



Culture Segments Australia

Pen Portraits for the
Australia Council

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► **morris
hargreaves
mcintyre**


Australian Government

Australia
Council
for the Arts 

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This report is designed to be a **practical, accessible** tool, providing a wealth of **data** to help you place your **audiences** at the **heart** of your organisation.

By segmenting Australian audiences, detailed **Pen Portraits** have been produced which support a **deeper understanding** of your audiences, participants and the groups within it.

Cover image: *Opera in the Park*. Credit: James Rogers for West Australian Opera

Foreword

From the Australia Council for the Arts:

As the Australian Government's principal arts funding and advisory body, the Australia Council for the Arts uses research and sector knowledge to inform policy, to champion and advocate for the arts, and to leverage new investment opportunities. Our research program also provides valuable resources for our stakeholders across the arts ecology.

The Australia Council's *Connecting Australians: Results of the National Arts Participation Survey* provides valuable insights about Australians' diverse and evolving relationships with the arts. For this report, Morris Hargreaves McIntyre applied their Culture Segments™, to data collected through the survey to create this series of Pen Portraits. They expand our knowledge of arts audiences and participants with a targeted set of tools for understanding the motivations, behaviours and lifestyles of Australians and how they relate to engagement with arts and culture.

MHM's Culture Segments continue online with a set of interactive dashboards, searchable by state and territory and by detailed art form.

We trust that you will find these Culture Segments a useful tool for understanding not just how Australians attend and participate in the arts, but why they do so, and the potential for arts experiences to reach Australians from all walks of life.

How to use this report

Culture Segments is a **universal**, sector-specific **segmentation** system for **arts, culture** and **heritage** organisations devised by Morris Hargreaves McIntyre.

The Pen Portraits which follow provide detailed summaries for each of the eight Culture Segments, exploring who they are, the role the arts play in their lives and how they interact with Australia's cultural landscape.

For each segment we have outlined key demographic information; which artforms they attend as well as which they participate in. Festival attendance and engagement with community arts and cultural development are also explored.

The Pen Portraits outline how each Culture Segment donates time or money to the arts (and how this tracks against the average), their views on a number of value statements about arts and culture and how this sits with their own values.

We also explore both their general online arts engagement as well as media used to engage with the arts.

If you are using Culture Segments for the first time:

You can use Culture Segments to help understand the needs of your existing audiences and participants, reach out to new ones, maximising income and realising fundraising potential.

Complementing this report, additional, interactive resources are freely available on the Australia Council for the Arts' research website *Arts Nation*.

MHM's Audience Atlas Australia has detailed breakdown of artforms by Culture Segment (and is also available to download for free on Australia Council for the Arts' website as well as mhminsight.com). Audience Atlas Victoria has artform information for the State, details on audience cross-over and was commissioned by Creative Victoria. It is freely available on <http://creative.vic.gov.au>

These Pen Portraits and Audience Atlas reports can help you establish where there is potential growth for your organisation. This growth can be from audiences, donors and participants - but it is all focused on helping you reach the maximum number of people.

If you are already using Culture Segments in your database/box office or Customer Relationship Management (CRM) system, you can use this report to:

- establish the Culture Segment profile of your audience (for attendance, participation, members and donors).
- explore where are there variances between the groups outlined above. What does this mean for your organisation?
- explore how the profiles compare with the information in *Connecting Australians: Results of the National Arts Participation Survey*.
- establish which Culture Segments will be the most engaged (and have the highest propensity to give and participate)

These insights will enable you to create an audience development, engagement or donor strategy using Culture Segments.

Key terms

The report uses a number of key terms:

Arts – includes (in this report) engagement with theatre, dance, visual arts and craft, music, literature, First Nations arts and cross-art form engagement. It includes attending the arts live, creative participation in the arts, engaging online, listening to music and reading books.

Culturally and linguistically diverse (CALD) – includes people who responded ‘yes’ to the question: *Do you identify as a person from a culturally or linguistically diverse background?* Culturally and linguistically diverse could include Auslan, as well as first generation migrants or those who self-identify with the language or cultural practices of heritages that differ from Anglo-Australians. This differs to other CALD measures such as those based on country of birth or language spoken at home.

Community arts and cultural development (CACD) – includes activities where communities, in collaboration with professional artists, are directly involved in the conception, creation and presentation of their own cultural and artistic expression.

Dance – includes any classical, contemporary and organised social dance.

First Nations – the words ‘Aboriginal and Torres Strait Islander’, ‘First Nations’ and ‘Indigenous’ are used interchangeably in this report to refer to the Aboriginal and Torres Strait Islander peoples of Australia, and their arts and cultural expressions. First Nations survey respondents self-identified. Some, but not all of the First Nations respondents also identified as CALD. First Nations arts were not defined based on creative control – it was up to survey respondents to identify whether they engaged with First Nations arts based on their own interpretation.

Literature – includes reading, creative writing and attending literary events (e.g. writers festivals, talks, storytelling and book clubs).

Music – includes playing an instrument, singing, composing music; and attending live music such as opera, classical music, musical theatre, art music and contemporary popular music.

Online engagement – includes viewing arts online; using the internet to create or learn to create arts; sharing, researching or reviewing arts online; following or engaging with artists through social media; and listening to recorded music online.

People with disability – includes people who responded ‘yes’ to the question: Do you identify as a person with disability and/or do you have an impairment that creates disabling barrier/s which limits the activities you participate in or attend unless access is provided?

Theatre – includes any traditional and experimental theatre, circus, acting or being part of a production.

Visual arts and craft – includes painting, sculpture, photography, light art, digital art, street art, crafts, woodwork, and textiles.

About this research

The data used in this report was collected through the Australia Council for the Arts' *Connecting Australians: Results of the National Arts Participation Survey*. A quantitative survey of 7,537 people, aged 15 and over was carried out online (6,456) and over the telephone (1,081).

Comparisons have been made throughout the report to the overall survey population (7,537). Please note, some questions were not asked in the telephone interviews. Where this is the case, a smaller base number has been included (6,456).

Figures have been rounded throughout this report. In some instances this will mean that, for example, pie charts will not add to 100% due to rounding.

Please see the technical note at the end of the report and the National Arts Participation Survey¹ the for further detail.

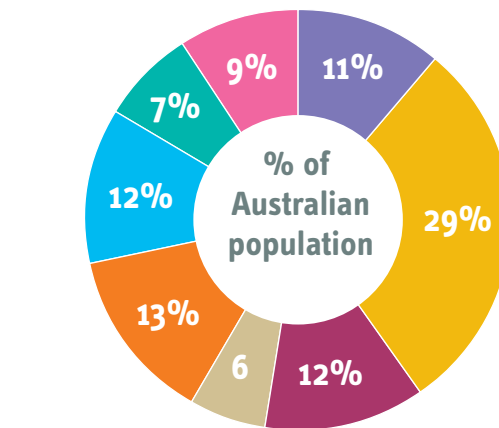
¹ The National Arts Participation Survey is available via <http://www.australiacouncil.gov.au/research/connecting-australians/>

Segmenting the Australian population

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

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**.

Culture Segments



Essence
Expression
Affirmation
Enrichment
Stimulation
Release
Perspective
Entertainment

Essence (11% of Australia's adult population)

Discerning, Spontaneous, Independent, Sophisticated

- Tend to be well-educated, highly active cultural consumers and creators
- Confident in their own tastes and pay little attention to what others think



Expression (29% of Australia's adult population)

Receptive, Confident, Community, Expressive

- In tune with their creative and spiritual side
- Confident, fun-loving, self-aware
- Wide range of interests, from culture and learning to community and nature



[Base 7537]

Affirmation (12% of Australia's adult population)

Self-identity, Aspirational, Quality time, Improvement

- See culture as a way of enjoying quality time with friends and family
- Culture also a way of improving themselves
- Arts tend to be one of many leisure choices



Enrichment (6% of Australia's adult population)

Mature, Traditional, Heritage, Nostalgia

- Like spending their leisure time close to home
- Have established tastes
- Enjoy culture that links to beauty, history, nature, heritage and traditional art forms



Stimulation (13% of Australia's adult population)

Active, Experimental, Discovery, Contemporary

- Live their lives to the full
- Look for challenges and opportunities to break away from the crowd
- Open to a wide range of experiences but like to be at the cutting edge



Release (12% of Australia's adult population)

Busy, Ambitious, Prioritising, Wistful

- Tend to be younger adults with busy lives
- Work and family commitments have squeezed out culture in recent years
- They have limited time and resources to enjoy the arts, but would like to do more



Perspective (7% of Australia's adult population)

Settled, Self-sufficient, Focused, Contented

- Fulfilled and home-orientated
- Spontaneous and their appetite for discovery drives their engagement



Entertainment (9% of Australia's adult population)

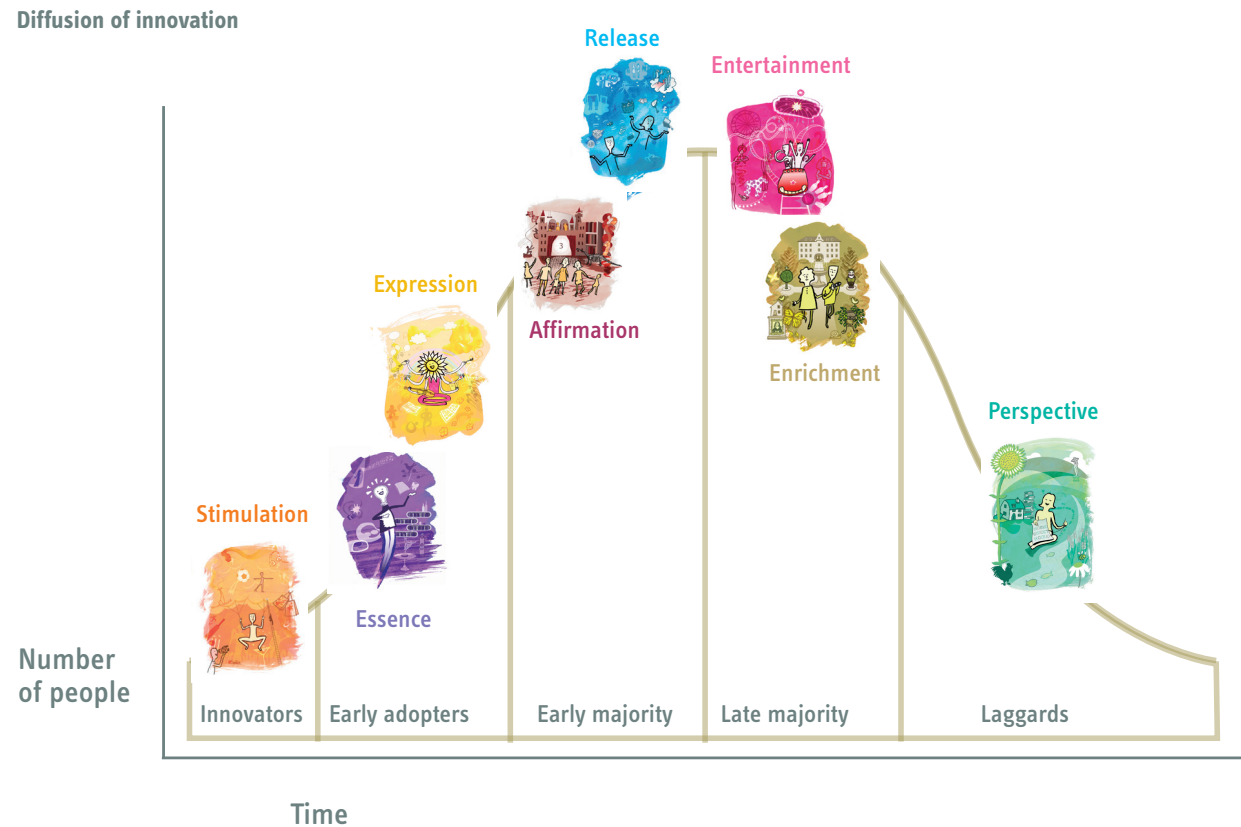
Consumers, Popularist, Leisure, Mainstream

- The arts are on the periphery of their lives and compete against many other interests
- Occasionally foray into culture for spectacular, must-see experiences



Revealing attitudes to risk

The segments respond differently to risk, with the most innovative segments actively seeking out cultural experiences that are new and unfamiliar, through to the more risk-adverse segments who require high levels of popular endorsement before they will engage with culture. Plotting the eight Culture Segments across a diffusion of innovation in this way aids understanding of why some segments over or under-index in audiences for different art forms.

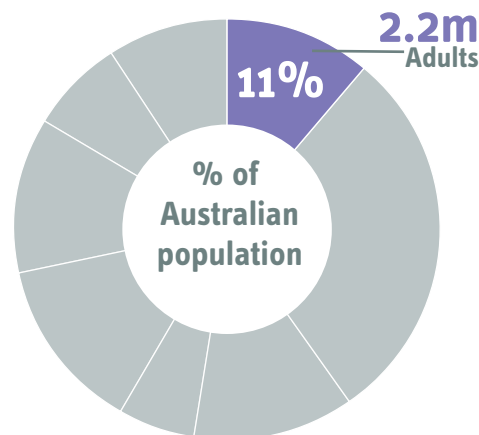


Essence

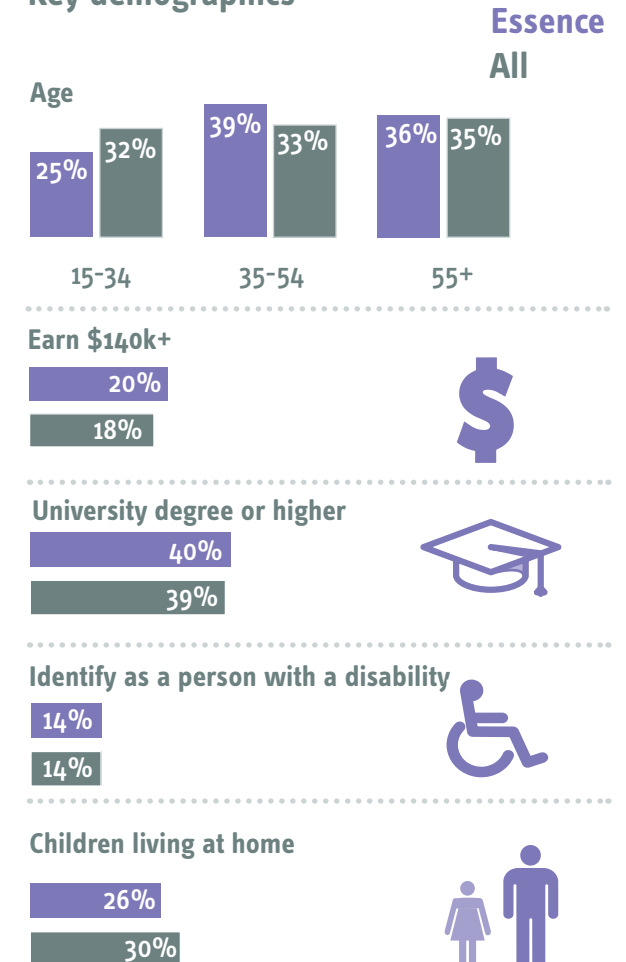


Discerning
Spontaneous
Independent
Sophisticated

The Essence segment tend 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.



Key demographics



[Base: Essence 536, All 7537]

20% of Essence are from a culturally or linguistically diverse background (27% all)

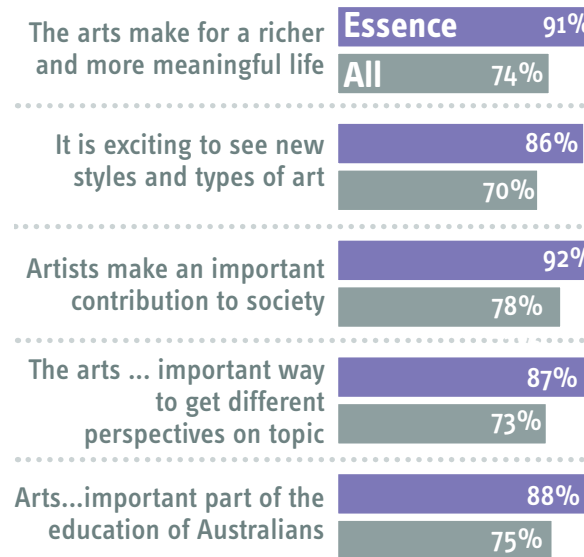
Attitudes and life priorities

Exploring
Art and culture
Self-development
Lifelong learners
Experience over
material goods
Adventures

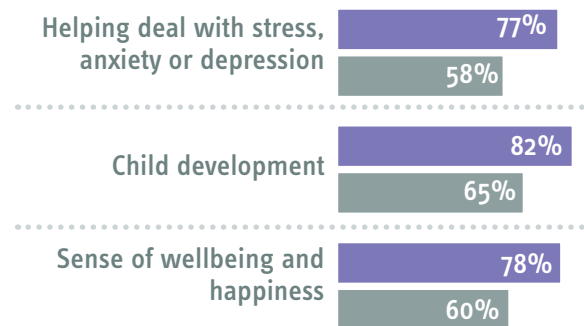
Essence seek quality, provocative and challenging arts experiences. Seeing something new and different doesn't daunt them; it excites them, offering a chance to gain new perspectives and enrich their knowledge. They are the segment least likely to feel that the arts aren't for them.

Essence like access to exclusive arts experiences, but they don't feel the arts are exclusive in a broad sense: the arts exist for the benefit of everyone. They are strong believers in the positive impact arts play on people's wellbeing and health and the segment most likely to believe in the positive impact that exposure to the arts has on child development.

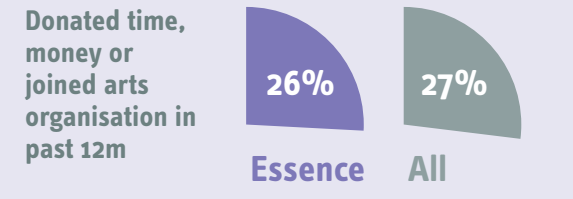
Agreement with attitudes towards the arts: where Essence differs the most



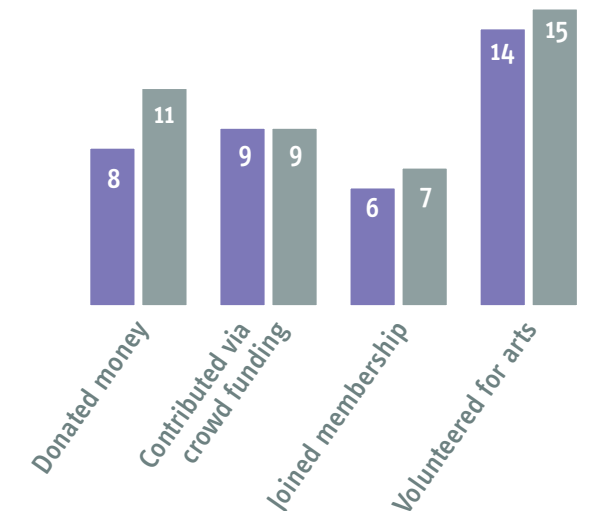
Belief in individual and societal impact of the arts: where Essence differs the most



[Base: Essence 536, All 7537]



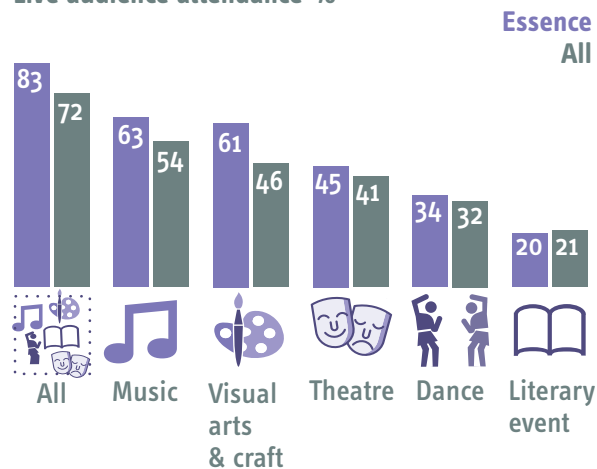
% done in the past 12 months...



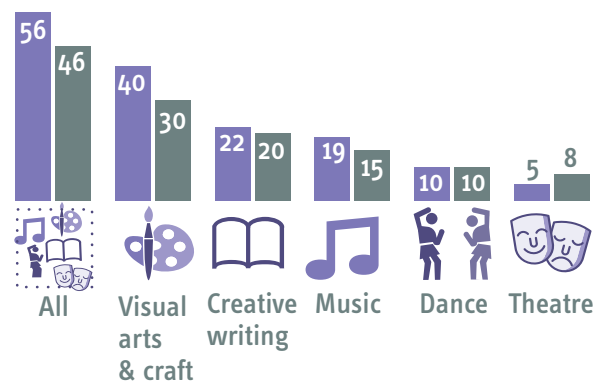
[Base 536, 7537]

Although convinced by the societal benefits of the arts, Essence's actual support through donations and volunteering is similar to average. Typically Essence consider themselves as 'world citizens' and there will be several causes vying for their attention. They do, however, show strong support for public funding for the arts (77% agree arts should be publicly funded vs. 66% on average).

Live audience attendance %

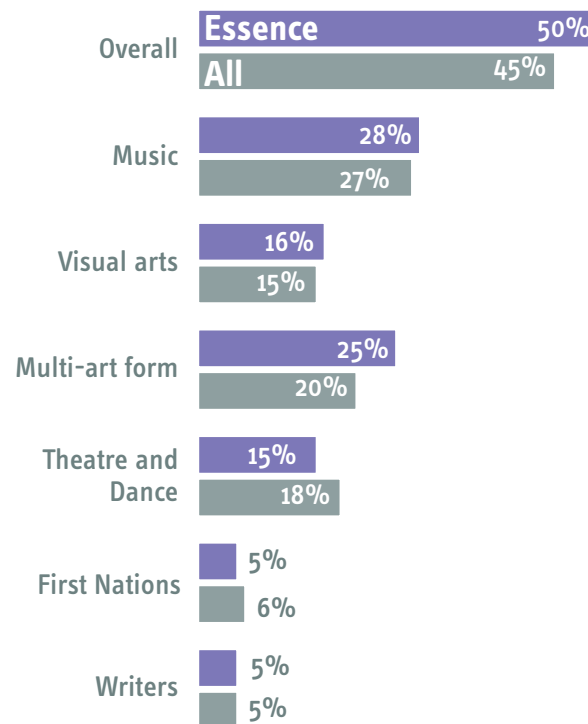


Creative participation %



[Base: Essence 536, All 7537]

Festival attendance



[Base: Essence 536, All 6456]

Appetite for culture

Culture is a hugely important part of life for members of the Essence segment. Of all the segments, they invest the most in actively pursuing their eclectic tastes. Culture is something they can experience with or without others. Rather than simply being a social activity or a form of entertainment, their cultural

consumption is a source of self-fulfilment and change; a means for experiencing life.

Essence's proclivity for culture is highlighted in both their artform attendance and active participation – both of which are higher than average. They are high consumers of visual arts, and one of the segments most likely to get 'hands on' in this area, with 4 in 10 having personally created visual arts and crafts in the past 12 months compared to 30% overall.

Despite this, attendance at festivals is just slightly above average and engagement with community arts is lower than average, indicative of their preference for established arts activities over community-based or grass-roots arts events.

7%

Involved in community art and cultural development (CACD) (14% all)

37%

Attended First Nation arts (35% all)

28%

Created or attended arts from own cultural background (35% all)

Online arts engagement in past year

90%

Engaged with the arts online (81% overall)

81%

Listened to recorded music online (76% overall)

41%

Researched/reviewed art/artists online (31% overall)

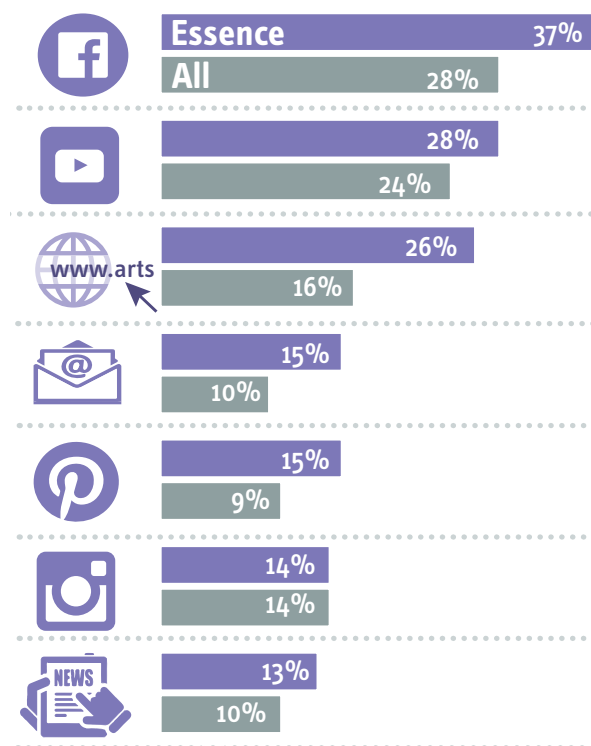
39%

Viewed visual arts, music, literature, dance / theatre (29% overall)

Essence's digital arts appetite is similar to their real-world appetite with higher than average engagement on all fronts. They are the segment most likely to spend time viewing arts performances online; nearly 4 in 10 do in a 12-month period.

The range of platforms that they use for online arts is broad and often self-directed; of all segments, Essence are the most likely to visit an arts organisation's website direct (26% did within the past 12 months compared to 16% of the population overall).

Online media used to engage with the arts



[Base: Essence 536, All 6456]

Messaging should focus on...

Quality and sophistication

Appreciation of their discerning knowledge and tastes

Opportunities to develop their taste

How do we develop them?

Engaging Essence is, on the surface of things, not difficult. Culture is not what they do – it is part of who they are – so they are proactive in keeping themselves up-to-date with the arts scene. However, they are fiercely independently-minded. When everyone else is zigging, they like to zag. They will take pride in liking things others don't and like to dislike what is popular.

Therefore, rather than attempting to sell to them (they inherently mistrust and reject overt marketing speak), arts organisations should provide them the 'tools' that help them filter the various options available to them. Pull marketing is most effective for this segment – they will come on their own terms and seek impartial reviews that signpost quality.

They are valuable across a broad range of art form markets and relationships could be deepened through tapping into more philanthropic support. Essence are convinced about the benefits of arts, but may need activating to push arts ahead of other causes they support.

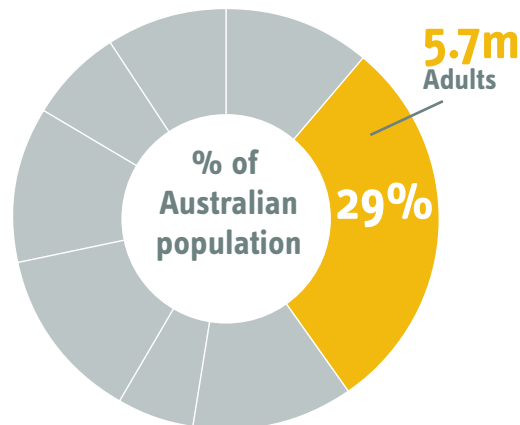
Expression



Receptive
Confident
Community
Expressive

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

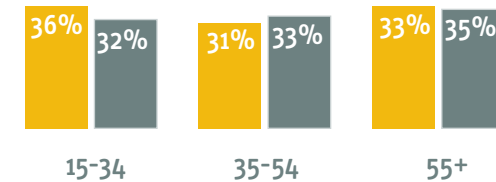
Expression like experiences to be **authentic** and enjoy opportunities to understand the **creative process**.



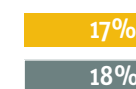
Key demographics

Expression
All

Age



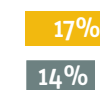
Earn \$140k+



University degree or higher



Identify as person with a disability



Children living at home



[Base: Expression 1225, All 7537]

38% of Expression are from a culturally or linguistically diverse background (27% all)

Attitudes and life priorities

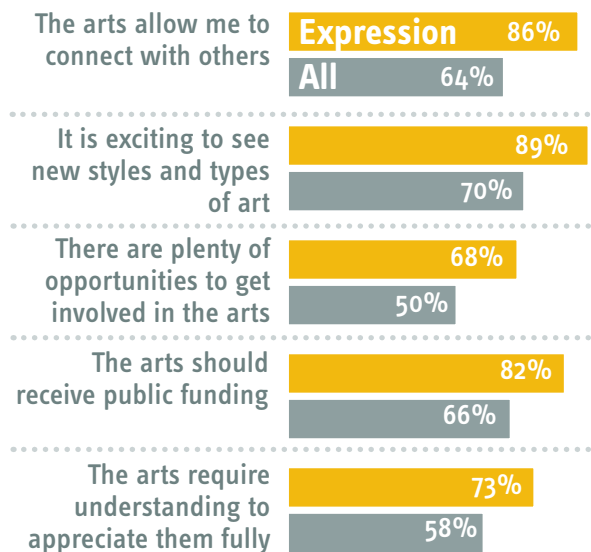
Living life to the full
Community and family
Arts and culture
Faith and spirituality
Nature

The arts are a key part of Expression's lifestyle, offering a means of exploring their place in the world, connecting with others and expressing themselves.

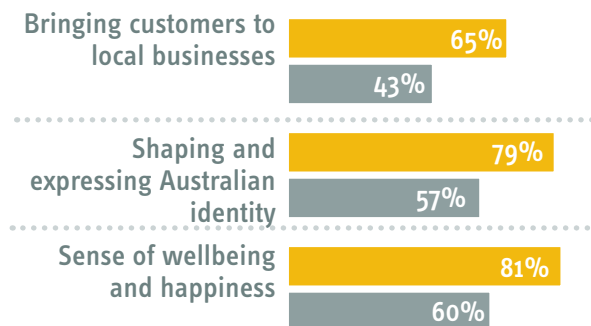
The arts are something to be enjoyed communally; something to immerse themselves in to get the rich insight into other people and cultures that they seek. Expression strongly value the inclusivity of the arts, yet they also have a sense of the depth of appreciation that comes through experiencing lots of different art forms.

They value the impact arts have in creating a sense of place and identity, as a gateway into local networks and for positively contributing to people's happiness and wellbeing.

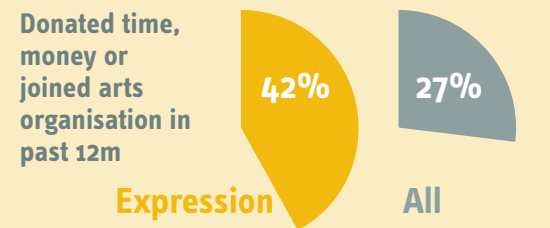
Agreement with attitudes towards the arts: where Expression differs the most



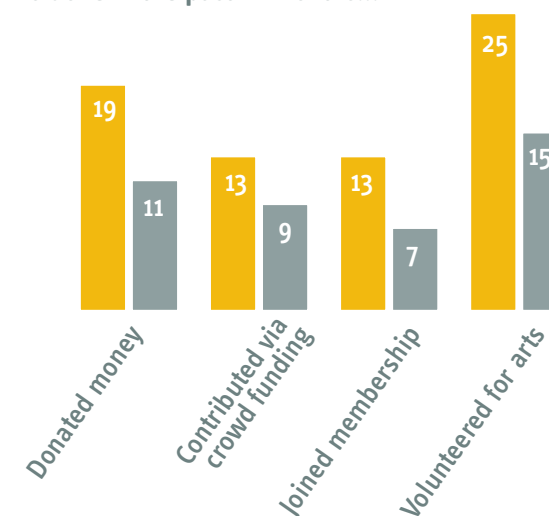
Belief in individual and societal impact of the arts: where Expression differs the most



[Base: Expression 1225, All 7537]



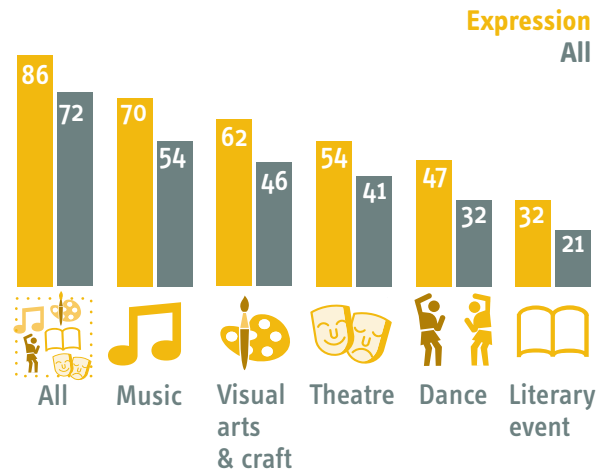
% done in the past 12 months...



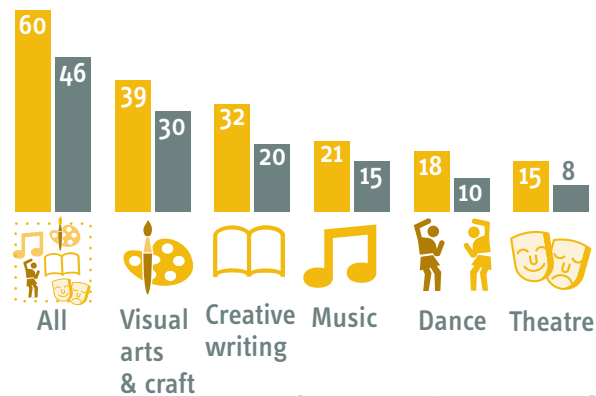
[Base: Expression 1225, All 7537]

Expression's enthusiasm for the arts extends through to high propensity to volunteer and donate money. In fact, they are significantly more likely than average to have done all philanthropic activities. Their tendency to want to join and be part of organisations is highlighted by them being nearly twice as likely as average to be a member of an arts organisation.

Live audience attendance %

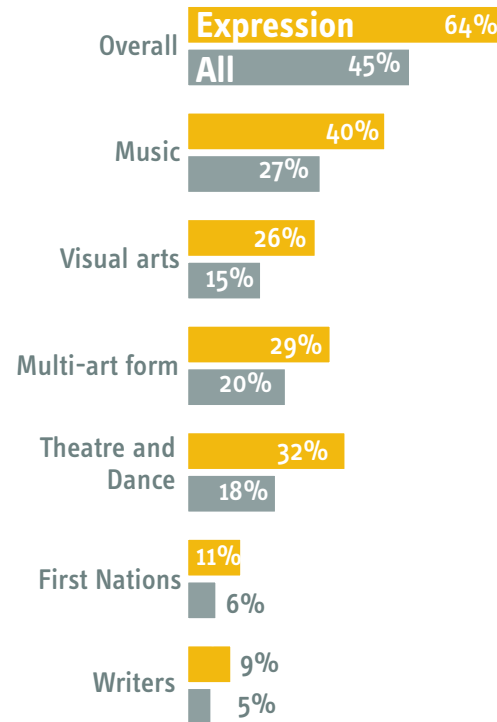


Creative participation %



[Base: Expression 1225, All 7537]

Festival attendance



Confident Cultural Consumers

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

Their cultural curiosity is reflected in their attendance and participation, which is significantly above average across all art forms. They are most likely to attend music performances (70% have in the past 12 months vs 54% overall) and participate in visual arts and crafts (39% vs 30%).

Aligning to their strong sense of community, Expression are particularly valuable to the community arts and festival markets. Their appetite for festivals is broad and spans many art forms. Expression use the arts as a way of expressing who they are; correspondingly engagement in community arts that reflect their own cultural background is the highest of the segments.

24%

Involved in community art and cultural development (CACD) (14% all)

51%

Attended First Nations art (35% all)

52%

Created or attended arts from own cultural background (35% all)

Online arts engagement in past year

90%

Engaged with the arts online (81% overall)

85%

Listened to recorded music online (76% overall)

43%

Researched/reviewed art/artists online (31% overall)

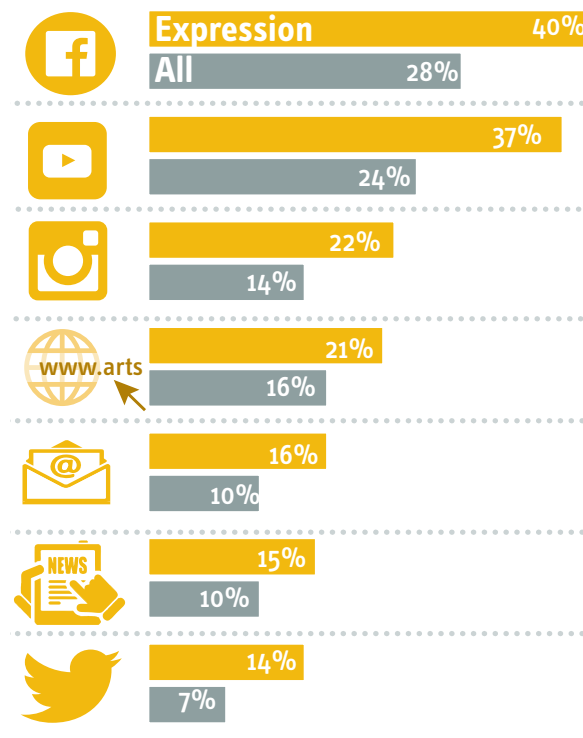
37%

Followed/interacted with an artist or arts organisation (25% overall)

Expression have a high propensity to actively engage with the arts online, through a broad range of channels. The internet offers a way to extend their artistic networks and stay in touch with organisations, with almost 4 in 10 (37%) following artists or arts organisations – significantly higher than the overall average of 25%.

Expression are the most active of all segments on Facebook (40% vs 28%) and frequently access the arts through Youtube (37% vs 24%) and Instagram (22% vs 14%).

Online media used to engage with the arts



[Base: Expression 1225, All 6456]

Messaging should focus on...

Debate and discussion

Building networks that appeal to their community spirit

Highlighting opportunities for participation

How do we develop them?

Although they like adventure, innovation and discovery, members of the Expression segment often like to know what they're letting themselves in for. Their receptiveness to the views of others and popular or well-endorsed activities, rather than being at the forefront of cutting-edge arts and culture, means they are open to reviews and recommendations. Expression like to feel part of a crowd and enjoy shared experiences so offering opportunity for dialogue and discussion appeals.

Expression don't need to be the first to know but they love to share, so when they do find out, they tell everyone. They are involved in all sorts of community activities making them well-networked, extremely good at spreading the word and a valuable source of advocacy.

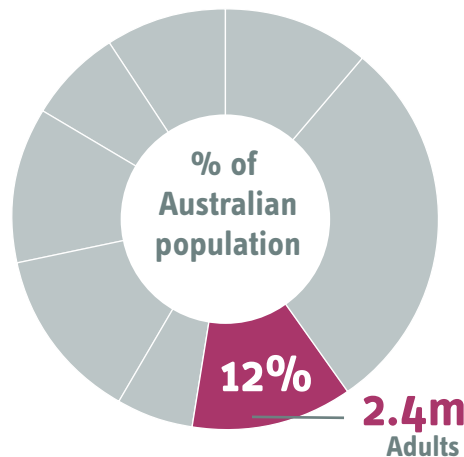
Bringing them closer and helping them to feel part of a community – through, for example membership schemes and participatory events – can be useful to maintain a dialogue with this valuable, supportive and enthusiastic audience.

Affirmation

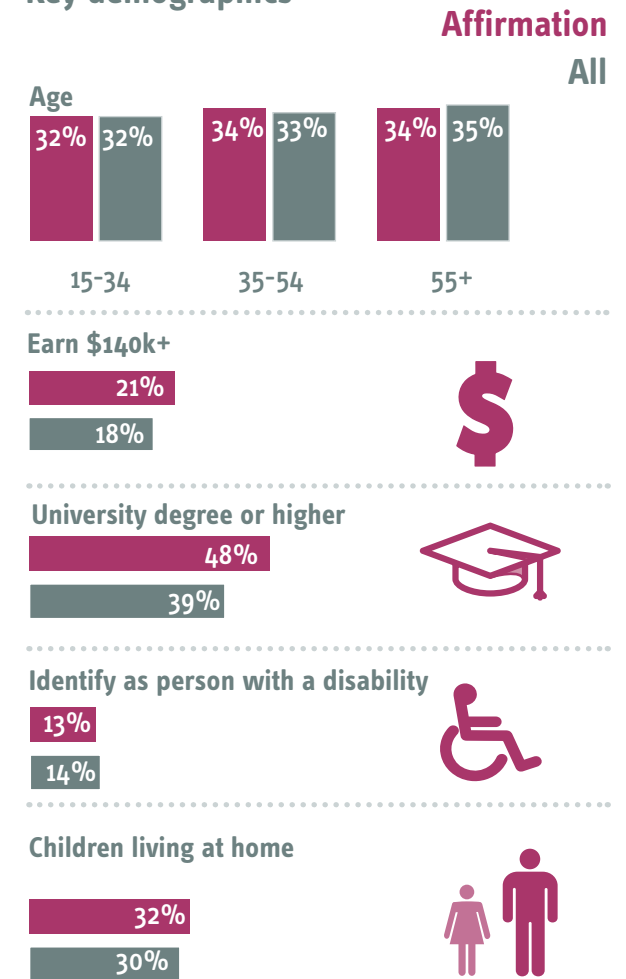


Self-identity
Aspirational
Quality time
Improvement

Affirmation welcome culture as a way of **enjoying quality time** with friends and family at the same time as **improving themselves** as individuals. They are interested in less traditional art forms but will continue to attend large, mainstream events and activities as they offer a low-risk means of satisfying these varied needs.



Key demographics



[Base: Affirmation 779, All 7537]

31% of Affirmation are from a culturally or linguistically diverse background (27% all)

Attitudes and life priorities

Family needs

Personal development

Quality time with others

Wholesome leisure activities

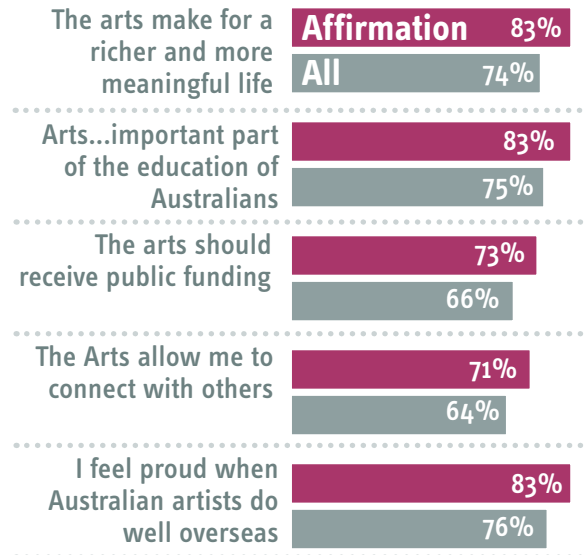
Enjoyable experiences

Arts and culture provide a means for Affirmation to validate themselves with their peers. This extends to the country as a whole, with members of this segment often proud of the success of Australian artists overseas.

They care what others think about them and as a result want to be seen to be engaging with cultural activities that develop them intellectually; art is not simply a source of popular entertainment, it is part of a well-rounded education.

They support public investment in art, valuing the contribution to enriching people's lives, local communities, national identity and individuals' sense of happiness and wellbeing.

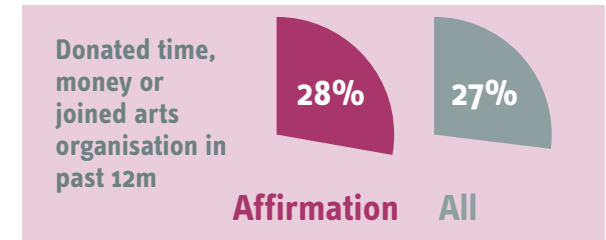
Agreement with attitudes towards the arts: where Affirmation differs the most



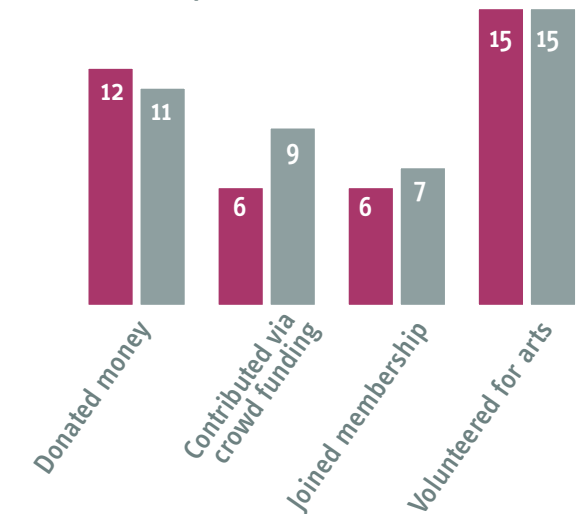
Belief in individual and societal impact of the arts: where Affirmation differs the most



[Base: Affirmation 779, All 7537]



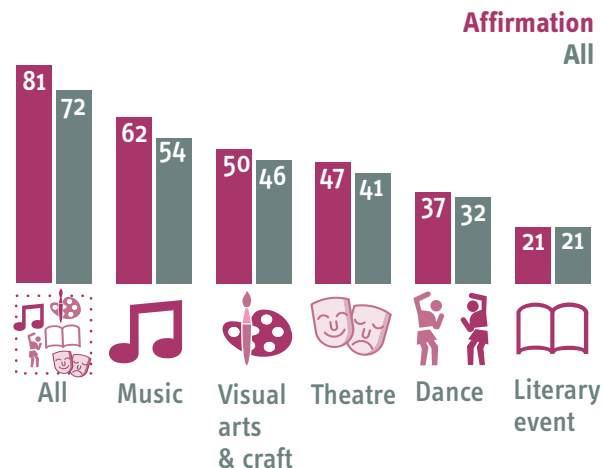
% done in the past 12 months...



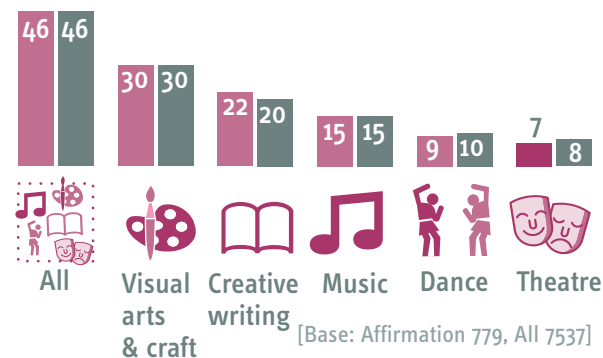
[Base: Affirmation 779, All 7537]

Affirmation's propensity to support arts organisations through philanthropy is similar to average, with 28% having done this in the past 12 months. They are among the segments most likely to support the arts through donations; conversely they are less likely than average to support through crowd funding.

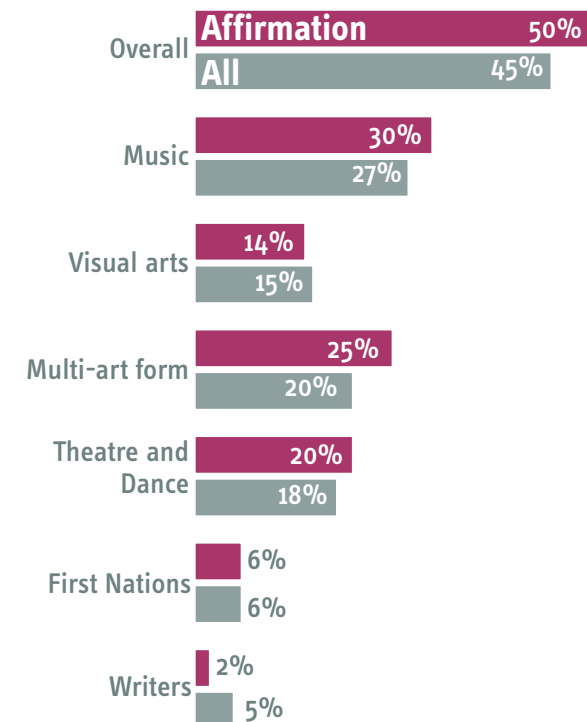
Live audience attendance %



Creative participation %



Festival attendance



[Base: Affirmation 779, All 6546]

An educational experience

Arts activities provide quality time with friends and family, as well as developing their children's knowledge. They typically attend large, mainstream events and activities and have a healthy appetite to consume a range of art

forms, with attendance above average across most types of activity. Whereas consumption is above average, creative participation is similar to the population overall, suggesting this could be a way to develop a segment who can sometimes lack confidence in the arts.

Festivals and community events are popular with Affirmation, offering a low-risk way to experience a variety of art and cater to the tastes and needs of everyone in their group.

11%

Involved in community art and cultural development (CACD) (14% all)

39%

Attended First Nation arts (35% all)

40%

Created or attended arts from own cultural background (35% all)

Online arts engagement in past year

87%

Engaged with the arts online (81% overall)

82%

Listened to recorded music online (76% overall)

34%

Researched/reviewed art/artists online (31% overall)

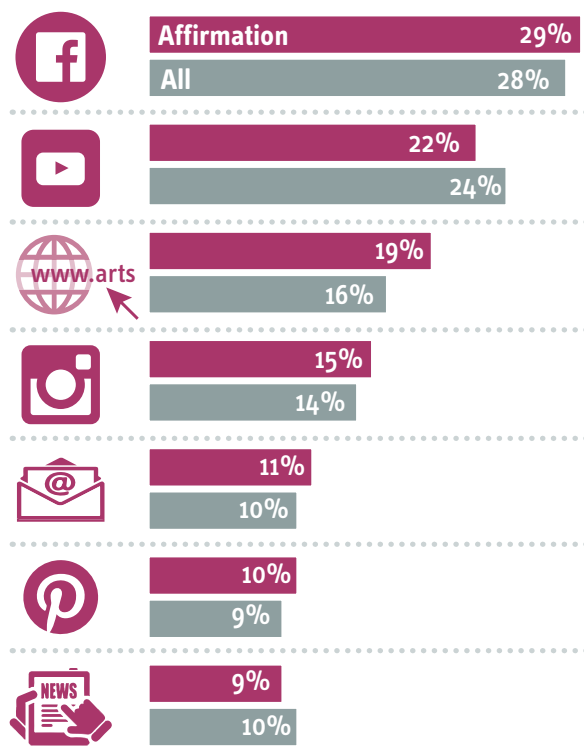
32%

Viewed visual arts, music, literature, dance / theatre (29% overall)

Affirmation are fairly active online and this extends to their arts engagement. As with other segments, they predominantly use the internet to listen to recorded music (82%), but online sources also help inform their offline arts decisions.

Engagement across various platforms is similar to the population as a whole, although they are more likely than average to visit arts organisations' websites.

Online media used to engage with the arts



[Base: Affirmation 779, All 6456]

Messaging should focus on...

Letting them know about events early

Promoting benefits as being entertaining & educational

Offering loyalty schemes, discount cards and clubs

How do we develop them?

Affirmation want enjoyable, quality time with others but they also seek self-improvement.

Arts marketing will be competing with other leisure activities, so needs to stand out and grab their attention, helping them work out the 'best' option that offers them the 'wholesome leisure' they seek. Conscientious decision makers, Affirmation often research their visits carefully. Arts organisations must clearly articulate the benefits they will get from engaging, not just the features of an event.

They are likely to be alienated if something is positioned as too experimental or risky. Participatory events that encourage them to be active creators could be particularly successful in deepening engagement with Affirmation, but they may need coaxing to try something completely new.

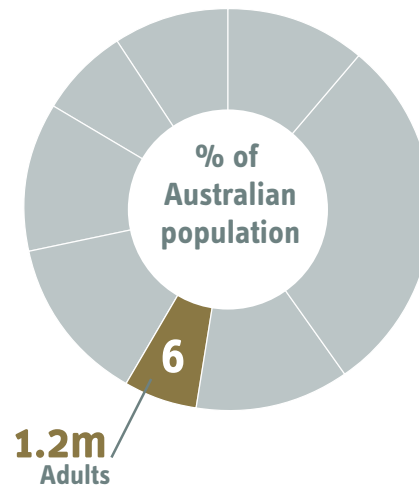
They wear their cultural consumption as a badge and want to be viewed by others as 'cultural consumers' – something that arts organisations can capitalise on by offering easy mechanisms for sharing content online.

Enrichment

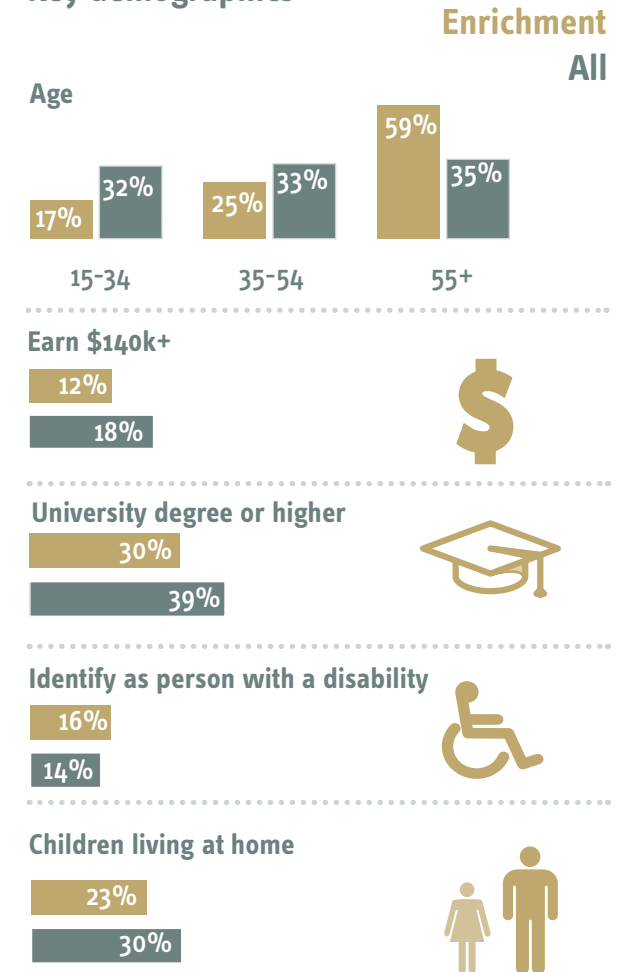


Mature
Traditional
Heritage
Nostalgia

The Enrichment segment is 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.



Key demographics



[Base: Enrichment 500, All 7537]

23% of Enrichment are from a culturally or linguistically diverse background (27% all)

Attitudes and life priorities

Nature, gardening,
outdoors

Traditional art forms

Homelife

The past

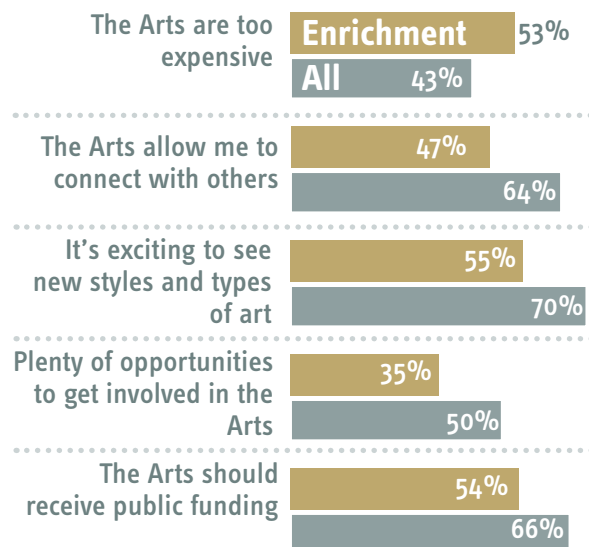
Faith

Arts and crafts

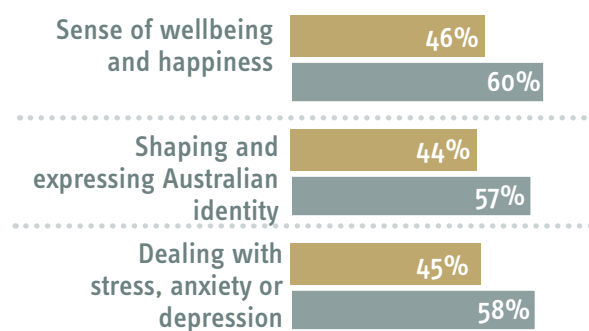
Enrichment often perceive barriers to engaging with the arts; they feel that opportunities for them to be involved are limited and price of access can be off-putting, reflecting their lower than average value of the arts generally. Their sense of artistic adventure is limited to the familiar; the arts are not a place they are looking to experiment.

The societal and health benefits of the arts are not necessarily obvious to members of this segment. Less than half feel that the arts contribute positively to people's happiness and wellbeing. Enrichment do, however, appreciate the opportunities that the arts offer for intellectual development and a means of stimulating the mind.

Agreement with attitudes towards the arts: where Enrichment differs the most



Belief in individual and societal impact of the arts: where Enrichment differs the most

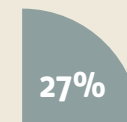


[Base: Enrichment 500, All 7537]

Donated time,
money or
joined arts
organisation in
past 12m

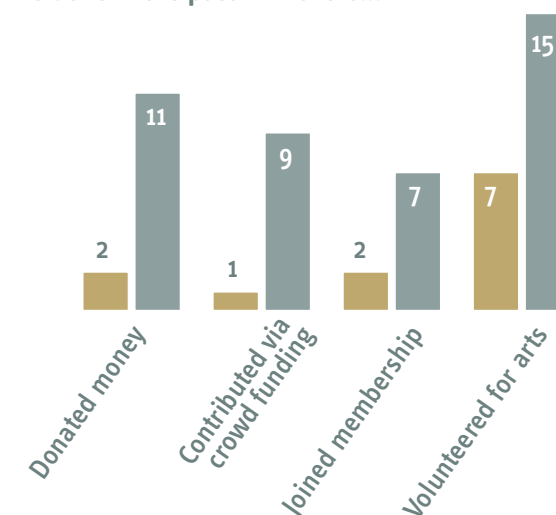


Enrichment



All

% done in the past 12 months...

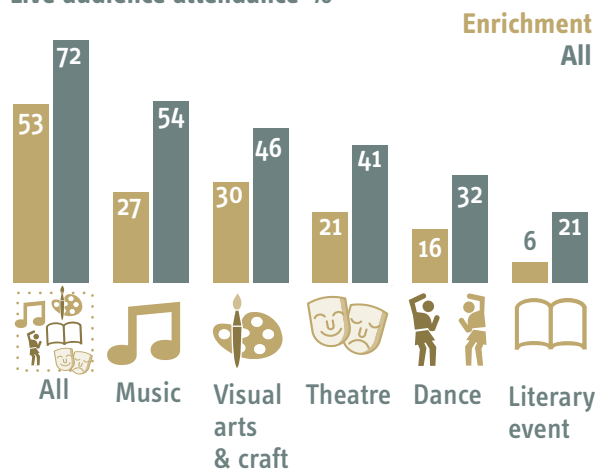


[Base 500, 7537]

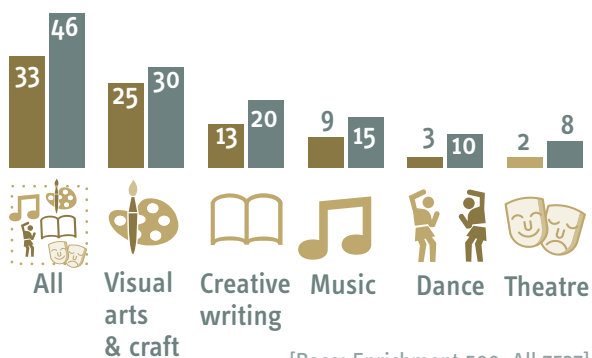
Support for the arts through donations is low within the Enrichment segment; only 1 in 10 have done this in the past 12 months, compared to over one-quarter of the population as a whole. For those Enrichment who do give to the arts, this is more likely to be through giving time than it is money.



Live audience attendance %

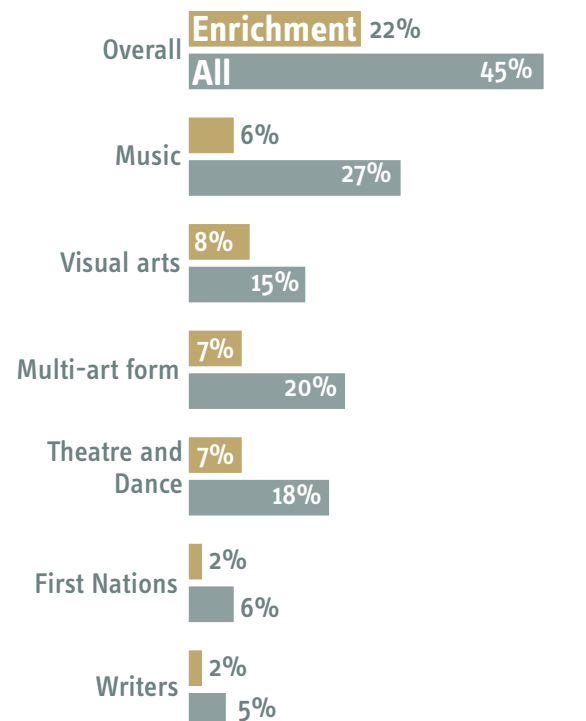


Creative participation %



[Base: Enrichment 500, All 7537]

Festival attendance



[Base: Enrichment 500, All 6456]

Creatures of habit

The Enrichment segment is risk averse with established tastes, favouring traditional art forms over the experimental and contemporary. They know what they like and their cultural activity is very much driven by their own needs, not what is considered to be new or fashionable.

They are most likely to attend and actively participate in visual arts and crafts activities, although engagement is lower than average.

The performing arts, festivals and community events are of lower appeal. The variety offered through festivals is not necessarily what they seek and they are not wanting to connect with others through the arts, meaning their development potential for community arts is fairly low.

5%

Involved in community art and cultural development (CACD)(14% all)

14%

Attended First Nation arts (35% all)

20%

Created or attended arts from own cultural background (35% all)

Online arts engagement in past year

59%

Engaged with the arts online (81% overall)

47%

Listened to recorded music online (76% overall)

15%

Viewed visual arts, music, literature, dance / theatre (29% overall)

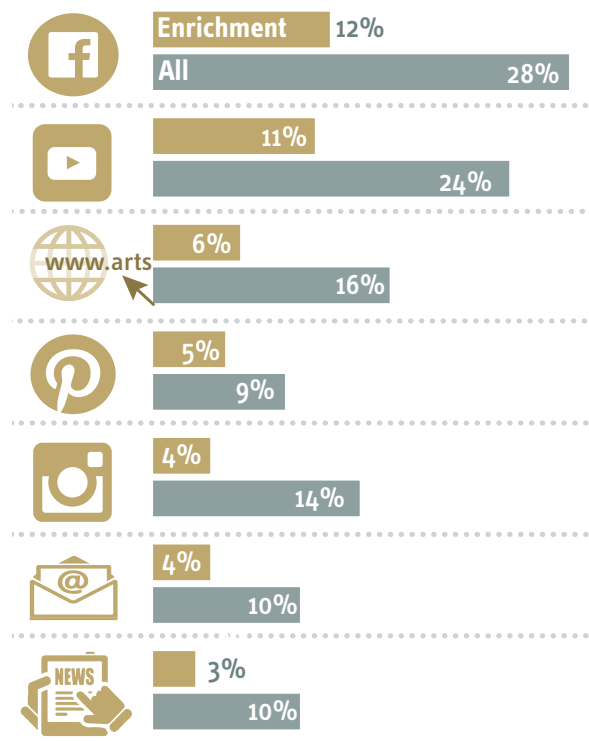
15%

Researched or reviewed the arts/artists (31% overall)

Enrichment are often lighter users of the internet and tend to go online for functional reasons, rather than a place for digital discovery. Nevertheless, although significantly less likely to engage with the arts online than average, the majority (59%) do.

Arts organisations cannot rely on Enrichment coming to them; they are one of the segments least likely to visit arts organisations or subscribe to their e-news.

Online media used to engage with the arts



[Base: Enrichment 500, All 6456]

Messaging should focus on...

Nostalgia

Highlighting the traditional and established

Providing good value for money

How do we develop them?

Enrichment are looking for a sense of nostalgia, beauty, awe and wonder which motivates their engagement with arts and culture. They are risk averse and not looking to step outside their comfort zone so will lean towards the familiar, and activities which link in with their interests in heritage and nature.

They are suspicious of marketing - to them it is one of the unpleasant features of the modern world. Communications should focus on established and traditional features, always avoiding gimmicks. This segment is conscious of value so respond to discounts and reduced risk through opportunities to see snippets or 'try before you buy'.

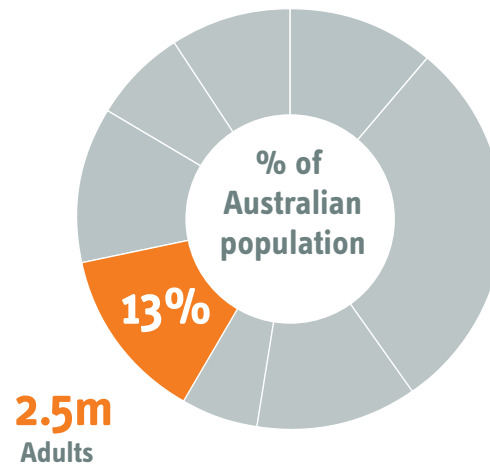
Arts organisations can successfully engage them by reassuring them that a visit meets their needs and interests, and, since they tend to be planners, offering easy access to planning information ahead of their trip.

Stimulation

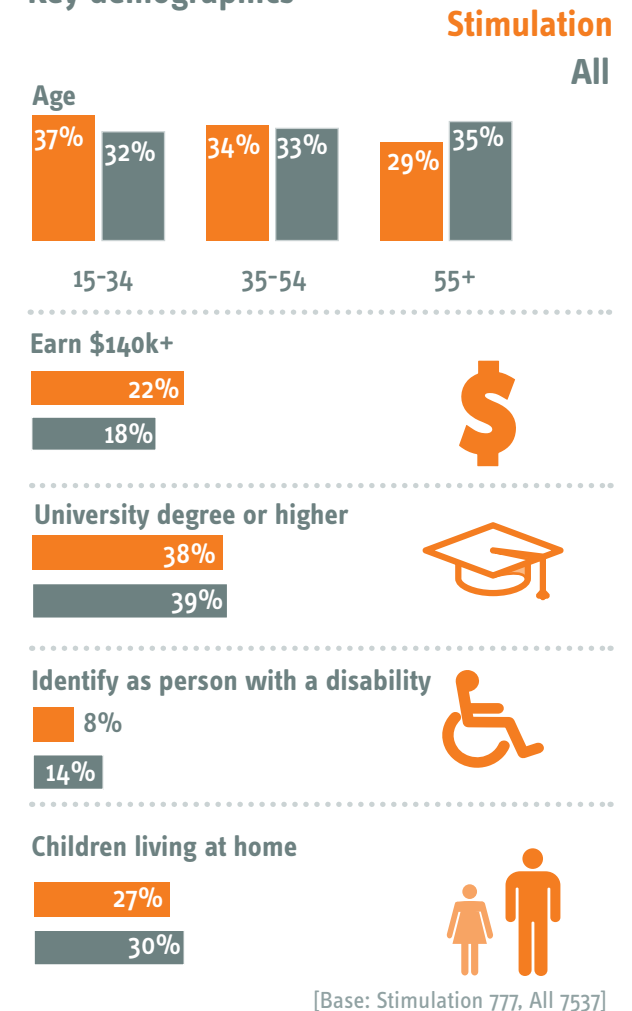


Active
Experimental
Discovery
Contemporary

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.



Key demographics



23% of Stimulation are from a culturally or linguistically diverse background (27% all)

Attitudes and life priorities

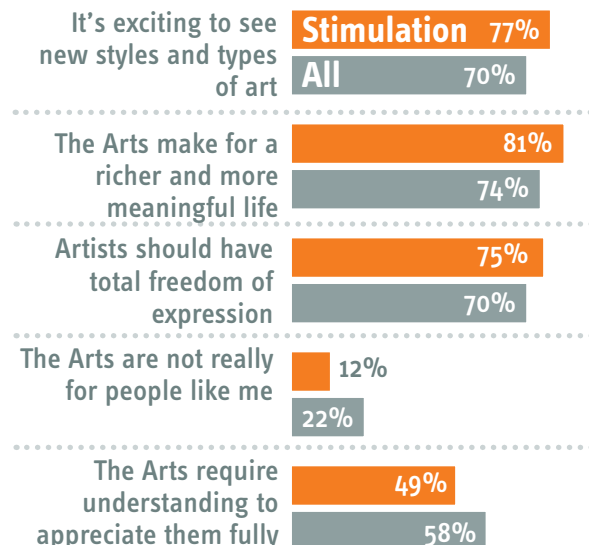
- Enjoying life
- Going out
- Taking risks
- Live music
- Food and drink
- Contemporary events

The personal relevance of the arts is obvious to members of the Stimulation segment: they offer a space for experimenting, experiencing and adventure. Stimulation welcome art without constraints, art that promotes innovation, freedom of expression and provides a source of new ideas and perspectives.

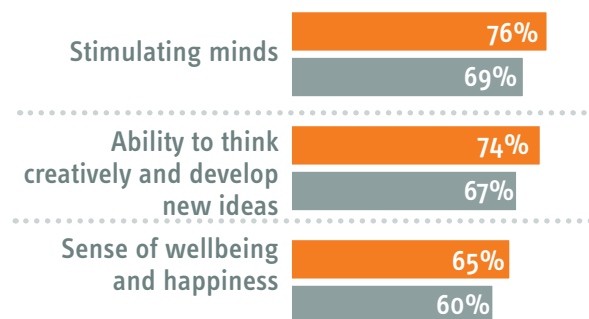
There is little stopping this segment from pursuing their artistic interests – price is not really an issue, although their constant quest for the new may mean that maintaining and retaining their attention is challenging.

They have a strong sense in the power of art to stimulate and inspire alongside the positive benefits for wellbeing and happiness.

Agreement with attitudes towards the arts: where Stimulation differs the most



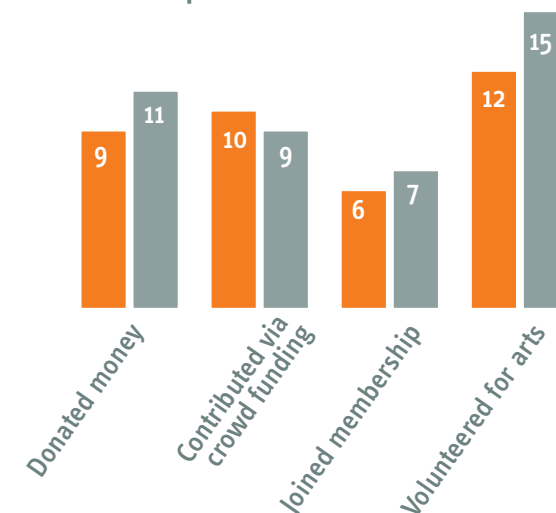
Belief in individual and societal impact of the arts: where Stimulation differs the most



[Base: Stimulation 777. All 7537]



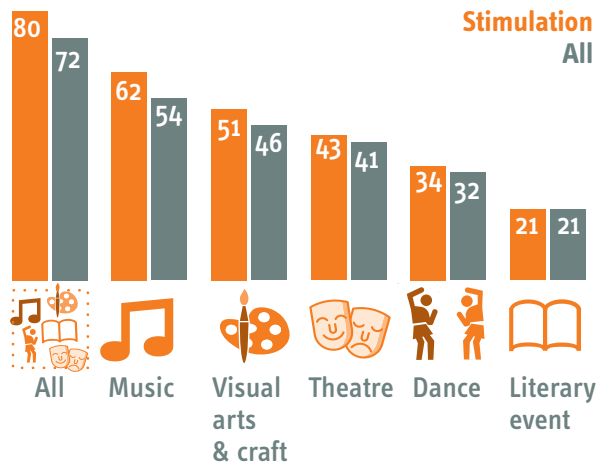
% done in the past 12 months...



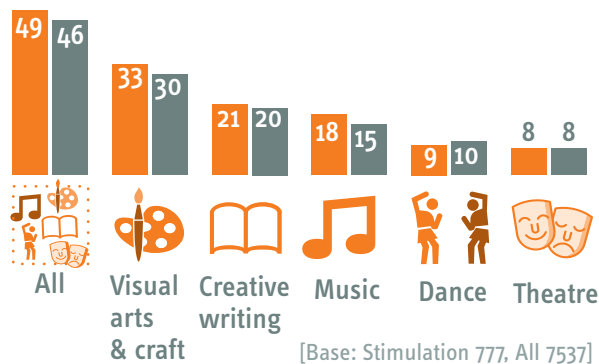
[Base 777, 7537]

Stimulation's support for the arts in a charitable sense is slightly lower than average. Often leading busy lives, their propensity to support through time is limited. When it comes to donating money, crowd funding models are more successful than traditional ways of giving; 1 in 10 have supported the arts in this way within the past 12 months.

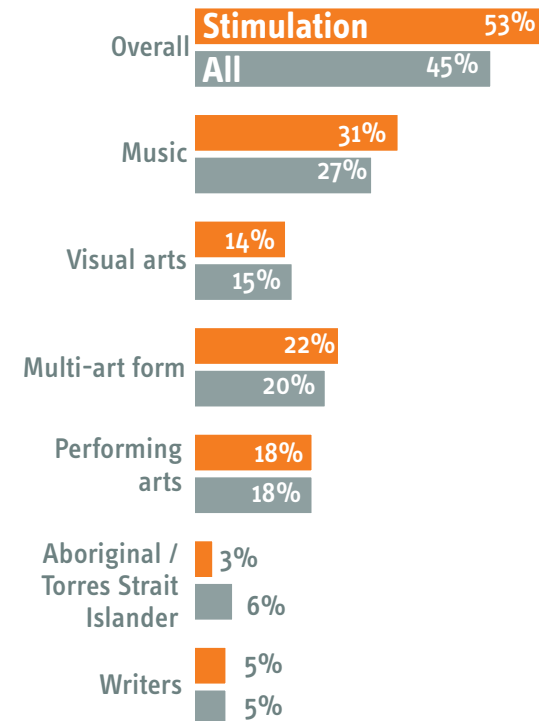
Live audience attendance %



Creative participation %



Festival attendance



[Base: Stimulation 777, All 6456]

Innovative Stimulation

Stimulation want to live a varied, entertaining life of novelty and challenge, taking part in a variety of art forms. Among their key reasons for attending arts events and activities are the social

experience and to remain the ones 'in the know' within their peer group. Music gigs and concerts are core to their art form engagement with over 6 in 10 attending in a given year. Attendance at visual arts and other performing arts is also higher than average and they are slightly more likely to actively participate in key art forms too, including playing music and doing arts and crafts.

Stimulation are one of the segments most likely to be in the festivals market, favouring music festivals. Community arts is of lower appeal and their engagement here is slightly below average.

9%

Involved in community art and cultural development (CACD) (14% all)

32%

Attended First Nation arts (35% all)

27%

Created or attended arts from own cultural background (35% all)

Online arts engagement in past year

89%

Engaged with the arts online (81% overall)

84%

Listened to recorded music online (76% overall)

36%

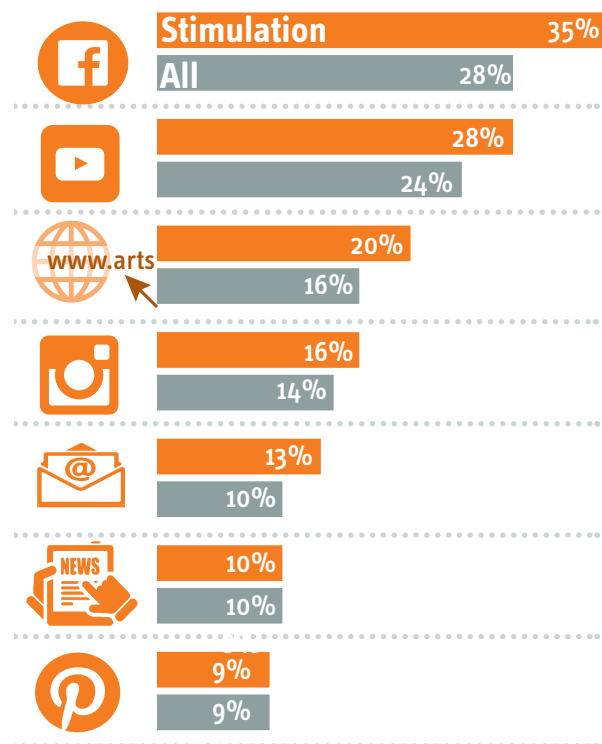
Researched or reviewed the arts/artists (31% overall)

33%

Followed/interacted with an artist or arts organisation (25% overall)

Stimulation are habitual digital engagers, often digital natives; engaging with the arts virtually will be natural to them. They are one of the segments most likely to consume music online, and the internet provides a means of keeping their finger on the pulse of the latest artistic events, particularly through Facebook and Youtube.

Online media used to engage with the arts



[Base: Stimulation 777, All 6456]

Messaging should focus on...

Offering events and activities on weekends and evenings

Riskier, less well-known activities

Promoting the social element

How do we develop them?

Stimulation want a sociable time, but they particularly enjoy new experiences from which they ultimately seek an emotional connection.

They can be relatively straightforward to engage as they are already proactively looking out for new and interesting ways to spend their spare time. They seek activities and brands reflective of their own self image and pride themselves in being ahead of the curve. They will respond to clever, quirky or 'cool' marketing and design.

Their early-adopter nature can also make them good brand ambassadors. Stimulation can see marketing as an artform in itself. They enjoy and appreciate 'cool' marketing and could help it 'go viral' for arts organisations.

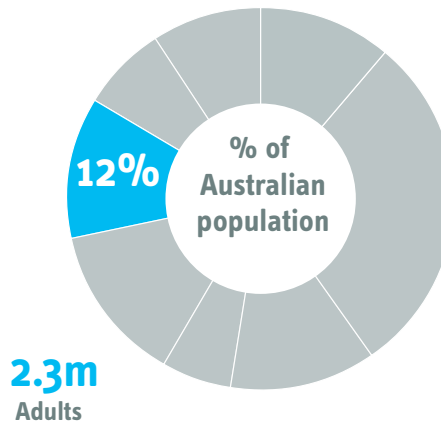
While they keep an eye out for what's on they may feel faced with lots of 'samey' options. Their interest will be piqued by features that stand out as unusual, experimental or with an interesting premise or hook.

Release



Busy
Ambitious
Prioritising
Wistful

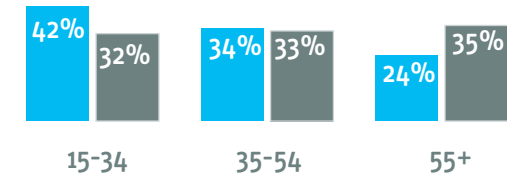
The Release segment tend to be **younger adults** with **busy** working and **family** lives who used to enjoy relatively **popular arts** and culture, but have become **switched off** as other things have taken priority in their lives. Consequently they feel they have **limited time** and **resources**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



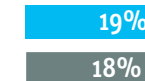
Key demographics

Release
All

Age



Earn \$140k+



University degree or higher



Identify as person with a disability



Children living at home



[Base: Release 1011, All 7537]

27% of Release are from a culturally or linguistically diverse background (27% all)

Attitudes and life priorities

Work and family
Socialising outside
the home

Relaxation

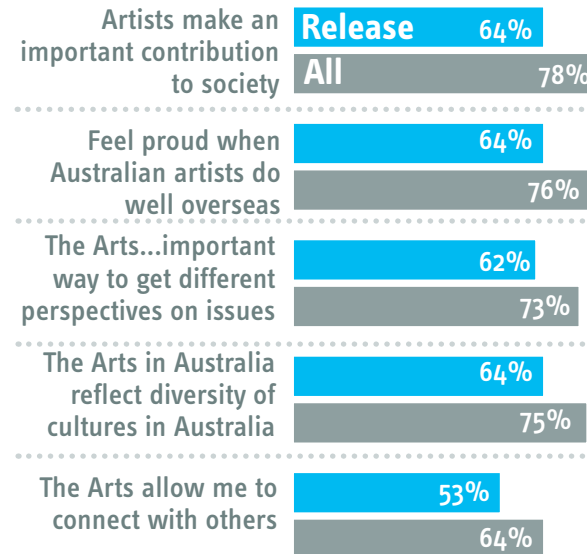
Entertainment

Priorities are close to home

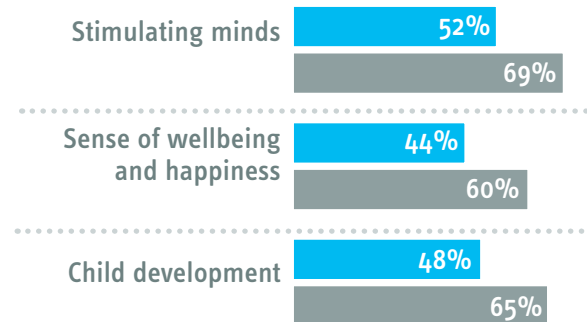
The Release segment seeks opportunities for relaxation, entertainment and socialising in their leisure time. Currently they do not perceive they can get this from engaging with cultural institutions and so look elsewhere.

Release need to be encouraged to see arts and culture as a social activity and another means of taking time out from their stressful and busy lives. They have an appreciation of art's value to the 'greater good', but don't necessarily see the arts as a way to spend quality time and connect with others. Although more likely than average to have children at home, their belief in the benefit arts can play on child development is significantly lower than average, suggesting those with children need convincing that cultural activities can also be entertaining and enjoyable for younger members of the family.

Agreement with attitudes towards the arts: where Release differs the most

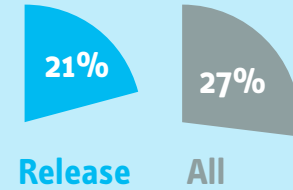


Belief in individual and societal impact of the arts: where Release differs the most

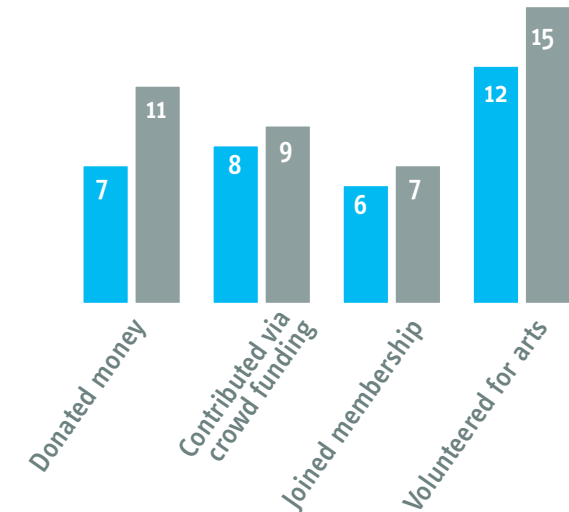


[Base: Release 1011, All 7537]

Donated time,
money or
joined arts
organisation in
past 12m



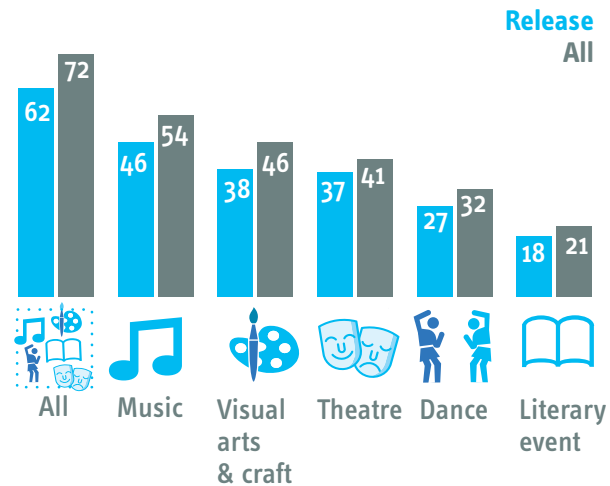
% done in the past 12 months...



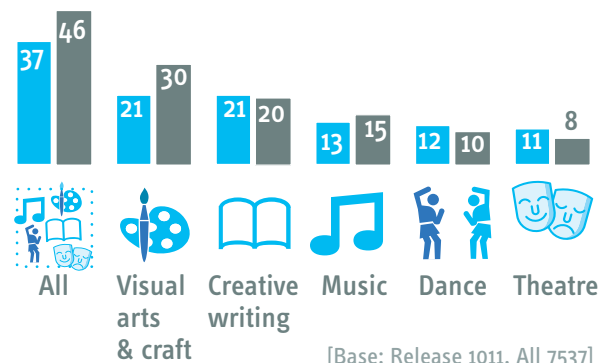
[Base 1011, 7537]

Given the lower value members of the Release segment place in the arts, it is unsurprising that their engagement in a charitable sense is lower than average. Nevertheless, they do offer potential. Around 1 in 5 are active supporters, with 12% having volunteered for the arts in the past year. Membership schemes also pose obvious benefits for a group who welcome convenience and easy decision-making.

Live audience attendance %

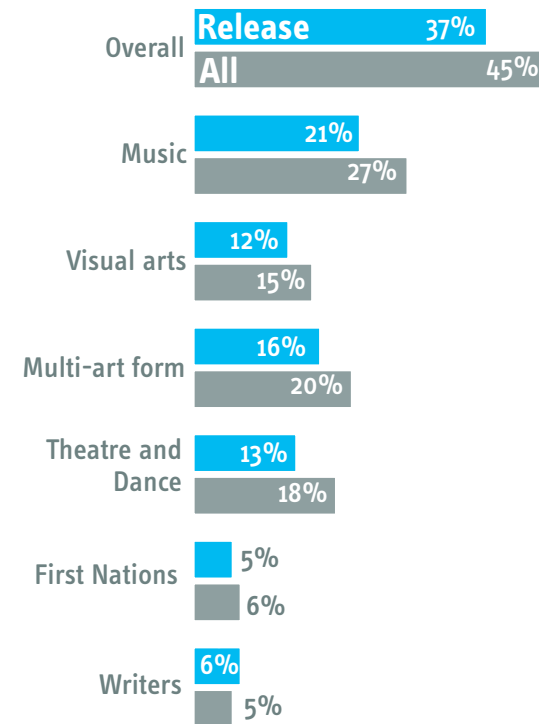


Creative participation %



[Base: Release 1011, All 7537]

Festival attendance



[Base: Release 1011, All 6456]

Busy Release

Members of the Release segment engage with the arts at a lower level than average, yet they are open to a variety of different art forms and experiences- they just need to make time for them in their busy lives.

The arts can provide a convenient way to keep in touch with their local community; engagement in this space was closer to the overall average than general attendance. Similarly, creative participation was similar to average across performing arts and creative writing and there may be room to develop this market even more, with the creativity offering a mindful way to relax and unwind.

Although engagement with festivals is below average there is also still potential here, with festivals providing Release with a convenient way to access a range of experiences.

13%

Involved in community art and cultural development (CACD) (14% all)

30%

Attended First Nation arts (35% all)

30%

Created or attended arts from own cultural background (35% all)

Online arts engagement in past year

80%

Engaged with the arts online (81% overall)

77%

Listened to recorded music online (76% overall)

26%

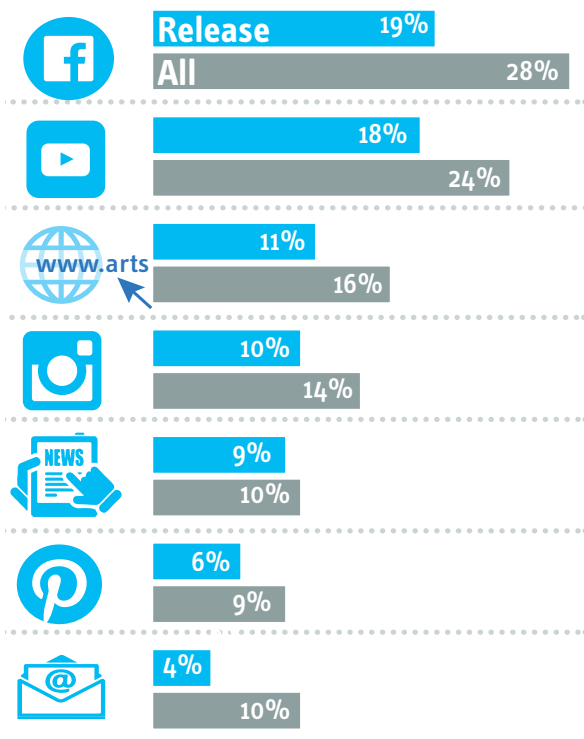
Viewed visual arts, music, literature, dance / theatre (29% overall)

23%

Researched or reviewed the arts/artists (31% overall)

Connecting with Release digitally can be highly effective – it's an easy way to access them and they use a range of online platforms. Information and sources that speed up their decision-making will be valued. They may not be in the habit of actively consuming art – other than music – online, but this could be a development area for an audience that might not make time to see the real thing.

Online media used to engage with the arts



[Base: Release 1011, All 6456]

Messaging should focus on...

Special offers and discount voucher codes

Packaging experiences – on a plate, easy to consume

Endorsements through known brands

How do we develop them?

Preoccupied by meeting life's demands Release seek opportunities to relax and socialise. They are not averse to consuming arts and culture, but need to be reactivated; an extra impetus to take the plunge and remind them what they're missing out on.

Arts marketing should emphasise ease, convenience and a great way for them to spend time with others and stay in touch with their community.

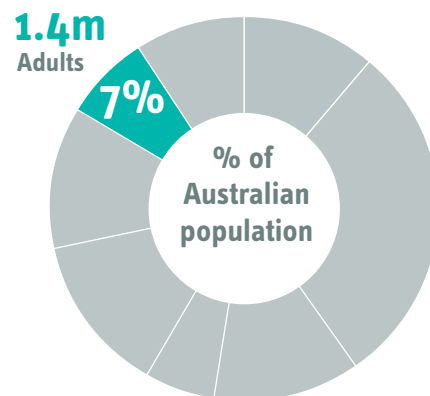
Given that their time is precious, they invest little in researching a day out and tend to go for the easy option, sticking to what they know. Making a visit as 'efficient' as possible (discounts, simple booking mechanisms, upfront information, 'all inclusives') will encourage them to take more risks and create loyal Release visitors.

Perspective



Settled
Self-sufficient
Focused
Contented

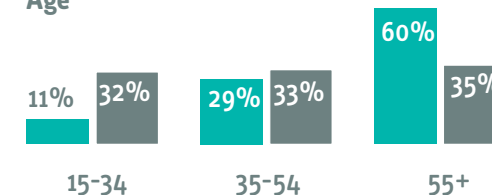
The Perspective segment is **settled, fulfilled** and **home-oriented**. The arts and culture are **low among their priorities**, however their underlying **spontaneous** nature and **desire to learn** provide a focus for engaging with arts and culture.



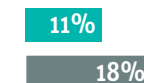
Key demographics

Perspective
All

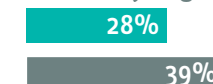
Age



Earn \$140k+



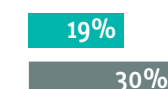
University degree or higher



Identify as person with a disability



Children living at home



[Base: Perspective 603, All 7537]

14% of Perspective are from a culturally or linguistically diverse background (27% all)

Attitudes and life priorities

Optimistic

Own needs are important

Inner directed

Reading

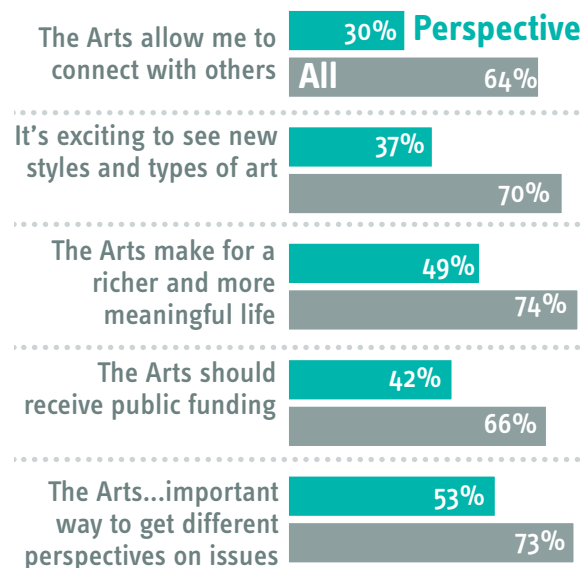
Learning

The outdoors

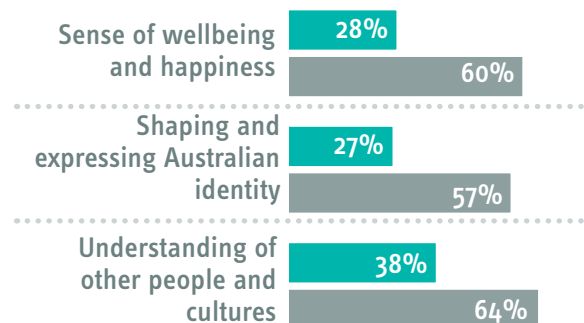
Members of the Perspective segment have self-directed interests. They may see the value in arts that align to their particular individual hobby or specialist interests, but the value in a broader sense is not always obvious to them. Rather than giving them an avenue to connect with others or a means of discovery, the arts are a channel for meeting their own individual needs and affirming pre-existing interests.

Their perceptions of the positive societal benefits of the arts is minimal – the arts can sometimes give new perspectives and food for thought, but are not seen as having an impact on health, community and national identity.

Agreement with attitudes towards the arts: where Perspective differs the most



Belief in individual and societal impact of the arts: where Perspective differs the most



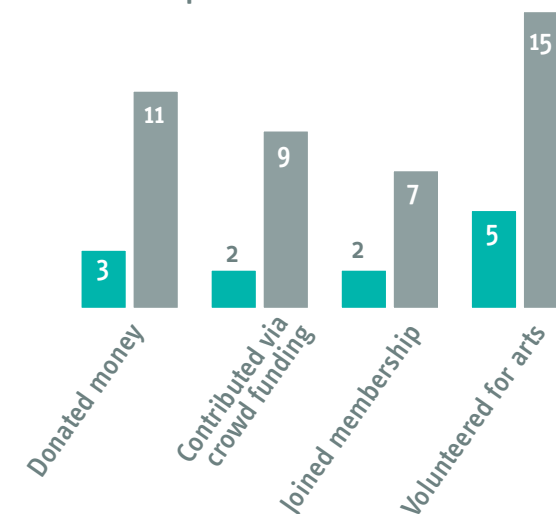
[Base: Perspective 603, All 7537]

Donated time, money or joined arts organisation in past 12m



Perspective All

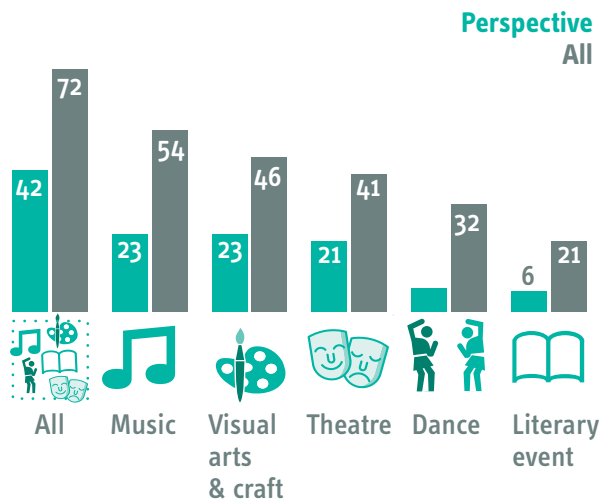
% done in the past 12 months...



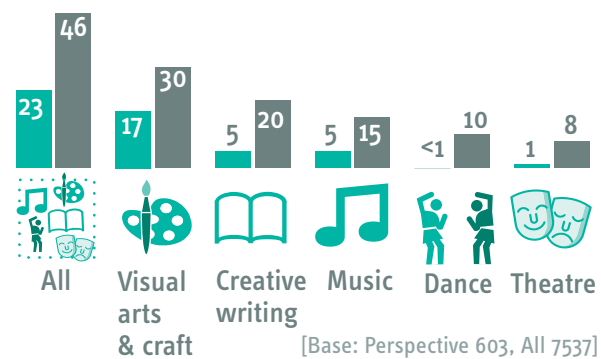
[Base 603, 7537]

Supporting the arts as a cause is fairly uncommon within the Perspective segment. Around 1 in 10 are active supporters and this tends to be focused, rather than spread over multiple ways of giving. There is little development potential when it comes to donations, they are unlikely to see the benefits of membership and three times less likely than average to volunteer for the arts.

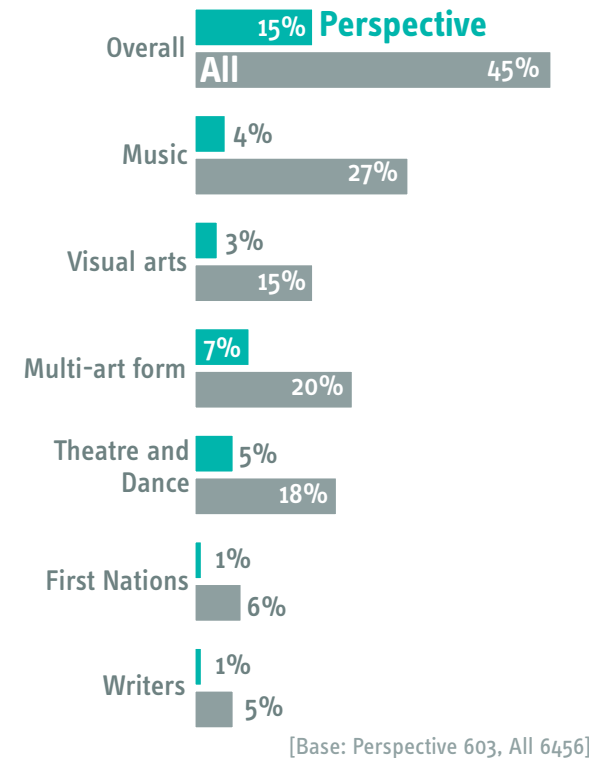
Live audience attendance %



Creative participation %



Festival attendance



Inner-directed consumption

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. Both attendance and participation are significantly lower than average across all art forms, particularly those that might be considered more 'niche' such as dance.

They are three times less likely than the general population to have been to a festival in a 12-month period and those who have gravitate towards more general events rather than art form-specific. They pay little attention to community-based arts events and offer low potential for this type of activity.

3%

Involved in community art and cultural development (CACD) (14% all)

10%

Attended First Nation arts (35% all)

9%

Created or attended arts from own cultural background (35% all)

Online arts engagement in past year

56%

Engaged with the arts online (81% overall)

50%

Listened to recorded music online (76% overall)

12%

Researched or reviewed the arts/artists (31% overall)

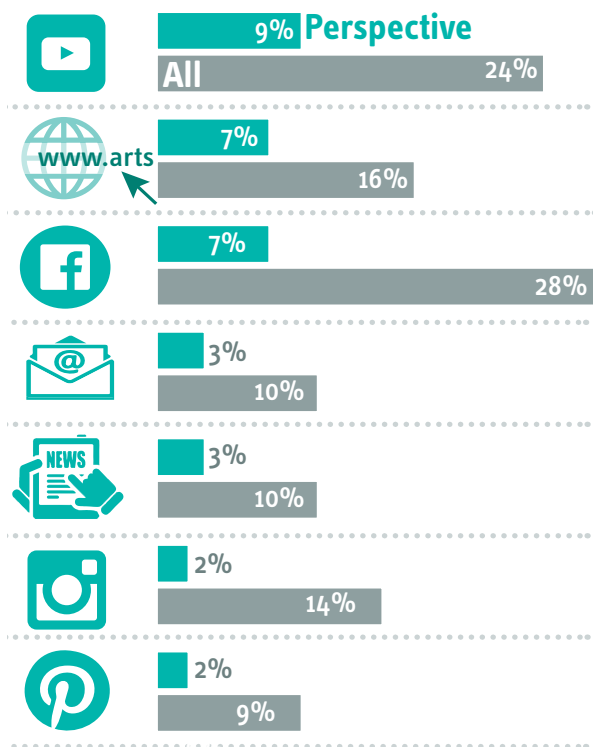
10%

Viewed visual arts, music, literature, dance / theatre (29% overall)

Although over half (56%) of Perspective use the internet to engage with the arts, this is the lowest of the segments and they are selective when it comes to different platforms. As such they can be difficult to reach in this way.

Their relatively low commitment to the arts doesn't naturally extend into the digital space, and they are unlikely to spend time viewing virtual art performances or staying connected to arts organisations online.

Online media used to engage with the arts



[Base: Perspective 603, All 6456]

Messaging should focus on...

Reassurances of quality entertainment

Tapping into & building on existing interests

Respecting their individuality & encouraging exploration

How do we develop them?

Perspective often use the arts as an avenue for private self-development. As such, they can find marketing irrelevant to their interests and are often sceptical towards explicit sales messages.

Arts organisations cannot rely on them proactively keeping themselves up-to-date and since they are unlikely to subscribe to mailing lists, push rather than pull marketing is required. Strategically placing articles or messages where they can 'stumble across' things that are relevant and interesting to them will be most effective.

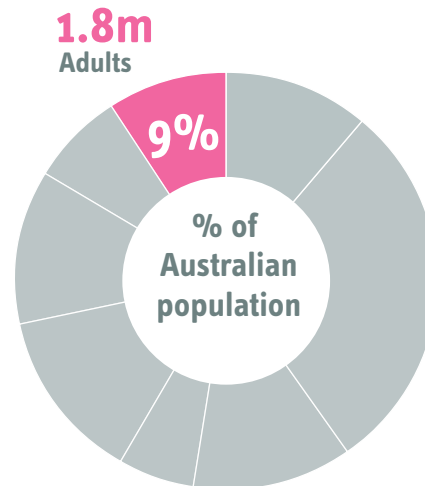
Messaging that informs them on how a visit can chime with specific interests will resonate, although they are wary of events that can seem 'gimmicky' or too family-focused.

Entertainment



The Entertainment segment tend 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**.

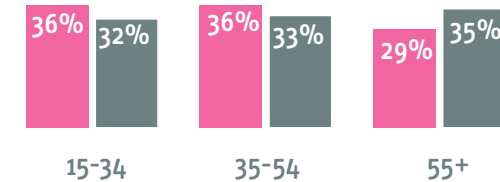
Consumers
Popularist
Leisure
Mainstream



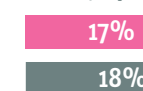
Key demographics

Entertainment
All

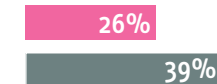
Age



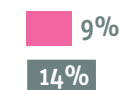
Earn \$140k+



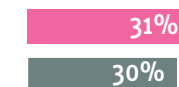
University degree or higher



Identify as person with a disability



Children living at home



[Base: Entertainment 1025, All 7537]

15% of Entertainment are from a culturally or linguistically diverse background (27% all)



Attitudes and life priorities

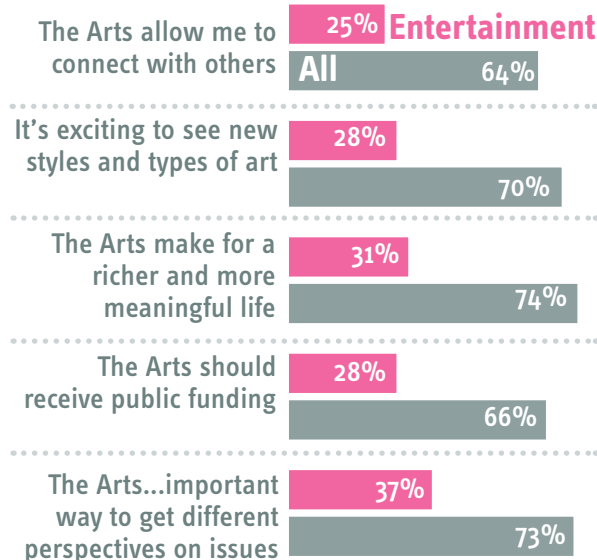
Home and pub
TV, celebrity, sports
Thrill
Escapism
Priorities are very close to home

The arts are not a huge priority for the Entertainment segment and they typically engage on the periphery, when the opportunity arises for mainstream, fun and 'big-ticket' arts events. Mainstream leisure activities are often more attractive for a segment that doesn't see much value in the arts beyond entertainment.

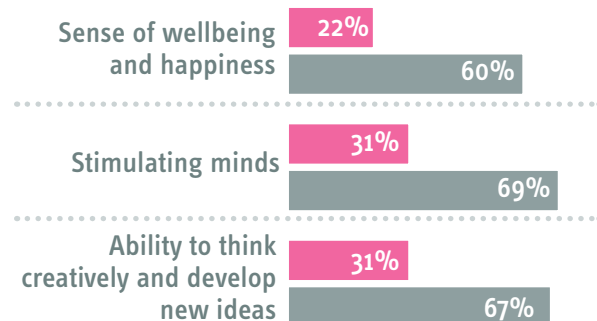
Tellingly, they are the segment least likely to think that arts should receive public funding and their perceived impact of the arts is muted; the majority don't see societal or individual benefits to people's wellbeing, stimulation or development.

Members of this segment are concerned about what others think of them and generally don't want to be seen to go against the grain or to be the first to try things out.

Agreement with attitudes towards the arts: where Entertainment differs the most



Belief in individual and societal impact of the arts: where Entertainment differs the most



[Base: Entertainment 1025, All 7537]

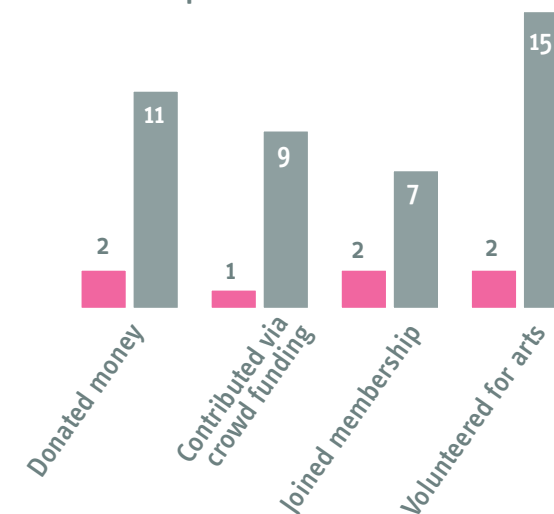
Donated time, money or joined arts organisation in past 12m

6

27%

Entertainment All

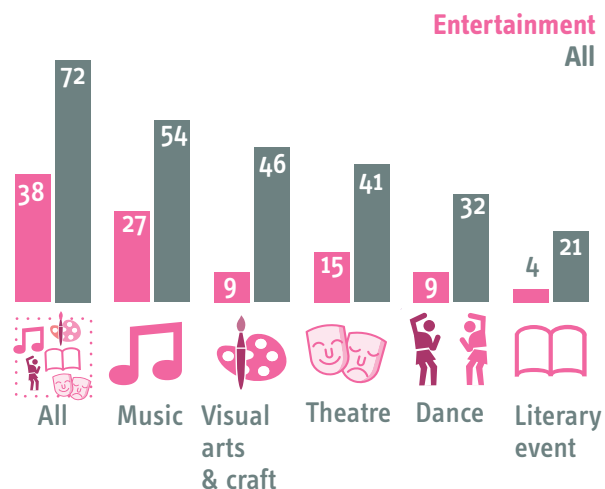
% done in the past 12 months...



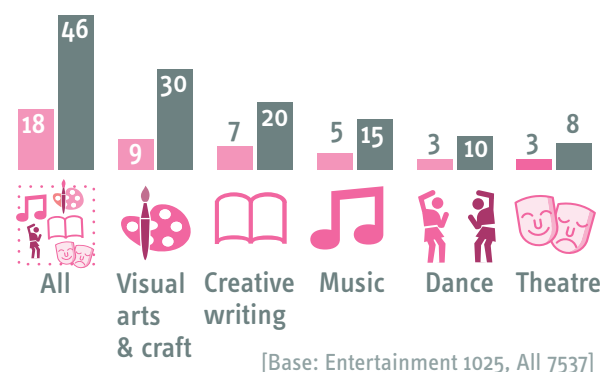
[Base 1025, 7537]

Entertainment are highly unlikely to support the arts through either time or money – in fact, the Entertainment segment is the least likely to do any supporting activity, offering very little development potential for this form of arts engagement.

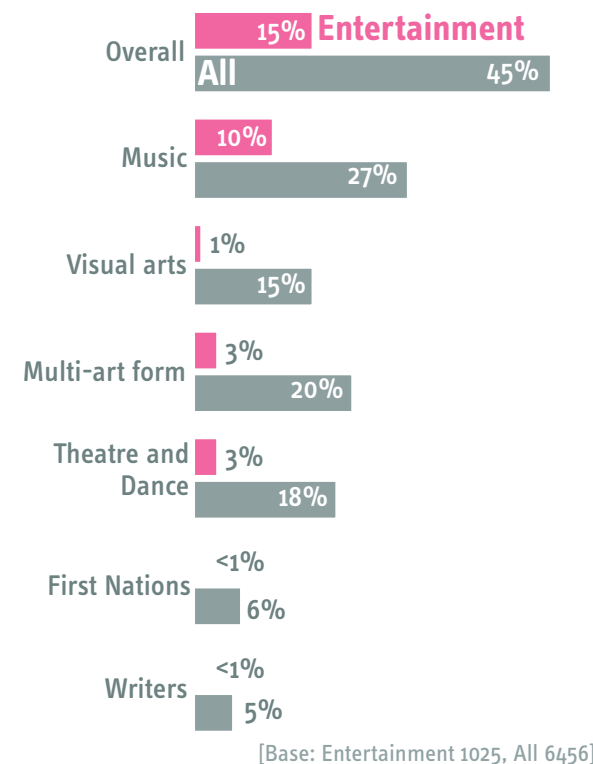
Live audience attendance %



Creative participation %



Festival attendance



Arts as an escape

Entertainment look for escapism and thrill in leisure activities. Leisure time is for fun, not for learning or applying oneself intellectually. They are largely socially motivated to attend,

looking to pass the time in an enjoyable and fun way with friends and family.

Attendance at different art forms is significantly lower than average across the board, as are their levels of active participation. These differences are most pronounced when it comes to visual arts, with less than 1 in 10 engaging with this art form in a 12-month period. Music is a core avenue through which they engage; just over one-quarter had attended a live music concert in a 12-month period.

Engagement with community arts and festivals is also low – typically around three times lower than the population as a whole.

3%

Involved in community art and cultural development (CACD) (14% all)

8%

Attended First Nation arts (35% all)

12%

Created or attended arts from own cultural background (35% all)

Online arts engagement in past year

66%

Engaged with the arts online (81% overall)

63%

Listened to recorded music online (76% overall)

14%

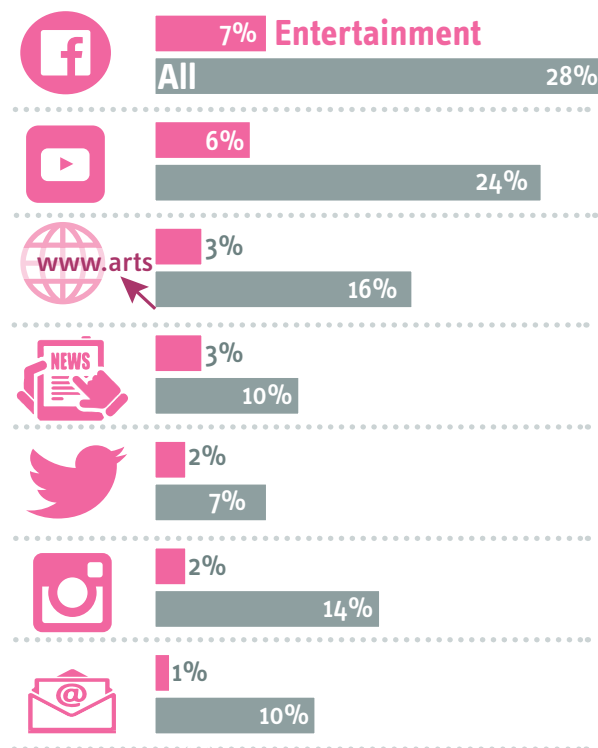
Viewed visual arts, music, literature, dance / theatre (29% overall)

6%

Followed/interacted with an artist or arts organisation (25% overall)

Two-thirds of Entertainment go online to engage with the arts and as with other segments, this is most likely through listening to recorded music online (63%). Elsewhere, however, engagement is low and they are the segment least likely to spend time viewing literature, visual or performing arts online. Their low levels of creative participation also translates into virtual spaces; just 4% used the internet to create, learn or share art with others compared to 14% of the population overall.

Online media used to engage with the arts



[Base: Entertainment 1025, All 6456]

Messaging should focus on...

Mainstream, popular culture and celebrity

One off, must-see events and shows

Promoting spectacle, occasion and excitement

How do we develop them?

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

They are heavily influenced by advertising through mainstream media and will only pay for something they are convinced will meet their needs. They are looking for things with established popular currency and will respond to celebrity endorsement. They don't identify with overtly 'cultural' activities so 'culture' needs to be downplayed in messaging. Instead emphasising the 'must-see', 'blockbuster', 'spectacular' elements of the offer will be more successful. Visually marketing needs to compete on a commercial playing field.

Linking cultural propositions to the mainstream – for example through films and TV shows – has the potential to get their attention.

Research parameters

This report was carried out for Australia Council by Morris Hargreaves McIntyre, based on data collected by Australia Council between November and December 2016.

Target group for the research Australians aged 15 years or over

Sample size 7,537

Sampling method Interlocking quotas based on age, gender and location were used

Data collection method An online survey of 6,546 respondents and a telephone interview of 1,081 respondents. Culture Segment questions were not asked of the telephone sample.

Weighting procedures Weighting was performed, by Australia Council, on both the online and telephone samples to be representative of age, gender and location based on Australian Bureau of Statistics (ABS) data.

Reliability of findings For any percentage given, we can estimate confidence intervals within which the true values are likely to fall. The data collected by Australia Council has a 95% confidence interval (margin of error) of +/- 1.13% at 50% (ie, where the result is 50%, the actual result may fall between 48.87% and 51.13%).



This report was prepared for
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Europe (Manchester) office

+44 (0) 161 839 3311
hello@mhminsight.com

Australia (Sydney) office

+61 (0) 2 8202 7581
sydney@mhminsight.com

New Zealand (Auckland) office

+64 (0) 9 551 7776
auckland@mhminsight.com

mhminsight.com

Australia Council (Sydney)

+61 (0) 2 9215 9000
<http://www.australiacouncil.gov.au/about/contact-us/>

