A shared market

Exploring the market for arts and culture in Geelong

September 2016
Geelong is the second largest city in Victoria and has a vibrant arts and culture scene. From large performing arts centres like GPAC to the National Wool Museum, arts and culture audiences have a range of opportunities to attend throughout the year.

Despite this buoyant scene, there was limited market intelligence which gave organisations any sense of their shared market. This led to sector-wide concerns around the potential duplication of activity and how this may impact on the maximum possible audience engagement.

To solve this, Creative Victoria commissioned MHM in January 2016, in collaboration with the City of Greater Geelong and the municipality’s major cultural organisations, to explore and articulate this shared market in detail.

Introducing Culture Segments
Understanding motivations
The shared market
Back to Back Theatre
Courthouse Youth Arts
Geelong After Dark
Geelong Botanic Gardens
Geelong Gallery
Geelong Library & Heritage Centre
Geelong Performing Arts Centre
Geelong Regional Libraries
Mountain to Mouth
National Wool Museum
Potato Shed Multi-Arts Centre
Willingness to support

Technical note and definitions
This report represents the response of 2,248 respondents from the mailing lists of 11 Geelong cultural organisations, including Geelong’s Arts Bulletin subscribers. The survey was conducted online 1–31 July 2016.

The original methodology of anonymously centralising data was not possible due to concerns around data protection. Therefore, all respondents to the survey are considered the ‘shared market’ for Geelong. Any respondent that had not been to any of the 11 organisations within the past 12-months has been removed (55 people).

This report articulates the shared market for arts and culture in Geelong. There is then a breakdown of each of the participating organisations in detail.

Each person has been counted based on which organisation they had attended in the past 12-months, and not based on which organisation’s invite they responded to. This increases the bases for each organisation and was achievable because the questions were not organisation specific.

Limitations of sample
It is important to note the limitations of the sample composition – those who subscribe to an organisation will be a highly engaged audience, and are therefore self selecting. Therefore, in some cases
it is useful to think of the data as the ‘active market’ relative across each organisation.

When interpreting reported dollar value spend it is important to consider that quoted figures are indicative only, and does not take into account those respondents who chose the ‘prefer not to say’ option.

Shared market
Throughout this report the term ‘shared market’ is used to refer to audiences for arts and culture in the Greater Geelong area and reflects everyone who responded to the survey – excluding 55 people who had not been to any of the organisations in the past 12-months.

Current audience
Throughout this report the term ‘current audience’ is used to refer to those in the shared market who had attended a particular organisation at least once within the past 12-months.

Please note
The data in this report is not weighted – it reflects everyone who responded to the survey sent out by the organisations.

Where percentages do not add up exactly to 100% this is due to rounding.
Introducing Culture Segments

A brief summary of the eight Culture Segments that comprise the market for arts, culture and heritage is provided below.

More detail is available here: www.mhminsight.com/articles/culture-segments-1179

**Essence**
**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**
**Receptive, Confident, Community, Expressive**
In-tune with their creative and spiritual side. Often artists, confident, fun-loving, self-aware people with a wide range of interests, from culture and learning, to community and nature.

**Affirmation**
**Self-identity, Aspirational, Quality time, Improvement**
Affirmation welcome culture as a way of enjoying quality time with friends and family as well as a means of self-development. The arts is one of many leisure choices but it provides a means to validate themselves with their peers.

**Enrichment**
**Mature, Traditional, Heritage, Nostalgia**
Like spending their leisure time close to home. Established tastes: enjoy culture that links to beauty, history, nature, heritage and traditional artforms.

**Stimulation**
**Active, Experimental, Discovery, Contemporary**
Live their lives to the full, looking for new challenges and to break from the crowd. Open to a wide range of experiences, but like to be at the cutting edge.

**Release**
**Busy, Ambitious, Prioritising, Wistful**
Release have often become switched off to arts and culture as conflicting demands on their time (like work and family commitments) have squeezed out culture in recent years. They have limited time and resources to enjoy arts and culture, but would like to do more.

**Perspective**
**Settled, Self-sufficient, Focused, Contented**
Fulfilled and home-oriented. A spontaneous nature and appetite for discovery drive their engagement.

**Entertainment**
**Consumers, Popularist, Leisure, Mainstream**
The arts are on the periphery of their lives and compete against many other interests. Occasional forays into culture for spectacular, must-see experiences.
Understanding motivations

When we talk about motivations we are referring to the underlying drivers for audiences to engage with culture: the factors that create a desire to attend contemporary dance based on their beliefs about the benefits they will get.

Understanding these motivations is crucial to developing audiences, informing how the benefits of attending are communicated through to how the experience is delivered.

Understanding motivations

Having asked thousands of people why they engage with arts and culture and what they hope to get from their experiences, we have identified four universal drivers: social, intellectual, emotional and spiritual. The model opposite shows these drivers and the broad needs of the audiences that experience each driver.

These motives make people decide to attend; as they enter they become expectations and as they leave they become outcomes. This is why they are so important. Being able to measure motives, expectations can provide deep insight into why people engage with the arts.

Audiences can arrive at a performance, exhibition or event with any level of need, and if those needs are met they will have a satisfying experience. It is also possible for an audience member or visitor to get unexpected benefits from attending an event. This can shape their future expectations of the organisations.

See the venue as ... Have this driver ...

Church Spiritual
Spa Emotional
Archive Intellectual
Attraction Social

And they seek this from attending...

Creative stimulation and quiet contemplation, they see experiences of arts and culture as opportunities to escape and recharge their batteries; food for the soul

May have a personal connection to the subject matter, want to see fascinating objects in an inspiring setting, seek ambience, deep sensory and intellectual experience

Keen to encourage their children’s or their own interest and knowledge, may have professional interest in the subject. They seek a journey of discovery to find out new things

See arts and culture as a chance to have an enjoyable time with friends and family. Seek ease of access, good facilities and services and welcoming staff
The shared market

**Essence** and **Expression** are more dominant within Geelong’s shared market when compared to the State of Victoria.

**Females** were over represented amongst the shared market respondents and a quarter were family households.

A **recommendation** was the most common source of information used to decide on arts and culture attendance, although **newspapers** were considered the main source for many.

**Key segments dominate**

Proportionally, 85% of Geelong’s shared market are in the more culturally active segments of Essence (20%), Expression (33%), Affirmation (15%) and Stimulation (17%). The remaining segments make up a much smaller proportion (15% combined) and are all under-represented when compared to the State of Victoria’s culture market profile.

**Expression are a third of shared market**

Expression represents the largest Culture Segment in the State of Victoria, making up over a fifth of those in the market for arts and culture (21%). This segment is even more dominant amongst Geelong’s shared market (33%).

**Essence well represented**

Essence also over-indexed in Geelong’s shared market (20%, compared to 13% for Victoria) and is, proportionally, the second most represented segment in Geelong’s shared market. Along with Expression these two segments make up just over half of the shared market (53%).

Female respondents

The majority of respondents in the shared market were female at 73% (27% male and <1% identified as intersex).

While there is often a higher proportion of female representation in the arts and culture market, this marked dominance could be due, in part, to the fact that it is more common for women to book the tickets and therefore be put onto box office systems and mailing lists.

Quarter are family households

Just over a quarter of the shared market reported having children under the age of 16 living at home (26%). The majority of this group reported taking children to at least half the arts and cultural events they attended (97%).

Affirmation were the segment most likely to have children in the household (32%, compared to 26% overall), and Perspective the least likely (16%).

Majority spend on arts and culture regularly

The majority (76%) of the shared market report having spent on arts and culture (either admission, food / drink, transport or souvenirs) within the last four weeks. Conversely, nearly a quarter (24%) reported not doing so.

Majority purchase tickets

Proportionally, just under seven in ten respondents in the shared market have personally paid for admission or tickets to arts or culture events within the last month (69%).

Half purchase refreshments

Just over half of the shared market reported having purchased food and / or drink at an arts or culture event in the past four weeks (51%).

Although there was marked variance amongst individual organisations, the outliers are Back to Back Theatre’s current audience, (72% reporting spend in this area) and Geelong Botanic Gardens, (47% of their current audience reported doing so).

Over half spend on transport

Just over half (56%) of those in Geelong’s shared market for arts and culture have paid for some form of transport, either private or public, to or from arts or cultural events in the past four weeks.
Souvenirs a low value spend
Across the shared market, a quarter had spent on souvenirs or programs within the past four weeks. Proportionally, spend of this nature had the lowest frequency and overall dollar value.
Those in Back to Back Theatre’s current audience were more likely to report having spent on souvenirs and programs in the past four weeks (39%, compared to 25% overall). This spend is general rather than specific to Back to Back’s work.

More culturally engaged segments spend most frequently
Unsurprisingly, the more culturally active segments reported more frequent spend on arts and culture and broadly to a higher value. Conversely, the less culturally engaged segments of Enrichment, Release, Perspective and Entertainment reported spending markedly less on souvenirs than the other segments ($1–$7, compared to $11–$16 for Essence, Expression, Affirmation, Stimulation). This was broadly consistent across other types of spend tested, with the exception of Release’s reported spend on food and beverage, which was the highest of the eight segments ($54, compared to $39 for the shared market).

Recommendation most cited information source
Over three-quarters of respondents cited a recommendation as one of the information sources used when deciding to attend arts and culture (78%). Although a recommendation rated lower as the main source of information (13%).

Print and e-news main information sources
Over a fifth of the shared market cited print newspaper as the main source of information arts and cultural attendance (21%), followed by e-news (18%) social networks (14%) and word-of-mouth (13%).

As Geelong’s shared market sample was achieved through responses from subscribers
to organisation’s e-news, it is unsurprising that one of the most common sources of information was e-newsletters (57%) and the second most cited main source (18%).

**TV and radio not a main source**
Just 3% of respondents cited radio as the main source of information when deciding on arts and culture attendance, and TV influenced only 1%. While not a main source used to decide which arts and culture events to attend, the effects of these media as an awareness building tool should not be dismissed.

**Facebook, YouTube most used social media**
Of the shared market, 69% reported using Facebook at least once during a typical week, with 11% reporting usage of seven or more hours. Nearly two-thirds reported using YouTube at least once in a typical week (65%). Although, while half of Facebook users reported spending over an hour a week on the site (50%) this was true for a lower proportion of YouTube users (20%). More reported spending less than one hour on YouTube (45%).

**Quarter use Pinterest and Instagram**
Pinterest and Instagram were both reportedly used by a quarter of the shared market (25% and 26% respectively). Although a lower proportion than the two most popular social media tested, these were twice as popular as Twitter – used by just 13% of the shared market.

**Expression, Affirmation, Stimulation, use social media more**
Affirmation, followed by Expression and Stimulation were the segments most likely to use Facebook in a typical week (77%, 70% and 70% respectively). Expression, Affirmation and Release reported this highest use of Pinterest (28% for each segment). Affirmation, along with Essence and Stimulation, the highest use of YouTube (67% for all).

Stimulation was the segment most likely to report using Instagram (36%) and Twitter (19%).

**Enrichment and Perspective lower use of social media**
Enrichment were the segment least likely to use Facebook (50%). Along with Perspective these segments reported the lowest use of Twitter (5% and 6% respectively) and Instagram (10% and 11% respectively).

YouTube is also less popular than average with Enrichment (58%), although, Entertainment reported the lowest engagement (42%).
There is room to **raise awareness** of Back to Back Theatre, as the potential audience within the shared market is twice the size of the current market.

**Stimulation** made up a quarter of Back to Back’s current audience – an audience who are also highly engaged with other forms of **performing arts** and are among the most **likely to spend** on arts and culture.

**Half of shared market aware of Back to Back**

Just over half the shared market had previous awareness of Back to Back Theatre (51%). As 49% of the shared market were previously unaware, it would follow that raising awareness could further increase the potential audience.

**Visitor visit history – Back to Back Theatre**

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| Base 2,248 |

**Potential market larger than current and lapsed combined**

Back to Back Theatre’s audience is nearly evenly split between those who had attended in the past (23% of shared market) and those who hadn’t (24%).

**Quarter in Stimulation**

Back to Back Theatre over-indexes against the shared market by 7-percentage points in the Stimulation segment. Culturally curious Stimulation made up just under a quarter of the Back to Back’s current audience (24%).

**Culture Segments profile – Back to Back Theatre**

- Essence: +2
- Expression: +2
- Affirmation: -4
- Enrichment: -3
- Stimulation: +7
- Release: -2
- Perspective: -3
- Entertainment: -1

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Cross over by current audience – all

- Geelong Gallery: 9%
- Mountain to Mouth: 21%
- Geelong Botanic Gdns: 79%
- Courthouse Youth Arts: 22%
- Geelong After Dark: 16%
- Potato Shed: 12%
- Geelong Regional Libraries: 87%
- Geelong Library & Heritage: 80%

Main motivations – Back to Back

- Social: 20%
- Intellectual: 31%
- Emotional: 36%
- Spiritual: 13%

Likelihood to return – Back to Back Theatre

- Extremely likely: 42%
- Quite likely: 45%
- Neither: 12%
- Quite unlikely: 1%

Essence and Expression also key

Essence and Expression are also over represented in Back to Back’s current audience, when compared to the shared market, at 23% and 35% respectively.

Crossover

Those in Back to Back Theatre’s current audience were significantly more likely to have also attended GPAC than the shared market overall (93%, compared to 78% respectively), as well as, Courthouse Youth Arts (61%, compared to 26%), Geelong After Dark (53%, compared to 31%) and Mountain to Mouth (31%, compared to 15%).

Majority likely to return

The Theatre’s current audience reported a high propensity to return, 87% are either ‘extremely likely’ (42%) or ‘very likely’ (45%) to return. Although the proportion considering themselves ‘extremely likely’ to revisit was at the lower end of the organisations tested.

High level motivations

Eight in ten of Back to Back Theatre’s current audience reported higher level motivations (Intellectual, Emotional or Spiritual) to attend Back to Back Theatre.

Over a third reported mainly Emotional motivations for attending (36%) and Back to Back ‘to be moved emotionally or experience awe-inspiring, fascinating or beautiful things’.

Mountain to Mouth was the other organisation in the shared market to have had the largest proportion of its current audience citing mainly Emotionally-driven attendance (36%).
Likely to spend on arts and culture

Back to Back Theatre’s current audience are more likely than the shared market to have spent on arts and culture within the past four weeks, 87% reported some form of arts or culture spend, compared to 76% overall.

Focussing on different areas of spend, 83% of the current audience reported having spent on admission or tickets to an arts or cultural event within the past four weeks, compared to 69% of the shared market. The value of spend in this area was reported, on average, at $69 above the norm.

Back to Back’s current audience had the highest reported frequency of spend on food and beverage at a cultural event (72%, compared to 51% overall).
The potential market for Courthouse Youth Arts is a similar size to its current audience.

A third of the current audience were Expression, typically attend for Social or Intellectual reasons and were more likely to spend on arts / culture and attend street performance than visit a library, when compared to the shared market.

Smaller share of market

Proportionally, just over a quarter of the shared market is in the current audience for Courthouse Youth Arts; 26% reported having attended the organisation within the past 12-months. Of those only 8% reported having attended twice or more within they past year.

Over half in potential market or unaware

A quarter of the shared market are in the potential market for the Courthouse; 25% have not previously attended but would be interested. A further 27% were unaware of the organisation. Only 5% were disinterested, suggesting a potential for further audience development.

Key segments dominate

Eight in 10 of Courthouse Youth Arts’ current audience are in either the Essence (25%), Expression (36%) or Stimulation (20%) segments. The organisations current audience relies heavily on these key segments, and over-indexes, against the shared market, in all three.
Cross over by current audience – all

Cross over

Courthouse Youth Arts current audience also currently attend a range of other organisations within the shared market, most notably 89% of the Courthouse’s current audience had visited GPAC within the past 12-months, compared to 78% for the shared market, and 48% had attended Geelong After Dark, compared to 31% for the shared market.

Most likely to return

Nearly nine in ten of the Courthouse’s current audience would consider visiting again (87%). Although, those considering themselves ‘extremely likely’ (38%) to visit again was at the lower end, when compared to other organisations tested.

Expression more likely to return

The Expression segment made up the largest proportion of the Courthouse’s current audience and were also the segment most likely to consider themselves ‘extremely likely’ to visit again (41%, compared to 38%).

Mainly Social and Intellectual drivers

Proportionally, the most common motivation to attend the Courthouse were for mainly Social reasons; 36% attended the organisation ‘to share an enjoyable experience or pass the time in a nice place’. A further 32% cited mainly Intellectual motivations and attended ‘to be stimulated intellectually and follow my interests’.

Likelihood to return – Courthouse Youth Arts

Extremely likely
Quite likely
Neither
Quite unlikely

[Base 385]

Social  Intellectual  Emotional  Spiritual

[Base 385]

61% of Back to Back Theatre’s current audience 61% had attended the Courthouse within the past 12-months, compared to 26% for the shared market overall.
The Courthouse’s current audience were significantly more likely to report having spent on arts or culture within the last four weeks than the shared market overall. Just over eight in ten reported paying for admission / tickets (82%, compared to 69% respectively). They were also more likely to have spent on food and drink while attending arts and culture, 13-percentage points above the norm for the shared market, at 64%, compared to 51% respectively.

High artform attendance

The Courthouse’s current audience had higher current engagement with most listed artforms when compared to the shared market, the exception being libraries. Although, engagement with libraries was still high (92%, compared to 95% overall).

Interestingly, the Courthouse’s current audience had one of the highest engagements with street performance, at 17-percentage points above the shared market (75%, compared to 58% respectively).
Geelong After Dark

The potential market for Geelong After Dark was a similar size to its current audience.

A quarter of the events current audience are Stimulation, typically attended for mainly Social reasons, were more likely to spend on arts / culture, attend street performance and be from Greater Geelong than the shared market overall.

A potential audience

The shared market was, broadly, evenly split between the current audience for Geelong After Dark (31%), potential audience (30%) and those previously unaware of the event (30%).

As Geelong After Dark is a relatively young event, unsurprisingly the proportion in the lapsed market is small (5%).

Visitor visit history – Geelong After Dark

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<th>Percentage</th>
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<td>24%</td>
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<tr>
<td>Unaware</td>
<td>24%</td>
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[Base 2,248]

Quarter are Stimulation

Stimulation made up just under a quarter of Geelong After Dark’s current audience (24%, compared to 17% for the shared market overall).

Expression and Affirmation

The two key segments of Expression and Affirmation are slightly under represented amongst the events current audience, suggesting they could be segments to target for future events.

Small proportion in less active segments

Only 7% of the current audience were from the less culturally active segments of
Enrichment (2%), Release (3%), Perspective (2%) and Entertainment (1%).

Cross over

Unsurprisingly, as both events are produced by the Arts and Culture Department of the City of Greater Geelong, there was high cross over between Mountain to Mouth and Geelong After Dark (32% of Geelong After Dark’s current audience had also attended Mountain to Mouth, compared to 15% for the shared market). And, 72% of Mountain to Mouth’s current audience had attended Geelong After Dark (compared to 31% for the shared market).

Nine in ten would return

A high, 91% of Geelong After Dark’s current audience reported they were either, ‘extremely likely’ (55%) or ‘quite likely’ (36%) to visit again. Of the event’s key segments, Essence were the most likely to have reported being ‘extremely likely’ to visit again (60%) and Affirmation were the least likely to, at 43%.

Socially motivated audience

Unsurprisingly, as this is an annual, evening event, 37% of the current audience attended Geelong After Dark for mainly Social reasons and ‘to share an enjoyable experience or pass the time in a nice place’. Interestingly, 16% attended with mainly Spiritual motivations. This was the largest proportion reported amongst the shared market organisations; Geelong Botanic Garden’s current audience also reported 16% mainly Spiritual motivations.
Frequent arts / culture spend

The Geelong After Dark current audience were more likely to report having spent money on arts and culture in each type of purchase than the shared market. Most notably, 59% had spent on food and beverage at a cultural event in the past four weeks, compared to 51% for the shared market).

Engaged audience

Those in Geelong After Dark’s current audience reported above the shared market engagement with a wide range of artforms tested. Unsurprisingly, this group over-indexed by 24-percentage points for current street performance attendance (82%, compared to 58% for the shared market). Only Mountain to Mouth’s current audience had reported higher engagement with this artform (84%).

Reliance on Greater Geelong visitors

Nine in ten of the current audience were Greater Geelong based (90%, compared to 86% for the shared market).

Heat map showing origin of visitors to Geelong After Dark by Local Government Area. Elsewhere in Victoria (2%) and Rest of Australia (0%) not shown.
Geelong Botanic Gardens

The majority of the shared market were aware of Geelong Botanic Gardens, leading to a large current audience and high repeat visitation.

Social drivers and above average Spiritual motivations dominated reasons for visiting the Gardens.

High awareness within shared market

Geelong Botanic Gardens had amongst the highest awareness within the shared market; only 1% of the shared market reported not being previously aware of this organisation.

Eight in ten visited within the past year

The majority of the shared market reported visiting at least once within the past 12-months (80%). Of those, 15% reported visiting six or more times and a further 35% between two and five times.

Visitor visit history – Geelong Botanic Gardens

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<td>1%</td>
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| Unaware           | 1%         | [Base 2,248]

A third in Expression

The Culture Segments profile for the Botanic Gardens is broadly similar to the shared market. Expression makes up the largest proportion of the current audience, at 33% the same proportion as the shared market overall.

Perspective

Although still a relatively small proportion, Perspective made up 5% of the current audience, compared to 3% for the shared market.

Variation compared to Geelong shared market

- Expression =
- Enrichment +1
- Perspective +1
- Stimulation =
- Release =
- Entertainment =

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[Base 1,555]
Crossover

Generally, the Botanic Gardens’ current audience had a lower crossover when compared to the shared market, 71% of the current audience also visit GPAC, compared to 78% for the shared market.

Of the other organisations, 83% Geelong After Dark’s current audience had visited the Botanic Gardens within the past 12-month, compared to 80% for the shared market.

Majority likely to return

Over three-quarters of Geelong Botanic Gardens’ current audience considered themselves ‘extremely likely’ to visit again (77%), a further 21% were or ‘quite likely’ and just 1% were undecided.

Of the key segments Essence were more likely to consider themselves ‘very likely’ to return (82%, compared to 77% overall).

Socially-driven attendance

The majority of the Botanic Gardens’ current audience reported mainly Social motivations for visiting (64%). This was significantly higher than that reported at other organisations within the shared market.

Spiritual drivers

Interestingly, by proportion, the next highest main motivation was ‘to escape or be inspired’, with 16% of the current audience reporting Spiritual drivers. Along with Geelong After Dark, this was the highest proportion of a mainly Spiritually-driven attendance amongst the shared market organisations.

Enrichment Intellectually driven

Although a relatively small proportion of the current audience, Enrichment were nearly twice as likely to be motivated to visit for Intellectual reasons than the Botanic Gardens’ current audience overall (14%, compared to 8% respectively).
Less spent on arts / culture

Typically, the Botanic Gardens’ current audience reported having spent on arts and culture less frequently when compared to the shared market (64% had spent on admission within the past four weeks, compared to 69% for the shared market). The value of spend was also below average.

Lower engagement

The Botanic Gardens’ current audience reported below average engagement with most listed artforms, compared to the shared market overall. Most notably in the performing arts (61% currently attended play or drama, compared to 66% overall and 54% currently attended musical theatre, compared to 59% overall).

Unsurprisingly the Botanic Gardens’ current audience were more likely to be in the current audience for gardens / public parks (97%, compared to 94% for the shared market overall).
A **high** level of **awareness** amongst the shared market, with many of Geelong Gallery's current audience having made **multiple visits** within the past 12-months.

**Essence** and **Expression** dominate the current audience and most attended for mainly **Intellectual** and **Emotional** reasons.

**Majority have attended in past**

Nearly nine in ten of the shared market had previously visited Geelong Gallery at least once (87%).

Due to the high awareness of the Gallery and the large current audience (71%), the proportion in the Gallery’s potential audience – those who have never been, but would be interested – is relatively small (7%).

**A committed audience**

Of the Gallery’s current audience, 12% reported visiting six or more times within the past 12-months and a further 30% between two and five times.

**Visitor visit history – Geelong Gallery**

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</tr>
<tr>
<td>Not interested</td>
<td>4%</td>
</tr>
</tbody>
</table>

**Essence and Expression dominate**

Combined, Essence and Expression make up 56% of the Gallery’s current audience. Essence in particular is well represented, and over-indexes against the shared market by 3-percentage points (23%, compared to 20% respectively).

**Less active segments**

Release, Perspective and Entertainment, are under represented within the current audience, combined they represent only 8%, compared to 11% of the shared market.
Three-quarters ‘extremely likely’ to return

Nearly three-quarters of the current audience consider themselves ‘extremely likely’ to return to the Gallery (74%). This is reflected in the 42% of the shared market who reported having visited the Gallery twice or more within the past 12-months (explored on previous page).

Essence and Expression most likely to return

Within the Galley’s current audience, both Essence and Expression respondents were most likely to consider themselves ‘extremely likely’ to return (79% and 76% respectively, compared to 74% for the Galleries current audience overall). Although, propensity to return was typically high amongst the Galleries key segments (Essence, Expression, Affirmation and Stimulation), of these, Affirmation were less likely to consider themselves ‘extremely likely’ to visit again (67% compared to 74%).

Emotional-drivers

Although the largest proportion of the Gallery’s current audience reported being mainly Intellectually-motivated to attend (36%), just over a third were looking to make an emotional connection and had mainly Emotional reasons for visiting (34%). Only Mountain to Mouth and Back to Back Theatre (36% for both) had a higher proportion of their current audience reporting mainly Emotional-drivers. Essence were the segment most likely, amongst the Gallery’s current audience, to be Emotionally-motivated (38%, compared to 36%) and least likely to be Socially-driven (16%, compared to 22%).
Most spend on admission
The Gallery’s current audience are more likely to have spent on arts and culture, in the past four weeks, than the shared market overall, particularly on admission (73%, compared to 69% overall) and public or private transport to a cultural event (60%, compared to 56% overall).

Current audience – % point difference compared to current artform attendance of shared market

<table>
<thead>
<tr>
<th>Artform</th>
<th>Gallery current audience</th>
<th>Shared market overall</th>
<th>Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Admission &amp; tickets</td>
<td>73%</td>
<td>69%</td>
<td>+4%</td>
</tr>
<tr>
<td>Food &amp; drink</td>
<td>60%</td>
<td>56%</td>
<td>+4%</td>
</tr>
<tr>
<td>Transport</td>
<td>60%</td>
<td>56%</td>
<td>+4%</td>
</tr>
<tr>
<td>Souvenirs &amp; programs</td>
<td>27%</td>
<td>20%</td>
<td>+7%</td>
</tr>
</tbody>
</table>

Stimulation report higher value spend
Of the key segments, Stimulation reported having spent above Gallery’s current audience average in all spend areas tested. For example, Stimulation reported having spent $56 on average, on food and beverage while attending cultural events in the past four weeks, compared to $45 for the Gallery’s current audience overall.

Engagement with visual arts
Unsurprisingly, the Gallery’s current audience are generally more inclined to visit an art gallery (93%, compared to 77%), craft exhibition (68%, compared to 60%) or museum (65%, compared to 59%) than the shared market overall.

Melbourne based attendance
A relatively small proportion, 5%, of the Gallery’s current audience were Melbourne based, compared to 3% for the shared market overall. Therefore, the Gallery relies less on Greater Geelong (82%), compared to 86% of the shared market.)
Geelong Library & Heritage Centre

Over half the shared market had made multiple visits to Geelong Library & Heritage Centre within the past year. Three-quarters of the Centre’s current audience expect to return and visit for mainly Intellectual reasons.

Large current audience

Of the shared market, 92% were previously aware of Geelong Library & Heritage Centre, resulting in a large proportion of the shared market in the current audience for the Centre, having visited at least once within the past 12-months (78%).

Multiple visits

Due to the nature and function of Geelong Library & Heritage Centre, 22% of the current audience reported visiting more than six times within the past 12-months and a further 32% between two and five times.

A broader profile

The Centre’s current audience over-indexes in the less culturally active segments of Enrichment, Release, Perspective and Entertainment, at +1-percentage point for each. Combined, this group made up 17% of the current audience, compared to 15% for the shared market.

Essence, Expression are half current audience

Half of the Centre’s current audience are in either Essence (18%) or Expression (32%). Although, both segments are under represented when compared to the shared market.
Unsurprisingly the Centre’s current audience have high crossover with Geelong Regional Libraries (95% of the current audience are also currently attend the Regional Libraries, compared to 93% for the shared market).

Of those in Geelong After Dark’s current audience, 82% reported to also currently visiting Geelong Library & Heritage Centre within the past 12-months, compared to 78% for the shared market.

Majority ‘extremely likely’ to return

Reflecting the proportion of the Centre’s current audience, who reported making multiple visits within the past 12-months (explored on previous page), it would follow that propensity to return would also be high. Just under three-quarters of the current audience considered themselves ‘extremely likely’ to return (73%).

Two-thirds have Intellectual drivers

Unsurprisingly due to the Centres’ nature and function, two-thirds of its current audience were motivated to visit for mainly Intellectual reasons (66%). A further quarter have mainly Social drivers (25%) and a much lower proportion Emotional (4%) and Spiritual (5%) motivations.

More Release visit for Social reasons

Release are more likely to visit for Social reasons than the Centre’s current audience overall (32%, compared to 25%) and Spiritual reasons (9%, compared to 5% respectively).
A shared market  September 2016 report

Lower reported spend on arts and culture

The Centre’s current audience reported less frequent spend on arts and culture within the last four weeks when compared to the shared market. The value of the spend was also below average.

Stimulation more likely have spent on arts and culture

Of the Centre’s current audience Stimulation were more likely report having spent on arts and culture within the past four weeks (74% spent on admission, compared to 66%). The dollar spend reported by this segment was also above the average for the Centre’s current audience ($48 on food and drink at a cultural event, compared to $34 respectively).

Typically lower engagement

The Centre’s current audience was generally less engaged with other artforms than the shared market, with the exception of libraries (98%, compared to 95% respectively). Although engagement with other artforms is still relatively high, for example, 74% currently attend art exhibitions, compared to 77% overall).
Geelong Performing Arts Centre
(GPAC) had high awareness amongst the shared market and a current audience who is typically committed to performing arts with a high propensity to return.

High awareness of GPAC
The majority of respondents had prior awareness of GPAC (99%). Among the other organisations tested, the National Wool Museum and Geelong Botanic Gardens both achieved the same level of awareness (99%) within the shared market audience.

Core committed audience
Nearly eight in ten had visited GPAC within the past 12-months (78%). Within this group, a committed 14% reported visiting more than six times within the past 12-months and a further 38% had visited between two and five times.

Profile broadly similar to shared market
GPAC’s Culture Segment profile is broadly similar to the shared market overall. Proportionally, Essence (19%) and Expression (33%) make up just over half of GPAC’s current audience. Although, Essence is slightly under represented when compared to the shared market (19%, compared to 20% respectively).

The less culturally active segments of Enrichment, Release, Perspective and Entertainment represent a relatively small proportion of GPAC’s current audience, although
similar to that of the shared market (14% combined, compared to 15% respectively).

Crossover

GPAC’s current audience currently attend other organisations within the shared market at, proportionally, lower levels than the shared market overall. For example, 63% of GPAC’s current audience visited Geelong Gallery within the past 12-months, compared to 71% for the shared market.

Majority ‘extremely likely’ to return...

Propensity to return was extremely high, with eight in ten of GPAC’s current audience considering themselves ‘extremely likely’ to visit again.

... Expression most likely to

Within GPAC’s current audience, Expression were the segment most likely to consider themselves ‘extremely likely’ to return (84%).

Balanced range of drivers

Motivations for visiting GPAC were fairly evenly split between Social, Intellectual and Emotional drivers. A lower proportion had high level Spiritual motivations; 7% attending GPAC ‘to escape or be inspired’.

Essence have Intellectual+ motivations

Essence was the segment least likely to attend GPAC for mainly Social reasons (21%, compared to 36% for GPAC’s current audience) and more likely to have mainly Intellectual (31%), Emotional (32%) or Spiritual drivers (10%) than GPAC’s current audience overall.
Admission spend

GPAC’s current audience were more likely to report having spent on admission or tickets to arts and culture within the past four weeks than the shared market overall (72%, compared to 69% overall).

Stimulation report more frequent spend

Of GPAC’s four largest segments, proportionally, Stimulation were significantly more likely to report having spent on admission within the past four weeks when compared to GPAC’s current audience (81%, compared to 72% respectively), and to report having spent on food and drink at an art or cultural event (60%, compared to 51%).

Engagement with performing arts

GPAC’s current audience were more likely to report current attendance at performing arts than the shared market overall. Those in GPAC’s current audience who had attended musical theatre in the past 12-months was 8-percentage points over the shared market average (67%, compared to 58% respectively). Although this group were slightly less likely to report attendance to street performance (55%, compared to 58% for the shared market).
Geelong Regional Libraries

Geelong Regional Libraries has a **large current audience** who often visit multiple times during the year.

**Expression** is the dominant segment in the Libraries current audience and the majority of are on an **Intellectually motivated** visit.

**High awareness**

Geelong Regional Libraries had one of the highest level of awareness of organisations in the shared market (99% of the shared market are aware of the Libraries). GPAC, the National Wool Museum and Geelong Botanic Gardens recorded similar levels of awareness (99% for all).

**Repeat visitation**

Due to the nature of the organisation and the fact that visitors will often be using the Library as a resource for a specific purpose, 93% of the shared market have visited the Regional Libraries in the past 12-months. Over half of the current audience reported visiting the Libraries more than six times within the past 12-months (61%) and a further 22% between two and five times.

**Broader profile**

The Culture Segments profile of the Regional Libraries’ current audience is broader than many other organisations within the shared market. Although, Essence (19%) and Expression (30%) still make up nearly half the current audience.

The Regional Libraries’ current audience over-indexes in the less culturally active segments of Enrichment, Release, Perspective and Entertainment by 1-percentage point each.
Crossover

The Regional Libraries’ current audience also currently attend a range of other organisations within the shared market, although at levels below the shared market average. For example, 59% of the current audience had visited GPAC within the past 12-months, compared to 71% for the shared market overall.

Majority ‘extremely likely’ to return

In line with the repeat visitation explored on previous page, 88% of the Regional Libraries current audience considered themselves ‘extremely likely’ to return and a further 11% ‘quite likely’.

Enrichment most likely to return

Although high across all segments, Enrichment were the segment most likely to consider themselves ‘extremely likely’ to return (94%)

intellectual drivers

Nearly seven in ten respondents in the Regional Libraries’ current audience were driven to visit for mainly Intellectual reasons (68%); unsurprising due to the organisation’s primary function.

Entertainment have different drivers

Interestingly, Entertainment had lower proportions visiting for Intellectual reasons (52%) and significantly more with Social drivers (41%).

Social Intellectual Emotional Spiritual

Main motivations – Geelong Regional Libraries

[Base 1,968]
Lower reported spend on arts and culture

A lower proportion of the Regional Libraries’ current audience reported having spent on arts and culture in the past four weeks. Most notably, 44% reported having spent on food or beverage at a cultural event, compared to 51% for the shared market. The value of the Regional Libraries' current audience spend was also below the shared market average on all areas tested.

Less engaged audience

Typically the Regional Libraries’ current audience had lower engagement with other artforms; with exception of libraries. For example, 68% of the Regional Libraries’ current audience also currently visit art galleries, compared to 77% for the shared market overall.

Surf Coast attendance

The proportion the Regional Libraries’ current audience from the Surf Coast Shire is above average for the shared market (8%, compared to 7% respectively). The remainder of the current audience was dominated by those living in Greater Geelong (83%).

<figure image>
Mountain to Mouth

Half the shared market were aware of Mountain to Mouth and a quarter are in the potential audience for this event.

The most culturally active segments Expression, Essence and Stimulation dominate the events current audience. The audience are predominantly driven to attend for mainly Social and Emotional reasons.

Half shared market aware
Just under half of the shared market were aware of the Mountain to Mouth event (49%). As with Geelong After Dark, Mountain to Mouth is a relatively young event, therefore the lower level of awareness amongst the shared market could be expected.

Potential for growth
Only 15% of the shared market are in the current audience for Mountain to Mouth, but nearly a quarter of the shared market have never attended the event, but would be interested (24%).

Reliance on three key segments
Expression is the most dominant segment in the current audience (37%), followed by Essence (25%) and Stimulation (21%). These three segments all over-index against Geelong’s shared market by 4-percentage points each.

The less engaged segments (Enrichment, Release, Perspective and Entertainment) made up only 7% of the current audience combined, compared to 15% for the shared market. There were no respondents, in the event’s current audience from Entertainment.
Crossover

Given that both Mountain to Mouth and Geelong After Dark are produced by the Arts and Culture Department of the City of Greater Geelong there was higher cross over between the two events when compared to the shared market. 72% of Mountain to Mouth’s current audience are in the current audience for Geelong After Dark, compared to 31% for the shared market.

Typically lower proportions of other venues’ current audience were in the current audience for Mountain to Mouth, which is reflective of this being a relatively young event. Nearly a third of Back to Back’s current audience were in the current audience for this event (31%, compared to 15% for the shared market).

Main motivations – Mountain to Mouth

When asked if they would return, 53% of the events current audience considered themselves ‘extremely likely’ to attend Mountain to Mouth again, with a further 34% being ‘quite likely’ to do so. Just 2% of the events current audience were not likely to revisit.

Social and Emotionally motivated audience

Given the nature of the event, it is not surprising that the largest proportion of Mountain to Mouth’s current audience reported mainly Emotional motivations for attending, 36% wanting ‘to be moved emotionally or experience awe-inspiring, fascinating or beautiful things’. A further third were driven to attend for mainly Social reasons (33%).
Likely to spend on arts and culture

Mountain to Mouth's current audience are likely to have spent on arts and culture, in some form, within the past four weeks. 85%, compared to 76% for the shared market overall reported some kind of arts and culture related spend during the past four weeks. Most notably, 64% of the current audience reported having spent on food and beverage at a cultural event, compared to 51% of the shared market.

The value of the spend was also above the shared market average in all four categories tested, most notably on admission, and food and beverage.

Current audience enjoys multiple artforms

Mountain to Mouth’s current audience attend a variety of artforms and over-index against the shared market in a range of artforms, with the exception of libraries. Unsurprisingly given the links to Geelong After Dark, Mountain to Mouth’s current audience were more likely have currently attended a street performance (84%, compared to 58% for the shared market overall).

Current audience – % point difference compared to current artform attendance of shared market

<table>
<thead>
<tr>
<th>Artform</th>
<th>Current audience</th>
<th>Shared market</th>
<th>Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Garden / park</td>
<td>+3</td>
<td>-3</td>
<td>6</td>
</tr>
<tr>
<td>Museum</td>
<td>+10</td>
<td>+19</td>
<td>9</td>
</tr>
<tr>
<td>Art gallery</td>
<td>+10</td>
<td>+6</td>
<td>4</td>
</tr>
<tr>
<td>Craft exhibition</td>
<td>+12</td>
<td>-5</td>
<td>17</td>
</tr>
<tr>
<td>Play or drama</td>
<td>+11</td>
<td>+15</td>
<td>-4</td>
</tr>
<tr>
<td>Musical theatre</td>
<td>+2</td>
<td>+7</td>
<td>-5</td>
</tr>
<tr>
<td>Street performance</td>
<td>+26</td>
<td>-10</td>
<td>36</td>
</tr>
<tr>
<td>Rock / pop concert</td>
<td>+9</td>
<td>+1</td>
<td>8</td>
</tr>
<tr>
<td>Film at cinema</td>
<td>+5</td>
<td>-2</td>
<td>7</td>
</tr>
</tbody>
</table>

Heat map showing origin of visitors to Mountain to Mouth by Local Government Area. Elsewhere in Victoria (2%) and Rest of Australia (0%) not shown.
There is a **high awareness** and a relatively **large current audience** for the National Wool Museum. Most of the Museum’s current audience consider themselves likely to return and attend for mainly **Social** reasons.

**High awareness**

Awareness of the National Wool Museum was 99% across the shared market – matching awareness reached at both GPAC and Geelong Botanic Gardens. Although, proportionally, the Museum’s current audience (63%) is lower than that of either GPAC (78%) or the Botanic Gardens (80%).

**Core regular audience**

Of the Museum’s current audience, 3% reported visiting the Museum more then six times within the past 12-months and a further 26% between two and five times.

**Expression dominates**

The Museum has a Culture Segments profile broadly similar to the shared market overall, where over half the current audience are either Essence (20%) or Expression (35%).
Crossover

The Museum’s current audience had high cross over with Geelong Regional Libraries (91%) although down on the shared market overall (93%) and Geelong Botanic Gardens (79%, compared to 80% for the shared market).

Three-quarters of Mountain to Mouth (75%) and 71% of Geelong After Dark’s current audience reported having visited the National Wool Museum within the past 12-months, compared to 63% for the shared market overall.

High propensity to return

As explored previously, 30% of the Museum’s current audience have visited more than once in the past 12-months. This is reflected in the 92% of their current audience considering themselves to be either ‘extremely likely’ (55%) or ‘very likely’ (37%) to visit again.

Mainly Social drivers

Proportionally, 46% of the National Wool Museum’s current audience had mainly Social drivers and attend ‘to share an enjoyable experience or pass the time in a nice place’.

Among the shared market organisations only Geelong Botanic Gardens had a higher proportion of mainly Socially-motivated attendance (64%).

Affirmation more Socially driven

Of the Museum’s four largest Culture Segments, Affirmation were more likely, although not significantly, to be motivated by mainly Social drivers when compared to Museum’s current audience (48%, compared to 46% respectively).Interestingly, this segment were also more likely to cite Spiritual motivations, ‘to escape or be inspired’, (8% compared to 5% for the current audience).
Arts and culture spend

Similar proportions of the Museum’s current audience report having spent on arts and culture within the past four weeks when compared to the shared market. Although the value of spend was typically bellow that of the shared market, with the exception of dollar value spend on souvenirs or programs.

Stimulation more likely to have spent on arts and culture...

Typically, Stimulation were the segment most likely to report having spent on arts and culture within the past four week (79% of Stimulation reported having spent on admission, compared to 69% for the Museum’s current audience, and 60% spent on food and drink while attending a culture event, compared to 51%).

Current audience – % point difference compared to current artform attendance of shared market

<table>
<thead>
<tr>
<th>Artform</th>
<th>Mean value of spend (compared to shared market)</th>
<th>Current audience – % point difference compared to current artform attendance of shared market</th>
</tr>
</thead>
<tbody>
<tr>
<td>Library</td>
<td>$128 (-$2 ▼)</td>
<td>+1</td>
</tr>
<tr>
<td>Garden / park</td>
<td>$39 (-$1 ▼)</td>
<td>+1</td>
</tr>
<tr>
<td>Museum</td>
<td>$15 (+$2 ▲)</td>
<td>+10</td>
</tr>
<tr>
<td>Art gallery</td>
<td>$28 (-$2 ▼)</td>
<td>+4</td>
</tr>
<tr>
<td>Craft exhibition</td>
<td>$15 (+$2 ▲)</td>
<td>+8</td>
</tr>
<tr>
<td>Play or drama</td>
<td>$39 (-$1 ▼)</td>
<td>-1</td>
</tr>
<tr>
<td>Musical theatre</td>
<td>$15 (+$2 ▲)</td>
<td>+1</td>
</tr>
<tr>
<td>Street performance</td>
<td>$39 (-$1 ▼)</td>
<td>+1</td>
</tr>
<tr>
<td>Film at cinema</td>
<td>Film at cinema</td>
<td>-4</td>
</tr>
<tr>
<td>Souvenirs &amp; programs</td>
<td>$28 (-$2 ▼)</td>
<td>+2</td>
</tr>
<tr>
<td>Transport</td>
<td>$15 (+$2 ▲)</td>
<td>+1</td>
</tr>
</tbody>
</table>

... Release less likely

Although, the sample size was lower amongst the less culturally active segments, therefore data should be treated indicatively, the proportion of Release who reported paying to attend a cultural event was 42%, compared to 69% for the Museum’s current audience. The value of spent was also lower ($68, compared to $128 respectively).
Proportionally, Potato Shed Multi-Arts Centre had the largest potential audience of any organisation in Geelong’s shared market.

The Centre relies heavily on the Greater Geelong area for its current audience, who mainly attend for Socially motivated reasons.

One in five in current audience

Just over one in five of the shared market are in the current audience for Potato Shed Multi-Arts Centre (22%).

A small proportion of the Potato Shed’s current audience reported making multiple visits over the past 12-months, 2% reported attending six or more times within the past 12-months and a further 6% between two and five times.

A potential audience

Those who had never previously attended Potato Shed but would be interested made up 32% of the shared market – a larger proportion than either the Potato Shed’s current (22%) or lapsed (23%) audience.

At 32%, proportionally, the Potato Shed’s potential audience was the highest reported amongst the shared market organisations. Suggesting the Potato Shed has a good potential for audience development.

Over half in Essence and Expression

Of the Potato Shed’s current audience, 55% are in either Essence or Expression. These two segments, along with Stimulation are
all over represented when compared to the shared market (+1-percentage point each).
Affirmation, was down on the shared market average (12%, compared to 15% overall).

Cross over

The crossover of the Potato Shed’s current audience reveals, proportionally, an above average cross over with GPAC (86%, compared to 78% for the shared market overall) and Courthouse Youth Arts (35%, compared to 26% overall).

Almost all of the Potato Shed’s current audience had visited Geelong Regional Libraries in the past 12-months (90%), which was to be expected given the large proportion of the shared market in the Regional Library’s current audience.

Over a third of Mountain to Mouth’s current audience had attended the Potato Shed in the past 12-months (36%, compared to 22% for the shared market).

Likelihood to return

Of those in the Potato Shed’s current audience 92% reported being either ‘extremely likely’ (54%) and ‘quite likely’(38%) to visit again.

Mainly Social-drivers

Nearly half of the Potato Shed’s current audience are motivated to attend for mainly Social reasons – ‘to share an enjoyable experience or pass the time in a nice place’ (46%). Amongst the shared market organisations only Geelong Botanic Gardens had a higher proportion of mainly Socially-motivated attendance (64%).
Three quarters have paid for admission

The current audience were more likely to report having spent on some aspect of arts and culture attendance when compared to the shared market overall, with the exception of public or private transport to a cultural event. Three quarters had spent on admission (75%, compared to 69% for the shared market).

Performing arts engagement

Given the multidisciplinary nature of the venue, it is no surprise that current Potato Shed audiences are more likely to attend a variety of artforms than the shared market. Musical theatre and plays or dramas are particularly more frequented by the Potato Shed’s current audience when compared to the shared market (81%, compared to 66% respectively for a play or drama and 74%, compared to 59% for musical theatre).

Reliance on Greater Geelong

The Potato Shed’s current audience relies more heavily on Greater Geelong based visits than other organisations within the shared market (93%, compared to 86% overall). And a lower proportion of it’s current audience are based in the Surf Coast Shire than the shared market (3%, compared to 7% respectively).
## Willingness to support

<table>
<thead>
<tr>
<th>Organisation</th>
<th>Proportion of shared market who are a member, subscriber or friend</th>
<th>Volunteered time – shared market</th>
<th>Donated money – shared market</th>
</tr>
</thead>
<tbody>
<tr>
<td>Geelong Regional Libraries</td>
<td>72%</td>
<td>42% 53%</td>
<td>48% 43%</td>
</tr>
<tr>
<td>GPAC</td>
<td>46%</td>
<td>39% 44%</td>
<td>44% 30%</td>
</tr>
<tr>
<td>Geelong Library &amp; Heritage Centre</td>
<td>32%</td>
<td>41% 56%</td>
<td>48% 45%</td>
</tr>
<tr>
<td>Geelong Gallery</td>
<td>30%</td>
<td>37% 54%</td>
<td>29% 32%</td>
</tr>
<tr>
<td>National Wool Museum</td>
<td>11%</td>
<td>55% 38%</td>
<td>55% 36%</td>
</tr>
<tr>
<td>Geelong Botanic Gdns</td>
<td>8%</td>
<td>46% 47%</td>
<td>33% 50%</td>
</tr>
<tr>
<td>Mountain to Mouth</td>
<td>8%</td>
<td>52% 33%</td>
<td>67% 29%</td>
</tr>
<tr>
<td>Geelong After Dark</td>
<td>8%</td>
<td>51% 37%</td>
<td>66% 29%</td>
</tr>
<tr>
<td>Potato Shed</td>
<td>6%</td>
<td>63% 28%</td>
<td>67% 31%</td>
</tr>
<tr>
<td>Courthouse Youth Arts</td>
<td>5%</td>
<td>57% 37%</td>
<td>60% 35%</td>
</tr>
<tr>
<td>Back to Back Theatre</td>
<td>2%</td>
<td>62% 35%</td>
<td>60% 37%</td>
</tr>
</tbody>
</table>

- **Have done before but would not do again**
- **Have not done before and would not do**
- **Have not done before but would do again**
**Research parameters**

This study was carried out for Creative Victoria by Morris Hargreaves McIntyre.

**Target group for the research**  Contacts from 11 Geelong based cultural organisations.

**Sample size**  2,248

**Date of fieldwork**  Collection ran 1–31 July 2016

**Sampling method**  The original methodology of anonymously centralising data was not possible due to concerns around data protection. Therefore, all respondents to the survey are considered the ‘shared market’ for Geelong. Any respondent that had not been to any of the 11 organisations within the past 12-months has been removed (55 people).

It is important to note the limitations of the sample composition – those who subscribe to an organisation will be a highly engaged audience, and are therefore self selecting.

**Data collection method**  Online self-completion questionnaire

**Weighting procedures**  The data in this report is not weighted – it reflects everyone who responded to the survey sent out by the organisations

**Results**  Where percentages do not add up exactly to 100% this is due to rounding

**Acknowledgements**  Icons used throughout report made by Flaticon from www.flaticon.com

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**Organisation links**

**Back to Back Theatre**
http://backtobacktheatre.com

**Courthouse Youth Arts**
http://courthouse.org.au

**Geelong After Dark**
http://www.geelongafterdark.com.au

**Geelong’s Arts Bulletin**
http://artsatlasgeelong.com.au

**Geelong Botanic Gardens**

**Geelong Gallery**
http://www.geelonggallery.org.au

**Geelong Library & Heritage Centre**

**Geelong Performing Arts Centre**
https://www.gpac.org.au

**Geelong Regional Libraries**
http://www.grlc.vic.gov.au

**Mountain to Mouth**
http://www.mountaintomouth.com.au

**National Wool Museum**

**Potato Shed Multi-Arts Centre**
Morris Hargreaves McIntyre is an award winning arts management consultancy. We use consumer insight to help organisations transform their relationships with audiences.

We are passionate about understanding cultural consumers, getting to the heart of issues that matter to you and making practical recommendations.

All projects are different, but the value we add is constant: we measure our success by the impact we have on organisations we work with.