



MORRIS HARGREAVES McINTYRE



audience atlas australia report

Audience Atlas Australia: National market report

Australia & New Zealand Office

Suite 2.1

63 Ponsonby Road

Auckland 1011

New Zealand

+64 (0)9 551 776

jooles.clements@lateralthinkers.com

European Office

50 Copperas Street

Manchester M4 1HS

United Kingdom

+44 (0)161 839 3311

inray@lateralthinkers.com

www.lateralthinkers.com



Morris Hargreaves McIntyre is an international strategic research consultancy working within the culture, heritage, leisure, media and charities sectors. Our specialism is in helping organisations develop enhanced consumer focus.

Our company was born out of a desire to help cultural organisations become more creative in the way in which they are managed, more audience focused, more engaging, able to deliver greater impact and, as a result, more successful and sustainable. This founding ethos remains at the core of all our activity today.

Research is a means to an end in our world. We believe that knowledge and insight are the key to sustainable change and a successful sector. However, what we find is that most research is tactical not strategic, leaving many fundamental questions on the market for the arts unanswered.

Clients keep asking us the same questions – how can we better understand and reach our potential market? To address these directly, we have developed two new sector specific products. Audience Atlas and Culture Segments.



Audience Atlas Australia is the most detailed survey of cultural audiences ever undertaken in Australia.

It is robust and representative. Audience Atlas Australia samples 5,500 adult respondents (aged over 15) who are in the market for art, culture and heritage activities and events. They are drawn from across the Australian states – with the exception of Northern Territory at present – and carefully weighted to be representative of the whole market.

It's rich and relevant. Audience Atlas Australia goes beyond the usual profiling. It measures lapsed and potential, not just recent engagement. It maps the market's motivations, not just its behaviour. Audience Atlas covers 60 artforms and leisure activities and 150 individual arts and heritage venues across Australia.

It's powerful and practical. Audience Atlas Australia defines your market. Then it cross analyses your lapsed, current and potential future market to provide detailed insight into your audiences. It supports realistic target setting, identification of potential markets and partner organisations. It provides powerful data for funders.

It puts your finger on the market's pulse. Audience Atlas Australia is up to date and is regularly updated to reflect and map trends over time.

If you want to know the size and characteristics of your current and potential market – you need Audience Atlas.



Culture Segments is a new, international, sector-specific segmentation system for arts, culture and heritage organisations. The system is powered by data from Audience Atlas Australia, and draws upon a decade's leading-edge practice helping organisations to truly understand and meet the needs of audiences for arts, culture and heritage.

The principle objective of Culture Segments is to provide the sector with a shared, international language for understanding the audience, with a view to targeting them more accurately, engaging them more deeply, and building lasting relationships.

Culture Segments is designed to be more subtle, granular and sophisticated than existing segmentation systems. This is because it is based on people's relationship with arts and culture, their values and motivations. These cultural values define the person and influence their attitudes, lifestyle choices and behaviour.

The segments are distinguished from one another by deeply-held beliefs about the role that art and culture play in their lives, enabling you to get to the heart of what motivates them and develop strategies to engage them more deeply.

Culture Segments has highly practical applications. It 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. The system can also be used to recruit focus group respondents and build online panels to explore your brand, test your marketing campaigns and inform product development.

If you want to reach new audiences and meet their needs more effectively – you need Culture Segments.

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1 Introduction

1.1 How to use this report

This report contains a wealth of data on the cultural market for Australia. It quantifies the current and potential markets for artforms, and segments the audience using Morris Hargreaves McIntyre's Culture Segments system.

This can help you understand the arts and culture market in order to inform product and service development, targeted communications campaigns and audience engagement strategies. This will ensure that future development plans are based on both robust market data, and a rich understanding of the values, motivations and needs of the culture market.

Going forward, you may wish to commission a further market report to bespoke the generic Culture Segments pen portraits to your unique venue or artform.

Furthermore, you could conduct a box office survey to quantify the volume and value of each segment to your organisation, qualitative research with key segments to explore visitor responses to your offer in detail and profiling of audiences at specific exhibitions or performances to determine which segments are being attracted and why. All of this would add rich layers of insight into how audiences engage with your brand.

A further highly effective use of Culture Segments is to code box office records and marketing contacts by segment by simply asking contacts to answer a small number of Golden Questions online. Responses are then automatically run through a powerful algorithm and written back to your database, giving each unique box office record a segment code and enabling every future communication to be tailed by segment.

This report should be viewed as a key step on the journey towards becoming an audience focussed organisation.

1.2 How to read this data

The data

All data quoted is taken from Morris Hargreaves McIntyre's Audience Atlas Australia, a nationally representative population survey of adults (aged over 15) who are in the market for arts, culture and leisure activities and events. The data was collected in September 2011 using an online survey methodology. Quotas were put in place to ensure that responses are representative of the Australian population. The weighted dataset is based on a sample of 5,500 respondents.

The Australian Culture market

The Australian culture market is defined as Australian residents aged over 15 who have been culturally active in the past 3 years – having made at least one visit to a cultural event or place within that period (this includes cinema, live music, comedy, museums, galleries, theatre and dance). This accounts for 87% of the Australian population aged over 15; that is 13,729,100 individuals. Population figures are taken from the Australian Bureau of Statistics.

2 The market for arts and culture

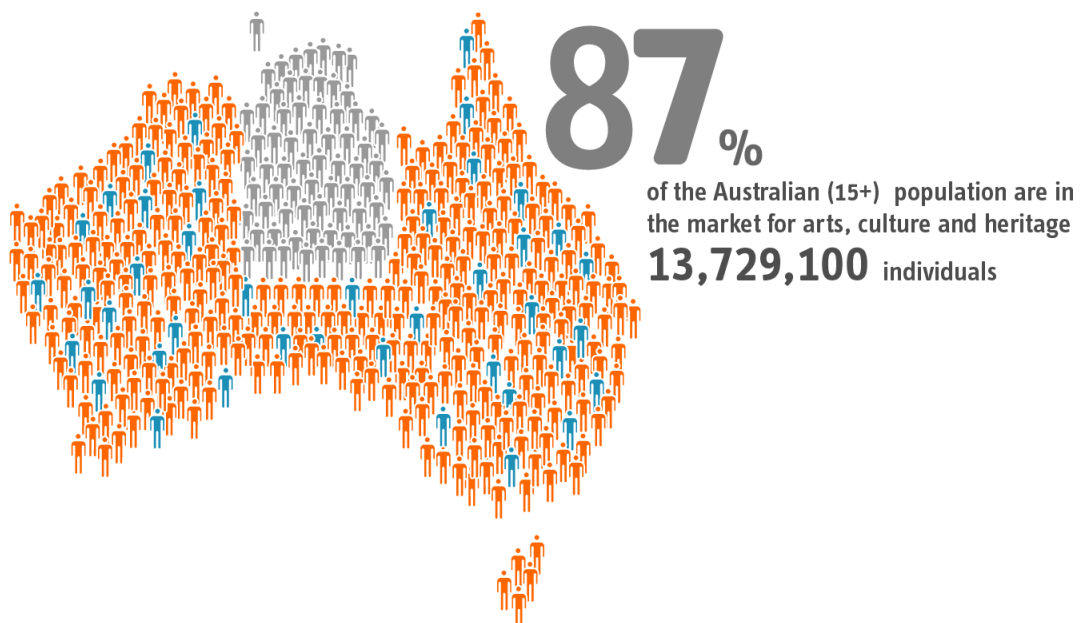
2.1 The size of the market

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

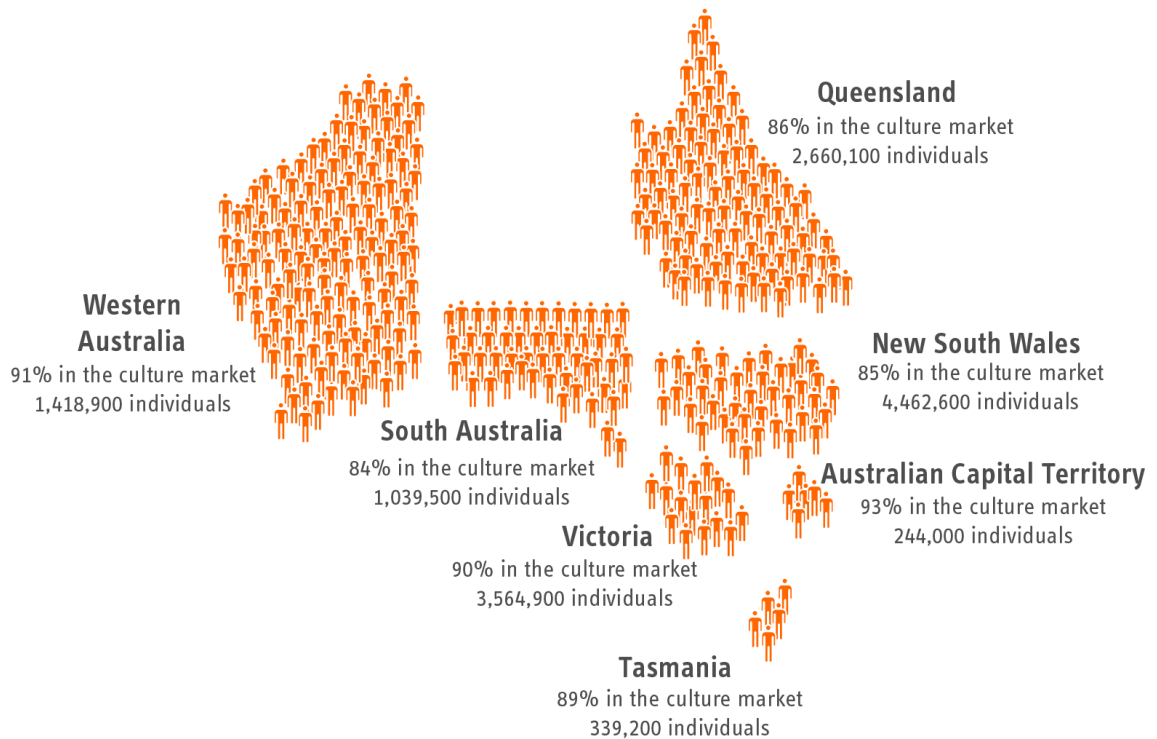
This compares with 95% of adults in the New Zealand market and 85% of adults in the United Kingdom in the market.

National culture market

87% of the Australian (15+) population are in the market for arts, culture and heritage: 13,729,100 individuals



State culture market



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

2.2 Market value

In the past month prior to survey, Australians in the culture market spent an average of \$71 on going to cultural events or places. This breaks down as \$44 on admission or tickets, \$18 on food and drink at cultural events and \$9 on souvenirs / programmes per adult.

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

State	Monthly cultural spend per person
Australia	\$71
Australian Capital Territory	\$83
Western Australia	\$81
New South Wales	\$75
Victoria	\$70
Queensland	\$67
South Australia	\$58
Tasmania	\$52

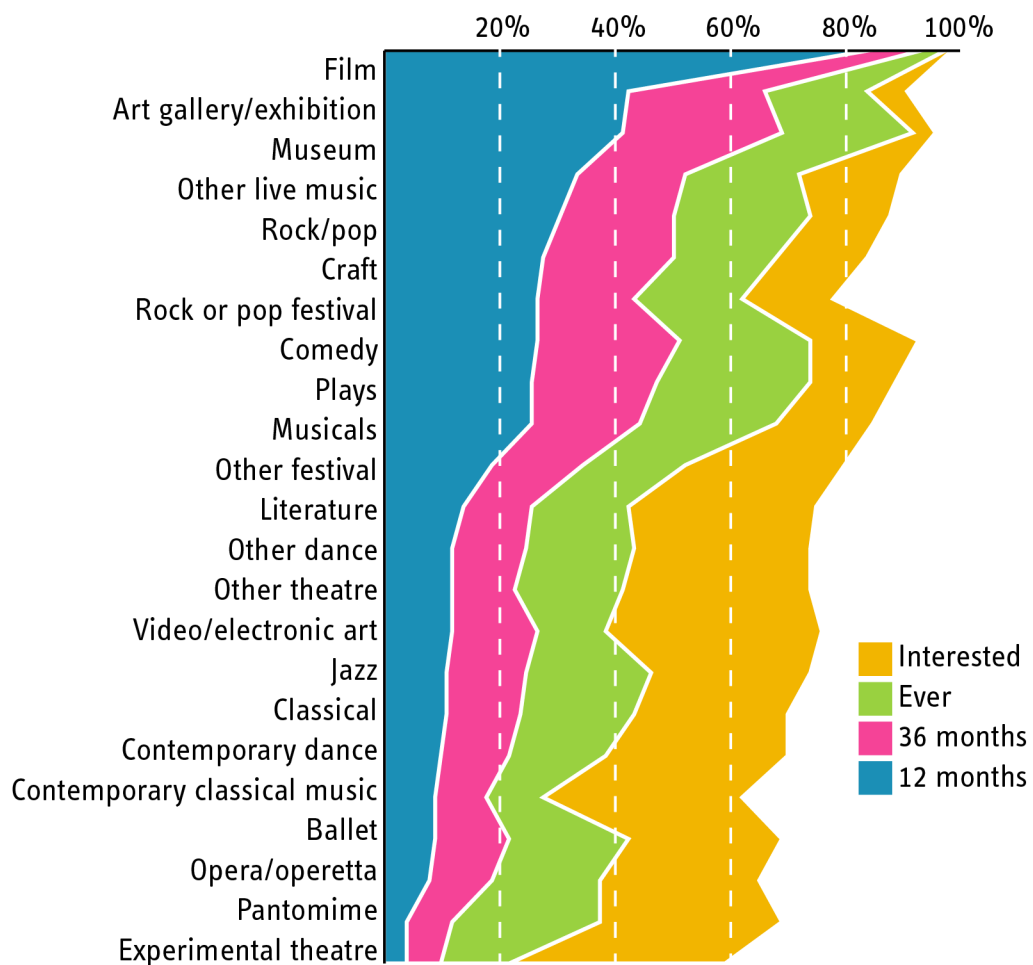
Extending the monthly average spend across the whole population gives a calculated total of \$11.7 billion spent on consuming culture in Australia in the past 12 months.

3

Artform attendance and demand

3.1 The shape of the market

The chart below shows the level of current and potential engagement for a number of different artforms.



The data shows us that not only is the current market for each artform larger than we might expect if we take a three-year, rather than a more narrow 12 month view of the market, but that there is significant potential for further development among lapsed and potential attenders.

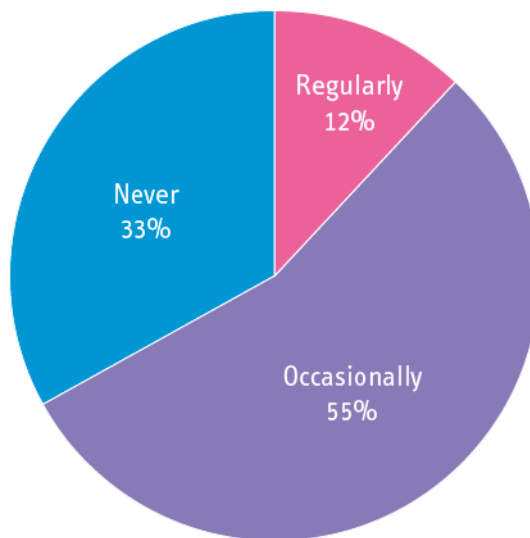
4

Support for the arts

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

The following set of charts and tables outlines the proportions of the culture market that support the arts in each way at a national and regional level. Taken together the charts demonstrate that support for the arts is significant across the cultural market at a national level, and that there are some interesting differences in support for the arts at a state and city level.

4.1 Donations



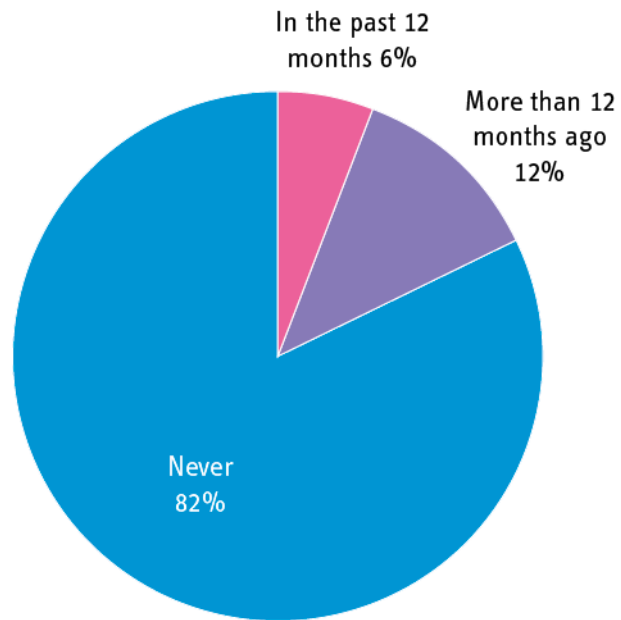
Donations by state

State	Regularly	Occasionally	Never
Australia	12%	55%	33%
Western Australia	17%	52%	31%
ACT	15%	60%	25%
New South Wales	12%	55%	33%
Tasmania	12%	60%	28%
Queensland	12%	57%	31%
South Australia	11%	51%	38%
Victoria	10%	53%	36%

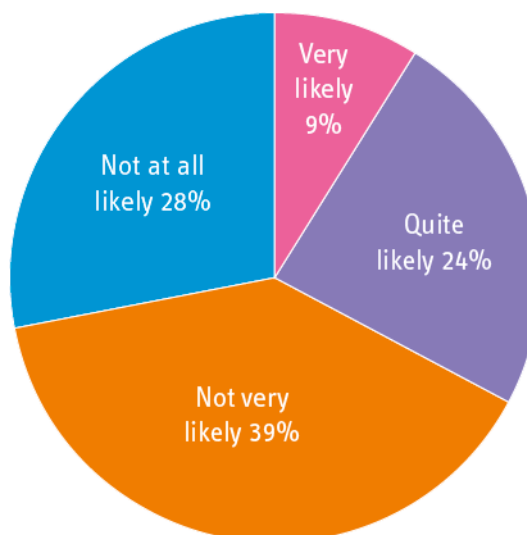
People are most likely to donate regularly to arts and cultural organisations in Western Australia and Australian Capital Territory, and least likely in South Australia and Victoria.

4.2 Volunteering

Volunteering history



Propensity to volunteer in the future



5 How can the market be segmented?

5.1 Culture segments

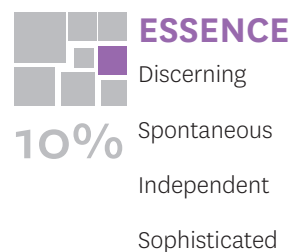
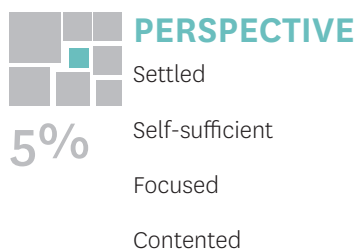
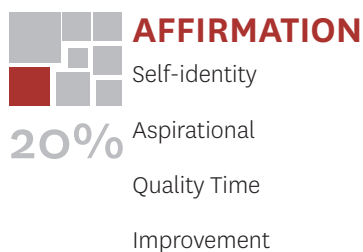
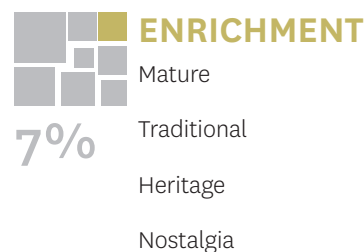
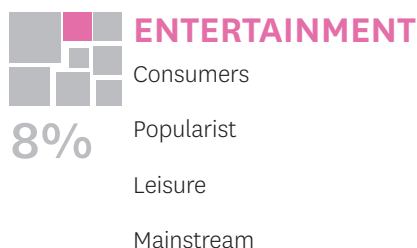
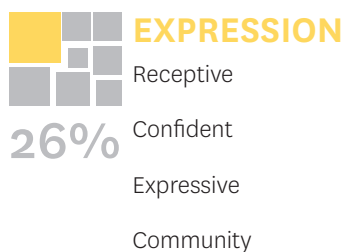
Culture Segments is a new, international, sector-specific segmentation system developed for arts, culture and heritage organisations by Morris Hargreaves McIntyre. The system uses data from Audience Atlas Australia, and draws on a decade of experience in helping organisations to understand and meet the needs of audiences for arts, culture and heritage.

The principle objective of Culture Segments is to provide the sector with a shared, international language for understanding the audience, so marketing can be targeted more accurately, audiences engaged more deeply and lasting relationships built.

Culture Segments is based on people's cultural values and motivations. These cultural values define the person and frame their attitudes, lifestyle choices and behaviour.

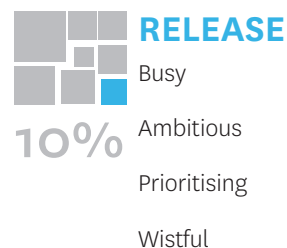
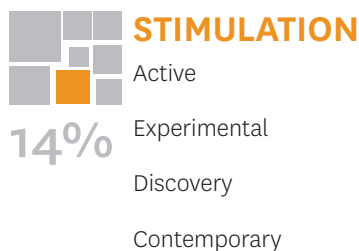
The people in these segments are distinguished from one another by deeply-held beliefs about the role that art and culture play in their lives, enabling arts organisations to get to the heart of what motivates people in each segment and develop strategies to engage them more deeply.

By taking a psychographic approach to segmenting the market for arts and culture, Culture Segments offers the sector a powerful framework for targeting new audiences and meeting their needs more effectively.



You can share your experiences with Culture Segments, find further information and watch the segment videos by joining the Culture Segments community at culturesegments.ning.com

Register your interest by emailing: jooles.clements@lateralthinkers.com



Each segment has different levels of spending and consumption

% who have spent on arts / culture / heritage in the last month

Average annual frequency of arts attendance

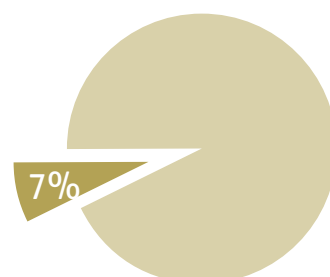


ENRICHMENT



MATURE
TRADITIONAL
HERITAGE
NOSTALGIA

951,100 adults



ENRICHMENT



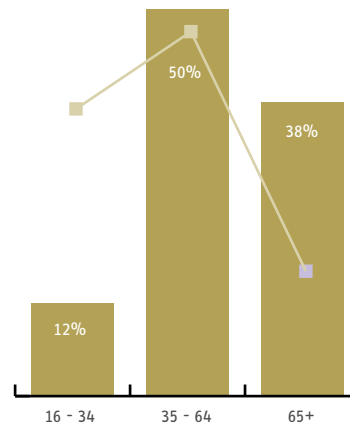
Who are they?

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

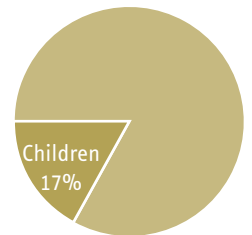
Attitudes and life priorities

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

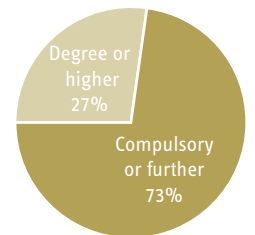
Age profile



Children at home



Highest education level reached



What needs are they looking to fulfil?

The Enrichment segment tends to be in the later stages of life and are unlikely to have children at home. They are a risk averse segment with established tastes. They know what they like and their visits to cultural organisations are very much driven by their own interests and not those of others, nor what is considered to be new or fashionable.

The arts and culture fits with their interests in heritage, gardening and nature. It is these interests, along with the desire to experience nostalgia, awe and wonder, which motivates them to engage with culture. Rather than the opportunity to seek out new experiences, the arts provides this segment with a form of warm escapism, offering a means to reach even greater fulfilment within their lives.

What do they do?

Artform interest index:

-19

Annual artform frequency index:

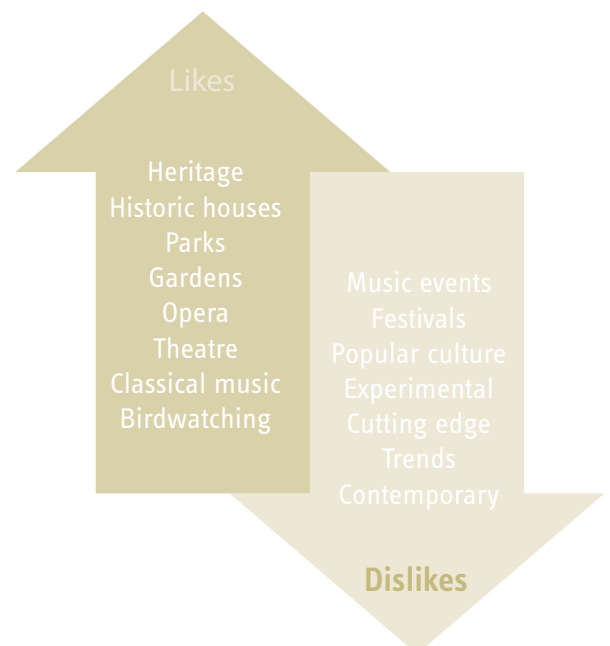
-50

Annual artform frequency:

8

The arts sit in the middle of this segment's leisure priorities, below the countryside, their garden and home life. Consumption is moderately high and tends to focus on traditional artforms and heritage days out, such as historic properties, parks and formal gardens.

Likes and dislikes



ENRICHMENT



What is their value?

Expenditure

70%

Paid for
exhibition ever

37%

Spent on culture
past month

Spend indices

Tickets



Food &
drink

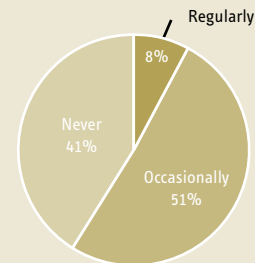


Souvenirs



Support

Frequency of donating to arts, cultural or heritage organisations



56%

Member library / arts /
cultural organisation

14%

Ever volunteered in
arts / culture sector

Despite slightly above average levels of attendance, with a high incidence of retirement and relatively low income levels, this segment tends to restrict secondary spend when visiting cultural venues. Value for money is very important to this segment; they are more likely to take a packed lunch than spend unnecessarily on on-site catering.

Whilst secondary spend is generally low, this segment likes to invest in membership, with memberships of heritage and wildlife charities and trusts particularly high. They have established tastes and will remain loyal to a small number of organisations that can cater well for their needs. These loyal relationships make them ripe for developing into active volunteers.

How to reach this segment

Focus on
nostalgia

Highlight the
traditional and
established

Provide
good value
for money

Key marketing proposition

‘Focus on their established tastes and desire to experience nostalgia, awe and wonder’

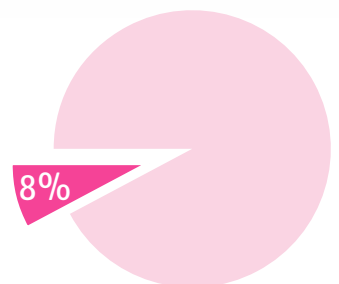
The key to engaging the Enrichment segment is to focus on their interests in heritage, gardening, nature, nostalgia, beauty and the past. They are risk averse and mature individuals who are not looking to broaden their horizons or to be taken outside their cultural comfort zone. They have a core set of venues, destinations and organisations that they will support and rarely explore further. Developing this segment will then require encouraging them to try something new that fits with their established tastes and appeals to their hobbyist interests.

They have moderate media consumption, with some readership of regional and local free press. They regularly watch ABC, Channel 7 and 9 and listen to ABC local radio. They show below average internet use. As they do not actively seek out information, the way to reach this segment is via their propensity to join certain types of organisations and through their preferred, established media brands.

Culture
Segments



8%



ENTERTAINMENT



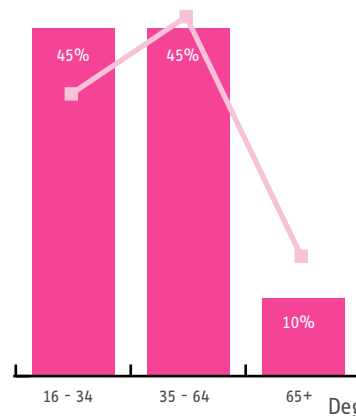
Who are they?

The Entertainment segment tends to be conventional, younger adults for whom the arts are on the periphery of their lives. Their occasional forays into culture are usually for spectacular, entertaining or must-see events, and compete against a wide range of other leisure interests.

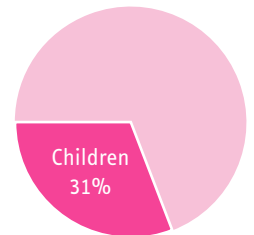
Attitudes and life priorities

**HOME AND PUB
TV, CELEBRITY, SPORTS
THRILL
ESCAPISM
PRIORITIES ARE VERY CLOSE TO HOME**

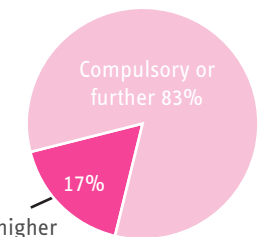
Age profile



Children at home



Highest education level reached



What needs are they looking to fulfil?

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

The Entertainment segment prefers to stick to the tried and tested when it comes to leisure pursuits and is not looking to be challenged or to take risks in discovering something new. They worry about what other people think about them and therefore do not want to be seen to go against the grain or to try things that do not have established, popular currency.

What do they do?

Artform interest index:

-47

Annual artform frequency index:

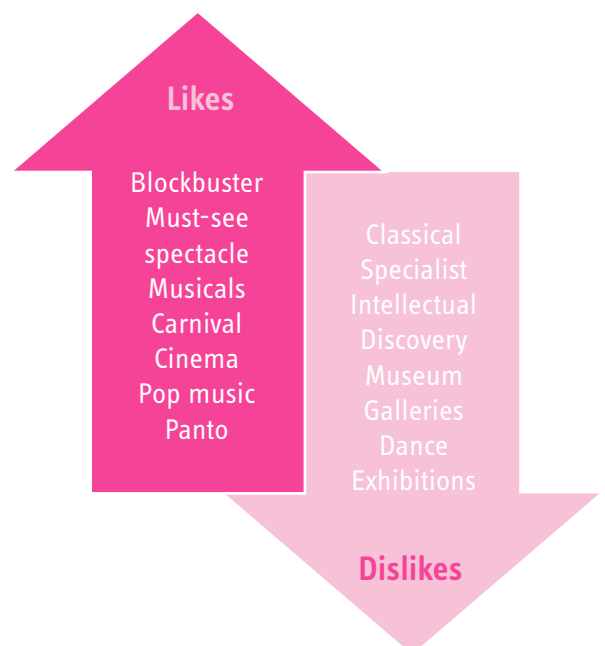
-53

Annual artform frequency:

7

The Entertainment segment has a very sporadic relationship with the arts and culture, attending popular, blockbuster events that have received widespread positive reviews and that they know they are guaranteed to enjoy. They enjoy popular cultural events and activities that are exciting and spectacular such as carnival, panto, popular music and blockbuster films.

Likes and dislikes



ENTERTAINMENT



What is their value?

Expenditure

39%

Paid for
exhibition ever

23%

Spent on culture
past month

Spend indices

Tickets



Food &
drink

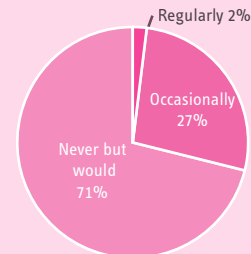


Souvenirs



Support

Frequency of donating to arts, cultural or heritage organisations



30%

Member library / arts /
cultural organisation

3%

Ever volunteered in
arts / culture sector

The arts and culture are only one of many leisure choices for the Entertainment segment. They prefer to enjoy theme parks, sports, the seaside, package holidays and a night in the pub. When they do engage in the arts they tend to be consumers rather than creators or participators, and stick to mainstream cultural activities. They will pay a premium for something that they are keen to see, but it will need to be spectacular and must-see when it comes to culture.

They do not believe that the arts contribute to people's lives or society at large, and therefore tend not to support public subsidy of the arts. They spend little time worrying about issues such as faith, the environment or consumerism, but are concerned with issues closer to home, such as the cost of living and local issues. They have limited development potential as either supporters or volunteers.

How to reach this segment

Link into
mainstream
through TV,
sports and
celebrity

Emphasis on
one off,
must-see
events and
shows

Promote
escapism and
excitement

The Entertainment segment is only willing to spend on leisure and recreation if they believe it will meet all of their needs. While they may not see a value in the arts and culture per se, the right type of event has the potential to provide exactly what they want - primarily escapism and thrill.

Key marketing proposition

'Highlight the thrilling and must-see elements, position as a blockbuster event'

They are heavily influenced by advertising via mainstream media. Their children also influence their behaviour so pester power would work on this segment. As they are not looking for anything overtly cultural; 'culture' needs to be downplayed in the marketing, with messaging emphasising the 'must-see', 'not to be missed', 'thrill' and 'blockbuster' elements of the offer.

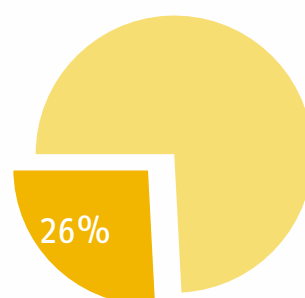
They prefer television to newspapers, in particular they like to watch Channel 10. They are also frequent consumers of commercial radio stations.

EXPRESSION



RECEPTIVE
CONFIDENT
COMMUNITY
EXPRESSIVE

3,577,400 adults



EXPRESSION



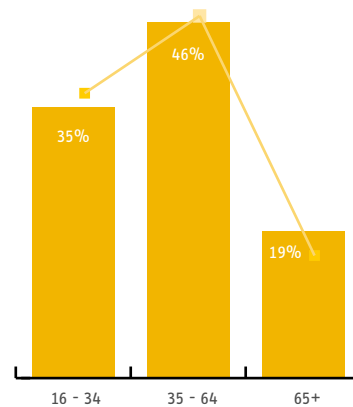
Who are they?

The Expression segment is in-tune with their creative and spiritual side. They are confident, fun-loving, self-aware people who accommodate a wide range of interests, from culture and learning, to community and nature.

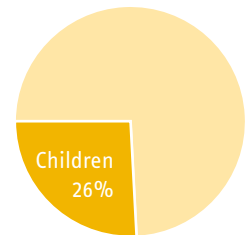
Attitudes and life priorities

LIVING LIFE TO THE FULL
COMMUNITY AND FAMILY
ARTS AND CULTURE
FAITH AND SPIRITUALITY
NATURE

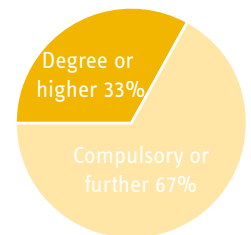
Age profile



Children at home



Highest education level reached



What needs are they looking to fulfil?

This segment actively pursues life. Their free time is highly valued and they try to cram in as much as possible to make the most of it. Open and receptive to new ideas, they pursue challenge, entertainment and intellectual stimulation through their cultural engagement.

They enjoy being part of a crowd and seek communal experiences that broaden horizons. Arts and culture is a key element of their lifestyle, it is a means of self-expression and connecting with other like-minded individuals who share their deeply held values about the world around them.

What do they do?

Artform interest index:

+10

Annual artform frequency index:

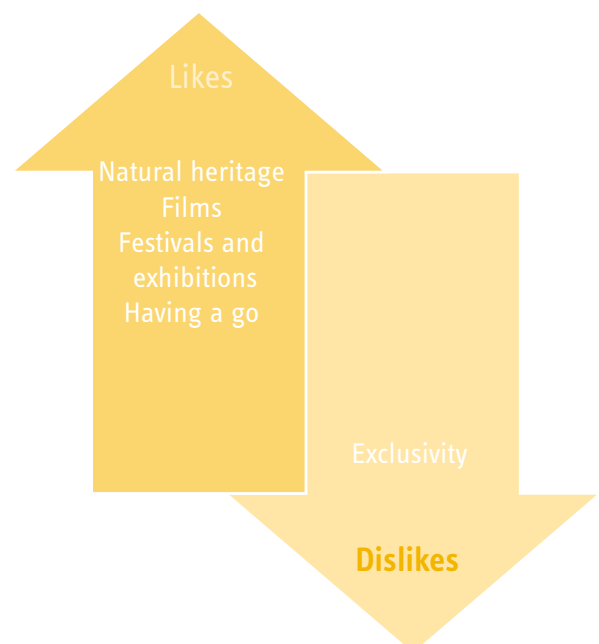
+30

Annual artform frequency:

20

The Expression segment is highly culturally active and open to a broad spectrum of artforms. They enjoy the arts and culture frequently in an active rather than passive manner, seeking inspiration and opportunities for self-expression through their engagement.

Likes and dislikes



EXPRESSION



What is their value?

Expenditure

83%

Paid for
exhibition ever

66%

Spent on culture
past month

Spend indices

Tickets



Food &
drink

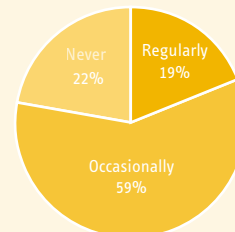


Souvenirs



Support

Frequency of donating to arts, cultural or heritage organisations



56%

Member library / arts /
cultural organisation

25%

Ever volunteered in
arts / culture sector

Their activity levels result in above-average expenditure in the arts. However, value for money and emotional engagement is important to this segment and they may avoid financial risks unless they are sure of the benefits to them. They tend to be loyal supporters of arts brands who mirror their own values and lifestyle choices.

The Expression segment strongly believes in the benefits of the arts and is supportive of public subsidy. They have above-average membership of arts, heritage and cultural organisations and their strong sense of community means that they are willing to volunteer their time for the greater good. They are ripe for campaigning relationships.

How to reach this segment

Debate and
discuss

Build networks
that appeal to
their community
spirit

Highlight the
opportunities
for participation

Whilst obscure and little-known names are appealing to this segment, so too are more mainstream artforms, as they don't hold disdain for popular culture. They believe that expressing an opinion is more important than following carefully developed taste; culture is for sharing and discussing with others.

Key marketing proposition

*'Tap into their desire to be part
of something bigger'*

Although they like adventure, innovation and discovery, the Expression segment also like to know what they're letting themselves in for. Their receptiveness to the views of others and happiness to lead from within, rather than be at the forefront of cutting-edge arts and culture, means they are open to reviews and recommendations. Rather than reject marketing communications they see them as a useful tool for being more discerning.

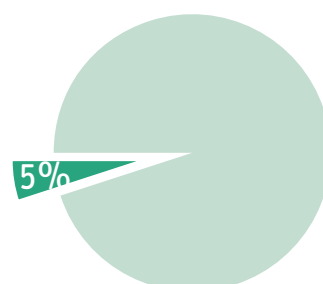
Keeping up to date with current affairs both home and abroad is important, and they are avid consumers of print media – in particular the Australian Financial Review, The Daily and Sunday Telegraph and current affairs magazines are very popular amongst this segment.

PERSPECTIVE



SETTLED
SELF-SUFFICIENT
FOCUSED
CONTENTED

739,300 adults



PERSPECTIVE



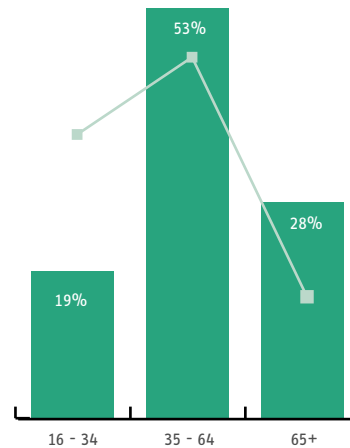
Who are they?

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

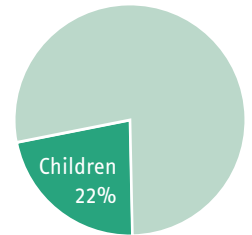
Attitudes and life priorities

OPTIMISTIC
THEIR OWN NEEDS ARE IMPORTANT
INNER DIRECTED
READING
LEARNING
THE OUTDOORS

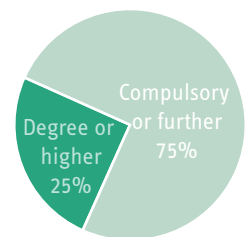
Age profile



Children at home



Highest education level reached



What needs are they looking to fulfil?

The Perspective segment has an optimistic outlook, they are inner-directed and prioritise their own needs above others. Whilst this means they are highly contented, their horizons have become somewhat narrowed. They tend to gravitate to a limited 'days out' focus in their leisure time, based around a small number of interests that have become habitual over time.

The Perspective segment doesn't see the arts as essential; culture for them is not part of their identity. Nevertheless they do see some forms of culture as providing the opportunity to pursue an interest or broaden their horizons, and it is this area which offers the greatest potential to increase the scope of their cultural consumption - by offering them a new perspective on life and the things that they are already interested in.

What do they do?

Artform interest index:

-26

Annual artform frequency index:

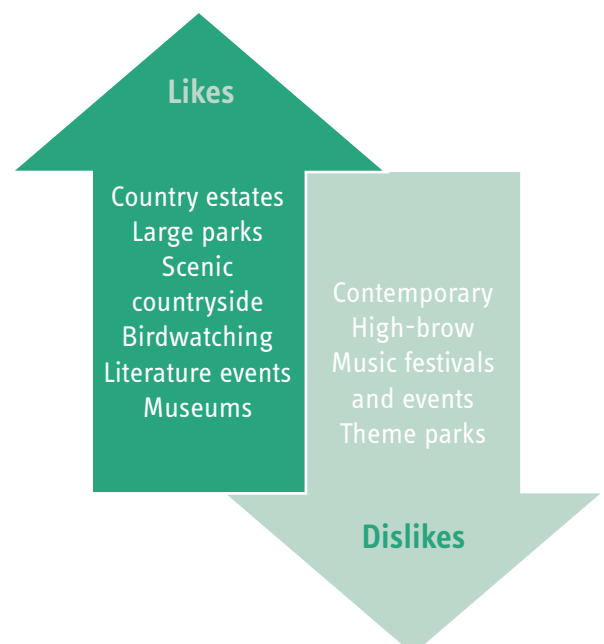
-47

Annual artform frequency:

8

The range of artforms that the Perspective segment engage with, or show an interest in engaging with, is relatively small and largely limited to the outdoors and nature activities. Their tastes tend to lean towards the traditional over the contemporary, topics such as literature, history and the natural world have the potential to spark their interest. They show an interest in libraries, museums and other cultural venues that focus on learning, as a means of further developing their specific interests and broadening their horizons.

Likes and dislikes



PERSPECTIVE



What is their value?

Expenditure

60%

Paid for
exhibition ever

31%

Spent on culture
past month

Spend indices

Tickets



Food &
drink

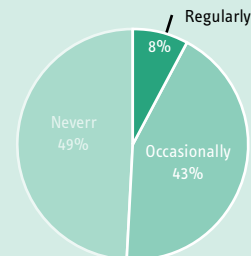


Souvenirs



Support

Frequency of donating to arts, cultural or heritage organisations



44%

Member library / arts /
cultural organisation

11%

Ever volunteered in
arts / culture sector

The low priority that they give the arts and culture in their lives translates into relatively low spend in this area. Instead the countryside and nature resonate strongly with the Perspective segment, and is something that they can access for free.

As with their personal expenditure, the Perspective segment may feel that taxpayers' money should be spent on things other than the arts and culture.

Nevertheless the segment does offer potential support to cultural organisations - particularly those with a nature and heritage focus - through membership and donations.

How to reach this segment

Offer taster
sessions

Tap into and
build on
existing
interests

Respect their
individuality and
subtly encourage
them to explore

Key marketing proposition

*'Allow them to feel they are
making their own discoveries'*

The Perspective segment's interest in culture seems to have dissipated, and they need to be tempted from their homes and countryside visits and convinced that the arts and culture do have something to offer them.

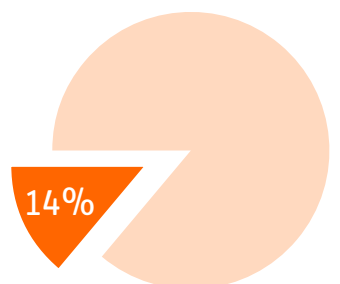
They are not proactive when it comes to seeking out cultural activities and events, thus push rather than pull marketing will be key to reaching them. Their inner-directed and independent nature, however, means that forming effective marketing messages can be a challenge; they will see through explicit marketing and publicity. Instead they need to feel that they are making their own discoveries and acting on their own terms.

They are not avid readers of newspapers and magazines, but like watching ABC and Channel 7. They are less likely than other segments to use the internet for viewing audio, video and newspaper content.

**Culture
Segments**



14%



STIMULATION



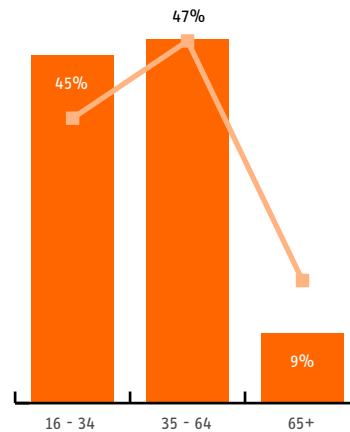
Who are they?

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

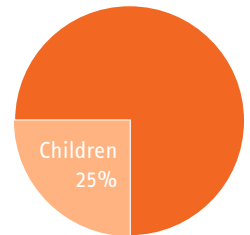
Attitudes and life priorities

**ENJOYING LIFE
GOING OUT
TAKING RISKS
LIVE MUSIC
FOOD AND DRINK
CONTEMPORARY EVENTS**

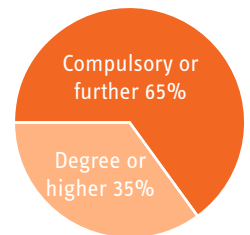
Age profile



Children at home



Highest education level reached



What needs are they looking to fulfil?

This segment wants to live a varied, entertaining life of novelty and challenge - hence the varied array of artforms they partake in and the level of risk they are willing to take. As they are unlikely to have children, their arts attendance is entirely driven by their own needs. Their main reasons for attending arts events and activities tend to be for the social experience and to ensure they remain the ones in the know amongst their peer group.

As innovators and early adoptors, they are not guided by the opinions of others. Rather they are keen to break away from the mainstream, and are at the head of the pack in terms of finding out about new events and activities. Their keen sense of adventure and a desire to stand out from the crowd constantly encourages them to try new things, even if it means going out on their own.

What do they do?

Artform interest index:

+7

Annual artform frequency index:

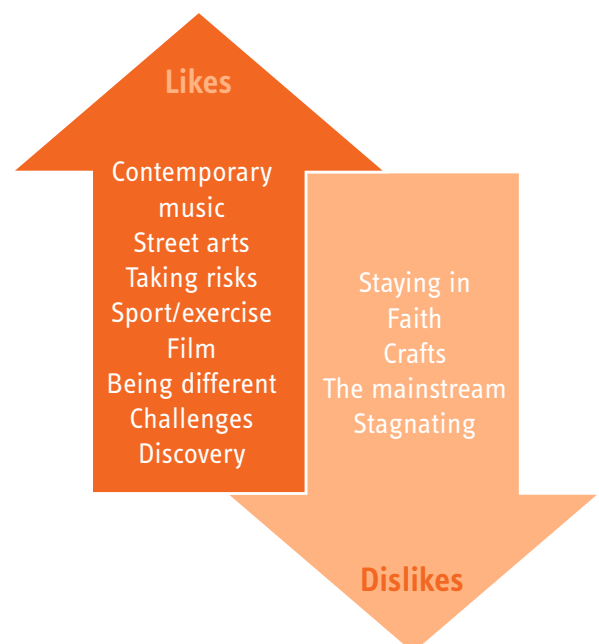
+15

Annual artform frequency:

17

The Stimulation segment has an interest in a wide range of artforms, and although they are happy to attend more traditional events, they often prefer to seek out more contemporary artforms such as music festivals, electronic live music and street art.

Likes and dislikes



STIMULATION



What is their value?

Expenditure

79%

Paid for
exhibition ever

57%

Spent on culture
past month

Spend indices

Tickets



Food &
drink

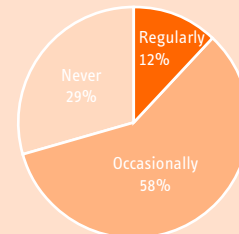


Souvenirs



Support

Frequency of donating to arts, cultural or heritage organisations



48%

Member library / arts /
cultural organisation

17%

Ever volunteered in
arts / culture sector

They like to keep themselves occupied in their spare time and are keen arts attenders, across a varied range of artforms. Whilst they are not averse to spending money on the arts, the sheer range of activities that make up their spare time sometimes limits their arts expenditure.

Their hectic lifestyle and constant search for something new and exciting means they tend not to commit to one particular activity or venue for any length of time. As soon as an event becomes mainstream they look for something different, meaning that whilst their potential to attend any arts venue is high, their limited attention span results in a relatively low propensity to support individual organisations over the longer term.

How to reach this segment

Offer events
and activities
on weekends
and evenings

Target them
with
riskier, less
well-known
activities

Promote
the sociable
element

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

There is little point in targeting the Stimulation segment with mainstream or blockbuster events - they will already know about them - but letting them know about less well-known, riskier events is a good way to generate interest. Their early adopter nature and desire to share their knowledge with others make them ideal to cultivate as brand ambassadors.

Key marketing proposition

*'Support their desire to be the first to
try something new'*

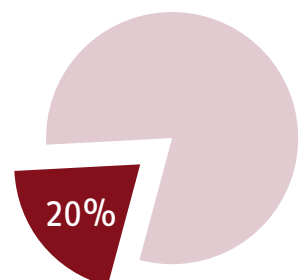
The Stimulation segment likes to listen to Triple J and are keen consumers of free newspapers, as well as The Sunday Mail and The Age and film, sport and music magazines.

AFFIRMATION



SELF-IDENTITY
ASPIRATIONAL
QUALITY TIME
IMPROVEMENT

2,711,400 adults



AFFIRMATION



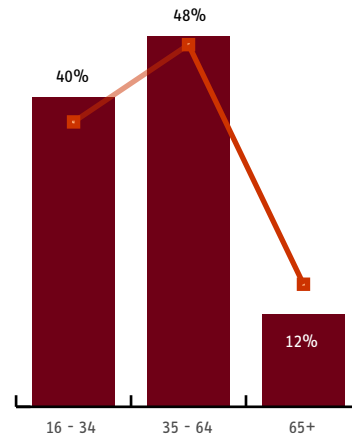
Who are they?

The core of the Affirmation segment comprises young adults, often studying or looking after family at home, for whom the arts is one of many leisure choices. They are adventurous when it comes to their arts and cultural consumption, viewing it as a means of developing themselves as individuals.

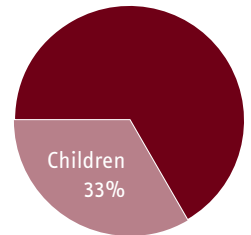
Attitudes and life priorities

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

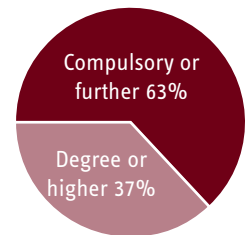
Age profile



Children at home



Highest education level reached



What needs are they looking to fulfil?

The Affirmation segment welcomes cultural consumption as a way of enjoying quality time with friends and family, as well as developing their children's knowledge and improving themselves as individuals. This segment will continue to attend large, mainstream events and activities as they offer a low risk means of satisfying these varied needs.

The arts and culture also provide a means for this segment to validate themselves with their peers. They care what others think about them and as a result want to be seen to be engaging with cultural activities, not just popular entertainment.

What do they do?

Artform interest index:

+9

Annual artform frequency index:

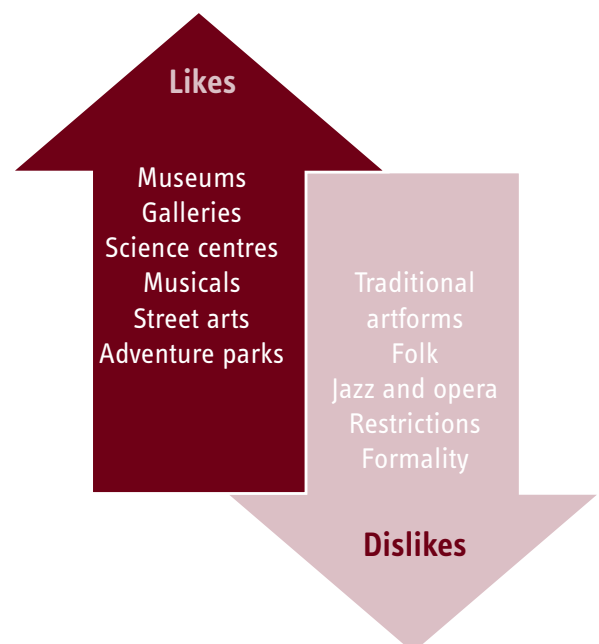
-6

Annual artform frequency:

14

The Affirmation segment expresses an interest in less traditional artforms such as contemporary dance and music festivals, but when it actually comes to attending they tend to gravitate towards established names, well-known films and more popular music events.

Likes and dislikes



AFFIRMATION



What is their value?

Expenditure

76%

Paid for
exhibition ever

57%

Spent on culture
past month

Spend indices

Tickets



Food &
drink



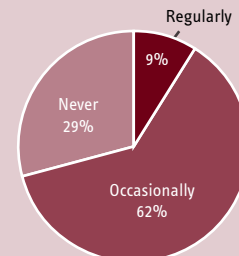
Souvenirs



This segment spends its free time engaging in a wide range of leisure activities, from learning experiences through historic houses, to entertaining days out at theme parks. Whilst they are relatively high spenders, the arts and culture is one element within this wider mix, and as a result has to compete for their leisure spend.

Support

Frequency of donating to arts, cultural or heritage organisations



50%

Member library / arts /
cultural organisation

18%

Ever volunteered in
arts / culture sector

They view arts and cultural organisations as a resource providing them with enjoyment and education, offering an environment for spending quality time with others. They have the propensity to be regular visitors to a small number of cultural organisations; ones they know from experience can meet their needs. Family discounts are likely to appeal.

How to reach this segment

Let them know early
about forthcoming
events - let them
feel like they're 'in
the know'

Promote
benefits as
being both
entertaining
and educational

Offer loyalty
schemes,
discount cards
and 'clubs'

They recognise the value in engaging with arts and culture, but need to be provided with clear reasons for selecting a cultural activity over a wider leisure activity. Emphasising the entertainment as well as learning value of engaging with a particular artform or venue would encourage take up by the Affirmation segment.

They wear their cultural consumption as a badge and want to be viewed by others as consumers of the arts, more so than they are in reality - give them advance notice of suitable events and provide them with the recognition they desire when they do engage.

Key marketing proposition

*'Endorse their view that culture
is a more valuable way of
spending time with others'*

Marketing for cultural venues, events and activities will be competing with other leisure activities, so needs to stand out from the crowd and grab their attention, as well as clearly demonstrating the benefits they will get from engaging. They welcome recommendations as to which cultural venues, activities and events they ought to be engaging with.

The Affirmation segment tends to favour mainstream and popular broadcast and media channels. They read The Daily Telegraph and the Herald Sun, and enjoy reading celebrity gossip and fashion magazines. Alongside advertising through these and other broadcast channels, encouraging them to sign up to well endorsed and relevant marketing lists and sending regular targeted marketing communications would ensure that they felt in the know and give them confidence in making their leisure choices.



10%

RELEASE



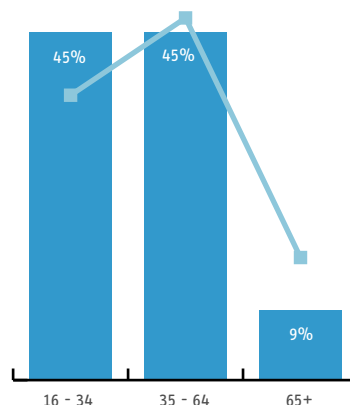
Who are they?

The Release segment tends to be younger adults with busy working and family lives who used to enjoy relatively popular arts and culture, but have become switched off as other things have taken priority in their lives. Consequently they feel they have limited time and resources to enjoy the arts and culture, although they would like to do more.

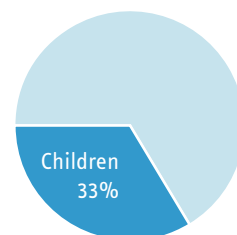
Attitudes and life priorities

**WORK & FAMILY
SOCIALISING OUTSIDE THE HOME
RELAXATION
ENTERTAINMENT
PRIORITIES ARE CLOSE TO HOME**

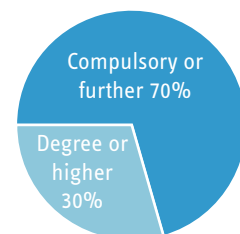
Age profile



Children at home



Highest education level reached



What needs are they looking to fulfil?

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

Because they are so busy with their day-to-day lives they currently feel 'out of the loop'. The arts and culture can then also offer them a means of staying connected to things that are current and contemporary.

Although they are one of the segments most likely to have children, they tend not to engage with arts and culture as a family, and need convincing that the arts can also be enjoyable for children.

What do they do?

Artform interest index:

Annual artform frequency index:

Annual artform frequency:

-4

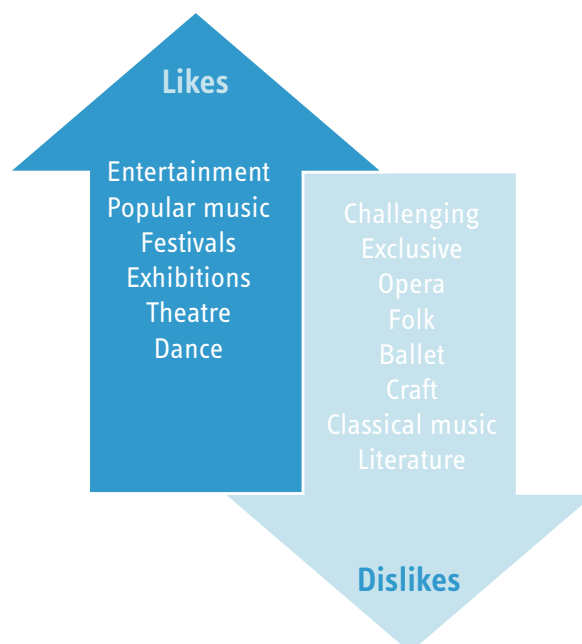
-10

14

Whilst their current consumption of the arts and culture is relatively low, the Release segment used to do far more in the past and would like to do more now. They express a certain wistfulness; a sense that they are missing out on something they once enjoyed.

They currently opt for relatively low-risk activities that they know will meet their needs, choosing the mainstream over the more challenging.

Likes and dislikes



RELEASE



What is their value?

Expenditure

71%

Paid for exhibition ever

44%

Spent on culture past month

Spend indices

Tickets



Food & drink

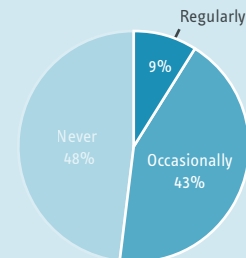


Souvenirs



Support

Frequency of donating to arts, cultural or heritage organisations



35%

Member library / arts / cultural organisation

8%

Ever volunteered in arts / culture sector

With average levels of education and working full time, the Release segment tends to be reasonably well off, but they do not currently spend a large proportion of their income on the arts. They need to be reassured that the arts can meet their leisure needs before they will adapt their spending habits.

The Release segment is not forthcoming in its support for arts and culture, certainly in relation to their propensity to donate to such organisations. Due to their busy lives they are unlikely to make the most of the cost-saving benefits of membership, and have little free time for volunteering. Engagement with the arts for this segment is likely to be based on transactional relationships.

How to reach this segment

Special offers and discount voucher codes

Package up experiences - on a plate, easy to consume

Endorsements through known brands

They tend to stick to what they know when it comes to arts and culture. Risk reduction is therefore key for this segment; they are looking for assurances of a guaranteed good time. They are externally referenced so will respond to things that are well recommended and endorsed. They are also highly price sensitive; special offers and vouchers will attract them.

Key marketing proposition

‘Demonstrate that the arts offers the opportunity for a great time together with friends’

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

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. They are unlikely to be actively looking for cultural activities, so push marketing that is eye-catching, contemporary and fun will be most effective.

They tend to be relatively low consumers of printed media, in particular they dislike magazines. They are below average internet users, but a small majority do use it for informational purposes.

ESSENCE



DISCERNING
SPONTANEOUS
INDEPENDENT
SOPHISTICATED

1,437,200 adults



ESSENCE

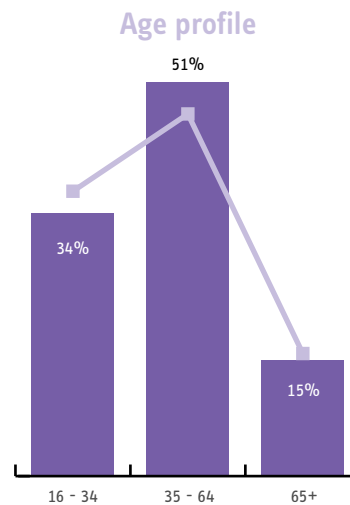


Who are they?

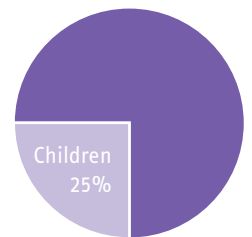
The Essence segment tends to be well-educated professionals who are highly active cultural consumers and creators, they are leaders rather than followers. Confident in their own tastes, they will act spontaneously according to their mood and pay little attention to what others think.

Attitudes and life priorities

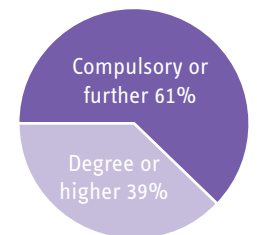
**EXPLORING
ART & CULTURE
SELF DEVELOPMENT
LIFELONG LEARNERS
EXPERIENCE OVER MATERIAL GOODS
ADVENTURES**



Children at home



Highest education level reached



What needs are they looking to fulfil?

Whilst they live full and active lives, they will make time for cultural activities. Arts and culture are an integral, even essential, part of their life. Culture is something they can experience with or without others, rather than a social activity or form of entertainment, culture is a source of self-fulfilment and challenge; a means for experiencing life.

They are inner-directed and self-sufficient. They actively avoid the mainstream, what other people think is of little importance to them. They are fiercely independent and will pride themselves in being the first to discover little-known names.

What do they do?

Artform interest index:

+13

Annual artform frequency index:

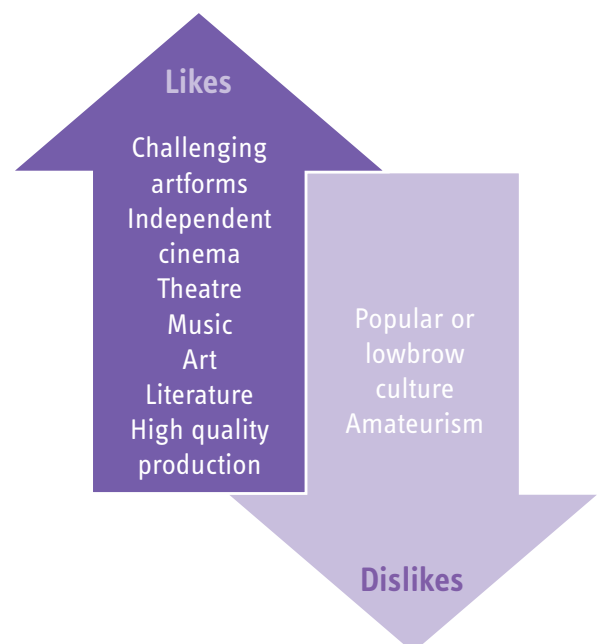
+21

Annual artform frequency:

18

The Essence segment demonstrates a high level of cultural consumption and participation across a broad expanse of cultural activities. They are adventurous and discerning in their tastes, engaging and creating often, with the arts and culture taking a prominent role in their life.

Likes and dislikes



What is their value?

Expenditure

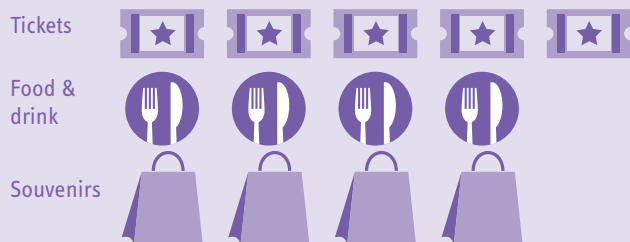
84%

Paid for
exhibition ever

65%

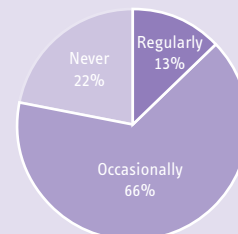
Spent on culture
past month

Spend indices



Support

Frequency of donating to arts, cultural or heritage organisations



62%

Member library / arts /
cultural organisation

28%

Ever volunteered in
arts / culture sector

This segment has the means to indulge and will follow their cultural interests at a cost - for them the arts and culture are worth paying for and supporting. That said, their keen support for the arts means that many are members of arts, heritage and cultural organisations, and they will make the most of reduced entry costs this brings.

They are active in their support; they are the segment most likely to donate money to arts, cultural or heritage organisations and one of the most likely to have carried out voluntary work. They strongly believe in state subsidy for the arts and recognise the benefits that the arts and culture bring to society. They are arts advocates.

How to reach this segment

Highlight
quality and
sophistication
aspects

Acknowledge
their discerning
knowledge and
interests

Present
opportunities
for taste
development
and challenge

Key marketing proposition

‘Flatter their independence and sophisticated tastes’

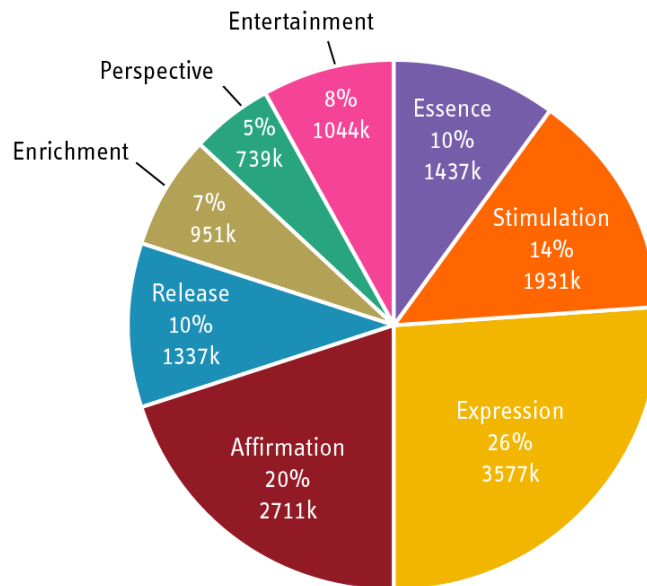
They need no convincing as to the benefits of engaging with arts and culture. They already have a voracious appetite for culture and diverse and eclectic interests.

Engaging them is not difficult, rather it's a case of competing for their time and building their valuable loyalty and advocacy. Targeting them may be difficult, and unnecessary; they have eclectic tastes, are highly proactive when it comes to finding out what's on and are independently minded. They can be wary and cynical of marketing speak and value discovery over recommendation. Pull marketing is most effective for this segment, they will come on their own terms.

They consume a broad range of media that reflects their wide range of interests and the importance they place on keeping up to date with current affairs. Their internet usage is high and crosses a broad spectrum of uses. They tend to favour traditional and broadsheet media over mainstream or popular output. Radio stations such as Triple J and ABC Classic FM, newspapers such as The Sydney Morning Herald and The Australian, and special interest magazines are channels for reaching them.

5.2 National profile

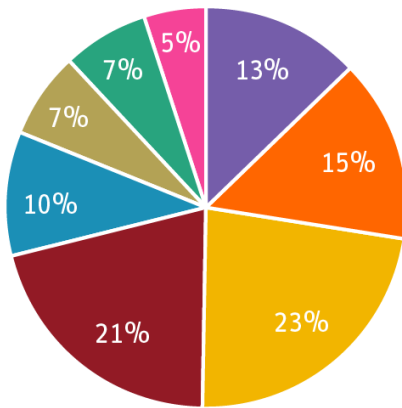
Australian market Culture Segments market profile



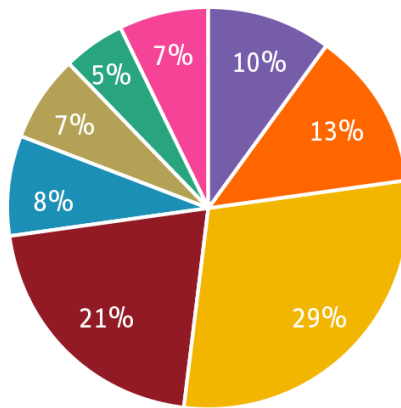
The charts below use indices to compare the Culture Segment profile of individual states to the Culture Segment profile of the overall Australian culture market, showing some interesting differences across the states.

Culture Segments index by state profile by state

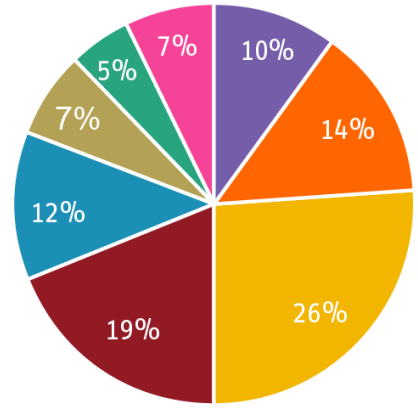
Australian Capital Territory



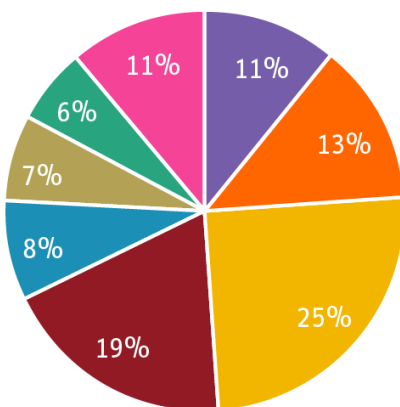
New South Wales



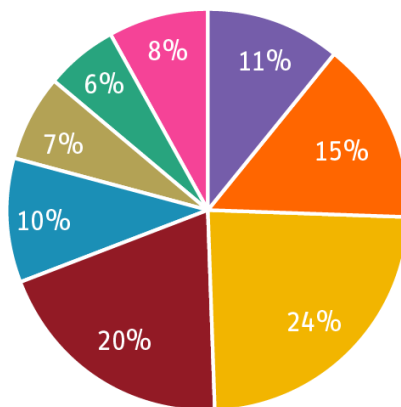
Queensland



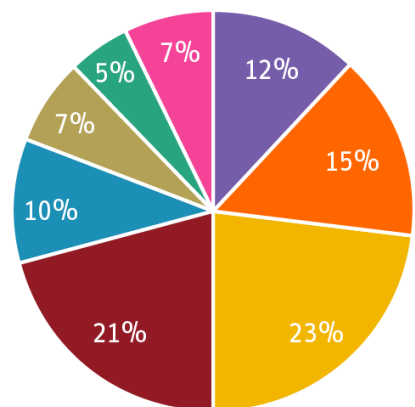
South Australia



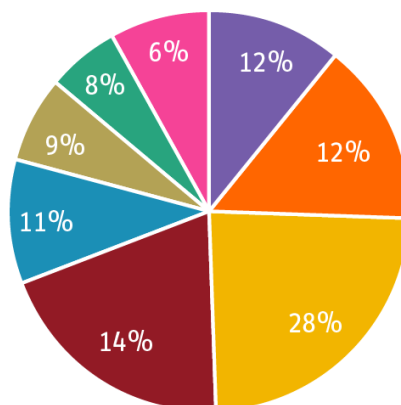
Victoria



Western Australia



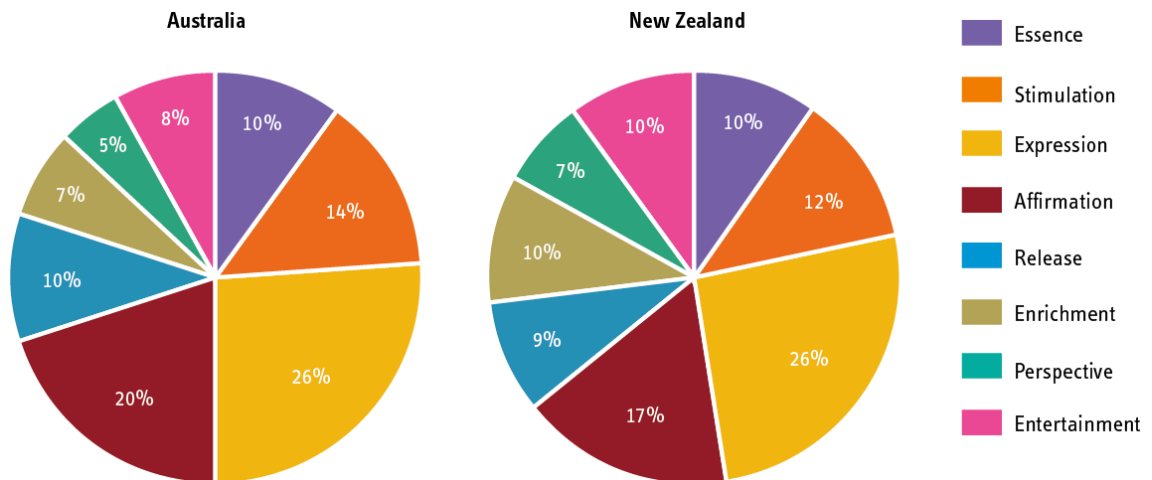
Tasmania



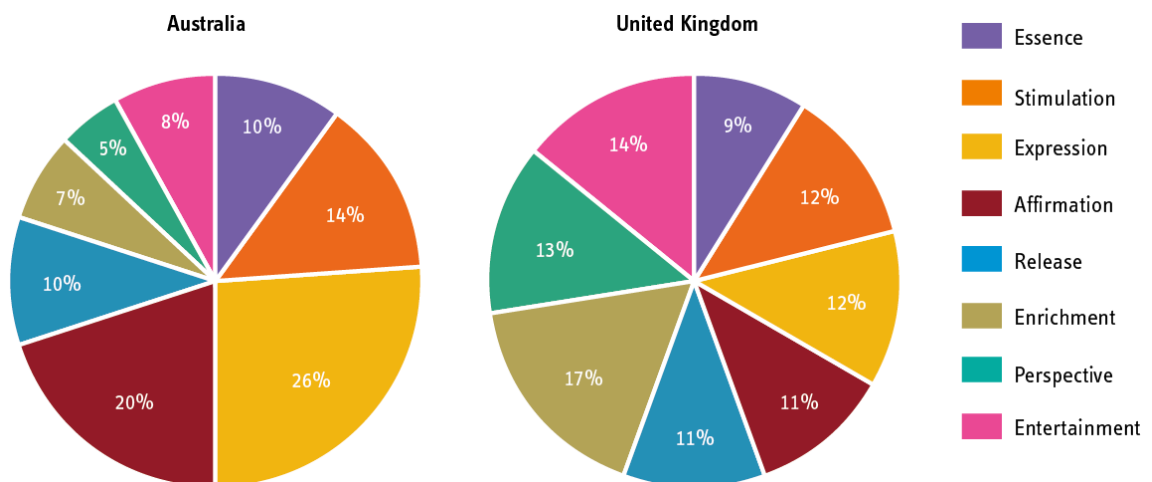
5.3 National comparators

The charts below compare Australia's Culture Segment profile with that of New Zealand And the United Kingdom.

Australia vs. New Zealand



Australia vs. United Kingdom



6

The way forward

This research quantifies the high level of public engagement with, support for, and expenditure on the arts and culture within Australia.

The research shows a strong correlation between consumption of art and culture and support for the arts. Those who consume the arts are more likely to support the arts, either through spending, donating or volunteering. Increasing arts consumption then gives rise to wider benefits for the sector and the economy.

The research also sheds new light on the significant level of potential for even greater consumption across the full range of artforms in Australia. There is high demand from the population to consume even more art and culture.

6.1 The challenge

The challenge for the sector is to find ways of unlocking the potential and increasing engagement with the arts. Culture Segments provides the sector with the tools it requires for achieving this.

Culture Segments offers a way to release the potential within the market, by widening the audience and deepening engagement with the arts, which in turn, will result in increased support for the sector.

This will require a cultural shift within the funding system away from the provision of artforms for regions, and towards building engaged audiences for visionary artists.

It will require a cultural shift within arts organisations away from functional transactions with the audience (selling tickets) to emotional interactions with them (making them *want* to buy tickets).

Morris Hargreaves McIntyre
Suite 2.1
63 Ponsonby Road
Auckland 1011
New Zealand

www.lateralthinkers.com