>96%</td>
<td>94%</td>
</tr>
<tr>
<td>Multi-arts</td>
<td>94%</td>
<td>89%</td>
</tr>
<tr>
<td>Commercial theatre</td>
<td>81%</td>
<td>71%</td>
</tr>
<tr>
<td>Live music</td>
<td>80%</td>
<td>75%</td>
</tr>
<tr>
<td>Museums</td>
<td>80%</td>
<td>68%</td>
</tr>
<tr>
<td>Libraries</td>
<td>75%</td>
<td>67%</td>
</tr>
<tr>
<td>Visual arts</td>
<td>70%</td>
<td>64%</td>
</tr>
<tr>
<td>Theatre</td>
<td>67%</td>
<td>63%</td>
</tr>
<tr>
<td>Craft</td>
<td>67%</td>
<td>56%</td>
</tr>
<tr>
<td>Festivals</td>
<td>63%</td>
<td>43%</td>
</tr>
<tr>
<td>Dance</td>
<td>43%</td>
<td>34%</td>
</tr>
<tr>
<td>Literature</td>
<td>28%</td>
<td>27%</td>
</tr>
</tbody>
</table>

Spend

Stimulation are not price sensitive when it comes to seeing new or unusual arts performances, and have the highest spend on admission.

Of all the Culture Segments, Stimulation have...

- the highest spend on admission to cultural events
- after Expression the highest spend on food and drink at cultural events
- with Expression, the highest equal spend for souvenirs / programs
How do we reach them?

How do they choose?

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

Key messages

New, unusual, different

Like nothing you’ve seen before

Best kept secret – see it before everyone catches on

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

Media consumption in a typical week

<table>
<thead>
<tr>
<th>Channel</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Channel 7</td>
<td>68%</td>
</tr>
<tr>
<td>Channel 9</td>
<td>64%</td>
</tr>
<tr>
<td>Channel 10</td>
<td>54%</td>
</tr>
<tr>
<td>Channel 10</td>
<td>54%</td>
</tr>
</tbody>
</table>

87% listening to the radio of those who do...

29% Gold 104
28% Triple M
24% Nova

How do they consume media?

Stimulation want to be the first to make discoveries about arts and culture, so it’s no surprise they’re highly active on keeping up to date with what’s on across a broad range of channels. They’re more likely to consume newer media such as on-demand TV and podcasts, but also as likely as average to watch free-to-air TV or listen to the radio.

Stimulation’s top five channels

<table>
<thead>
<tr>
<th>Channel</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Television</td>
<td>38%</td>
</tr>
<tr>
<td>Social media</td>
<td>36%</td>
</tr>
<tr>
<td>Radio</td>
<td>34%</td>
</tr>
<tr>
<td>Recommendation</td>
<td>40%</td>
</tr>
<tr>
<td>E-news / listings</td>
<td>33%</td>
</tr>
</tbody>
</table>

85% spent time on social media of those who do...

Facebook | 86%
Instagram | 55%
YouTube | 58%

Highly visual with a preference for short, punchy content, Stimulation that use social media are significantly more likely to use Instagram and Youtube than average.

48% read a print newspaper of those who do...

58% Herald Sun
31% The Age
29% Sunday Herald Sun

62% read an online ‘paper’ of those who do...

54% The Age
39% Herald Sun
20% The Guardian

74% watched on-demand TV
78% watched a subscription TV service
Donating and volunteering

Stimulation are less likely to have volunteered for arts organisations but slightly more likely to have donated in the past.

Reasons for donating time or money to the arts

- To contribute to something that I am passionate about: 23%
- Gain a wider perspective of the world: 20%
- Makes me feel I can make a difference: 23%
- Satisifies my social conscience / responsibility: 20%
- Be part of something bigger than myself: 18%
- Helps me develop and grow as a person: 22%
- Stimulation donation frequency

38% Never, not interested
14% In the past 12 months
18% 1–3 years ago
17% Over three years ago

Fewer than 1 in 5 Stimulation have volunteered at a cultural organisation in the past

Membership

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

- 44% An active member of a library (44%)
- 44% An active member of a sports club (31%)
- 16% An active member of a cultural organisation (14%)
- 9% An active member of a conservation or activist organisation (8%)

How do we develop them?

Marketing should focus on...

Events with a quirky hook or theme

Promoting social element

Highlighting the unexpected or new perspectives

Alerting Stimulation to potentially interesting arts events at a sufficiently early juncture, and focusing on the new, experimental, quirky and one-off, will encourage attendance. There is little point in targeting the Stimulation segment with mainstream or blockbuster events, but letting them know about less well-known, riskier events is a good way to generate interest. Grab their attention by doing something different. Stimulation like spectacle, they like happenings, they like fireworks going off, they like it pop-up. They like it to be after dark, on the roof or in the basement, starting at 10 o’clock.
The Release segment is looking for escape from the stresses of everyday life. For some these conflicts may be reality, but often, being in the Release segment is more a state of mind.

Release is the segment most likely to say...

‘We should do this more often’

... and least likely to say...

‘Don’t worry so much – there’s plenty of time’

Attitudes and life priorities

Work, home and family

Relaxation

Juggling commitments

Live music
What role does culture play?

Culture is a way to escape

Culture can be a means of staying in the loop with things that are current and contemporary. However when day-to-day life is busy, it is easy to become switched off to this optional pastime, with other things jostling for priority. This means Release tend to veer towards more popular things. Because they don’t have much time, they’re not prepared to take a risk on the one chance to go out.

What do they do in Victoria?

Due to the competing priorities in their lives, Release are not very culturally active and tend to under-index in the current market for most artforms.

Release have a mid-range proportion of ‘highly engaged’ at 9% versus 14% average.

Spend

Reflecting low attendance, Release have a relatively low level of spend on arts and culture.

Of all the Culture Segments, Release have the fourth lowest spend on admission to cultural events and the fourth lowest spend on food and drink at cultural events with Enrichment, Perspective and Entertainment, have the lowest spend for souvenirs / programs.

How do they approach culture?

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

Key messages

It will be relaxing

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

The venue has everything you need

It will tick all the boxes for a fun time out

How do they choose?

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

How do they consume media?

Overall, like their cultural consumption, Release engage with media less than average. This is particularly the case for mediums which require a bit more cognitive load or time, such as print or online newspapers.

Media consumption in a typical week

88% watching free-to-air TV

69% Channel 7

61% Channel 9

54% Channel 10

78% listening to the radio

25% Gold 104

22% Triple M

20% Nova

Release’s top five channels

Recommendation

TV

Social media

Radio

Print newspapers

Release

Culture market average

76% spent time on social media

of those who do...

86% Facebook

44% Instagram

49% YouTube

Release are less likely to use social media than average, and those who do, tend to engage with individual platforms less than the overall culture market. Their use of Facebook reflects the overall average, but they’re less likely to use Instagram and YouTube. Perhaps reflecting their time-poor nature, they’re more likely than any other segment to use Twitter.

38% read a print newspaper

55% Herald Sun

31% The Age

28% Sunday Herald Sun

39% read an online ‘paper’

50% The Age

32% Herald Sun

18% The Guardian

58% watched on-demand TV

64% watched a subscription TV service

Highlight multiple benefits – maybe an activity to entertain the kids is also a great chance to catch up with neglected friends (and it’s guaranteed their kids will like it too). This will help make Release feel like it really is an unmissable event, as it ticks all the boxes.
Donating and volunteering

Supporting the arts is low in Release’s priorities, they have a low propensity to donate or volunteer to arts organisations.

Reasons for donating time or money to the arts

Be part of something bigger than myself
Contribute to something that I am passionate about
Makes me feel good about myself
Makes me feel I can make a difference
Helps me gain a wider perspective of the world
Helps me develop and grow as a person

Membership

Release tend not to be forthcoming in support for arts and cultural institutions and are unlikely to find time to make the most of cost-saving benefits of membership. They are less likely than average to be an active member of most organisations.

Donation frequency

- 55% Never, not interested
- 38% In the past 12 months
- 12% 1–3 years ago
- 12% Over three years ago
- 10% Never, but interested

Fewer than 1 in 10 Release have volunteered at a cultural organisation in the past

38% An active member of a library (44%)
27% An active member of a sports club (31%)
9% An active member of a cultural organisation (14%)
5% An active member of a conservation or activist organisation (8%)

How do we develop them?

Marketing should focus on...

Special offers and discounts

Packaging experiences on a plate – easy to consume

Endorsements through well recognised brands

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

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

Perspective is the segment most likely to say...

‘Really, I’m fine doing my own thing’

... and least likely to say...

‘Let’s go out and do something totally different!’

Attitudes and life priorities

Reading
Learning
Personal space
The outdoors
**What role does culture play?**

**A way to pursue their interests**
Perspective tend to do things on their own terms. Going to a communal experience like a theatre, or a big, busy museum, is not Perspective’s natural game. Rather, they prefer entering a private, affective, personal bubble.

They typically have a particular thing they pursue, enjoy, and are knowledgeable about. The externalisation of this is not so relevant – that it is rewarding to them is what matters.

**What do they do in Victoria?**
Not very culturally active, Perspective have the second lowest proportion of high engagers, and under-index in the current market for every artform.

**After Entertainment, Perspective have the lowest proportion of ‘highly engaged’ at 3% versus 14% average.**

**Spend**
Reflective of the non-essential role culture plays in their lives, Perspective have low cultural spend.

Of all the Culture Segments, Perspective... only Entertainment had a lower spend on admission to cultural events

third lowest spend on food and drink at cultural events, after Entertainment with Enrichment, Perspective had the lowest spend for souvenirs / programs

**How do they approach culture?**
Perspective are thinkers, so it is not that they are averse to new things and ideas, rather that they already have an enthusiasm for particular subjects and want to focus their time in ways that relate. They therefore register lower levels of interest in most artforms as the artform itself will not be the pull – more the subject matter being dealt with.

**Perspective in the current market for...**

<table>
<thead>
<tr>
<th>Artform</th>
<th>Perspective</th>
<th>Culture market average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Film</td>
<td>88%</td>
<td>94%</td>
</tr>
<tr>
<td>Multi-arts</td>
<td>80%</td>
<td>89%</td>
</tr>
<tr>
<td>Commercial theatre</td>
<td>53%</td>
<td>71%</td>
</tr>
<tr>
<td>Live music</td>
<td>54%</td>
<td>68%</td>
</tr>
<tr>
<td>Museums</td>
<td>58%</td>
<td>67%</td>
</tr>
<tr>
<td>Libraries</td>
<td>57%</td>
<td>64%</td>
</tr>
<tr>
<td>Visual arts</td>
<td>48%</td>
<td>63%</td>
</tr>
<tr>
<td>Theatre</td>
<td>38%</td>
<td>56%</td>
</tr>
<tr>
<td>Craft</td>
<td>27%</td>
<td>36%</td>
</tr>
<tr>
<td>Festivals</td>
<td>21%</td>
<td>34%</td>
</tr>
<tr>
<td>Dance</td>
<td>10%</td>
<td>27%</td>
</tr>
<tr>
<td>Literature</td>
<td>15%</td>
<td>24%</td>
</tr>
</tbody>
</table>
How do we reach them?

How do they choose?
When it comes to marketing, Perspective are the one segment that have no fear of missing out. All the other segments think there’s probably something happening somewhere that they’ve not heard of. Perspective think they’ve already found it, so they’re not looking. If what you’re doing aligns with their pre-existing interests and ignites their passion, then they will arrive with great motivation, but won’t be influenced by messaging.

Key messages

It will be personally rewarding

It’s nice to do something special occasionally

It will be interesting, engaging and spark your imagination

It will help you dive deeper into your interests

Media consumption in a typical week

92% watching free-to-air TV of those who do...
76% listening to the radio of those who do...
74% Channel 7
63% Channel 9
52% Channel 10

How do they consume media?
Perspective are less engaged with media than the majority of the other segments. Their TV and radio consumption is largely in line with the average, but they’re much less likely to engage with other sources. Given their focused nature, they will engage if a channel provides a way for them to dig deeper into their core interests, but they’re not loyal to any one channel or source.

37% read a print newspaper of those who do...
58% Herald Sun
40% Sunday Herald Sun
23% Local free paper

38% read an online ‘paper’ of those who do...
45% Herald Sun
37% The Age
16% The Guardian

Perspective’s top five channels

Television
Perspective 32%
Culture market average 36%

Recommendation
Perspective 27%
Culture market average 33%

Print newspapers
Perspective 24%
Culture market average 26%

E-news / listings
Perspective 20%
Culture market average 27%

Radio
Perspective 20%
Culture market average 27%

68% spent time on social media of those who do...

Facebook 88%
Instagram 30%
YouTube 41%

Perspective are the least likely to engage with social media of all the segments, reflecting their low appetite in seeking out new things. Those who do, tend to use Facebook as much as average, but are much less likely to use any other platform.

51% watched on-demand TV
51% watched a subscription TV service
Donating and volunteering
Perspective have a low appetite for support – they are the third least likely to have volunteered and the second least likely to have donated.

**Reasons for donating time or money to the arts**
- Makes me feel good about myself [16%]
- Makes me feel I can make a difference [16%]
- Be part of something bigger than myself [14%]
- Gives me a tax deduction [12%]
- Contribute to something that I am passionate about [12%]
- Gain a wider perspective of the world [10%]

Membership
Perspective are not interested in developing a relationship with arts organisations and are the least likely – tied with Entertainment – to be an active member of a cultural organisation.

- 43% An active member of a library (44%)  
- 28% An active member of a sports club (31%)  
- 7% An active member of a cultural organisation (14%)  
- 7% An active member of a conservation or activist organisation (8%)

How do we develop them?
Marketing should focus on...

Respecting their individuality and encouraging exploration

Tapping into existing interests

If they decide to engage, Perspective view it as their business – not that of marketers, to try and get them there. Therefore, on the most part, they don’t make a priority segment to actively target as the return on investment is less rewarding than for other segments. Those in the market for a particular artform are likely to attend – providing the organisation have sufficient profile and the segment can find out what’s on. This may also be the case where an organisation is picked up by the blogs or editorial they follow. Others will come on their own terms.
10% or 461k of adult Victorians

25% (23%) have children in household

16% (26%) have a university degree or higher

44% (43%) are in full-time employment

17% (20%) are retired

80% (77%) born in Australia

6% (7%) speak a language other than English at home

1% (1%) are Indigenous Australians

16–25 9%
25–34 18%
35–54 38%
55–64 13%
65+ 16%

Entertainment tend to see arts and culture as very much on the periphery of their lives. Leisure time is for fun, and this segment is looking for entertainment and escapism.

Entertainment are the segment most likely to say...

‘Go on – entertain me’

... and least likely to say...

‘Let’s find something new – with plenty of food for thought’

Attitudes and life priorities

Home and pub TV, celebrity, sports Thrill and spectacle Priorities close to home
**What role does culture play?**

**Not a priority for their leisure time**

If asked, this segment would probably say culture doesn’t really play a role in their lives. They don’t see themselves as cultural attenders or arts goers as such. But they do go out – sometimes this could include a blockbuster exhibition or a popular show.

The emphasis is on having fun with other people rather than intellectual pursuit and the meaning behind the art.

**What do they do in Victoria?**

Entertainment are the least likely to be high engagers in the culture market, and under-index in the current market for every artform except for film.

Entertainment are the least likely to be ‘highly engaged’ at 1% versus 14% average.

**Spend**

Entertainment are highly price sensitive and have the lowest spend on arts and culture out of all the segments.

- **Entertainment have...**
  - the lowest spend on admission to cultural events
  - the lowest spend on food and drink at cultural events
  - the lowest spend for souvenirs / programs after Enrichment and Perspective

**How do they approach culture?**

Entertainment are the one segment who don’t have some kind of taxonomy of culture. They don’t reflect on all the different artform categories they could be choosing between - they just see it all as leisure. It’s the same as shopping, going to the beach, going for a meal, going ten-pin bowling. Therefore culture and the arts are literally competing against everything.
How do we reach them?

How do they choose?

Entertainment prefer to stick with the tried and tested, and they view popularity and celebrity casting an endorsement of quality. Therefore, they only try things which have established popular currency and have little interest in engaging with what could be considered specialist or niche.

Key messages

It’s popular

There’s a celebrity in it

It will be fun and enjoyable for everyone

It’s a great night out and an ‘easy sell’ to others

Media consumption in a typical week

95% watching free-to-air TV of those who do...
76% Channel 7
70% Channel 9
64% Channel 10

84% listening to the radio of those who do...
23% Triple M
22% FOX
21% Gold 104

How do they consume media?

Reflecting their mainstream tastes, Entertainment are more likely than average to watch free-to-air TV, and are the most likely to watch Channel 7 and Channel 9. Other than free-to-air TV they consume less media on a weekly basis than average.

Entertainment’s top five channels

<table>
<thead>
<tr>
<th>Medium</th>
<th>Entertainment</th>
<th>Culture market average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Television</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Radio</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Social media</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Print newspapers</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Recommendation</td>
<td></td>
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</tr>
</tbody>
</table>

78% spent time on social media of those who do...

Facebook 90% Instagram 40% YouTube 51%

Entertainment are as likely as average to spend time on social media in a typical week, and more active on Facebook than any other segment.

39% read a print newspaper of those who do...
69% Herald Sun
36% Sunday Herald Sun
21% The Age

37% read an online ‘paper’ of those who do...
47% Herald Sun
47% The Age
18% Daily Mail Online

58% watched on-demand TV
61% watched a subscription TV service

This segment likes marketing and advertising – it’s a useful way to get information. They can tell a lot from marketing – a big, expensive billboard campaign, for example, is an indicator that something has high production values.
Donating and volunteering

Entertainment are not natural supporters and have comparatively low propensity to donate or volunteer.

Reasons for donating time or money to the arts

- Gives me a tax deduction: 10% (6%); Makes me feel good about myself: 8% (6%); Gain a wider perspective of the world: 6% (6%); Socialise and meet with other like-minded people: 5% (5%); Satisfies my social conscience / responsibility: 5% (5%); Develop and grow as a person: 5% (6%); Entertainment - Culture market average: 16% (18%)

Fewer than 1 in 10 Entertainment have volunteered at a cultural organisation in the past

Membership

Entertainment very rarely invest in a supportive way, and therefore should not be targeted for membership. They don’t see culture as contributing to community or society at large. Benefits-driven transactional membership schemes aren’t going to work either – purely because they wouldn’t make much use of it so it’s unlikely to feel relevant or worth it.

How do we develop them?

Marketing should focus on...

Mainstream through TV, sports and celebrity

One-off, must-see events

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. The deciding factors are most likely to be around “will it be entertaining?” “do the facilities meet our needs?” - fairly simple hygiene factors. While they may not see 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. ‘Culture’ needs to be downplayed in the marketing, with messaging emphasising the ‘must-see’, ‘thrill’ and ‘blockbuster’ parts of the offer.

- 24% An active member of a library (44%)
- 27% An active member of a sports club (31%)
- 7% An active member of a cultural organisation (14%)
- 5% An active member of a conservation or activist organisation (8%)
Section 4: Arts attendance

Victoria’s artform markets

This final chapter examines the Victoria 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 is also examined, alongside the market profile for the current market of each main artform.

Further information about how individual venues perform within their markets can be found in Appendix 1: Individual Venues.
3.2 million are in the craft market

The current market for craft is relatively small, with strong growth prospects in the potential market. Those in the craft market tend to be older than average, are high engagers and are also more likely than average to be in the art exhibition market. Expression is the dominant segment, and Entertainment is under-represented.

7 in 10 are in the market for crafts

Of the Victoria culture market, 73% are in the market for crafts. Across artforms, craft has seen the largest decrease in its current market in real terms (down 230k), while the potential market has seen growth.

**Something to think about**

There is a societal meta-trend of growing interest in authenticity and provenance which, in turn, is fuelling interest in artisanal objects and growth potential for the craft market. The positioning for craft organisations should align with this broader trend, rather than solely the aesthetics or features of the objects themselves.

**Defining the market**

The craft market is defined as anyone in Victoria who has attended, or is interested in attending, a craft exhibition.
Consistent market across Victoria

Looking at variations across different regions of Victoria, there is consistency in the craft market. There are no significant variances across the current, lapsed or potential markets. Craft is the only market of the 12 core artforms that doesn’t have a disparity between Greater Melbourne and regional Victoria. This may be due, in part, to the wide availability of craft exhibitions in regional Victoria (particularly in agricultural shows and fairs).

The lapsed craft market

At 771k or 19% of the total culture market, the lapsed craft market represents a strong opportunity for craft organisations to re-activate.

Lapsed craft market key stats

Essence (24%) and Release (23%) are more likely to be in the lapsed market for craft than average.

Those aged over 65+ are more likely to be in this market than younger age groups.

Spotlight on the current craft market

22%

Aged 65+, significantly higher than the culture market average (18%)

46%

have practiced a craft in the past 12 months, significantly higher than the culture market average (27%)

35%

are high engagers (9 or more artforms in the past three years), significantly higher than the culture market average (14%)

83%

are in the current art exhibition market, significantly higher than the culture market average (61%)

37%

have donated to an arts or cultural organisation within the past three years, significantly higher than the culture market average (26%)

Lower spend than most artforms

Like many of the artform markets, those in the craft market tend to spend more than the average culture market overall. However, compared to the other artforms, the difference is much less pronounced.

The craft market spent the most on tickets in the past 4 weeks at $41.87, followed by transport at $21.68.

Average spend on arts and culture (past 4 weeks)

<table>
<thead>
<tr>
<th></th>
<th>Average</th>
<th>Craft market Current</th>
<th>Craft market Ever</th>
<th>Ever</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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<td></td>
<td>$3.14</td>
<td>$5.50</td>
<td>$4.18</td>
<td></td>
</tr>
</tbody>
</table>
Expression and Essence over-index

67% of those in the market for craft fall into the most culturally active segments: Essence, Expression, Affirmation and Stimulation. This is significantly above the overall average, due to over-indexing in the Essence, Expression and Affirmation segments.

The craft market has one of the smallest proportions of Entertainment compared to other artforms at 4%. This also influences a significant drop in the average of 6 percentage points.

Something to think about

It’s unsurprising that Expression is the largest segment in the craft market. Expression appreciate other people’s artistic expression and admire craft skills. They are driven by a need to make human connection – if they can do this with a maker, that is the ultimate reward. They feel a sense of obligation to support creativity, so a craft purchase is often about supporting the maker. Whereas Expression are keenly interested in the act of creativity and engaging on a personal level with a maker, Essence will want the opportunity to purchase a unique piece of fine quality to express their individuality.
Victoria’s commercial theatres’ programs are diverse, covering a range of different genres and artforms. This therefore means that the commercial theatre market itself is very broad, representing the majority of the culture market. It has the third largest current market of all the major artforms, and a sizeable lapsed market to re-engage.

7 in 10 are in the current market

With 96% in the market overall, commercial theatre represents the third largest market of all the artforms tested, following film and multi-arts. Commercial theatre also has the third largest current market at 71%, again following film and multi-arts. This reflects the breadth of the commercial theatre market's offer.

The current market has grown significantly from 2014, up 14 percentage points from 57%. Commercial theatre has seen the greatest real-figure growth out of all artforms tested (up 849k), reflecting the success in reaching new audiences.

Defining the market

The commercial theatre market is defined as the combination of the markets for musicals, cabaret and comedy.
8 in 10 inner-city locals are in the current market for commercial theatre

Likely due, in part, to the ease of accessing theatre in the city, those who live in Inner-Melbourne are significantly more likely to be in the current market than average (82% compared to 71% overall).

The lapsed market is more likely to include those from Melbourne’s outer suburbs and regional Victoria, particularly Melbourne West, Mornington Peninsula and regional Victoria.

At 6%, the potential market for theatre is comparatively small compared to most artforms tested.

Spotlight on current commercial theatre market

32% aged 16–34, significantly higher than the culture market average (29%)

20% are high engagers (9 or more artforms in the past three years), significantly higher than the culture market average (14%)

81% are in the current live music market, significantly higher than the culture market average (68%)

30% have donated to an arts or cultural organisation within the past three years, significantly higher than the culture market average (26%)

Spend is broadly reflective

The level of spend in the last four-weeks for those in the commercial theatre market was broadly comparable to the average. The pattern remained consistent; they spent the most on tickets and the least on souvenirs and programs. The greatest difference to the average was on tickets – the commercial theatre market spent $3 more than the average.

Average spend on arts and culture (past 4 weeks)

<table>
<thead>
<tr>
<th></th>
<th>Average</th>
<th>Commercial theatre market</th>
</tr>
</thead>
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<tr>
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<td>$14.38</td>
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</tr>
<tr>
<td>$3.14</td>
<td>$4.10</td>
<td>$3.42</td>
</tr>
</tbody>
</table>
A comparable profile

Given the sheer size of the commercial theatre market, it is no surprise the Culture Segment profile is broadly reflective of the overall culture market. The only significant difference is that Entertainment under-indexes by a slight – but significant – two percentage points.

Release and Enrichment over-index in lapsed and potential markets

Looking at the lapsed and potential markets for commercial theatre, both Release and Enrichment significantly over-index. However, given the established tastes of both of these segments, it’s unlikely organisations can persuade them to attend anything outside of their established interests.

Something to think about

Commercial theatre organisations can reach potential Expression through empathy – facilitating a personal connection with them and the story. Lapsed Affirmation will re-engage through endorsement and reassurance. They prove very loyal once they’ve ‘accessioned’ you to their repertoire. Both segments will prove more productive here than Release or Enrichment.
9 in 10 in the market for musicals and comedy

Overall, the size of the market for musicals and comedy is broadly similar – 89% and 88% respectively. The differences lie in how this market is broken down – musicals have a significantly higher current market, and comedy has the largest potential market at 16%.

There’s significant potential for comedy organisations to reach out to Enrichment – both re-activating lapsed attenders and reaching new audiences.

As to be expected, Essence, Expression Affirmation and Stimulation dominate the current market for each artform.

Conversely, cabaret has a much smaller market comparatively at 69%, with a strong potential market of 27% to tap into.
There is **real opportunity** to grow the dance market, with nearly **961k adults** in the **potential market**. Of the sub-artforms, **ballet** has the highest penetration, with **1 in 5** in the current market. The more **culturally confident** segments **dominate** the dance market profile, whilst conservative **Entertainment** is **under-represented**.

### A large potential market for dance

Compared to the other artforms tested, the market for dance is relatively small, with only **49%** of the culture market having ever attended a dance event. However, dance has one of the largest potential markets (those who have never been to a dance event, but would be open to doing so), at **22%**. This means there are **961k adults** in Victoria open to attending, but in need of the right proposition to provoke a call to action.

---

**Defining the market**

The dance market is defined as the combination of the markets for ballet, classical, contemporary and other live dance events.
Inner-city locals most likely to be in the current market

Of those in the market for dance (attended in the last three years), those based in Inner-Melbourne are significantly more likely to be in the current market than average (35% versus 27%). This could either be reflective of access or appetite. Those in Mornington Peninsula and Melbourne’s outer regions are more likely to be in the potential market than average. This may suggest there is interest in attending dance events but a lack of availability compared to the inner city.

Spotlight on the current dance market

33% aged 16–34, significantly higher than the culture market average (29%)

28% have practiced dance in the past 12 months, significantly higher than the culture market average (12%)

43% are high engagers (9 or more artforms in the past three years), significantly higher than the culture market average (14%)

80% are in the current play or drama market, significantly higher than the culture market average (51%)

42% have donated to an arts or cultural organisation within the past three years, significantly higher than the culture market average (26%)

Dance market spends more

Compared to the overall Victoria culture market, those in the market for dance spent more on arts and culture in the last four-weeks, in every category tested. Those who have attended a dance event ever, were significantly more likely to have spent on arts and culture in the last four-weeks, and spent higher amounts than average. The current market spent even more, with the most money spent on tickets, at $62.22 in the past four-weeks.

Average spend on arts and culture (past 4 weeks)

<table>
<thead>
<tr>
<th></th>
<th>Average</th>
<th>Dance market</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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<td>Ever</td>
</tr>
<tr>
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<tr>
<td>$3.14</td>
<td>$6.98</td>
<td>$5.23</td>
</tr>
</tbody>
</table>

The lapsed dance market

At 961k or 22% of the total culture market, the lapsed dance market represents a strong opportunity for dance organisations to re-activate.

Lapsed dance market key stats

Essence (33%) and Affirmation (27%) are more likely to be in the lapsed market for dance than average. Those in Melbourne Outer East are significantly more likely to be in the lapsed market than average (27% versus 22% overall).
A more culturally confident profile

Compared to the culture market overall, the profile of the dance market tends to over-index on the more culturally active and confident segments – Expression, Essence and Stimulation (up 6, 5 and 3 percentage points respectively). Conversely, the more risk averse segments were under-represented, most significantly Entertainment, down 8 percentage points on the average.

Potential market most reflective of the culture market overall

While the current market is more heavily weighted to Expression and Essence, the potential market for dance is more broad, comparable to the overall market for culture. This suggests there is scope to diversify the profile of the dance market by reaching out to segments who are under-represented in the current market.

Something to think about

Affirmation holds real value for the dance market, representing nearly 1 in 5 of the potential market. Potential or lapsed Affirmation may need a direct invitation or a first-timer program that acts as an induction into dance - they’ll worry everyone is an expert and they’re not, which is a key barrier to attendance for this group. A program designed for people like them will remove this anxiety.
Ballet has the highest market penetration

6 in 10 are in the market for ballet, the highest of the dance forms tested (61%). Other live dance events follow closely at 60%, with a slightly larger potential market of 28%. Although the current market for contemporary dance is the smallest at 15%, there’s a strong potential market of 26% to tap into.

Essence, Expression and Affirmation over-index in all dance forms

The more culturally active segments over-index in the current, lapsed and potential markets for ballet, contemporary dance and other dance events. Interestingly, Stimulation are significantly more likely to be in the lapsed market for each dance form – showing scope for dance organisations to re-engage this segment.

<table>
<thead>
<tr>
<th>Dance Form</th>
<th>Current</th>
<th>Lapsed</th>
<th>Potential</th>
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<td></td>
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<td>22%</td>
<td>39%</td>
</tr>
<tr>
<td>Essence</td>
<td>29%</td>
<td>29%</td>
<td>23%</td>
<td>10%</td>
</tr>
<tr>
<td>Expression</td>
<td>29%</td>
<td>25%</td>
<td>19%</td>
<td>25%</td>
</tr>
<tr>
<td>Affirmation</td>
<td>23%</td>
<td>19%</td>
<td>23%</td>
<td>21%</td>
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<tr>
<td>Enrichment</td>
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<td>19%</td>
<td>13%</td>
</tr>
<tr>
<td>Simulation</td>
<td>21%</td>
<td>19%</td>
<td>23%</td>
<td>21%</td>
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<tr>
<td>Release</td>
<td>13%</td>
<td>16%</td>
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<td>11%</td>
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<tr>
<td>Perspective</td>
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<td>6%</td>
<td>6%</td>
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<tr>
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<td>7%</td>
<td>8%</td>
<td>8%</td>
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<tr>
<td><strong>Other live dance event</strong></td>
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<tr>
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<td>17%</td>
<td>23%</td>
<td>29%</td>
<td>20%</td>
</tr>
<tr>
<td>Essence</td>
<td>23%</td>
<td>29%</td>
<td>20%</td>
<td>7%</td>
</tr>
<tr>
<td>Expression</td>
<td>29%</td>
<td>19%</td>
<td>23%</td>
<td>17%</td>
</tr>
<tr>
<td>Affirmation</td>
<td>20%</td>
<td>11%</td>
<td>22%</td>
<td>12%</td>
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<tr>
<td>Enrichment</td>
<td>7%</td>
<td>17%</td>
<td>32%</td>
<td>31%</td>
</tr>
<tr>
<td>Simulation</td>
<td>21%</td>
<td>8%</td>
<td>31%</td>
<td>31%</td>
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<tr>
<td>Release</td>
<td>13%</td>
<td>12%</td>
<td>32%</td>
<td>31%</td>
</tr>
<tr>
<td>Perspective</td>
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<td>8%</td>
<td>31%</td>
<td>11%</td>
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<tr>
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<td>11%</td>
<td>8%</td>
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<tr>
<td><strong>Contemporary dance</strong></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Culture market average</td>
<td>15%</td>
<td>20%</td>
<td>26%</td>
<td>18%</td>
</tr>
<tr>
<td>Essence</td>
<td>20%</td>
<td>14%</td>
<td>20%</td>
<td>9%</td>
</tr>
<tr>
<td>Expression</td>
<td>26%</td>
<td>14%</td>
<td>20%</td>
<td>9%</td>
</tr>
<tr>
<td>Affirmation</td>
<td>18%</td>
<td>20%</td>
<td>42%</td>
<td>16%</td>
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<tr>
<td>Enrichment</td>
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<td>17%</td>
<td>42%</td>
<td>29%</td>
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<tr>
<td>Simulation</td>
<td>17%</td>
<td>20%</td>
<td>29%</td>
<td>29%</td>
</tr>
<tr>
<td>Release</td>
<td>9%</td>
<td>12%</td>
<td>29%</td>
<td>4%</td>
</tr>
<tr>
<td>Perspective</td>
<td>2%</td>
<td>5%</td>
<td>4%</td>
<td>4%</td>
</tr>
<tr>
<td>Entertainment</td>
<td>3%</td>
<td>1%</td>
<td>4%</td>
<td>4%</td>
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Base [4083] [427] [871] [572] [465] [534] [428] [402] [384]

2019 average | % significantly higher than average | % significantly lower than average
The festival market has seen **significant growth** since 2014, and has the **second largest potential** market of all artforms tested. Community-minded **Expression** dominates the profile, but there is still **scope to reach more** of this segment in the **potential** and **lapsed** markets.

**1 in 5 in the potential market**

7 in 10 of those in the culture market are in the market for festivals – on the lower end of the scale compared to the other artforms tested. However, there are two key data points that suggest this might be an emerging market. Given that the festival market has grown significantly since 2014 (up 400k and 6 percentage points), coupled with the second largest potential market – there is real scope for this market to continue to grow.

---

**Defining the market**

The festival market is defined as anyone in Victoria who has attended, or is interested in attending, arts festivals (excluding music or film festivals).
The largest current markets are in North East Melbourne and inner-city

Looking at consumption by region, those based in Inner-Melbourne and North East Melbourne were significantly more likely to be in the current market for festivals, at 37% and 41% respectively. Melbourne’s outer regions – the North West and Outer East – were conversely more likely to be in the lapsed market, highlighting potential for organisations to re-engage these groups.

The lapsed festival market
At 574k or 13% of the total culture market, the lapsed festival market represents a strong opportunity for festival organisations to re-activate.

Lapsed festival market key stats
Essence and Release (17% each) are more likely to be in the lapsed market for festivals than average.
Those in the market for literature are significantly more likely to be in the lapsed festival market (18%), representing potential for collaborations to re-engage this audience.

Spotlight on the current festival market

35%
aged 16–34, significantly higher than the culture market average (29%)

40%
are high engagers (9 or more artforms in the past three years), significantly higher than average (14%)

48%
are in the current market for an event connected to books or writing, significantly higher than average (24%)

40%
have donated to an arts or cultural organisation within the past three years, significantly higher than the culture market average (26%)

The festival market spends more on transport

Those in the festival market typically spend more than the culture market on average. Like the majority of the markets, the highest value spend in the past 4 weeks is tickets, at $47.71 compared to the $35.15 average. This is followed by transport at $25.87. Out of all the artform markets, the festival market spends the most on transport.

Average spend on arts and culture (past 4 weeks)

<table>
<thead>
<tr>
<th></th>
<th>Average</th>
<th>Festival market</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Current</td>
<td>Ever</td>
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<tr>
<td>Transport</td>
<td>$35.15</td>
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<tr>
<td></td>
<td>$14.38</td>
<td>$29.60</td>
</tr>
<tr>
<td>Ticket</td>
<td>$3.14</td>
<td>$5.47</td>
</tr>
</tbody>
</table>
Community-minded
Expression dominates

Unsurprisingly given the communal and social nature of festivals, Expression is significantly over-represented in the festival market, up by 6 percentage points. Conversely, the more traditional Enrichment segment who appreciates nostalgia and more traditional artforms is under-represented, as is Entertainment.

Scope to reach more Expression

Expression are a natural fit for festivals. Expression have a strong need to be around like-minded people, and deeply enjoy sharing experiences with others. Being as culturally active as they are, festivals give them the opportunity to attend a wide range of experiences and new things and therefore we typically find large proportions of Expression in festival organisations’ profiles.

Something to think about

Successful festivals are increasingly differentiating the experiences they offer, both in content streams and also in price modelling. This aligns well with different segments, important as by nature, festivals are ‘something for everyone’. Festival organisations need to be very clear about what strands will be good for which segments and optimise those for each segment by mapping benefits offered with the benefits each segment seeks.
4.4 million are in the film market

The film market is the largest artform market in Victoria, with over 9 in 10 having attended a film in the last three years. Proportionally, this market has remained stable since 2014, but has grown with Victoria’s population. Because of its size, the market profile for film is comparable to the overall culture market.

Market for film reflective of the culture market

At 4.4 million adults, nearly everyone in the market for arts and culture is in the market for film. Due to such a large market penetration, particularly in the current market, the market for film has the smallest lapsed and potential markets of all artforms, at 206k and 13k respectively. Only 26k adults are out of the market.

The film market has grown since 2014, in line with population growth in Victoria, up 398k.

Defining the market

The film market is defined as anyone in Victoria who has attended, or is interested in attending, a film at either a cinema or as part of a film festival.
Market for film consistent across Victoria

Due to the accessible nature of film compared to the other artforms tested, it’s unsurprising that there are no significant variances across different areas of Victoria for film consumption. Those who live in Inner-Melbourne and Melbourne Outer West are the most likely to be in the current market at 97% each, and those in regional Victoria were the least likely to be in the current market at 91%.

Spotlight on the current film market

30% aged 16–34, comparable to the culture market average (29%)

15% are high engagers (9 or more artforms in the past three years), comparable to the culture market average (14%)

49% are in the current comedy market, comparable to the culture market average (47%)

27% have donated to an arts or cultural organisation within the past three years, comparable to the culture market average (26%)

Spend is comparable

The level of spend for the film market on arts and culture in the last four-weeks is nearly identical to the culture market overall. $35.45 is the average amount this group spent on tickets, only 30 cents above the average. The film market spent the least on souvenirs compared to any other artform market, at $3.16.

Average spend on arts and culture (past 4 weeks)

<table>
<thead>
<tr>
<th></th>
<th>Average</th>
<th>Film market</th>
</tr>
</thead>
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<tr>
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<tr>
<td>Ever</td>
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</tr>
<tr>
<td>Transport</td>
<td>$3.14</td>
<td>$3.31</td>
</tr>
</tbody>
</table>

Something to think about

The ubiquity of film can provide an opportunity for organisations within other artforms to reach new audiences; for example offering a film screening independently, or partnering with a film festival to host Q&As or screenings.
A comparable profile

Due to the large levels of market penetration, the Culture Segment profile for the film market is nearly identical to the overall culture market, with no differences above 1%. The lapsed market for film is notably different however, with large levels of Perspective and Release, and a small proportion of Expression, which typically dominates in Australia.

Culture Segment profile difference of those who have ever engaged with film outside the home, compared to the whole Victorian culture market (in percentage points):

- Due to the sheer size of the film market, there are no proportional differences in the Culture Segment profile compared to the culture market overall.

Film market by Culture Segment:

- *due to sample size, % film’s potential market has not been included
9 in 10 have seen a film at a cinema...

Within the film market, seeing a film at a cinema had the highest market penetration at 94% in the current market. The more culturally active segments, Essence, Affirmation and Expression, were significantly more likely to be in current markets than any other segment.

...but there is scope to grow the film festival market

Comparatively, there is real scope to grow the market for film festivals. A third of the culture market would be interested in attending a film festival, and this is consistent across all segments (except Entertainment). This, coupled with the overwhelming market for film in general, suggests there is real interest to grow this market further.
4.1 million are in the library market

The library market is large, with 4.1 million adults. It has the largest proportion of lapsed audiences at 1.1 million or 25%, illustrating strong potential to re-engage this audience. The Culture Segment profile for this market is broadly comparable to the culture market overall, reflecting libraries’ broad offer.

A quarter are in the lapsed market

At 25%, libraries have the largest lapsed market of any artform tested. The lapsed market has grown significantly since 2014, up 300k or 5 percentage points proportionally. Given that the current market has seen a significant 7 percentage point drop, this suggests that the library market is lapsing. There is a real opportunity for organisations to re-engage lapsed visitors in growth strategies, especially given the relatively small size of the potential market (4%, or 157k) to dip into.

Current market drops while lapsed grows

Defining the market

The library market is defined as anyone in Victoria who has visited, or is interested in visiting, a public library.
**Outer metro and regional Victoria most likely to have lapsed**

We know that the lapsed market for libraries is large, but who is most likely to have lapsed? Looking across Victoria, those who live in Melbourne’s outer regions (Melbourne South West, and Melbourne Outer West) as well as Mornington Peninsula are most likely to be in the lapsed market, significantly more so than average.

**Spotlight on the current library market**

- **31%** aged 16–34, comparable to the culture market average (29%)
- **15%** have written stories, plays or poetry in the past 12 months, significantly higher than the culture market average (11%)
- **21%** are high engagers (9 or more artforms in the past three years), significantly higher than the culture market average (14%)
- **71%** are in the current art gallery or exhibition market, significantly higher than the culture market average (61%)
- **30%** have donated to an arts or cultural organisation within the past three years, significantly higher than the culture market average (26%)

**The lapsed library market**

At 1.1m or 25% of the total culture market, the lapsed library market is the largest of all the main artforms. This represents a key opportunity to re-engage this group.

**Lapsed library market key stats**

- Entertainment (35%) and Release (32%) are more likely to be in the lapsed market for libraries than average.
- Those aged 35–64 are more likely to be in the lapsed library market than any other age group at 28%.

**Spend comparable to average**

Compared to the Victoria culture market overall, there is little difference in spend on arts and culture within the library market. There is little variation in the amount spent by those in the library market compared to the culture market overall. The library market spend pattern follows the same as the market overall – spending the most on tickets and the least on souvenirs.

**Average spend on arts and culture (past 4 weeks)**

<table>
<thead>
<tr>
<th></th>
<th>Average</th>
<th>Library market</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current</td>
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<td>Ever</td>
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<tr>
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<td>Meals</td>
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</tr>
<tr>
<td>Books</td>
<td>$3.40</td>
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</tr>
</tbody>
</table>
Profile is reflective of the market overall

The Culture Segment profile for the library market is comparable to the overall Victoria culture market, with no significant variances. This is reflective of the breadth of the offer a library has – there’s something to meet a broad range of motivations and needs.

Something to think about

It goes without saying that Expression is the epicentre of the library market. They believe in public provision, enjoy the shared experience of a library and are comfortable with communal work spaces. But, given that almost all segments have been a library user at some point, it is most useful to look at the audiences libraries have lost. Two main segments pose potential here: Stimulation, and Perspective. Stimulation want to access things they can’t anywhere else and are particularly interested in events - they’ll be more keen on programming that fosters debates and discussion. Perspective will respond to any area of specialism, any topics where there is specific interest poses huge potential to bring in Perspective hobbyists. There is also a clear opportunity to co-create with special interest community groups. In turn, if libraries create an opportunity or space where hobbyists can showcase their hobbies, this will invite other visitors into the library.
2.8 million are in the literature market

The literature market represents 2.8 million Victorians. Although the current market for literature is the smallest of all artforms tested and has dropped since 2014, there is significant potential to grow. At 27%, the potential market shows significant scope for growth. Expression is over-represented in this market, but there’s still opportunity to extend the reach.

A small market with real potential

The market for literature is the smallest market compared to the other 12 artforms tested, at 2.8 million or 63%. The literature market also has the smallest current market of any artform, at 24% or 1.1 million. However, this market also holds the largest potential – 27% of the Victoria culture market would be interested in attending a literature event, which equates to 1.2 million adults.

Defining the market

The literature market is defined as anyone in Victoria who has attended, or is interested in attending, events associated with books or writing.
Greatest potential in outer metro and regional Victoria

Those who live in the outer metro areas of Melbourne and the Mornington Peninsula are significantly more likely than average to be in the potential market for literature. However, there is also significant potential in the inner city at 26%, suggesting that although access to these types of events is a factor, there is a large potential market ready to be tapped with the right persuasion.

Spotlight on the current literature market

36% aged 16–34, comparable to the culture market average (29%)

44% have practiced a craft in the past 12 months, significantly higher than the culture market average (27%)

52% are high engagers (9 or more artforms in the past three years), significantly higher than the culture market average (14%)

77% are in the current play or drama market, significantly higher than the culture market average (51%)

45% have donated to an arts or cultural organisation within the past three years, significantly higher than the culture market average (26%)

Literature market spends the most

Looking at spend across the last four-weeks, the literature market spent the most out of any other artform tested. The pattern followed the overall Victoria culture market, spending the most on tickets at $50.22 and the least on souvenirs at $6.14.

Average spend on arts and culture (past 4 weeks)

<table>
<thead>
<tr>
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<th>Average</th>
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<tr>
<td>Current</td>
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<tr>
<td></td>
<td>$3.14</td>
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</tr>
</tbody>
</table>
The largest Expression segment of all artforms

Like most artforms, the largest proportion of the Culture Segment profile for the literature market is made up of Expression. However, the literature market significantly over-indexes on Expression by 9 percentage points. At 31%, this is the largest proportion of Expression in all artforms tested.

In the potential market, 1 in 5 are Expression. This shows that there is still a proportion of this segment who have yet to attend a literature event but would be interested. Organisations should prioritise this segment for growth, using targeted messaging, appealing to Expression’s curiosity about others and interest in learning about new perspectives.

Something to think about

Literature events have real scope for differentiation by segment. Literary Expression will want to meet creatives and like-minded people, and will love the shared experience. Stimulation will want to be at the cutting edge and will be drawn to events presented in an edgier format. Essence will want prestige and to be as close to the art as possible but not in a big event, they’d prefer an intimate, in-depth setting.
The market for live music is in the **top five artform** markets, representing nearly all of the culture market at **4.2 million**. The **current market** is one of the **largest**, and has also experienced real-figure growth since 2014. **Rock or pop concerts** have the **highest penetration** of all sub-artforms, and there’s **strong potential** in the lesser-known artforms, particularly **experimental music**.

**Fifth largest artform market**

The market for live music is large, and represents 4.2 million Victorian adults, or 95% total. This makes it the fifth largest market comparatively, and the fourth largest current market at 68%. The market for live music experienced significant real term growth since 2014, with the current market up 308k.

**Defining the market**

The live music market is a combination of the markets for rock or pop music, classical, jazz or blues, opera, folk, contemporary art music or any other live music.
1 in 5 are lapsed

Like visual arts, theatre and craft, just under 1 in 5 are in the lapsed market for live music, showing potential to re-engage. The potential market is comparatively small at 7%, which suggests that live music organisations should focus their efforts on re-engaging lapsed attenders as opposed to reaching new audiences.

Proportionally, the lapsed market for live music is largest in Melbourne Outer East (26%) and regional Victoria (24%).

The lapsed live music market

At 863k or 19% of the total culture market, the lapsed live music market represents a strong opportunity for live music organisations to re-activate.

Lapsed live music market key stats

Enrichment (30%) and Release (26%) are more likely to be in the lapsed market for live music than average.

There is an equal proportion of family and non-family groups in the lapsed market for live music, showing equal potential to re-engage.

Spotlight on the current live music market

32%

aged 16–34, comparable to the culture market average (29%)

21%

are high engagers (9 or more artforms in the past three years), significantly higher than the culture market average (14%)

59%

are in the current comedy market, significantly higher than the culture market average (47%)

32%

have donated to an arts or cultural organisation within the past three years, significantly higher than the culture market average (26%)

Spend in line with average

Those in the music market who spent money on arts and culture in the last four-weeks spent a broadly similar amount to the culture market overall. The current market tends to have spent more, particularly on tickets – $45.40 compared to $35.15 on average.

Average spend on arts and culture (past 4 weeks)

<table>
<thead>
<tr>
<th>Average</th>
<th>Live music</th>
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<tbody>
<tr>
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<td>$35.15</td>
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<td>$19.45</td>
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<tr>
<td>$3.14</td>
<td>$4.19</td>
</tr>
</tbody>
</table>
A broadly similar profile
to the overall market

The Culture Segment profile for the music market is broadly comparable to the overall Victoria culture market – reflective of the size of the overall music market. The lapsed market shows potential to re-engage Expression, Stimulation and Affirmation audiences, as well as the more conservative Enrichment and Release segments.

Something to think about

There is real scope to develop segments into the sub-artforms in live music.

Essence are an established core market for many music sub-artforms, but there is significant potential to increase their crossover between classical and jazz, emphasising the intellect, skill and high quality of both.

Give Expression a friendly invitation to try classical and opera by emphasising the experiential, immersive nature of it.

Affirmation are a huge potential growth audience for classical and opera but only if concert information is encouraging and reassuring.

Stimulation would love to ‘discover’ and then champion experimental music but ironically they first need to be given a shortcut, a compelling bite sized proposition that convinces them it will be rewarding.
Rock or pop has the highest penetration

Across the music sub-artforms tested, rock or pop concerts had the highest penetration rates at 83% of the market. The current market for this sub-artform was also the highest at 47% having attended a rock or pop concert in the last three years. Essence, Expression, Affirmation and Stimulation were significantly more likely to be in the current market for this than other segments.

A quarter in the potential market for jazz and blues and classic music

At 25% and 24% respectively, a quarter of the culture market is in the potential market for jazz and blues and classic music, showing scope to entice this group with targeted messaging. Organisations should focus on the Expression and Affirmation segments here.
Large potential markets for opera, folk and experimental music

Although opera, folk and experimental music have relatively small markets compared to rock and pop music, there is scope to develop a potential audience, with a quarter open to attending these types of events.

For opera, there is significant scope to reach new Essence, Expression and Affirmation audiences. With the right messaging, these segments are natural fits for this artform.

For folk music organisations, strategies should focus on reaching new Expression and Affirmation audiences.

Experimental music has the largest potential market of the music artforms, and there is significant scope to target Essence, Expression, Affirmation and Stimulation in growth strategies.
3 in 10 in the market for other music festivals

Of all the sub-artforms tested within the live music category, other music festivals had the largest potential market, with 29% interested. This category includes all other music festivals besides rock and pop. Essence, Affirmation and Stimulation are most likely to be in the potential market for this sub-artform, highlighting potential growth.
The multi-arts market is a combination of the markets for live music, theatre, visual arts and literature. Understandably given how many artforms it includes, it represents the majority of the culture market at 4.4 million adults. Like film, due to its size, the profile of the market is comparable to the overall culture market.

99% in the multi-arts market

Almost the entire culture market is in the multi-arts market, at 99%. This is the same size as the film market, which also represents 4.4 million adults. The size of this market is unsurprising given the number of artforms within it, and it’s important to note that it’s likely a proportion of this market would be unlikely to attend the full range of artforms programmed by a multi-arts organisation.

Defining the market

The multi-arts market is a combination of the markets for live music, theatre, commercial theatre, dance, visual arts and literature.
Spotlight on the current multi-arts market

30% aged 16–34, comparable to the culture market average (29%)

8% are high engagers (9 or more artforms in the past three years), comparable to the culture market average (7%)

66% are in the current musicals market, significantly higher than the culture market average (59%)

28% have donated to an arts or cultural organisation within the past three years, comparable to the culture market average (26%)

Average spend on arts and culture (past 4 weeks)

<table>
<thead>
<tr>
<th></th>
<th>Average</th>
<th>Multi-arts market</th>
</tr>
</thead>
<tbody>
<tr>
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</tr>
<tr>
<td>$3.14</td>
<td>$3.49</td>
<td>$3.21</td>
</tr>
</tbody>
</table>

Multi-arts market by Culture Segment

*due to sample size, % should be seen as indicative only
4.2 million are in the museum market

The majority of the Victoria culture market are in the market for museums, with over 9 in 10 having ever visited a museum. The large lapsed market illustrates strong growth prospects for museums to re-engage lapsed visitors.

Museums are the fourth largest artform market

Those in the market for museums represent 4.2 million adults, or 96% of the total Victoria culture market. This makes it the fourth largest artform market after film, multi-arts and theatre. The market has stayed relatively stable since 2014, up by 312k in real terms but stable proportionally. Like the market for libraries, museums have a large lapsed market at 24%, suggesting there is scope to re-engage lapsed visitors.

Defining the market

The museum market is defined as anyone in Victoria who has visited, or is interested in visiting, a museum.
Inner-city locals most likely to be in the current market

Unsurprisingly given the proximity to many major museums, those who live in Inner-Melbourne are significantly more likely to be in the current market for museums than average (77% versus 67%). Conversely, those who live in regional Victoria are significantly less likely to be in the current market, and much more likely to be in the lapsed market at 29% versus 24% overall. Particularly for those who live far away, museums need to offer a reason for visitors to return on a regular basis – the permanent collection alone may not be enough to make a long commute into the city worthwhile.

Spotlight on the current museum market

31%
aged 16–34, comparable to the culture market average (29%)

21%
are high engagers (9 or more artforms in the past three years), significantly higher than the culture market average (14%)

78%
are in the current art gallery exhibition market, significantly higher than the culture market average (61%)

30%
have donated to an arts or cultural organisation within the past three years, significantly higher than the culture market average (26%)

Comparable levels of spend

Like the library market, those in the market for museums spent a comparable amount on arts and culture in the last four-weeks compared to the average. The current market had a higher level of spend than the museum market overall, but not markedly so compared to current markets of other artforms in this study.

Average spend on arts and culture (past 4 weeks)

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<tr>
<th></th>
<th>Average</th>
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<td></td>
<td>$3.14</td>
<td>$3.94</td>
</tr>
</tbody>
</table>

Something to think about

The traditional museum market has grown exponentially with an evermore hands-on and interactive offer. Many museums have broken out of their traditional market and become popular cultural attractions. However, there is still a significant market who do not see museums as being relevant to them. These non-attenders are unlikely to be reached by established marketing and programming. To access these markets, museums need to invest in a programme that offers opportunities to co-create and empower people’s lives, concerns and interests; build community; amplify voices that deserve to be heard and moderate the ensuing debate.
Reflective of the overall market

The Culture Segment profile for the museum market is broadly comparable to the overall Victoria culture market. There is only one significant difference – Entertainment is under-represented by 2 percentage points.

The broad profile of the museum market reflects the broad range of needs a museum has the potential to meet.

Scope to grow Enrichment

The profile for the museum market is broadly comparable across the current, lapsed and potential markets. There is scope however, to tap into a relatively large potential Enrichment market (16%). Particularly for museums with a focus on history, Enrichment is a natural fit given their love of nostalgia and learning about the past.
The market for theatre in Victoria is large, and the current market has grown significantly since 2014. The current market in particular has seen notable growth of 439k, indicating success in reaching new audiences and re-engaging lapsed attenders.

A growing current market

The current market for theatre represents over half of the Victoria culture market at 56%. This represents 2.5 million adults. After commercial theatre, theatre has seen the largest increase in its current market, up 439k.

Theatre market has a strong lapsed market, and therefore potential to re-engage, with 1 million Victorians positioned here.

460k
Not in market
Haven’t attended, not interested

436k
Potential market
Haven’t attended, but interested

1m
Lapsed market
Last attended more than three years ago

2.5m
Current market
Attended within the last three years

Defining the market

The theatre market is a combination of the markets for drama and plays, experimental theatre and any other theatre events.
7 in 10 inner-city locals are in the current market for theatre

Like the commercial theatre market, those who live in Inner-Melbourne are significantly more likely to be in the current market for theatre than average (69% compared to 56% overall). Those who live regional Victoria are significantly more likely to be in the lapsed market for theatre than average, at 28% versus 24% on average.

The lapsed theatre market
At 1m or 24% of the total culture market, the lapsed theatre market represents a strong opportunity for theatre organisations to re-activate.

Lapsed theatre market key stats
Enrichment (33%) and Perspective (27%) are more likely to be in the lapsed market for theatre than average.
Those aged 35+ are significantly more likely to be in the lapsed market for theatre than those aged 16–34 (26% versus 18%).

Spotlight on the current theatre market

30%
aged 16–34, comparable to the culture market average (29%)

25%
are high engagers (9 or more artforms in the past three years), significantly higher than the culture market average (14%)

79%
are in the current museum market, significantly higher than the culture market average (67%)

34%
have donated to an arts or cultural organisation within the past three years, significantly higher than the culture market average (26%)

Theatre market spends more
Looking at spend across the last four-weeks, those in the market for theatre spent more on arts and culture than the Victoria culture market. Spend for this market followed the same pattern as the culture market average, spending the most on tickets and the least on souvenirs and programs in a four-week period. Those in the theatre market spent the most on tickets at $41.76, and those in the current market spent even more at $53.15.

Average spend on arts and culture (past 4 weeks)

<table>
<thead>
<tr>
<th></th>
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<tbody>
<tr>
<td></td>
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<tr>
<td>$3.14</td>
<td>$4.88</td>
<td>$3.72</td>
</tr>
</tbody>
</table>
A reflective profile

The Culture Segment profile for the theatre market is broadly comparable to the overall culture market. The well-represented profile is reflective of the breadth of the offer.

A more conservative lapsed market

The profile of the lapsed theatre market includes larger proportions of the less culturally active segments – Entertainment, Enrichment, Perspective and Release – than the market overall.

Something to think about

Culture Segments offer a powerful way to engage different audiences with the meaning that theatre’s sub-genres offer. Essence are more literary and able to place each work in a critical and historical context. Expression seek the narrative arch and empathise deeply with characters, they enjoy connecting with performers and playwrights (living and dead) and above all want to be part of an audience community. Stimulation are seeking real drama through intrigue, spectacle and surprise and appreciate the visual presentation of the work.
Plays have the highest penetration

Of all the theatre sub-artforms, plays or drama had the highest market penetration. Over half of the culture market are in the current market, with Essence, Expression and Affirmation significantly more likely to be than the average.

Significant potential to engage

Stimulation in experimental theatre

Experimental theatre’s market represents just over half of the culture market overall. The potential market is large, which suggests there’s real scope to find new audiences. Stimulation in particular represent great value for experimental theatre organisations – they love a challenge and are curious about traditional mediums being experimented with and presented in new ways. Over a third of Stimulation are in the potential market (35%), showing real opportunity for experimental theatre organisations to reach out.
The market for visual arts represents 4 million Victorians. Similar to museums and libraries, there is a large lapsed market to target for growth strategies. There is high crossover with museums – the current market for visual arts is significantly more likely to be in the current market for museums than average.

9 in 10 in the market for visual arts

The visual arts market represents 4 million Victorians, making it the seventh largest artform market. Nearly two thirds are in the current market, which although has remained broadly stable in real terms, has dropped proportionally since 2014. The lapsed market is relatively large compared to other artforms, showing scope to re-engage this audience.

Current market saw significant drop

The visual arts market is a combination of the markets for art galleries or exhibitions and digital or video arts events or exhibitions.
**Inner-Melbourne more likely to be in the current market**

When we look at visual arts consumption across Victoria, those based in Inner-Melbourne are significantly more likely to be in the current market at 78%. Those who live in Mornington Peninsula were the least likely to be in the current market, at 53% compared to 67% overall. Melbourne West was most likely to be lapsed, at 23% versus 19% on average.

**Spotlight on the current visual arts market**

31% aged 16–34, comparable to the culture market average (29%)

23% are high engagers (9 or more artforms in the past three years), significantly higher than the culture market average (14%)

85% are in the current museum market, significantly higher than the culture market average (67%)

33% have donated to an arts or cultural organisation within the past three years, significantly higher than the culture market average (26%)

**Visual arts market spends more**

On average, those in the market for visual arts spent more in the last four-weeks than the average culture market. The current market was even more likely to spend more, particularly on tickets at $46.44 compared to $35.15 on average.

**The lapsed visual arts market**

At 837k or 19% of the total culture market, the lapsed visual arts market represents a strong opportunity for organisations to re-activate.

**Lapsed visual arts market key stats**

Enrichment (29%) and Release (26%) are more likely to be in the lapsed market for visual arts than average.

Those aged 35–64 were significantly more likely to be in the lapsed market for visual arts than all other age groups.

**Average spend on arts and culture (past 4 weeks)**

<table>
<thead>
<tr>
<th>Average</th>
<th>Visual arts market</th>
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<tbody>
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<td>$20.96</td>
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<tr>
<td>$3.14</td>
<td>$4.24</td>
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</tbody>
</table>
Entertainment is under-represented

Overall, the Culture Segment profile of the visual arts market is broadly comparable to the overall market. However, the key exception is a significant drop in Entertainment – 3% of the visual arts market fall into this segment, compared to 10% overall.

Something to think about

One size does not fit all. Compared to the performing arts, visual art have far more scope to differentiate elements of the offer across time and place to appeal to different segments. Essence would prefer the gallery space to themselves for a close personal encounter with art and similarly, small intimate events with artists and curators. Expression would love the gallery to be thronged by Victorians from every background and persuasion, and prefer events to be communal. Entertainment and Release want to enjoy themselves without too much mental taxation, whereas Affirmation are prepared to put in the effort to get the reward of learning and Enrichment have come to worship at the cathedral of art. Understanding these motivations and matching them not only to the offer but also to the proposition and correct channel, will help marketers unlock the full potential of the audience.
Potential to grow the digital art market

Looking at sub-artforms, art galleries or exhibitions have the highest level of penetration, with 88% in the market. The more culturally active segments dominate the current market, particularly Essence who are the most likely to be in the current market at 81%.

Comparatively, the market for digital or video art events is smaller, with 64% in the market. Expression, Essence and Stimulation are most likely to be in the current market for this sub-artform. There is real potential to grow this market, with 31% interested. This is relatively consistent across the segments, with significantly more interest expressed from the top three segments.
Research parameters

This study was carried out for Creative Victoria by Morris Hargreaves McIntyre. This study was commissioned with the aim of exploring the profile of the arts and culture market in Victoria.

Target group for the research  Victorians in the market for culture.

Sample size  We collected 4,058 responses to the Audience Atlas Victoria 2019 survey. Where applicable, comparisons were made to a national omnibus survey, undertaken in April 2019 and representative of the Australian population. The sample size of the omnibus was 1,000.

Date of fieldwork  Collection ran from 11 April to 13 May 2019

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, highest level of educational attainment and location. These distributions were calculated based on the 2016 Census data.

Reliability of findings  At a 95% confidence level, the maximum confidence interval, or margin of error, is 1.54%. This means that at 50%, the actual figure could range from 48.46% to 51.58%.

Credit: A number of icons on pages 31-74 are supplied courtesy of Vecteezy.com