Audience Atlas Norway

Market report

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Audience Atlas Norway – market report

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

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

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

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

Contents

1 Executive summary

1.1 Key facts

The Oslo region is very culturally engaged - overall 99% of the population of Oslo and Akershus have ever engaged with culture[1] – this is the culture market - and the majority of them have done so within the past 12 months.

Of the culture market 87% (820k people) have been to a performing arts event at some point in their lives – the performing arts market - and 46% have done so in the past 12 months. A further 91.3k people have not attended a performing arts event but would be interested in doing so in the future.

Analysis of recency of attendance for different arforms shows that while larger numbers of people have been to cinemas, museums and music concerts in the past 12 months, for other artforms, there is a great deal of potential for development within the lapsed and potential markets. For example for Contemporary Dance, the potential market is bigger than the number of people who have attended in the past 3 years.

1.2 Income and education

There is modest correlation between income, education and attendance at performing arts events. However, there are users with lower levels of education and income, and non-users with higher levels, suggesting that lower levels of education and income do not preclude cultural engagement.

1.3 Support for government subsidy

Overall the majority of the culture market (69%) agrees that subsidising the arts is a good use of government money. However those who have attended one of the 5 partner institutions within the past 5 years are significantly more likely than those who have not (46% vs. 22%) to say they definitely agree.

1.4 Non-users

There are some interesting differences between 'non-users' (those who have not attended any of the 5 partner institutions in the past 5 years) and 'users' (those who have).

[1] Please note, we have intentionally used a broad definition of culture, from traditional culture such as museums, art galleries and theatre to pop and rock concerts, cinema, and public singing. A main body of the report includes a full list of artforms included.

On the whole Non-users are less likely to engage in a whole range of other hobbies, interests, activities and recreational visits than users – including outdoor activities, sport and fitness. The smallest difference between users and non-users was in attendance at sports events where users and non-users are equally engaged.

This suggests that rather than choosing culture instead of other activities, users are engaging with cultural and non-cultural activities; and non-users are generally less actively pursuing any hobbies or interests either within and beyond the cultural sphere.

1.5 Motivations and barriers

Non-users are far less able to cite motivations – or perceived benefits – for engaging with the arts and culture. They imagine that the benefits are likely to be largely social ('a pleasant form of entertainment or a way to pass the time.'). On the other hand they are also less likely to cite barriers to attendance – the most common barriers being to do with not knowing what's on or lack of relevance or interest.

Users identify significantly more and a wider range of motivations and benefits for attending than non-users. These include 'it enriches my quality of life, helps me to live life', 'expands my knowledge' and 'allows me to reflect and contemplate on the world'. These more profound intellectual and emotional benefits that can be derived from arts and cultural engagement are not recognised as potential outcomes by non-users.

The reasons for not engaging come down to lack of motivation and absence of brand affinity. Rather than there being barriers that are preventing them from attending, they have never identified or been given any clear reason why they should. The cultural sector has not yet convinced them there is an intrinsic benefit in engaging that they can't satisfy elsewhere.

1.6 Culture Segments

Morris Hargreaves McIntyre's Culture Segments is a segmentation system that groups people, not by socio-demographic factors such as age, income or gender but by core values and attitudes towards culture and needs, wants and motivations for engaging. This allows us to really understand and target people based on the kinds of experiences they might be seeking to have, craft messages that will resonate and build experiences to satisfy their needs.

The distribution of Culture Segments in Oslo and Akershus reflects the very engaged population. The three typically most culturally engaged segments – Essence, Expression and Stimulation – are dominant in this market. Essence (the most engaged segment) is even more prevalent within the performing arts representing 20% of this market and 27% of those who have attended in the past 12 months.

1.7 Strategic implications

For Audiences Norway

While Oslo and Akershus is a very culturally engaged region there is a great deal can be done to open up participation to a wider audience base. Audiences Norway can support collaborative working to address the challenges identified through this research.

Culture Segments data provides an informed basis for audience and programme development initiatives. It also provides a common language for talking about audiences between different organisations and different roles within them. While marketing is clearly an area that will benefit from, the challenges identified in this research cannot be addressed by marketing teams alone.

A cross-disciplinary approach is needed with artistic directors, programmers, marketing, front of house, customer services – and where they exist educators and learning colleagues – all needing to become more audience focused to meet these challenges head on.

For Oslo cultural organisations

This data helps organisations see the potential there is for audience development and the appetite for different forms of art as well as the challenges to engaging a wider audience. There is enormous scope for growing audiences – particularly within the lapsed and potential markets - and using this data and Culture Segments insight can help unlock this potential.

For the 5 partner institutions

This research reveals awareness, penetration and potential for each of the five partner institutions. There are also differences in segment profiles between artform markets and each of the institutions and their potential markets. This suggests that as well as working together to accelerate a shared market, each institution also has slightly different potential audience growth opportunities and related approaches open to them.

2 Introduction

2.1 Audience Atlas Oslo

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

Audience Atlas Oslo samples 1,500 adult respondents (aged over 15) who are in the market for art, culture and heritage activities and events. They are drawn from Oslo and Akershus – and weighted to be representative of the whole market.

It's rich and relevant. Audience Atlas Oslo goes beyond the usual profiling. It measures lapsed and potential, not just recent engagement. It maps the market's motivations, not just its behaviour. Audience Atlas covers many artform, leisure activities and individual arts and cultural venues across Oslo.

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

2.2 Culture Segments

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

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

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

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

Culture Segments has highly practical applications. It uses a small set of Golden Questions, which can easily be included in audience surveys or databases to evaluate the success of campaigns and better understand your existing audiences. The system can also be used to recruit focus group respondents and build online panels to explore your brand, test your marketing campaigns and inform product development.

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

2.3 How to read this report

The data

All data quoted is taken from Morris Hargreaves McIntyre's Audience Atlas Oslo, a nationally representative population survey of adults (aged over 15). The data was collected in September 2013 using an online survey methodology. Data was weighted for age, gender, origin and education. The weighted dataset is based on a sample of 1,497 respondents.

The market

We define the market as residents of Oslo and Akershus aged over 15 who have ever engaged in any cultural activity – having made at least one visit to a cultural event or place within that period (this includes cinema, live music, comedy, museums, galleries, theatre and dance). This accounts for 99% of the Oslo population aged over 15; that is 945,500 individuals. Population figures are taken from Statistics Norway and are quoted to the nearest hundred. All % and figures are based on the total market for culture, unless stated otherwise.

Report structure

This report addresses a range of markets and topics. Whilst it is possible to read it 'cover to cover' we recommend that readers focus on the areas that are most relevant to them. To aid this the main body of the report is broken into four sections.

1. Overall culture market and performing arts market
2. Artform markets
3. Institution markets
4. Non-users

We recommend reading all of section 1, but choosing only relevant chapters from sections 2 and 3. Section 4 focuses on those not currently attending the 5 participating institutions.

Accompanying documents

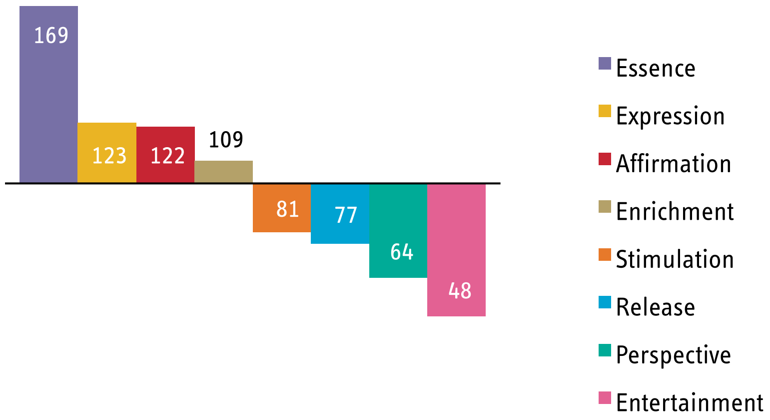
In addition to this report there are two additional documents. The Culture Segments Pen Portraits offers a concise overview of each Segment's profile, needs and wants and should be used as the basis for understanding each segment. The appendix includes a technical note, research materials, selected data tables and transcriptions.

Reading indices

Some data in this report is presented as indices. An index is a measure used to show how a particular subgroup differs from the overall average. If two percentages are identical the index would be 100. For this reason the horizontal axis of indices models is set at 100.

For example the model below indexes the classical music market against the culture market. It shows that the classical music market over-indexes on the Essence segment, meaning that Essence makes up a larger proportion of the classical music market than the culture market.

Figure 1 Example of modelling indices, classical music market indexed against culture market



Data tables in the main body of the report

In addition to graphs, we also include a number of tables in the main report. Where we comment on specific values in the text, these are also highlighted in the tables. Where the target group in question scores significantly higher than comparators it is highlighted in green, where it scores significantly lower than comparators it is highlighted in orange. Please note we only highlight figures where they are specifically cited in text, we have not highlighted all statistically significant differences. Differences in appended tables are not highlighted.

Figure 2 Example of highlighted percentages in a main report table

Cultural consumption		Culture market	Performing arts market	Contemporary dance market	Dansens Hus market
	Base	1497	1298	325	67
Play	Plays by 'established' playwrights	54%	62%	78%	64%
	Contemporary theatre or new writing	39%	45%	59%	75%
	Children's theatre	50%	57%	54%	61%
	Other	8%	10%	6%	6%

3 Introducing the Culture Segments

In this chapter we briefly describe each of the Culture Segments. This report is accompanied by Pen Portraits for each Culture Segment, based on the Audience Atlas Oslo data. These portraits are designed to help you distinguish between the segments, understanding their different needs and motivations

Essence

Discerning, Spontaneous, Independent, Sophisticated
The Essence segment tends to be well-educated professionals. They are leaders rather than followers, confident in their own tastes, adventurous, sophisticated, discerning. They pay little attention to what others think and will act spontaneously according to their mood. Culture is something they experience with or without others.

Expression

Receptive, Confident, Community, Expressive
The Expression segment is in-tune with their creative side. They are confident, fun-loving, self-aware people who accommodate a wide range of interests from culture to learning and nature. They enjoy being part of a crowd and join and build communities. Culture is for sharing and discussing rather than following carefully developed tastes.

Affirmation

Self-identity, Aspirational, Quality time, Improvement
Affirmation are very careful decision makers, always weighing up the options. They want to be sure they are doing the right thing and getting something more worthwhile out of life. They are open minded when it comes to arts and culture, viewing it as a means of developing themselves as individuals at the same time as having fun.

Enrichment

Mature, Traditional, Heritage, Nostalgia

The Enrichment segment tend to have established tastes and will enjoy culture when it links with their existing interests. These might include nature, parks and heritage. They tend to veer towards the established and traditional. They can be risk averse, preferring to stick to that which is familiar and they are confident they will enjoy.

Stimulation

Active, Experimental, Discovery, Contemporary
The Stimulation segment is an active group living their lives to the full, looking for new experiences, a life of variety, and are open to a wide range of experiences. They are sociable and pride themselves on being leaders, keen to be among the first to know about new or interesting things. They veer away from the staid or traditional.

Release

Busy, Ambitious, Prioritising, Wistful
The Release segment tend to be leading busy working or family lives. They may have enjoyed relatively popular arts in the past but have become switched off as other things have taken priority in life. While they would like to go to more, they feel they have too many conflicting demands on their time and resources to enjoy the arts and culture.

Perspective

Settled, Self-sufficient, Focused, Contented
The Perspective segment is settled, fulfilled and home-orientated. They have an underlying desire to learn and need to make their own discoveries that can provide a focus for engaging with arts and culture. This is likely to be a home-based pursuit however. Perspective prioritise their own needs and tend to have a narrow set of interests.

Entertainment

Consumers, Popularist, Leisure, Mainstream
Entertainment see leisure time as for fun, not applying oneself intellectually. The arts are on the periphery of their lives and their occasional forays into culture are usually for the spectacular, entertaining or must-see events. Culture competes against a wide range of other leisure options and ways of spending time with friends or family.

Overall culture market and performing arts market

4 Culture market

4.1 Chapter summary

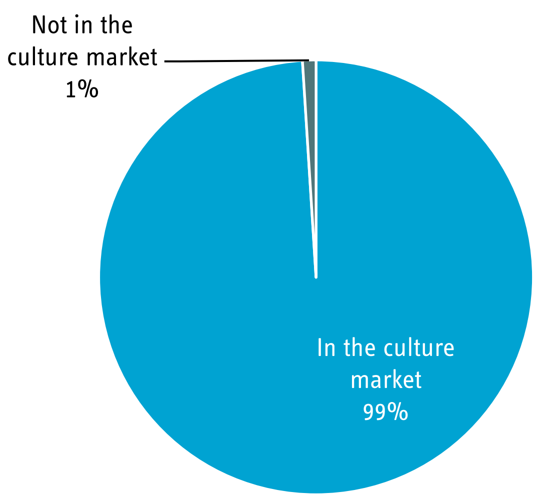
The culture market in Oslo and Akershus is large and active. This is evident in its Culture Segment distribution.

The three segments that typically show greatest cultural engagement, Essence, Stimulation and Expression, together make up 46% of this market. The most dominant segment is Essence – the segment most typically *very* culturally engaged – in an unusually large proportion (17%). In other territories where an Audience Atlas has been conducted Essence accounts for around 1 in 10 in the culture market.

4.2 Market size

In this report we focus on the culture market, but our survey spoke to all Oslo/Akershus residents. The model below illustrates Oslo is very culturally engaged.

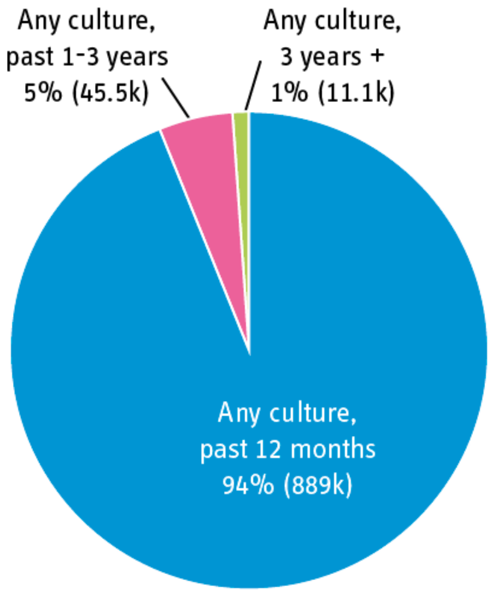
Figure 3 Oslo population and culture market



Base: 1,513

Overall 99% of the population of Oslo and Akershus have ever engaged with culture. This equates to 945.5k people in the market for culture. The model below illustrates how recently these people engaged in a cultural activity. It shows that the majority of those who have engaged in culture have done so within the past 12 months.

Figure 4 Overall culture market size and makeup



Base: 1,497

It is important to be aware that all survey data comes with a 'confidence interval' that is, a range within which the true value for the population is likely to fall. However, even taking this in to account, participation in Oslo and Akershus is higher than it's next nearest comparators - In New York and London around 90% of the population are in the market for Culture.

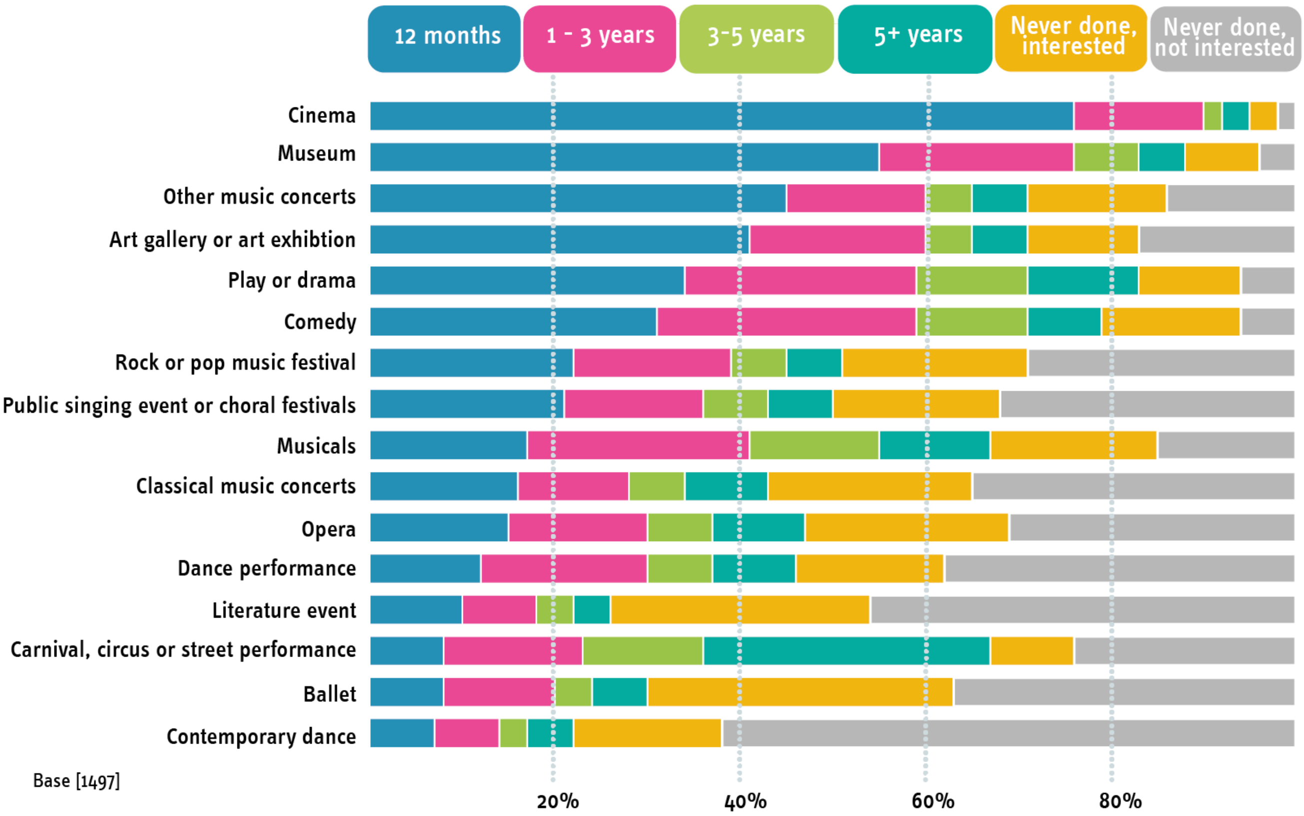
Whilst not direct comparators, other countries can also provide a useful benchmark. In Europe, participation across the UK stands at around 85%, in Germany it is 84%. Outside Europe, 95% of the New Zealand population are in the market for culture, falling to 87% for the population of Australia.[2]

[2] Please note due to the sparse population, the Northern Territories were excluded from Australian Audience Atlas. All market size proportions are taken from Audience Atlas studies managed by Morris Hargreaves McIntyre and conducted between 2010 and 2013. Further details of sample sizes and methods are available upon request.

4.3 Market potential

Artforms

Figure 5 Artform engagement, whole culture market



This model illustrates the overall pattern of engagement in a range of artforms. This illustrates that the market is far bigger than those who have made recent visits, and for several artforms, the lapsed and potential market is bigger than the recent market offering opportunity for development.

The table below provides the exact figures illustrated in this model.

Figure 6 Artform engagement, whole culture market

Artform	Done in the past 12 months	Done in the past 1-3 years	Done in the past 3-5 years	Done more than 5 years ago	Never done, interested	Never done, not interested
Cinema	76%	14%	2%	3%	3%	2%
Museum	55%	21%	7%	5%	8%	4%
Other music concerts	45%	15%	5%	6%	14%	13%
Art gallery or art exhibition	41%	19%	5%	6%	12%	17%
Play or drama	34%	25%	12%	12%	11%	7%
Comedy	31%	28%	12%	8%	15%	7%
Rock or pop music festival	22%	17%	6%	6%	20%	28%
Public singing or choral festivals	21%	15%	7%	7%	18%	32%
Musicals	17%	24%	14%	12%	18%	14%
Classical music concerts	16%	12%	6%	9%	22%	35%
Opera	15%	15%	7%	10%	22%	31%
Dance performance	12%	18%	7%	9%	16%	38%
Literature event	10%	8%	4%	4%	28%	46%
Carnival, circus, street performance	8%	15%	13%	31%	9%	23%
Ballet	8%	12%	4%	6%	33%	38%
Contemporary dance	7%	7%	7%	5%	16%	62%

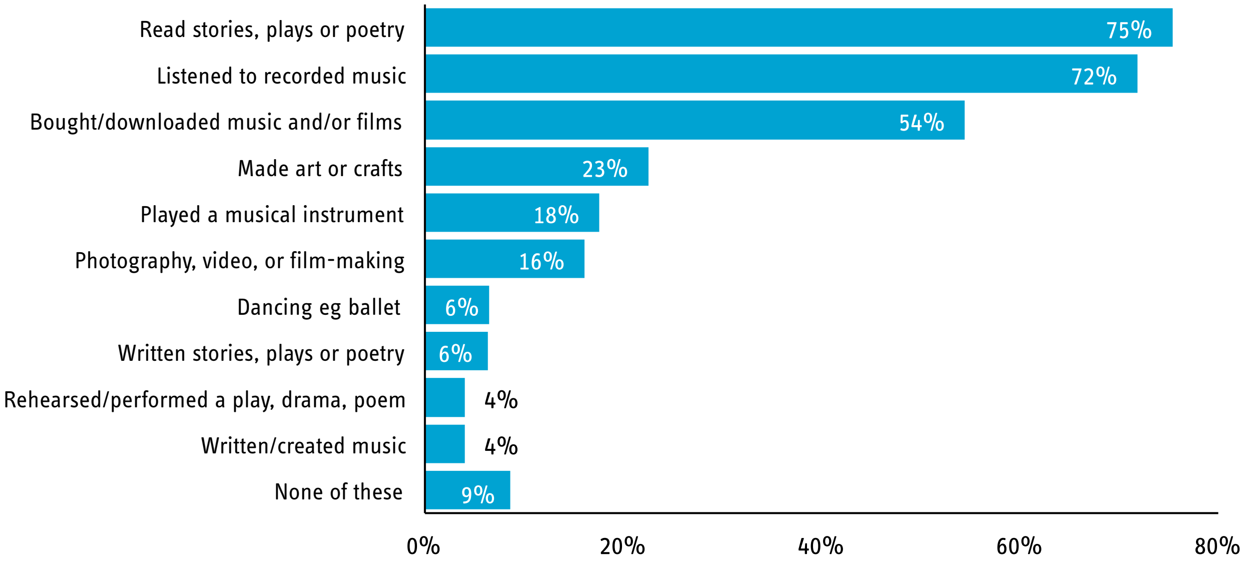
This data illustrates that cinema was the artform most commonly engaged with – three quarters had attended in the past 12 months. Slightly more than half of the culture market had visited a museum in the past 12 months, and 41% had attended an art gallery or exhibition.

Contemporary dance is the least well attended, fewer than 1 in 10 (7%) had attended a performance in the past 12 months.

4.4 Other activities

Participation

Figure 7 Participation in culture, whole culture market, past 12 months



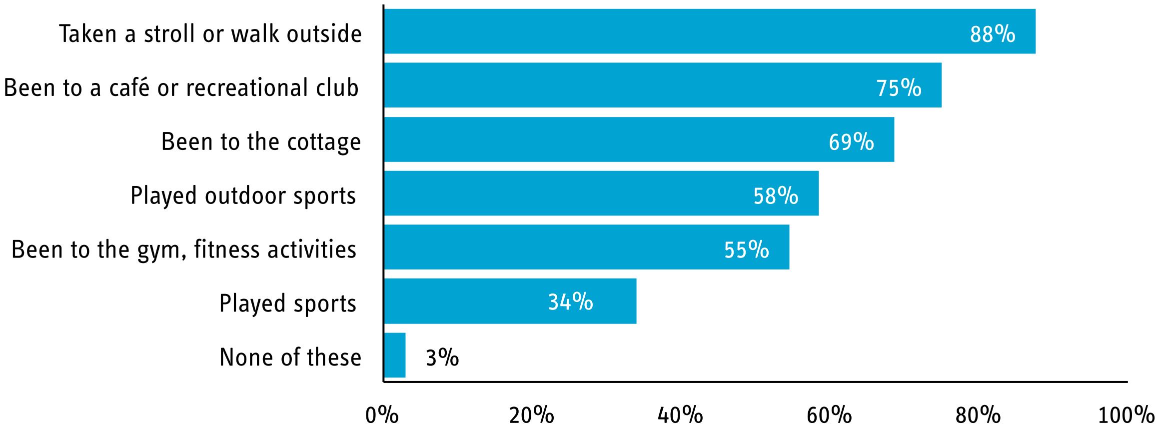
Base: 1,497

Overall participation in culture was high, 9 in 10 (91%) had participated in some way in the past 12 months. Respondents were most likely to have read stories, plays or poetry, or have listened to recorded music. Smaller proportions had written stories (6%) or music (4%).

Around 1 in 4 (23%) participated in visual arts or crafts and 16% undertook photography or filmmaking. Participation in the performing arts was slightly lower – 18% had played an instrument and 6% had danced.

Other activities

Figure 8 Other (non-cultural activities) engaged in, whole culture market, past 12 months



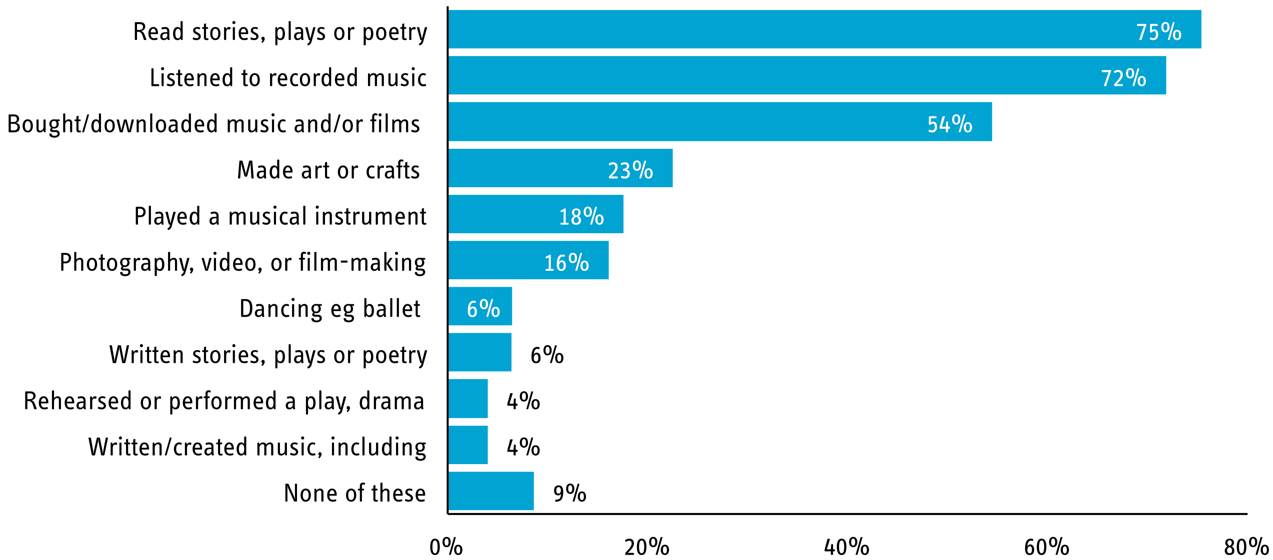
Base: 1,497

Engagement with non-cultural activities was almost universal – 97% of the culture market had engaged in one of the tested activities in the past 12 months. Walking was the most common, followed closely be attendance at cafes or recreational clubs.

Sports were slightly less popular, 58% had played outdoor sports, 55% had been to the gym and 34% had played other sports.

Hobbies

Figure 9 Hobbies pursued, whole culture market, past 12 months

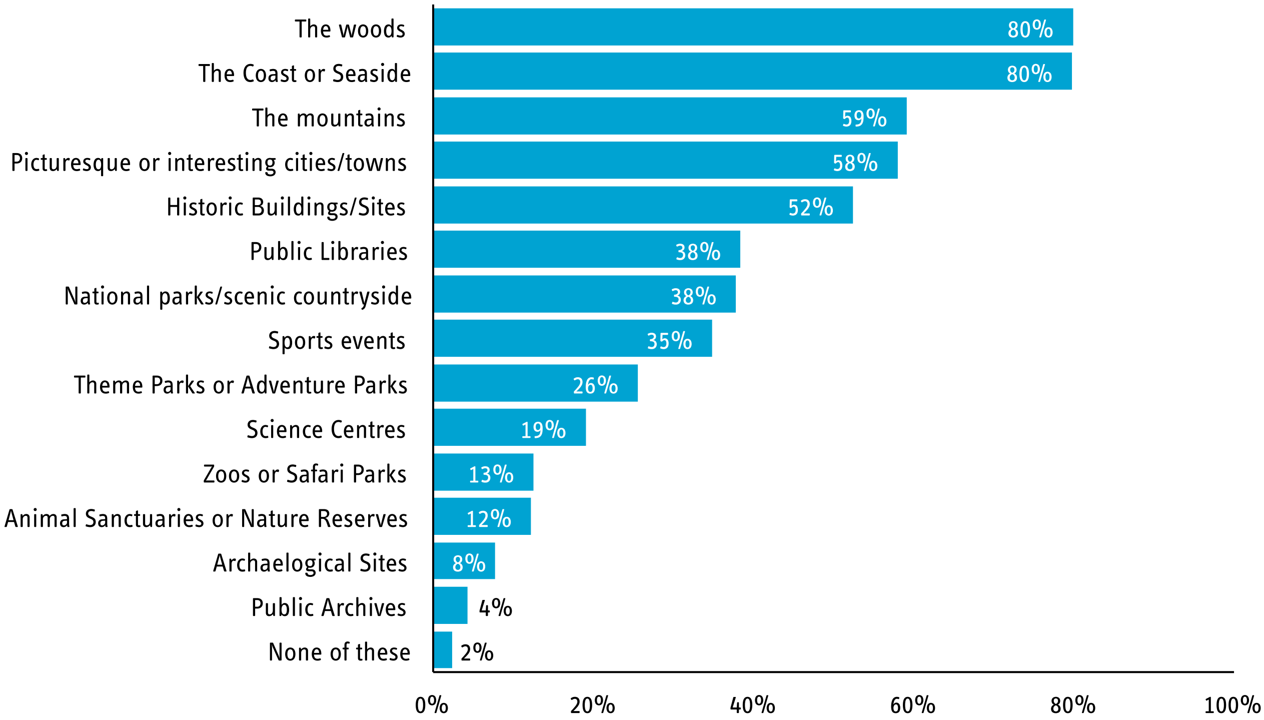


Base: 1,497

9 in 10 (91%) of respondents reported pursuing at least one hobby in the past 12 months. Reading and listening to recorded music were most popular, followed by buying or downloading music or films.

Recreation

Figure 10 Other sites visited or recreational activities undertaken, whole culture market, past 12 months



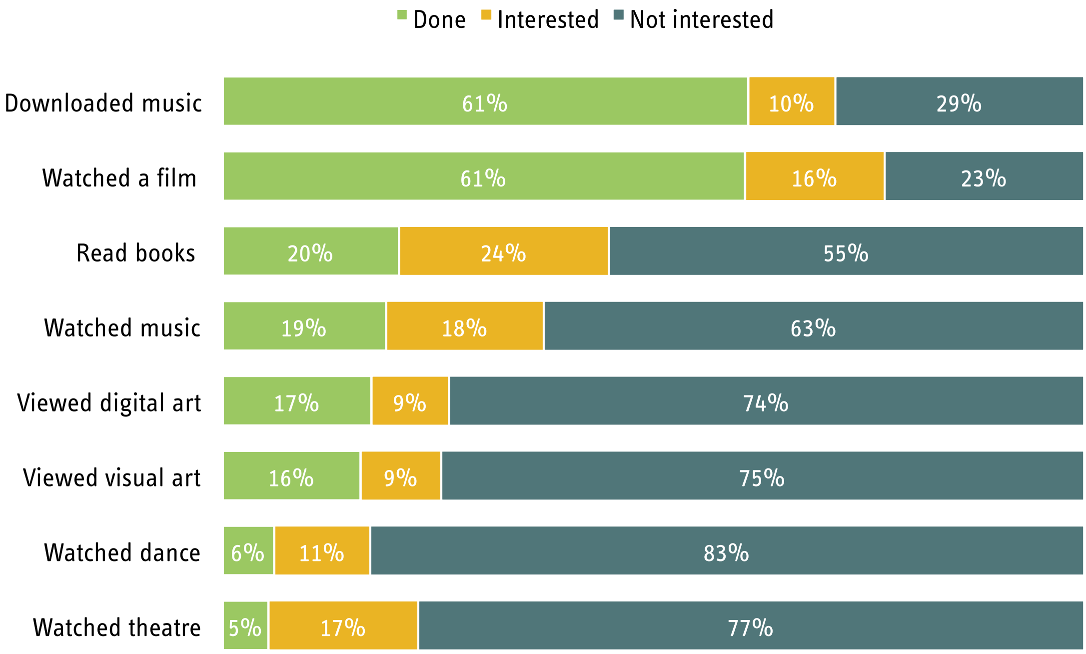
Base: 1,497

This model illustrates the importance of outdoor activities as a form of recreation – the top 3 most common activities undertaken all involve natural environments. Visitor attractions such as theme parks, zoos, and science centres all feature less prominently.

When it comes to recreational visits, people are much more likely to undertake free activities than paid.

Engaging with culture online

Figure 11 Engaging with culture online, ever done or interested in doing, whole culture market



Base: 1,497

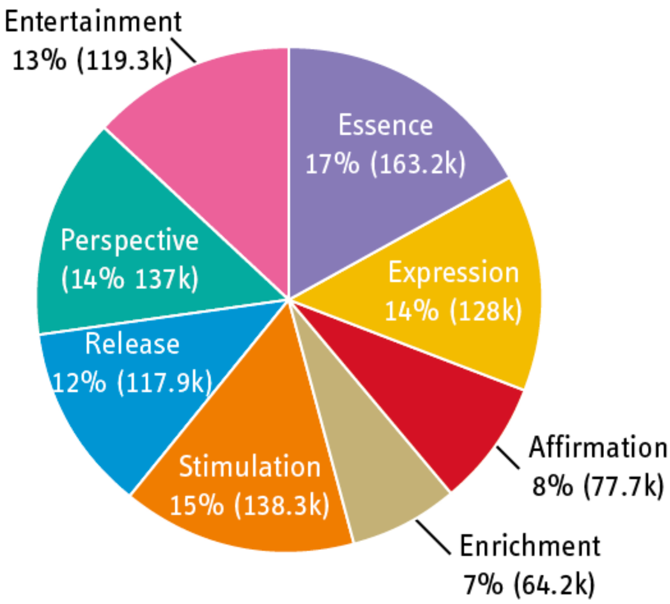
This model illustrates respondents' past engagement with culture online, and their propensity to do so in the future. Unsurprisingly respondents were most likely to have downloaded music or watched a film online. However around 1 in 5 had read books or watched music, and a similar proportion had viewed digital art (17%) or conventional visual art (16%).

Respondents showed the highest interest in reading books online (24%) and watching music online (18%) but there was also a clear potential market for watching theatre (17%) and dance (11%) online.

5 Oslo and Arkershus Culture Segments profile

5.1 Overall Culture Segment profile

Figure 12 Culture segment profile, whole culture market



Base: 1,497

This shows the distribution of the Culture Segments in the Oslo Culture Market. Essence – the largest segment is the segment that is most typically very culturally engaged. This represents a larger proportion of Essence in the market than other city markets tested.

5.2 Motivations for engaging in culture

When we talk about motivations we are referring to the underlying drivers for a cultural visit: the factors that might encourage people to attend based on their beliefs about the benefits they will get.

Having asked thousands of people why they visit cultural venues and what they hope to get from a visit we have identified four universal drivers. The model below shows these drivers and the broad needs of the visitors that experience each driver.

These motives make people set off for a visit; 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 and outcomes can provide deep insight into the visitor experience.

Figure 13 Drivers

See museum as a...	Have this driver...	And they seek this from a visit..
CHURCH	SPIRITUAL	Creative stimulation and quiet contemplation, they see museums as an opportunity to escape and recharge their batteries, food for the soul
SPA	EMOTIONAL	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
ARCHIVE	INTELLECTUAL	Keen to encourage their children's or their own interest and knowledge, may have professional interest in the subject, seek a journey of discovery, to find out new things
ATTRACTION	SOCIAL	See museums as an enjoyable place to spend time with friends and family, seek ease of access and orientation, good facilities and services, welcoming staff

Visitors can arrive at a venue with any level of need, and if they meet those needs they will have a satisfying visit. It is also possible for visitors to get unexpected benefits, or outcomes, from a visit. This can shape their future expectations of the venue. Experiencing these unexpected outcomes can enable visitors to switch or add new motivations. For example someone can move from purely socially driven visits to visits that are driven by both social and intellectual needs.

If visitors do not have their needs met then it is unusual for them to engage at a deeper level. For example if someone feels uncomfortable, unwelcome or out of place they will not have their social needs met and are unlikely to engage at an intellectual or emotional level, so will not get the associated benefits. In this respect the model owes much to Maslow's Hierarchy of Needs (A Theory of Human Motivation, 1943) in that visitors can only move up the hierarchy if the previous level of need is met.

It is difficult to jump levels. For example, we find that if visitors get unexpected emotional outcomes from a visit, many will want to 'backfill' with intellectual understanding of the objects that delivered these benefits. People who expect to fulfil emotional and spiritual needs with a visit tend to have above average levels of knowledge or confidence with the subject matter.

The table below shows the statements we use to capture audiences' perceived motivations and outcomes, and how these relate to the four drivers described above.

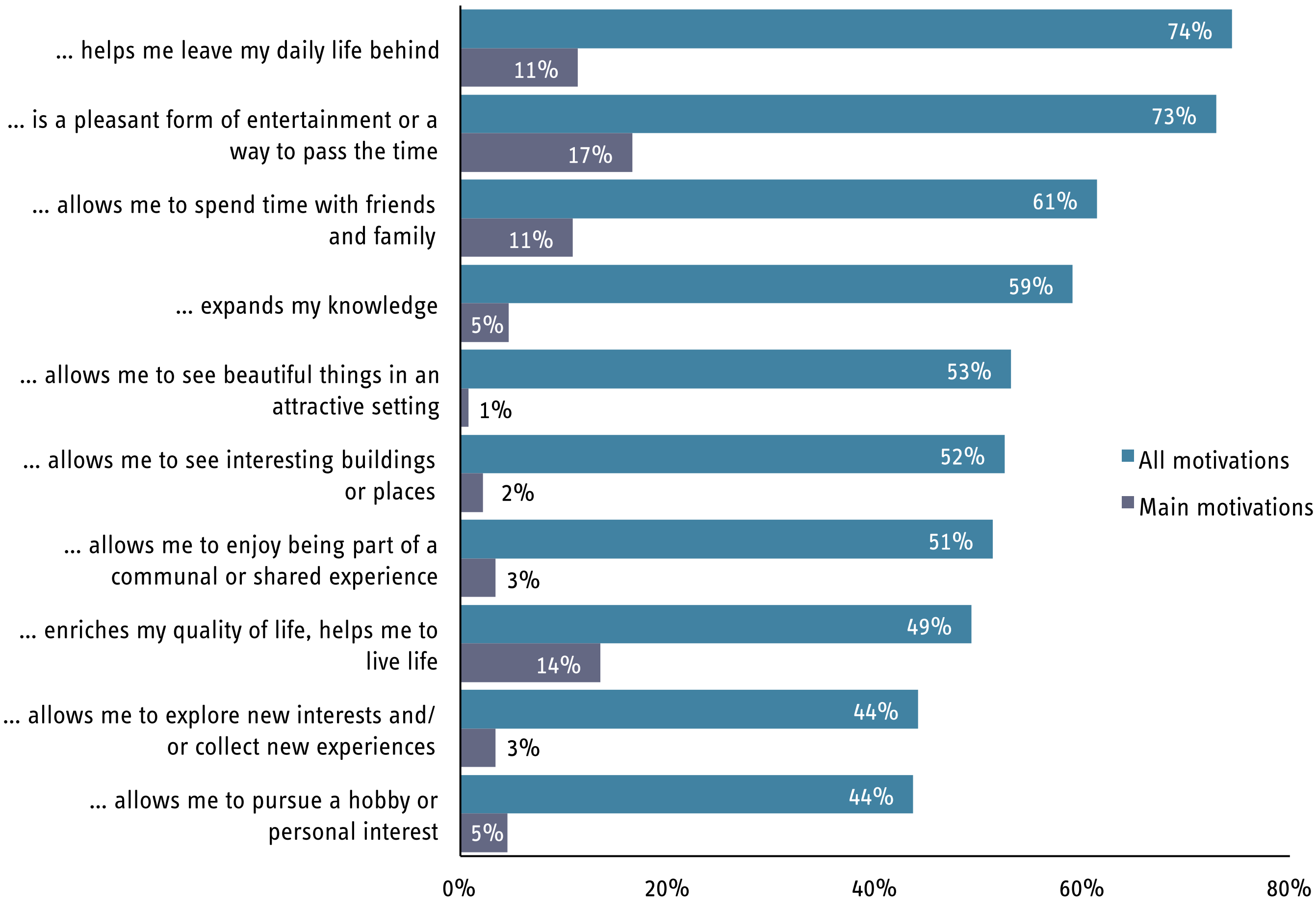
Figure 14 Example motivation statements

Motivations		
Generic	**Statement**	**Abbreviation**
Spiritual	To escape and recharge my batteries	Escape
	For peaceful, quiet contemplation	Contemplation
	To stimulate my own creativity	Stimulate creativity
Emotional	To see beautiful things in an attractive setting	Aesthetic beauty
	To see fascinating, awe inspiring things	Awe and wonder
	To have an emotionally moving experience	Moving
	For a strong sense of personal connection or identity	Personal relevance
	To experience what the past was like	Experience the past
	To be reminded of what life was like when I was younger	Nostalgia
	To gain an insight into the artists mind	Insight
Intellectual	Get a better understanding of people/cultures	Understanding
	Academic/professional interest in the subject(s)	Academic /prof. interest
	Personal interest in the subject(s)	Hobby / personal interest
	Improve my own knowledge	Self-improvement
	To encourage children's interest in art / history / culture	Stimulate children's interest
Social	Nice place to spend time with friends/family	Social interaction
	Enjoyable way to pass the time	Enjoyable
	One of the major attractions in the area	To see to do
	I am drawn to interesting buildings	Architecture

Most common motivations for engaging in culture Oslo and Akershus

Respondents were asked to choose from a list of motivations for engaging in culture. Then of those chosen, they selected what they felt to be the main motivation for them. The model below illustrates the top 10 most commonly cited reasons for engaging in culture.

Figure 15 Top 10 motivations for engaging in culture, all motivations and main motivation, whole culture market



Base: 1,497

Escapism was the most commonly cited motivation, followed closely by a pleasant way to pass the time. Spending time with friends and family and expanding knowledge were less common – cited by around 6 in 10 respondents.

The most commonly cited main motivations were 'a pleasant way to pass the time' and 'enriching my quality of life'.

The table below gives a full breakdown of all motivation statements tested. It also links each individual motivation to its broader 'driver', as described in section 5.2.

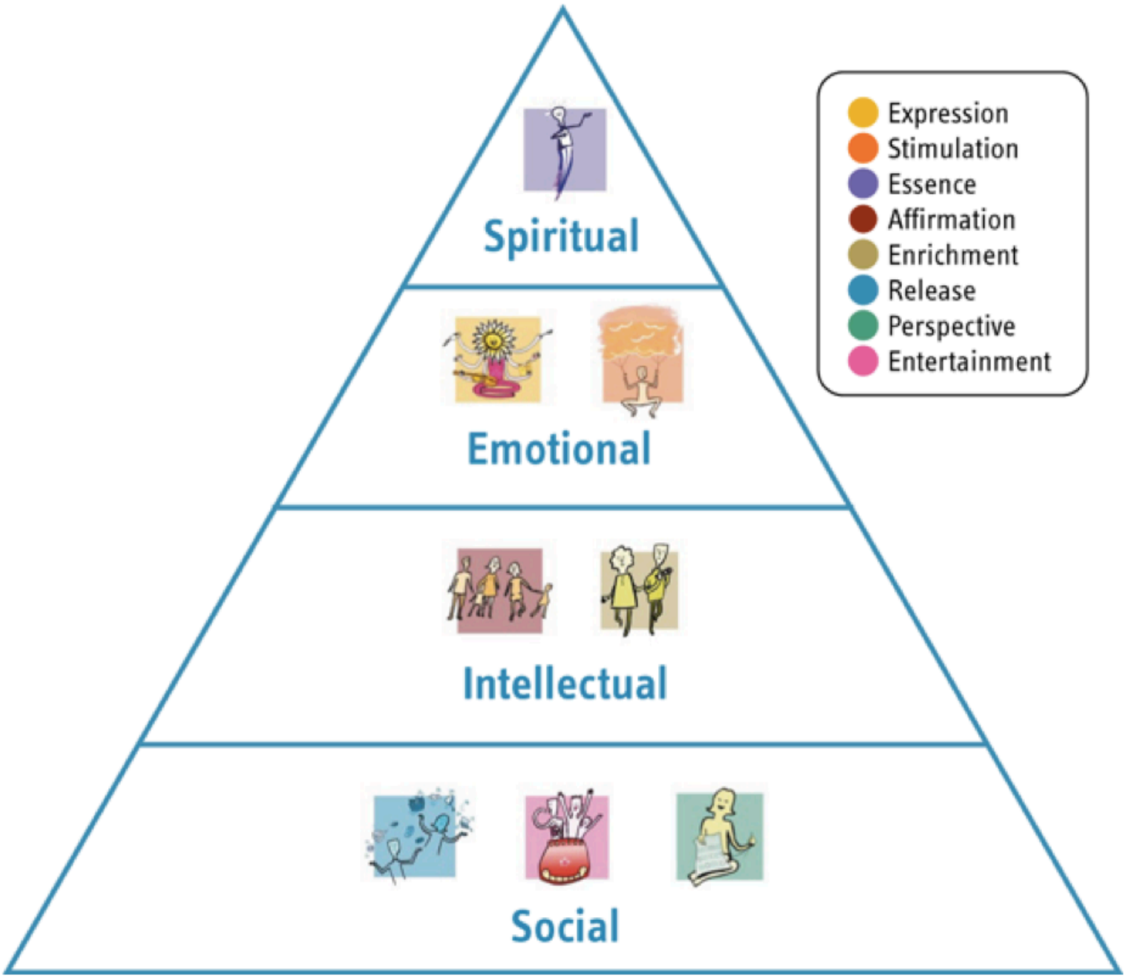
Figure 16 Motivations for engaging in culture, all motivations and main motivation, whole culture market

	Driver	All motivations	Main motivation
... helps me leave my daily life behind	Spiritual	74%	11%
... is a pleasant form of entertainment or a way to pass the time	Social	73%	17%
... allows me to spend time with friends and family	Social	61%	11%
... expands my knowledge	Intellectual	59%	5%
... allows me to see beautiful things in an attractive setting	Emotional	53%	1%
... allows me to see interesting buildings or places	Social	52%	2%
... allows me to enjoy being part of a communal or shared experience	Social	51%	3%
... enriches my quality of life, helps me to live life	Spiritual	49%	14%
... allows me to explore new interests and/or collect new experiences	Emotional	44%	3%
... allows me to pursue a hobby or personal interest	Intellectual	44%	5%
... helps me control stress	Social	43%	2%
... helps me keep fit, for my health	Social	40%	3%
... allows me to reflect and contemplate on the world	Spiritual	38%	4%
... gives me something new to talk about	Social	38%	1%
... allows me to feel the extremities of emotion	Emotional	36%	3%
... broadens my horizons and those of my family/children	Intellectual	31%	4%
... develops my creativity and imagination	Emotional	28%	1%
... lets me keep up with what others are talking about	Social	26%	0%
... allows me to discover new ways of doing things, innovation or new works of art	Emotional	24%	1%
... gives me a sense of nostalgia, a sense of stepping back in time	Emotional	23%	1%
... allows me to experience awe and wonder	Emotional	21%	1%
... develops my children's interests	Intellectual	20%	1%
... enriches my own cultural or personal identity or feel a personal connection	Emotional	16%	0%
... develops my skills, knowledge and give me a sense of accomplishment	Intellectual	15%	0%
... helps me to express myself and my feelings	Emotional	13%	0%
... helps me to express my ideas	Emotional	8%	0%

Primary motivations of the Culture Segments

It is also possible to plot the primary motivations among each segment on the hierarchy of motivations, to provide further contextual information. When attending the arts Essence are most likely to be coming for mainly spiritual reasons. Expressions tend to be emotionally motivated, wanting to feel connected to the subject personally. This hierarchy is typically cumulative – Stimulation for example are ultimately seeking an emotional outcome but are also like to engage intellectually while experiencing social benefits.

Mainly intellectually motivated segments are (when applicable) Affirmation and Enrichment. They want to improve their own knowledge and satisfy an interest in the subject matter. At the lower end of the hierarchy, attending the arts for mainly social reasons, are Release, Entertainment and Perspective.



6 Culture Segments characteristics

This chapter looks at differences between the profiles of the segments in Oslo and Akershus. While the segments are defined by their needs and sought outcomes around cultural engagement, we can also identify where there are other factors that help describe them. Therefore while members of each segment do not by definition share the same socio-demographic profile, we can identify which segments have higher than average incidents of particular traits.

6.1 Summary of key features by Culture Segment

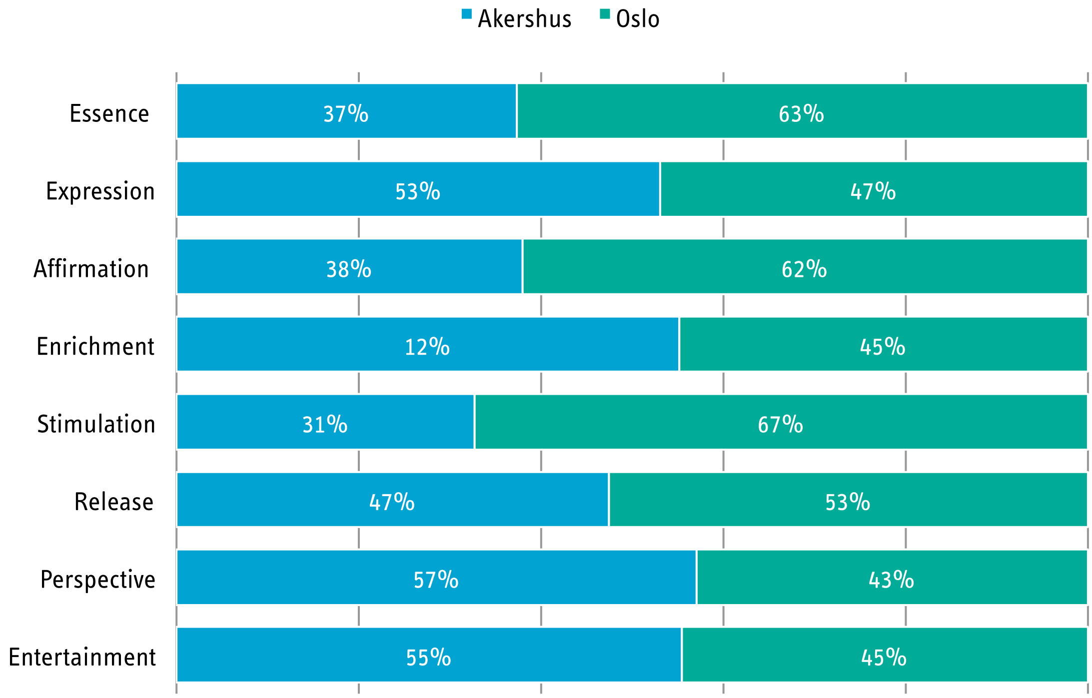
Segment	Distinguishing demographic features
Essence	Essence tends to be well educated. There is no significant age profile to the most culturally engaged segment, who are more likely to live in Oslo and specifically the desirable Frogner area.
Expression	With slightly higher numbers of older people in this segment, Expression are equally likely to live in Oslo or Arkershus, those in Oslo are more likely than other segments to live in Ås and are the segment most likely to love Ullensaker. Those living in Oslo are likely to enjoy St Hanshaugen with its park.
Affirmation	Affirmation is significantly more likely than any other segment to live in popular Grünerløkka with its cafés, bars and boutiques.
Enrichment	This segment includes people in all age groups though there are larger numbers in the older brackets and fewer under 34.
Stimulation	The Stimulation segment has a younger age profile and are significantly more likely to live where the action is – in Oslo rather than Arkershus – as the segment with the largest proportions is found in the city. Specifically they are more likely than other segments to live in family-centric Ullern and work in Grorud. Stimulation has the highest proportion of high earners.
Release	Release has a younger than average age profile and are more likely than any other segment to live in affordable Søndre Nordstrand.
Perspective	The segment with the second highest age profile, the fewest graduates and enjoying a quieter life, Perspective are more likely to live in Akershus than the other segments. Those who do live in Oslo are significantly more likely than any other segment to live in residential Bjerke.
Entertainment	Entertainment has a relatively young age profile (and the lowest proportions of 40-44). Those living in Oslo are more likely to live in Gamle Oslo.

6.2 Geo-demographic profile

Overall residence – Oslo and Akershus

The Perspective segment is significantly more likely to live in Akershus compared to all other segments (57% vs. 46% overall). Stimulation is significantly more likely than all other segments to live in Oslo (67% vs. 54% overall), followed by Essence (63%).

Figure 17 Culture segments overall residence – Oslo and Akershus



Base: 1,497

Residence by district - Akershus

We can also analyse origin within each district. There are a number of differences across those in each segment who live in Akershus.

Expression is significantly more likely to live in Ås (11% vs. 5% overall).

Both Stimulation and Release are significantly more likely to live in Asker (23% and 20% respectively vs. 9% overall). Stimulation is the most likely to segment to live in Sørum (11%vs. 4% overall).

Affirmation is the most likely group to live in Eidsvoll (13% vs. 3% overall). Perspective is the least likely group to live in Bærum (6% vs. 21% overall).

Entertainment is the most likely group to live in Nannestad (6% vs. 2% overall) as well as in Nesodden (9% vs. 3% overall).

Perspective is significantly more likely to live in Nes (Ak.)(14% vs. 4% overall). This segment is also significantly more likely than any of the other culture segments to live in Rælingen (7% vs. 2% overall).

Expression is the most likely group to live in Ullensaker (17% vs. 17% overall). Perspective is the least likely to do so (1%).

Residence by district - Oslo

Examining Oslo specifically, both the Expression and Affirmation segments are significantly more likely than any other segment to live in Vestre Aker (both 13% compared to 6% overall). This is generally a low deprivation area and known for its good transport links.

Expression is also significantly more likely than any other segment to live in St Hanshaugen (11% vs. 5% overall). They like this popular residential area because they like community and the outdoors; the St Hanshaugen park serves as a focal point

Affirmation is significantly more likely than any other segment to live in Grünerløkka (18% vs. 9% overall). The cafés, bars and boutiques in this area will suit their social life and offer a quality neighbourhood.

The Stimulation segment is significantly more likely to live in Ullern, an area popular with families (13% vs. 6% overall). This segment is also more likely than any other segment to live in Grorud (18% vs. 8% overall) a traditionally working class area; this segment appreciates the diversity Grorud offers.

The Essence segment is significantly more likely to live in Frogner, a desirable residential area (17% vs. 8% overall).

The Perspective segment is significantly more likely than any other segment to live in the popular residential district of Bjerke (19% vs. 5% overall).

Entertainment is significantly more likely to live in Gamle Oslo (20% vs. 8% overall). Known as ‘old Oslo’, with its historic buildings, large parks and botanical gardens this area appeals to a segment seeking a strong leisure offer.

Release is more likely than any other segment to live in Søndre Nordstrand, an area located in the southern suburbs which is perceived as a very affordable place to live (14% vs. 5%).

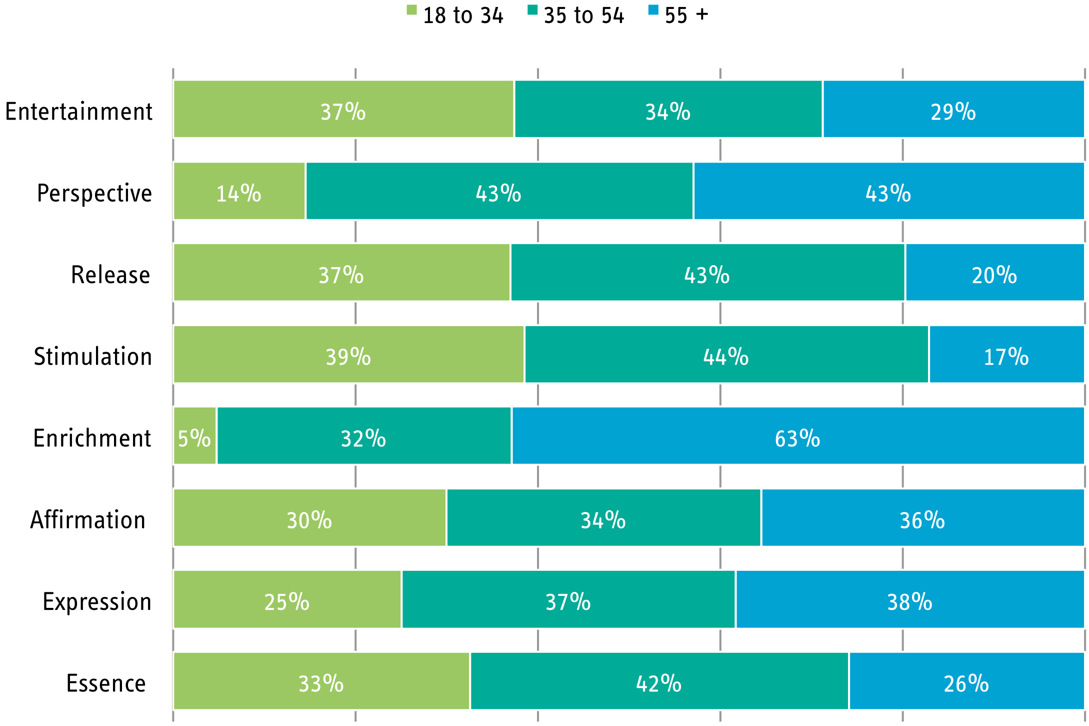
Origin

There is no significant difference between the segments with regard to geographic origin, with over 90% in each segment born in Norway. However, the Enrichment segment is significantly more likely than all other segments to include people born in Sweden (7% vs. 1% overall) and the Perspective segment is significantly more likely than all other segments to include people born in China (3% vs. less than 1% overall).

This means if seeking to reach audiences who were born outside Norway, they will be found in equal proportions in each of the Culture Segments. Therefore campaigns designed to reach and resonate with a particular segment based on segment needs and motivations are likely also to be successful in reaching these targets.

6.3 Age

Figure 18 Culture segments by age



Bases: 434 (18 to 34), 584 (35 to 54), 479 (55+)

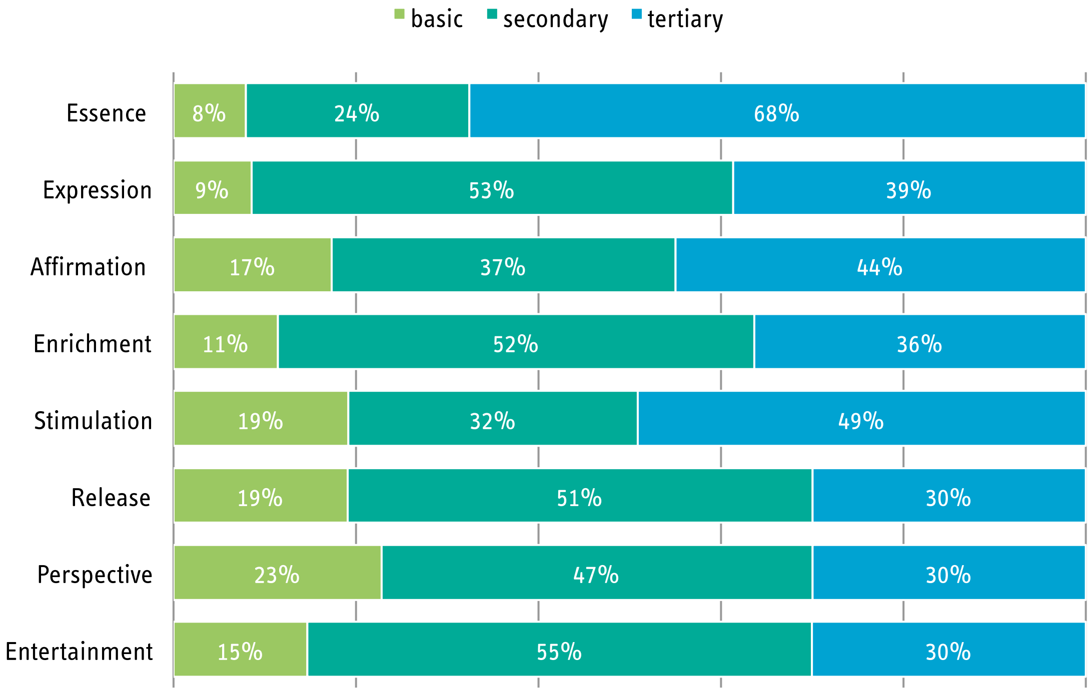
The model above shows that while not defined by age there are some differences in age profiles of the segments.

The Enrichment segment has an older age profile – those in this segment are significantly more likely to fall into the over 55s cohort (63%), followed by the Perspective segment (43% aged 55 or above). The Enrichment segment is significantly less likely than all other segments to include those aged between 18 and 34 (5%).

The Stimulation segment has a younger age profile with 39% in the '18 to 34' age cohort (39%).

6.4 Education

Figure 19 Culture segments by educational level



Bases: 224 (basic), 644 (secondary), 629 (tertiary)

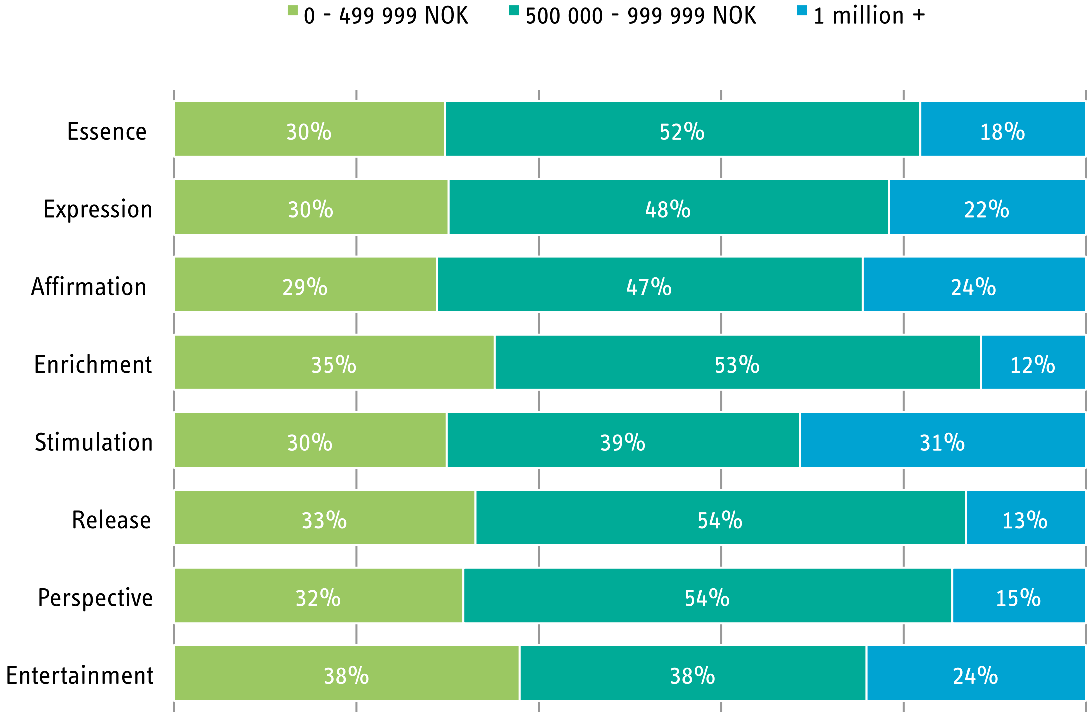
The Perspective segment is more likely than average to have achieved only a basic education (23%). Release is also slightly more likely to have only a basic education (both 19%).

Entertainment and Enrichment are most likely to have completed secondary education (55% and 53% respectively), closely followed by Release (51%).

Essence is the segment most likely to have completed tertiary education (68%). This does show that more culturally engaged segments tend to have higher levels of education. However as discussed elsewhere in this report this link is not causal and there are significant numbers of people with only basic education engaging in a range of cultural activities in Oslo and Akershus.

6.5 Income

Figure 20 Culture Segments by Income



Bases: 420 (0 – 499,999 NOK), 630 (500,000 – 999,999 NOK), 262 (1 million +)

There are few significant differences in income by segment. The only significant difference to emerge is with the Stimulation segment, who have the highest proportion in the top annual household income group of 1 million + (31%).

6.6 Politics

The Entrainment segment is more likely to have voted for Fremskrittspartiet, the Conservative liberal/classical liberal Progress Party (24%) and less likely than all other segments to have voted for Fremskrittspartiet (4%).

The Affirmation and Expression segments are all more likely than the other segments to have voted for Høyre, the Conservative Party (37% and 32% respectively). Perspective is also the most likely segment compared to all other segments to have voted Det Norske Arbeiderparti (Labour party) and Entertainment is the least likely segment to have done so (17%).

6.7 Reaching the segments - media profile and digital consumption

Media habits – newspaper readership

Figure 21 Media habits by culture segments – newspaper readership[3]

	Average total	Essence	Expression	Affirmation	Enrichment	Stimulation	Release	Perspective	Entertainment
Base	1064	212	168	91	84	175	94	156	84
Aftenposten	76%	79%	83%	78%	70%	81%	88%	60%	55%
Verdens Gang	57%	45%	65%	51%	58%	62%	60%	59%	64%
Other	34%	30%	31%	24%	50%	26%	22%	51%	46%
Dagbladet	48%	52%	58%	38%	32%	62%	52%	37%	35%
Ditt Oslo - lokalavisen	32%	38%	32%	29%	30%	41%	31%	24%	22%
Dagens Naeringsliv	27%	33%	31%	24%	17%	24%	27%	19%	31%
Dagsavisen	15%	22%	19%	22%	12%	13%	11%	6%	15%
Morgenbladet	8%	16%	6%	4%	2%	9%	7%	8%	-
Utrop	1%	1%	1%	-	3%	1%	0%	-	-

Aftenposten remains the biggest newspaper in Norway, and the Release and Expression segments are significantly more likely to read it than all other segments (88% and 83% respectively vs. 76% of those who read newspapers).

Stimulation is significantly more likely than any other segment to read tabloid and business focused Dagbladet (62%) closely followed by Expression (58% vs 48% of those who read newspapers). Dagbladet is far less widely read by Entertainment and Enrichment.

The Stimulation segment is also significantly more likely than any other segment to read Ditt Oslo – lokalavisen (41% vs. 32% of those who read newspapers).

[3] Please note: this data is of those respondents who claimed to read a newspaper, not the overall sample.

Media habits – magazine readership

Magazine readership is much lower than newspaper readership – only 15% of the research sample regularly read magazines. As such this data should be interpreted with caution.

Essence is more likely than any other segment to read Obos bladet.

The Expression segment is slightly more likely than any other segment to read Plan B.

The Perspective segment is slightly more likely than any other segment to read Vi I Villa, Interiørmagasinet, KK, Det Nye and Henne.

Information sources for cultural activities

Word of mouth is a key source of information for all segments, providing trusted recommendations between people who know one another. TV and national and local newspapers are also well used as information sources. Venue's own websites also play a role but those segments who are more engaged are more likely to use these sources.

On the whole those living in Oslo use more information sources than those in Akershus – particularly posters on public transport, but also venue websites and other digital 'what's on' platforms. There are also differences between the segments that can inform differentiated communications campaigns.

Essences use the widest range of information sources though they are less likely than other segments to look to television for what's on information and rely less on listings magazines. They are the segment most likely to look to a venue's own websites and leaflets, brochures and flyers as well as posters and adverts outside venues themselves. They also look in local and national newspapers and three quarters of them are influenced by word of mouth and personal recommendation. This reflects their broad tastes, independent mind-set and desire to explore a broad range of cultural experiences.

Expression are far less likely to look to a venue's website, favouring newspapers and radio as well as posters outside venues and in over ground trains and railway stations.

Stimulation also use a range of sources but are biased towards published media looking to what's on pages in local papers, national newspapers and lifestyle/ special interest magazines as well as websites of newspapers and magazines. Word of mouth is an important source for Stimulation and they are engaged in wider digital networks, using email newsletters, artist websites and as such are the most likely to segment to use social media and microblogs as what's on information sources.

Affirmation and are more likely to look to larger budget advertising seeing posters on the Metro/Tunnelbana as well as posters in bus stations and national newspapers. They do use venues' own websites and online listings when they want to find out what is on.

Enrichment, Release, Perspective and Entertainment all use fewer of these sources though Release are more likely to directly visit a venue's website and use posters and billboards in a range of places and TV as information sources.

Entertainment are less likely to notice posters and advertising and are the segment least likely to use venues' own printed publications. They may look to TV or newspaper and magazine websites and as with most segments word of mouth is relatively important. This may reflect the fact that they are generally less likely to engage in culture – they don't seek out cultural experiences and only come across those that are marketed to a mass audience.

Use of digital technologies

Overall Stimulation is the most digitally engaged segment and Enrichment the least.

The Stimulation segment is the group most likely to use a smart phone (92%). Perspective and Enrichment are significantly less likely to use a smart phone than all other segments (73% and 68% respectively).

Essence and Stimulation are significantly more likely to use an audio/MP3 player (42% and 40% respectively). Affirmation and Enrichment are significantly less likely to use these devices (21% and 20% respectively).

Enrichment is significantly less likely to use a tablet computer compared to all other segments (36%). Essence is the most likely group to use a portable laptop computer (91%). Release is significantly less likely to do so compared to all other segments (76%).

Online behaviour

Figure 22 Online behaviour by Culture Segment

	Average total	Essence	Expression	Affirmation	Enrichment	Stimulation	Release	Perspective	Entertainment
Base	1497	258	203	123	102	219	187	217	189
Looking at newspaper content	54%	51%	51%	50%	41%	70%	65%	42%	55%
Reading / sending emails	46%	54%	48%	41%	51%	50%	45%	45%	31%
Social networking	40%	38%	37%	40%	22%	53%	47%	35%	39%
Other web browsing	40%	42%	32%	39%	26%	47%	45%	37%	48%
Learning / gaining understanding	20%	31%	19%	12%	9%	33%	17%	10%	13%
Listening / streaming audio	19%	23%	15%	19%	8%	31%	19%	14%	17%
Watching streaming video	15%	10%	16%	18%	7%	20%	17%	10%	22%
Playing networked games	11%	8%	4%	9%	11%	12%	17%	10%	17%
Online banking	9%	8%	10%	7%	14%	12%	9%	3%	11%
Online shopping	7%	6%	5%	6%	0%	9%	7%	6%	11%
Uploading photos	5%	5%	7%	1%	1%	11%	2%	6%	2%
Downloading video	4%	3%	2%	3%	0%	14%	1%	2%	1%
Downloading music	3%	4%	3%	2%	1%	8%	2%	2%	1%
Microblogging	3%	3%	1%	1%	1%	7%	1%	2%	4%
Downloading podcasts	3%	2%	4%	0%	1%	8%	3%	1%	1%
Uploading audio / video	2%	2%	2%	3%	-	6%	1%	0%	1%
Blogging	1%	2%	2%	1%	1%	1%	-	1%	1%
Online rating	1%	2%	2%	2%	1%	3%	1%	-	0%

In addition to digital devices, we can also examine what behaviours each segment tends to undertake online.

Stimulation is the most likely group to listen to live streaming audio (31%). Enrichment is significantly less likely to do this (8%).

Stimulation are consequently significantly less likely than all other Culture Segments to download music and then listen to it later (8%) and download podcasts and listen to them later (8%). This segment is also however significantly more likely to download a video and watch it later (14%), upload photos (11%), upload audio or video (6%) and microblog (7%).

Stimulation is the most likely segment to use social networking sites (53%). Enrichment is the least likely group to do so (22%).

Essence and Enrichment are least likely watch a streaming video (10% and 7% respectively).

Stimulation and Release are the most likely segments to look at newspaper content online (70% and 65% respectively). Perspective and Enrichment are significantly less likely to do so (42% and 41% respectively).

Enrichment is significantly less likely than any other segment to shop online (0%). Perspective is the least likely group to use online banking/pay bills online (3%).

Stimulation and Essence are the two segments significantly more likely to go online to learn/gain an understanding / enrich knowledge (33% and 31% respectively). Perspective and Enrichment are the least likely to do this (10% and 9% respectively).

Entertainment and Release are the most likely group to play networked games (both 17%). Expression is the least likely group to do so (4%).

Culturally engaged Essence also use online platforms for learning and knowledge gain and busy Release are high users of online newspaper content. Less culturally engaged Entertainment use the Internet for general web browsing but not for personal development. This segment does also use online newspapers.

7 Performing arts market

7.1 Culture Segments and the performing arts

The performing arts market has even higher proportions of the most engaged segment - Essence - than the already high proportion in the overall culture market.

Segments that are typically less engaged – Entertainment and Release – are found in smaller proportions in the performing arts market than the wider cultural market. These segments are open to more ‘popularist’ artforms such as comedy gigs and cinema as well as visiting museums.

Performing arts potentially represent a greater risk to less culturally active audiences than some other cultural offers. The performing arts experience is typically more formally structured and the visit less within the control of the visitor. In a museum or at a rock concert it is appropriate to talk, move at your own pace, come and go – or indeed leave if the show is not to your taste.

To engage more people in performing arts experiences we need to better communicate the unique benefits of these experiences – the intense dynamics of live performance and power of real-time, shared experiences.

It can be difficult to envisage from marketing alone, what a production or performance will look and feel like – in particular, but not exclusively, for those who have not had many previous similar experiences.

As well as marketing messages needing to better articulate the experience, people welcome opportunities to ‘try before you buy’. This might involve offering more access to the creative process and insight into the artists – helping to build confidence but also a desire to experience the resultant performance.

Being able to sample the work through video and audio clips, to prepare through pre performance introductions, carefully considered programme content (freely available in advance) can also be beneficial. Preparation not only decreases the sense of risk but also very often improves the resultant experience.

Live broadcasts online and in cinemas have proved to be useful entry points for audiences curious about trying a new artform in a more casual and familiar setting. This ‘Theatre/Opera/Ballet live’ concept has been a successful alternative distribution model in itself, as well as encouraging people to graduate to live in-theatre experiences.

Culture Segments insight can inform the most appropriate approaches to maximise these factors in order to encourage performing arts attendance. These segment-specific strategies can be effective:

Essence

This is the segment most dominant in the performing arts market and most likely to recognise the benefits, but not all will have experienced the performing arts. They dislike feeling marketed to or patronised and those who are not currently engaging are more likely than other segments to be engaging in some form of culture already. It is possible they are either unaware of – or rejecting – current marketing and would respond to more direct, genuine descriptions of the experiences on offer than sales copy.

Expression

This segment loves to connect. Provide insight into the creative process, revealing something of the artists, their backgrounds and personal connection to the work. Highlight the shared experience and opportunity to be part of something bigger. In particular identifying any opportunities for participation. Expression respond positively to the idea of "live" performance but want to feel that as an audience member they are playing an active not passive role. Create and communicate opportunities to participate, get involved and join in in discussion and debate after the event.

Affirmation

Affirmation leaves nothing to chance. Communicate and evidence that every aspect of the offer will meet their needs – social as well as intellectual. Promote details of all aspects of the evening – from the pre-show meal options to the bar in the interval and where to go after the show – as well as what will happen on the platform.

The Affirmation segment also want to align themselves with well-developed brands that they feel positively reflect their own self-image. To engage them, focus on developing a consistently clearly articulated, relevant brand promise.

Enrichment

Enrichment are wary of commercialisation, they value integrity and substance. Make connections and draw similarities with well-known works, highlighting traditional and well-established aspects. They may be more likely to take a risk on a new artform or experience where it is likely they will like at least some of it. Clips and samples will help them know what they are letting themselves in for. Opportunities to attend for free (or a reduced price) for the first time may be an effective introduction.

Stimulation

Communications aimed at Stimulation need to project the performing arts as cool and relevant. Offer opportunities to engage digitally. Challenge their preconceptions head on and dispel any myths about theatre being staid or traditional. Target Stimulation with new, relevant work – especially those in unusual settings or those with innovative or cross-artform content. Highlight the unusual aspect, that which makes it quirky or different, that which promises an exciting and dynamic experience.

Release

The Release segment may well currently reject the performing arts for practical reasons of time, other priorities (and in this context money). They need convincing that this is a valuable use of their time and that it can meet their social needs. Flexibility, more targeted marketing and concierge-style customer services will demonstrate you understand their pressures and are ready and willing to respond.

Perspective

Rather than pull marketing to convince Perspective to attend a performance, strategically placed messages around the benefits of live performances that link to places where video or audio clips and supporting articles about the work will help them feel it is their own discovery.

Entertainment

Looking for a great, sociable night out, Entertainment need further convincing of the social benefits of theatre and performing arts. They are more likely to respond to cinema style advertising that bring home the popularity of a show, and prove its mass endorsement. There is little point marketing new, untested work to this segment but once something has gained mainstream traction, hype can be built around it making it a must-see event.

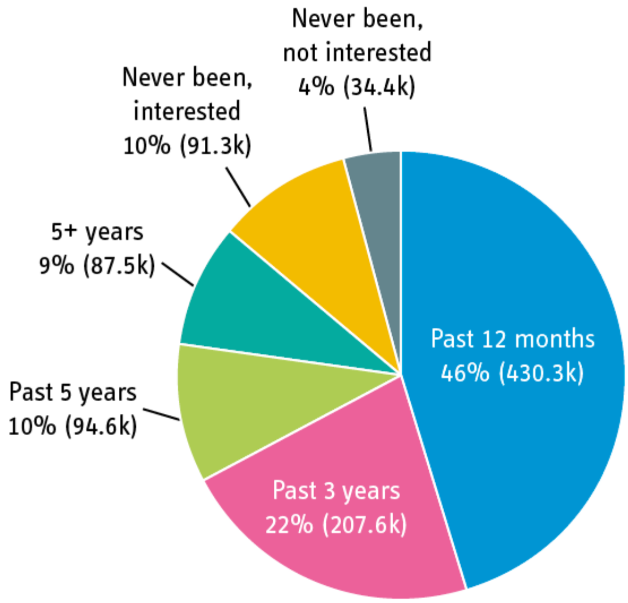
7.2 Defining the market

For the purpose of comparing the performing arts market with the wider culture market, we define the performing arts market as including classical music, opera, plays or dramas and any dance performances. We do not include more 'mainstream' activities such as musicals or pop/rock concerts.

7.3 Market size and potential

87% of culture market has ever been to a performing arts event. We classify these as 'in the performing arts market'. This equates to 820k people. (732.5k have been in the past 5 years). A further 91.3k have never been to a performing arts event, but would be interested in doing so in future.

Figure 23 Engagement with performing arts, whole culture market



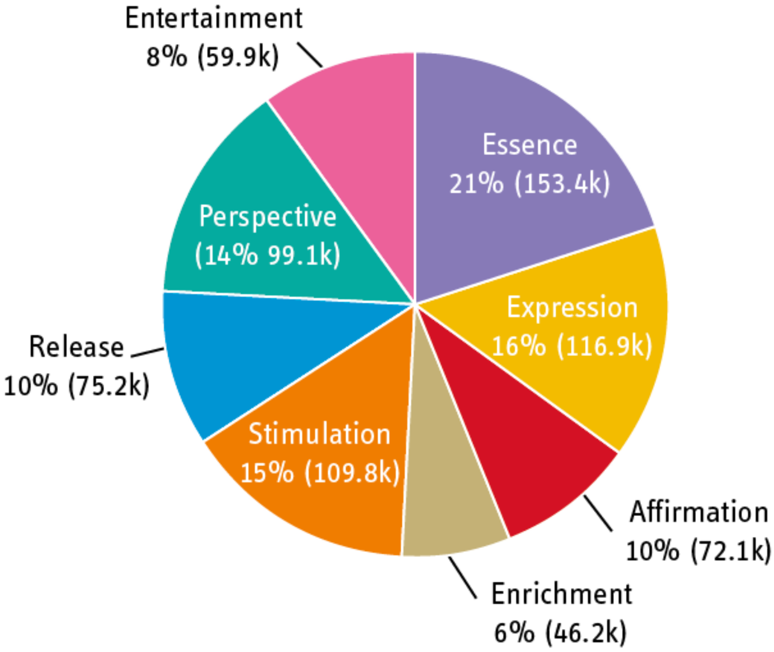
Base: 1,497

This model illustrates that even the recent market for performing arts – those who have attended in the past 12 months – is substantial. Only 4% of the culture market counts themselves out of attending a performing arts event. There is huge potential to develop among those who have ever attended – before even considering the 10% who haven't but would consider doing so.

7.4 Market profile

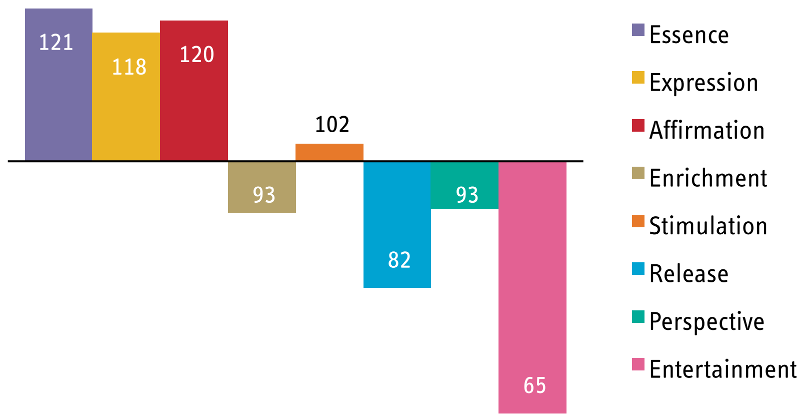
The models below illustrates the overall Culture Segments profile of the performing arts market, and index this profile against the whole culture market.

Figure 24 Culture Segment profile, performing arts market (attended a performing arts event in the past 5 years)



Base: 1,298

Figure 25 Culture segment profile of Performing arts market (5 years), indexed against culture market



Base: 1,298

This model shows that Oslo's largest segment, Essence, makes up an even larger proportion of the performing arts market than they do the overall culture market. Release and Entertainment make up smaller proportions.

The table below illustrates both percentages and real numbers of each segment in each market. It shows that almost all of the Essence segment in the culture market (163.2k) are also in the performing arts market (161.2k).

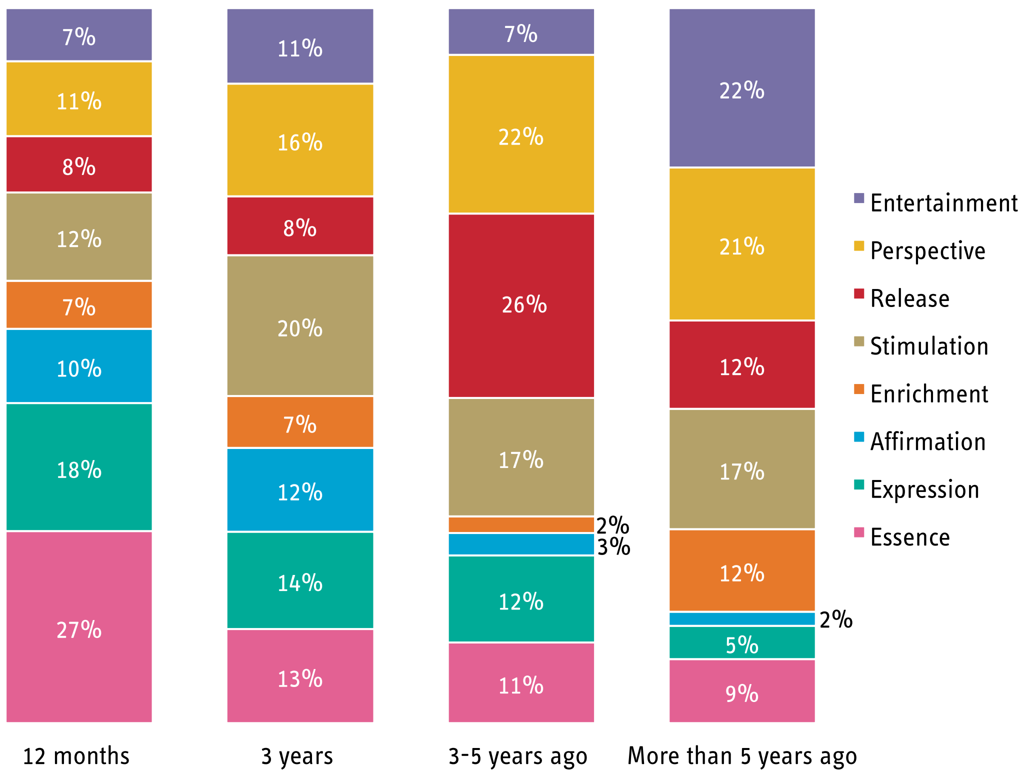
In contrast, only around 66% of those in the Entertainment segment are in both the performing arts market and the culture market.

Figure 26 Percentages and real numbers for Culture Segments profile of the performing arts market (past 5 years) and the whole culture market

Culture Segment	Culture market %	Culture market Number	Performing arts market %	Performing arts market Number
Essence	17%	163,200	21%	153,400
Expression	14%	128,000	16%	116,900
Affirmation	8%	77,700	10%	72,100
Enrichment	7%	64,200	6%	46,200
Stimulation	15%	138,300	15%	109,800
Release	12%	117,900	10%	75,200
Perspective	14%	137,000	14%	99,100
Entertainment	13%	119,300	8%	59,900

As shows, the majority of the culture market is also in the performing arts market. In order to gain a better understanding of who attends performing arts events we can also look at the Culture Segments profile of more recent and less recent attenders. The model below splits the performing arts market into four categories – those who have attended in the past 12 months, the past 3 years (but more than 12 months ago), 2-5 years ago and more than 5 years ago.

Figure 27 Culture segments profile of performing arts market, by recency



Bases: 681 (12 months), 329 (3 years), 150 (3-5 years), 139 (more than 5 years).

When we analyse the performing arts market according to recency of attendance a clearer pattern emerges. Essence and Expression make up a larger proportion of the most frequent attenders, whilst Entertainment, Perspective and Release are much more likely to appear as lapsed attenders.

Artform markets

8 Artform markets

8.1 Culture Segments and the artform markets

There are some differences between the Culture Segments profiles for the different performing artforms.

The contemporary dance and ballet markets have the largest proportions of confident Essence – suggesting those that are already the most culturally engaged are more likely to be attracted to these more challenging forms of dance. Consequently they also hold smaller proportions of risk-averse Enrichment and Entertainment and larger proportions of conscientious Affirmation. The contemporary dance market also holds higher than average proportions of adventurous, risk-taking Stimulation.

The classical music and opera markets have slightly higher proportions of artistic and emotional Expression and the play/drama market is most similar to the overall culture market, albeit with smaller numbers of Entertainment as is found throughout the performing arts.

Developing audiences in these markets

Contemporary dance: As the smallest current market, there is potential to develop contemporary dance attendance within the dominant market segments. In particular there are more Essence and Stimulation in the wider market to be attracted to contemporary dance by selling the visceral and challenge nature of the experience to these open, adventurous audiences. Affirmation too, are keen to ensure they are experiencing the worthwhile things in life. Though they need to be more confident about what they are letting themselves in for – and that a visit will be enjoyable and meet social needs.

Ballet: There is a big potential market for ballet. 29% of the market has been to a ballet and a further third would be interested in doing so. The Essence and Affirmation segments are over indexed in these markets and while there may be further room for growth here, there may also be opportunities within Expression and Stimulation who will need to be convinced that ballet can be vital, communicative and emotional rather than a verbose, passive, less connective experience.

Classical music: 43% of the culture market has at some point in time been to a classical concert and a further 22% would be interested in doing so. Combined that is 65% of the culture market – not quite the niche artform it often purported to be. Essence over-indexes in the classical music market (a is the case with many artform markets). Expression, Affirmation and Enrichment only modestly over-index, suggesting there is scope to grow these segments within the classical music market. We might expect to see further penetration into classical music in the Expression segment in particular. Expression responds positively to the idea of a sense of connection with a musician and how they express themselves through their craft. Enrichment are likely to listen to recordings of music they know and love but need further convincing that something extra is to be gained from live performance that cannot be experienced at home.

Opera: The opera market is active and there is still remaining potential (33% of the culture market have never been but would consider it). There is a slightly more even spread of Culture Segments than in the dance and classical music markets suggesting that opera is considered in Oslo to be more appealing to more people. While Essence is the largest segment it is less dominant, with larger proportions of Expression, Affirmation and Enrichment. This may reflect the relatively recent opening of the new Oslo Opera House turning the spotlight onto opera. The consequence of this is that individual venues and companies have greater choice as to which segments they target. However, it would be typical to see Essence dominating the market for Opera.

Plays/ drama: By far the largest market only 7% are not interested in attending a play or drama and the large majority of those who are interested have attended (with a third doing so in the past year). This penetration into the culture market is reflected in broader penetration into more segments, making this market most similar to the culture market overall. Developing audiences for plays and drama will depend on the type of work. The segment most absent from this market is Entertainment whose occasional forays into culture are likely to be at the more mainstream popularist end of the spectrum.

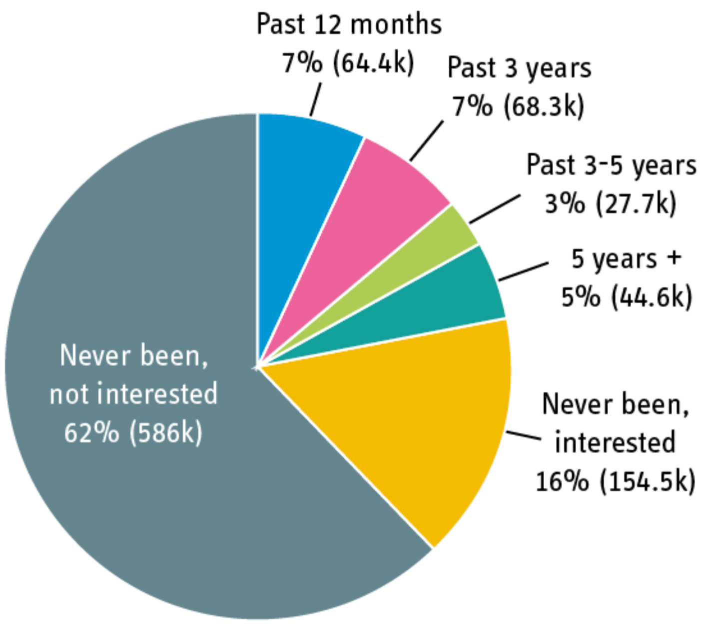
8.2 Contemporary dance market

Market size

22% of the culture market has ever attended a contemporary dance performance. This equates to 205,000 people. (160,400 have been in the past 5 years). The model below illustrates the market potential for contemporary dance within the whole culture market. While this is the smallest artform market with 62% not interested in attending, 16% have never been to a contemporary dance performance but would be interested in doing so offering potential for growth.

Market potential

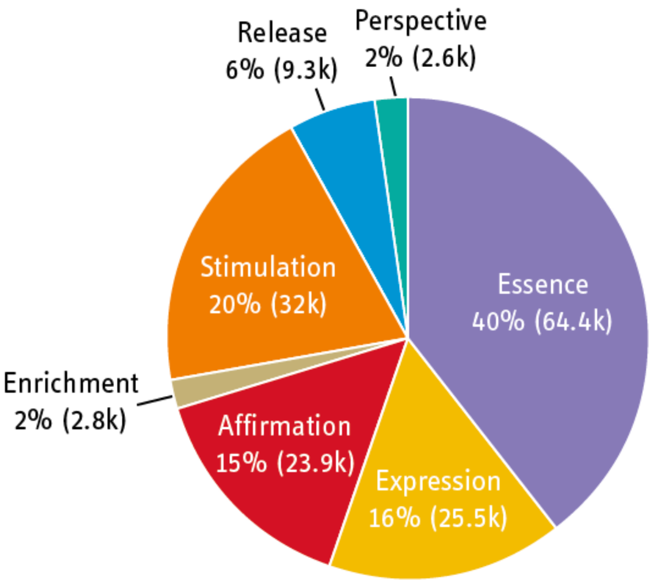
Figure 28 Market potential, contemporary dance market, of the whole culture market



Base: 1,497

Market profile

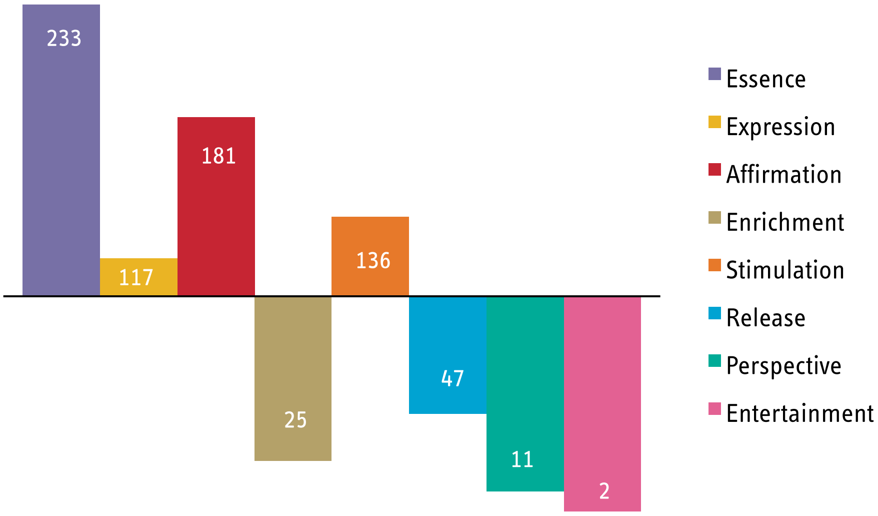
Figure 29 Culture Segment profile, been to contemporary dance in the past 5 years



Base: 254

The contemporary dance market is made up primarily of Essence and Stimulation, collectively accounting for 62% of the market. Together with Affirmation and Expression, these four segments account for 90% of the market.

Figure 30 Culture Segment profile, been to contemporary dance (5 years), indexed against Culture Market



Base: 254

Essence, Affirmation and Stimulation make up a disproportionately large part of the contemporary dance market. Enrichment, Release, Perspective and Entertainment are almost entirely absent.

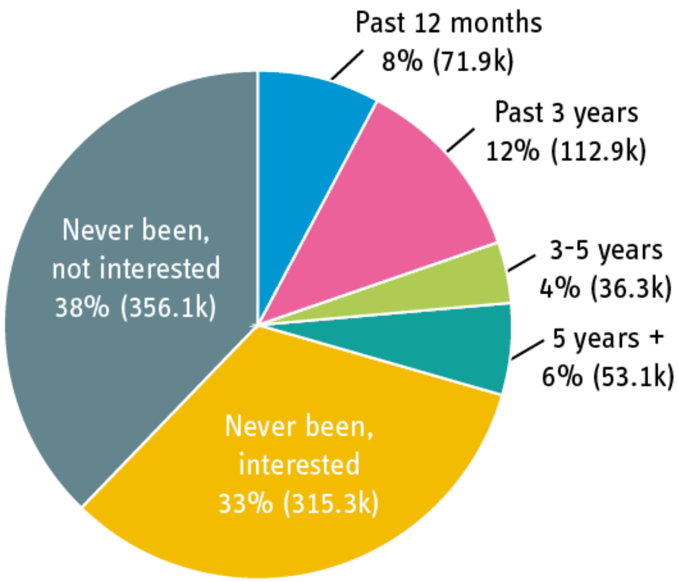
8.3 Ballet market

Market size

29% of the culture market has ever attended a ballet performance. This equates to 274,100 people. (221,100 have been in the past 5 years). The model below illustrates the market potential for ballet within the whole culture market.

Market potential

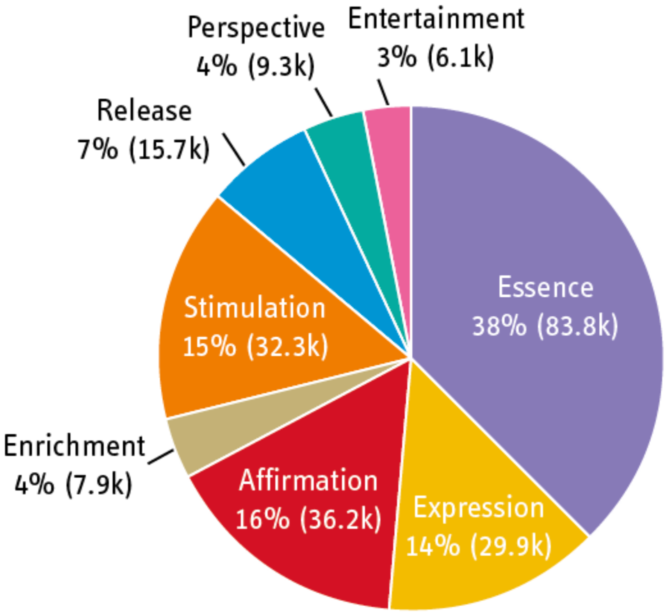
Figure 31 Market potential, ballet market, of the whole culture market



Base: 1,497

Market profile

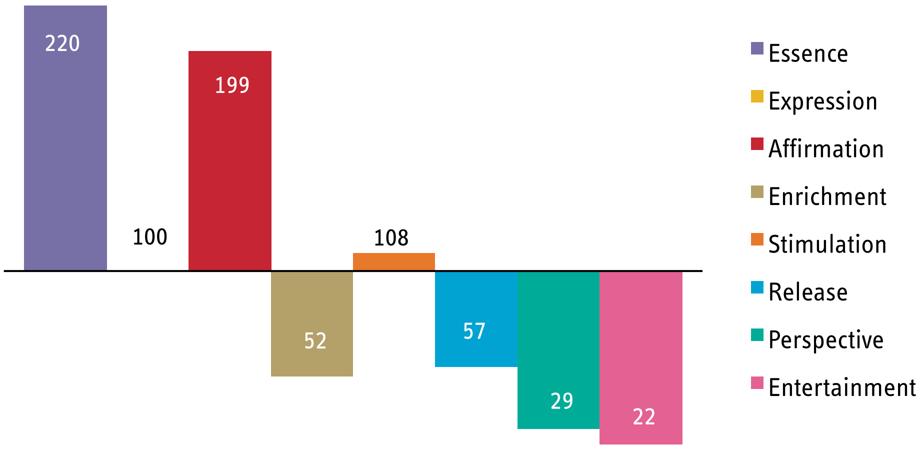
Figure 32 Culture Segment profile, been to ballet in the past 5 years



Base: 350

Essence is the largest segment in the ballet market, with Stimulation, Affirmation and Expression making similar, smaller proportions of attendances.

Figure 33 Culture Segment profile, been to ballet (5 years), indexed against Culture Market



Base: 350

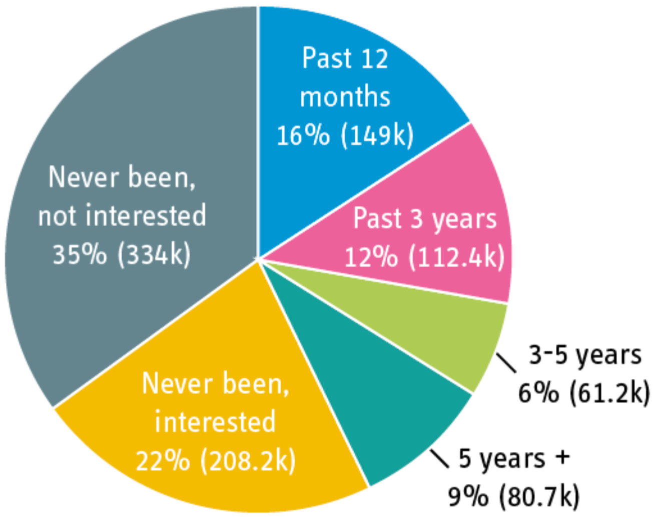
8.4 Classical music market

Market size

43% of the culture market has ever attended a classical music performance. This equates to 403,300 people. (322,600 have been in the past 5 years). The model below illustrates the market potential for classical music within the whole culture market. Over 4 in 10 (43%) of the culture market had ever been to a classical music performance, and a further 2 in 10 (22%) would be interested in attending a performance making the combined lapsed and potential market larger than the more recent market.

Market potential

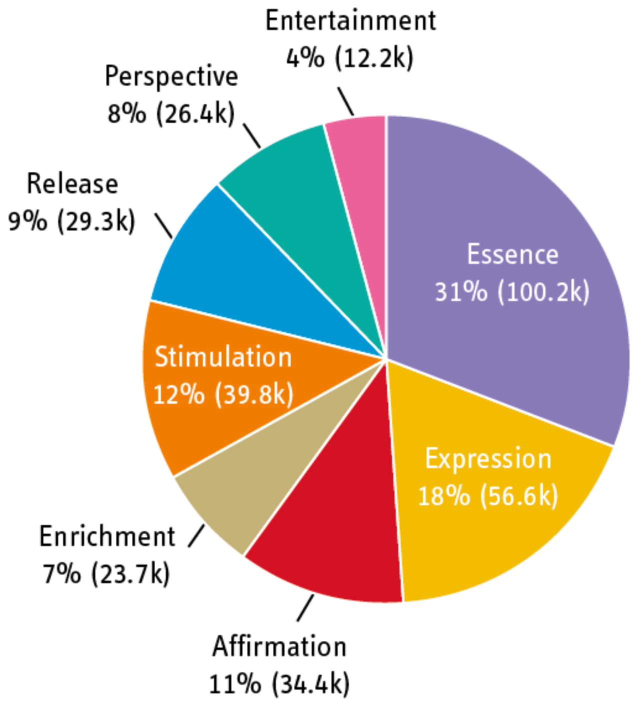
Figure 34 Market potential, classical music market, of the whole culture market



Base: 1,497

Market profile

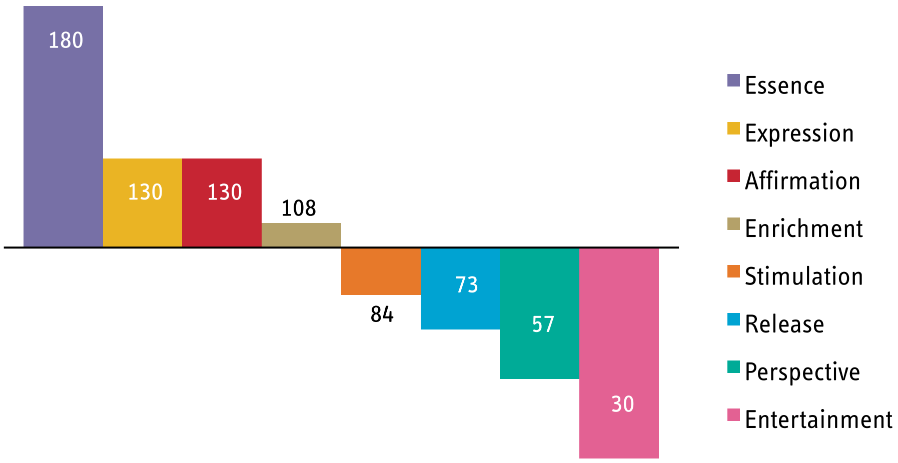
Figure 35 Culture Segment profile, been to classical music in the past 5 years



Base: 511

The two largest segments in the classical music market are Essence and Expression, collectively accounting for 49% of the market.

Figure 36 Culture Segment profile, been to classical music (5 years) indexed against Culture Market



Base: 511

The only segment which the classical music market over-indexes on significantly is Essence. Expression, Affirmation and Enrichment are only slightly more likely to feature in the classical music market than the culture market overall.

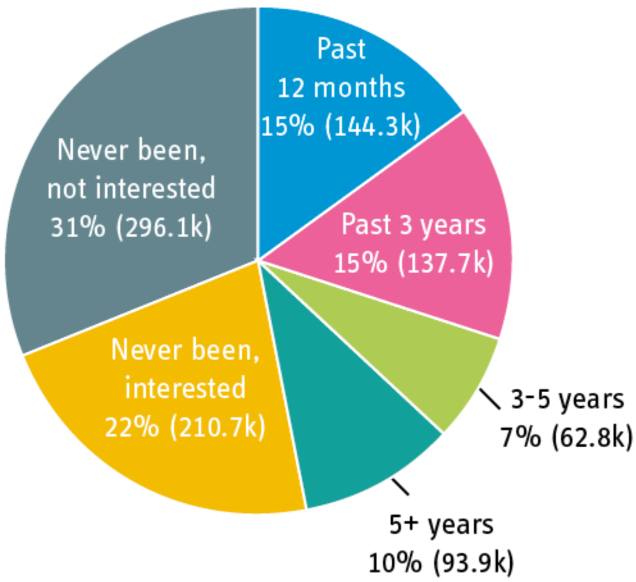
8.5 Opera market

Market size

46% of the culture market has ever attended an opera performance. This equates to 438,800 people. (344,800 have been in the past 5 years). The model below illustrates the market potential for opera within the whole culture market. Almost half (46%) of the culture market have ever been to an opera performance, but most of these last attended more than 12 months ago.

Market potential

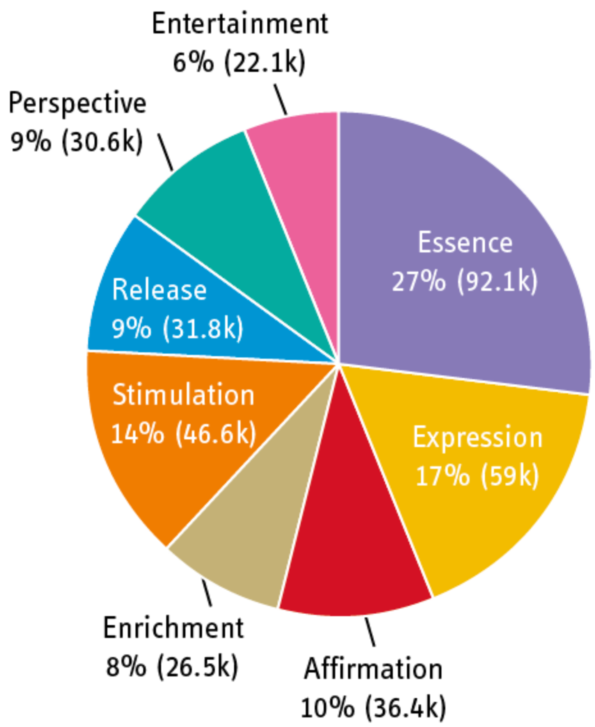
Figure 37 Market potential, opera market, of the whole culture market



Base: 1,497

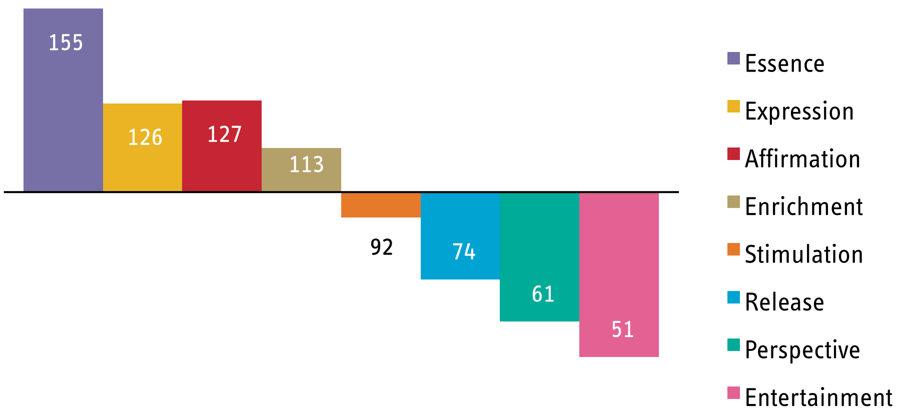
Market profile

Figure 38 Culture Segment profile, been to opera in the past 5 years



Base: 546

Figure 39 Culture Segment profile, been to opera (5 years), indexed against Culture Market



Base: 546

As with the classical music market, the only segment which the opera market over-indexes on significantly is Essence.

8.6 Play or drama market

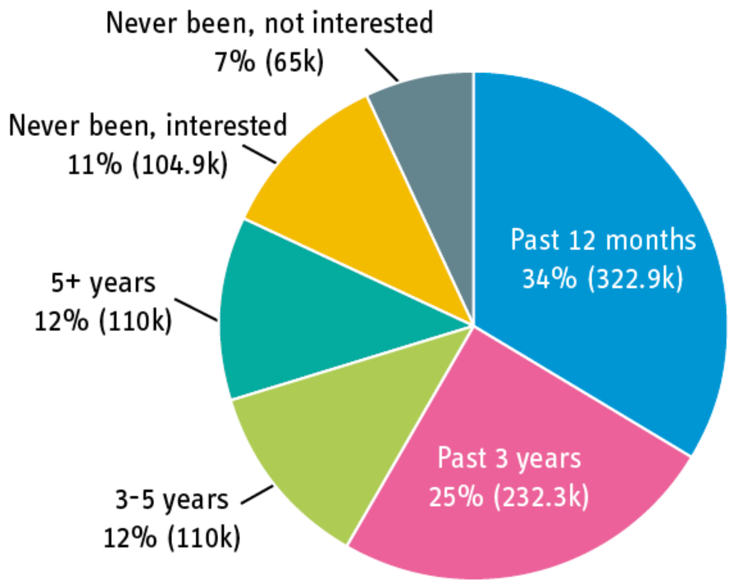
Market size

82% of the culture market has ever attended a play or drama. This equates to 775,600 people. (675,200 have been in the past 5 years). The model below illustrates the market potential for plays or drama within the whole culture market.

The majority of those in the culture market have also been to a play or drama, and 1 in 3 (34%) have attended in the past 12 months.

Market potential

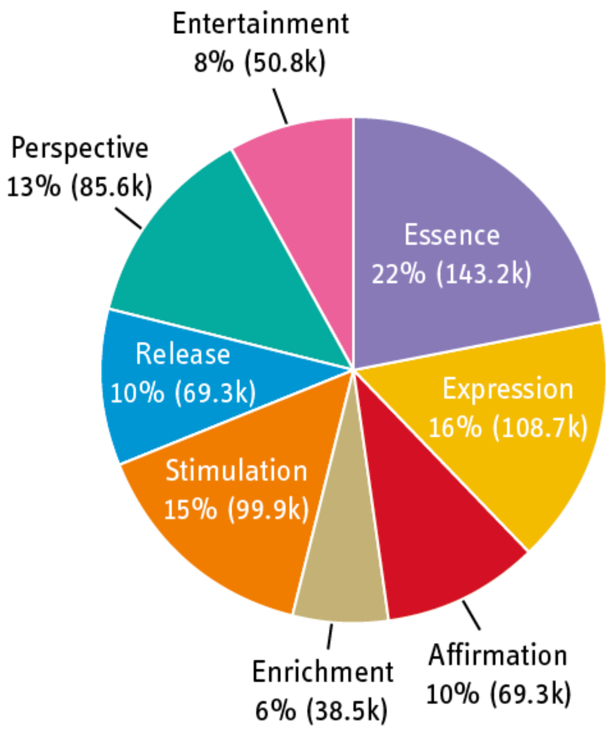
Figure 40 Market potential, play or drama market, of the whole culture market



Base: 1,497

Market profile

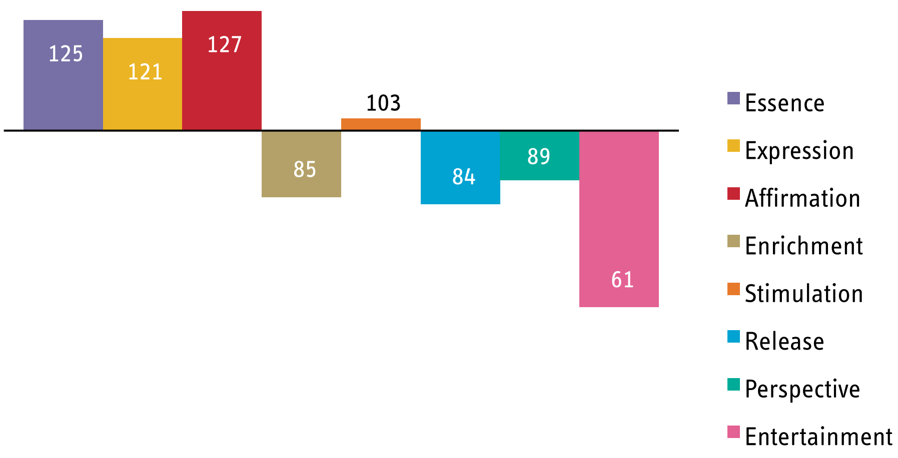
Figure 41 Culture Segment profile, been to a play or drama in the past 5 years



Base: 1,228

The play or drama market sees a much more even distribution of the Culture Segments than for other artforms.

Figure 42 Culture Segment profile, been to a play or drama (5 years), indexed against Culture Market



Base: 1,054

With the exception of Entertainment, all other culture segments are well represented in the play or drama market and the profile is more similar to the overall culture market.

Institution markets

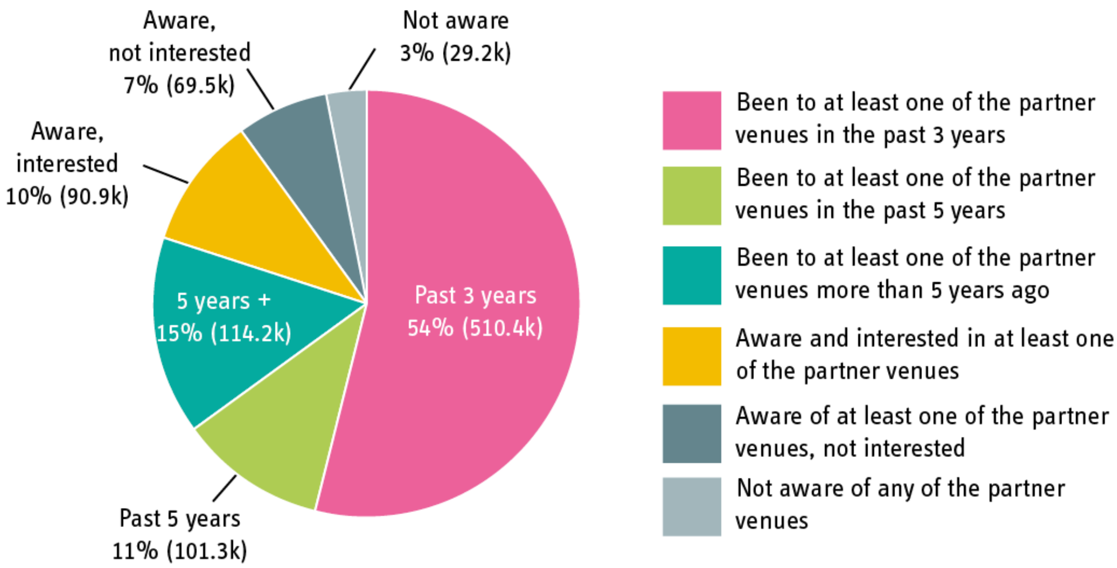
9 Overall user market

For the purpose of this project we define users as those who have attended at least one of the five partner institutions[4] in the past 5 years. This chapter briefly summarises their overall profile.

The model below illustrates overall attendance across the five institutions. Attendance is analysed using a hierarchy, so if a respondent has attended any one of the venues in the past 3 years, then they fall into the 'past 3 years' cohort.

Market penetration

Figure 43 Combined market penetration, five partner institutions, of the whole culture market



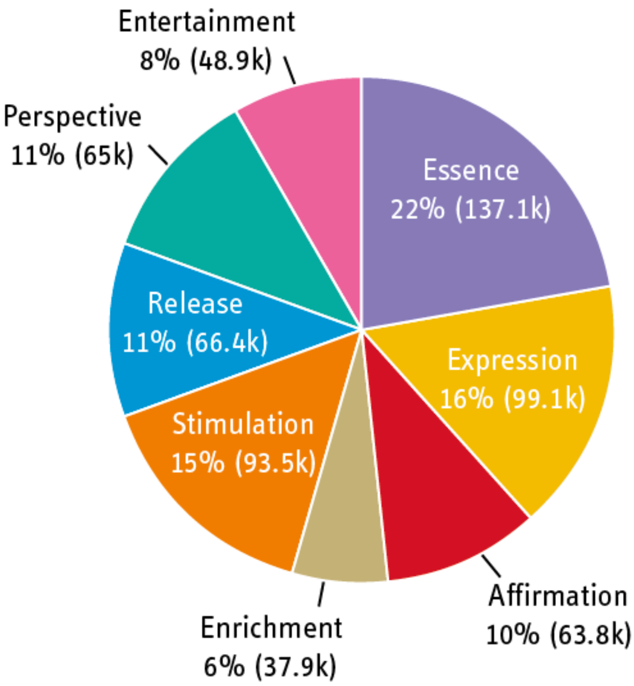
Base: 1,497

Overall 65% of the culture market has engaged with at least one of the partner institutions in the past 5 years, with the majority of these doing so in the past 3 years.

[4] Dansens Hus, NationalTheatret, Den Norske Opera & Ballett, Det Norske Teatret and Oslo Filharmonien.

Market profile

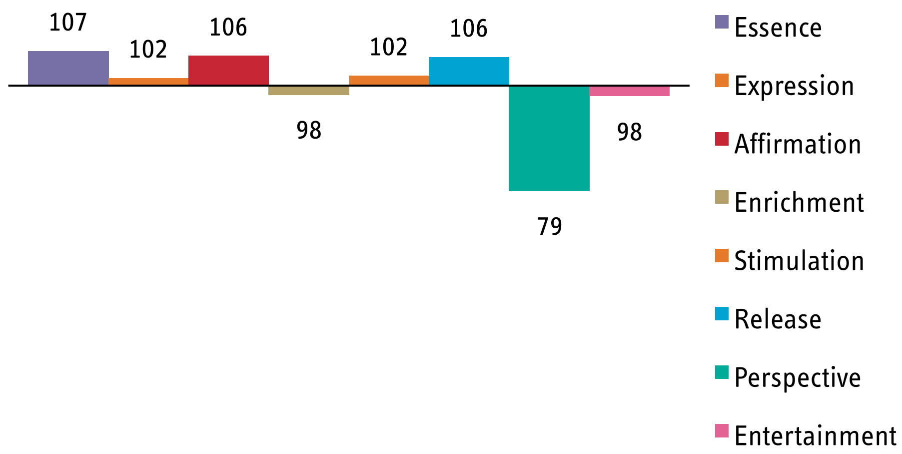
Figure 44 Culture Segments profile, been to at least one of the partner institutions in the past 5 years



Base: 969

The dominant segments amongst the institutions' collective 5-year market are Essence, Expression and Stimulation, collectively accounting for just over half (54%) of attenders.

Figure 45 Culture Segment profile, been to at least one of the partner institutions (5 years) indexed against the overall performing arts market (5 years)



This model illustrates that the institutions 5-year market is very similar to the overall performing arts market. The only marked difference is in Perspective, collectively users of the partner institutions are slightly less likely to fall into the Perspective segment than the wider performing arts market.

Market characteristics

Media channels

Figure 46 Media channels used to find out about leisure activities, culture market, performing arts market (5 years) and user market (5 years)

Sources used to find out what events are on or to plan activities, including cultural activities, for leisure time?	Culture market	Performing arts market	User market
Base	1497	1160	969
Word of mouth/recommendation	61%	66%	67%
Local newspapers	59%	61%	66%
Television	58%	58%	58%
National newspapers	53%	59%	65%
Newspaper or magazine websites	51%	51%	51%
Venue websites	47%	52%	50%
Email newsletters	43%	45%	47%
Posters, boards and banners outside venue	43%	49%	49%
Advertising elsewhere	42%	45%	45%
Social networking sites	40%	42%	43%
Radio	36%	37%	38%
Posters on outdoor billboards	34%	37%	37%
Venue leaflet, brochure and flyers	33%	36%	37%
Posters on the Metro/Tunnelbane	32%	34%	36%
Posters on trams / in tram stations	24%	26%	28%
Online 'what's on' listings	23%	26%	28%
Posters in bus stations	22%	25%	25%
Venue mailing lists	20%	23%	23%
Posters in overground trains or railway stations	18%	20%	20%
Tourist maps/guidebooks/information centres	16%	18%	18%
Lifestyle / special interest magazines	15%	17%	18%
Online rating site	14%	16%	17%
Listings magazines	13%	13%	12%
Other websites	12%	14%	14%
Artist websites	9%	9%	10%
Microblogs	5%	5%	6%
Blogs	2%	3%	3%

There are no significant differences between the user market and the performing arts market. Users are slighrtly more likely than the culture market as a whole to use national newspapers (65% vs 53%) and local newspapers (66% vs 59%).

Cultural consumption

Figure 47 Cultural consumption, culture market, performing arts market (5 years) and user market (5 years)

Cultural consumption		Culture market	Performing arts market	User market
	Base	1497	1160	969
Play	Plays by 'established' playwrights	54%	67%	67%
	Contemporary theatre or new writing	39%	47%	47%
	Children's theatre	50%	54%	54%
	Other	8%	9%	9%
Musical	Traditional musicals	51%	63%	63%
	Jukebox musicals	38%	46%	46%
	Cabaret or dinner shows	21%	24%	24%
	Other	5%	5%	5%
Dance	Ballet or classical dance	29%	39%	39%
	Contemporary dance	24%	30%	30%
	Folk or traditional dance	12%	16%	16%
	Other	5%	5%	5%
Concert	Jazz music	27%	35%	35%
	Blues	24%	27%	27%
	Rock or pop concert	60%	63%	63%
	Contemporary music	11%	15%	15%
	Traditional or folk music	21%	27%	27%
	New classical, electronic, improvised or sound art concert	15%	20%	20%
	Other	9%	10%	10%
Art exhibition	Traditional art from the 19th Century or earlier	42%	51%	51%
	20th Century art	51%	62%	62%
	Art by contemporary artists or as yet unknown artists	34%	43%	43%
	Photography from the 20th Century or earlier	12%	15%	15%
	Contemporary photography	29%	38%	38%
	Sculpture	34%	41%	41%
	Digital or video art	16%	20%	20%
	Other	6%	7%	7%
Museum	Art museum	62%	74%	74%
	Social history museum	64%	71%	71%
	Natural history museum	53%	60%	60%
	Other	11%	11%	11%
Film	Mainstream or blockbuster films	89%	90%	90%
	Independent or arthouse films	29%	34%	34%
	Other	7%	7%	7%

It is unsurprising that the user market is more likely to have engaged with a range of performing arts activities. Users are also more likely to have attended both traditional (62% vs. 51%) and 20th Century art (62% vs. 51%). Users are also significantly more likely to have attended an art museum (74% vs 62%).

Online activities

Figure 48 Online activity in the past week, culture market, performing arts market (5 years) and user market (5 years)

Spent more than two hours on the following activities in the past week (Includes mobile and personal devices)	Culture market	Performing arts market	User market
Base	1497	1160	969
Looking at newspaper content	54%	52%	53%
Reading and sending emails	46%	50%	52%
Other web browsing for information/entertainment	40%	41%	39%
Social networking	40%	41%	39%
Learning/gaining understanding/enriching my knowledge	20%	22%	22%
Listening to streaming audio	19%	20%	18%
Watching streaming video	15%	14%	13%
Playing networked games	11%	10%	10%
Online banking, paying bills etc.	9%	8%	9%
Online shopping of any kind	7%	6%	6%
Uploading photos	5%	5%	5%
Downloading video to watch later	4%	4%	3%
Downloading music to listen to later	3%	3%	3%
Microblogging (eg Twitter, Pinterest)	3%	2%	3%
Downloading podcasts to listen to later	3%	2%	2%
Uploading audio or video	2%	2%	2%
Online rating (eg TripAdvisor)	1%	2%	2%
Blogging	1%	1%	1%
None of these	16%	16%	16%

There are few significant differences in online activity when they instituions' user market is compared to the culture market as a whole. Users are slighrly more likely to have spent more than 2 hours reading and sending emails (52% vs. 46%).

Gadget ownership

Figure 49 Gadget ownership, culture market, performing arts market (5 years) and user market (5 years)

Gadget ownership	Culture market	Performing arts market	User market
Base	1497	1160	969
Portable Laptop computer	85%	87%	87%
Smart phone	80%	82%	82%
Tablet computer	52%	54%	56%
Desktop computer	48%	48%	49%
Audio/MP3 player	32%	35%	35%

Those in the institutions' user market are slighrly more likely than the culture market as a whole to own a tablet computer (56% vs. 52%).

Newspaper readership

Figure 50 National newspaper readership, culture market, performing arts market (5 years) and user market (5 years)

National newspaper readership	Culture market	Performing arts market	User market
Base	1497	1160	969
Aftenposten	54%	59%	67%
Verdens Gang	41%	41%	41%
Dagbladet	34%	36%	38%
Ditt Oslo – lokalavisen	23%	24%	28%
Dagens Naeringsliv	19%	21%	23%
Dagsavisen	11%	13%	13%
Morgenbladet	6%	7%	8%
Utrop	1%	1%	1%
Other	24%	24%	24%

Those in the institutions' user market are significantly more likely to read Aftenposten (67% vs. 54%). They are also slighly more likely to read Ditt Oslo and Dagladet.

Venue cross over

Figure 51 Venues attended in the past 5 years, culture market, performing arts market (5 years) and user market (5 years)

Venues attended in the past 5 years	Culture market	Performing arts market	User market
Base	1497	1160	969
Oslo spectrum	61%	62%	69%
NationalTheatret	48%	54%	75%
Det Norske Teatret	45%	50%	70%
Den Norske Opera & Ballett	44%	50%	68%
Latter	43%	44%	47%
Oslo Konserthus	42%	46%	60%
Oslo Nye Teater	42%	47%	60%
Sentrum Scene	40%	42%	46%
Rockefeller Music Hall	40%	41%	46%
Chat Noir	39%	42%	50%
Telenor Arena	31%	32%	34%
Folketeatret	23%	26%	34%
Lillestrøm kultursenter	19%	21%	19%
Parkteatret	18%	20%	24%
Bærum kulturhus	15%	16%	19%
Christiania teater	13%	15%	19%
Torshovteatret	13%	15%	19%
Oslo Filharmonien	12%	13%	18%
Trikkerstallen	10%	12%	13%
Cosmopolite	10%	10%	13%
Ullensaker kulturhus	8%	8%	8%
Kolben kulturhus	8%	8%	10%
Asker kulturhus	8%	9%	9%
Black Box Teater	6%	7%	9%
Dansens Hus	4%	5%	7%
Rådhusteatret i Ski	4%	5%	5%
Nes kulturhus	3%	3%	2%
Dukketeatret på Frogner	2%	3%	4%
Det andre teatret	2%	3%	3%
Nordic Black Theatre	1%	1%	2%
Dramatikkens hus	1%	1%	2%
Akershus Teater	1%	1%	1%
Teater Manu - norsk tengspråkteater	0%	1%	0%

Those in the institutions user market are also significantly more likely to have attended the Oslo Konserthus (60% vs. 43%) and the Oslo Nye Teater (60% vs. 42%) in the past 5 years. They are also more likely to have visited Chat Noir (50% vs. 39%) and Folketeatret (34% vs 23%).

10 Dansens Hus Market

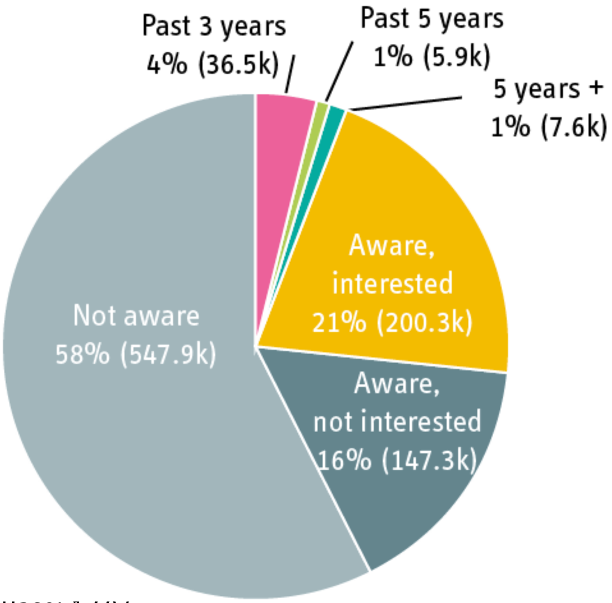
Market awareness

42% of the culture market is aware of Dansens Hus. This equates to 397,600 people. The model below illustrates the market potential for Dansens Hus within the whole culture market. Over half of those who have attended Dansens Hus (6%) have been within the past 3 years (4%).

Despite relatively low penetration overall (6% have ever attended), 1 in 5 of the culture market (21%) are interested attending Dansens Hus making the potential market considerably larger than the existing market.

Market penetration

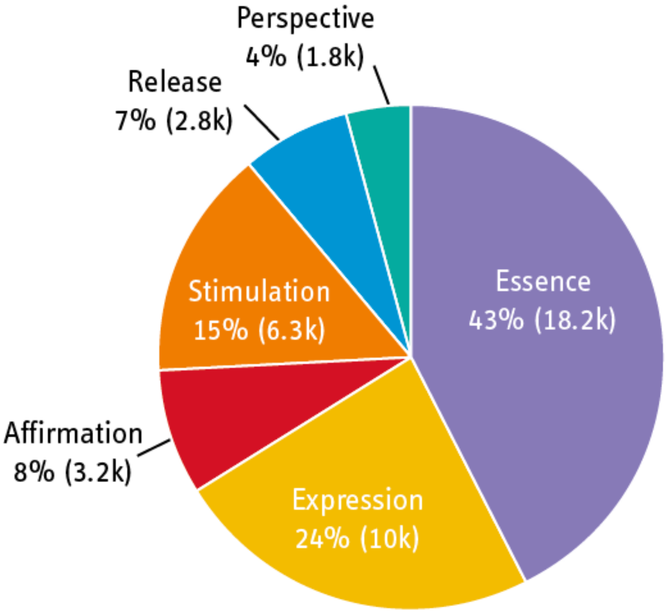
Figure 52 Market potential, Dansens Hus, of the whole culture market



Base: 1,497

Market profile

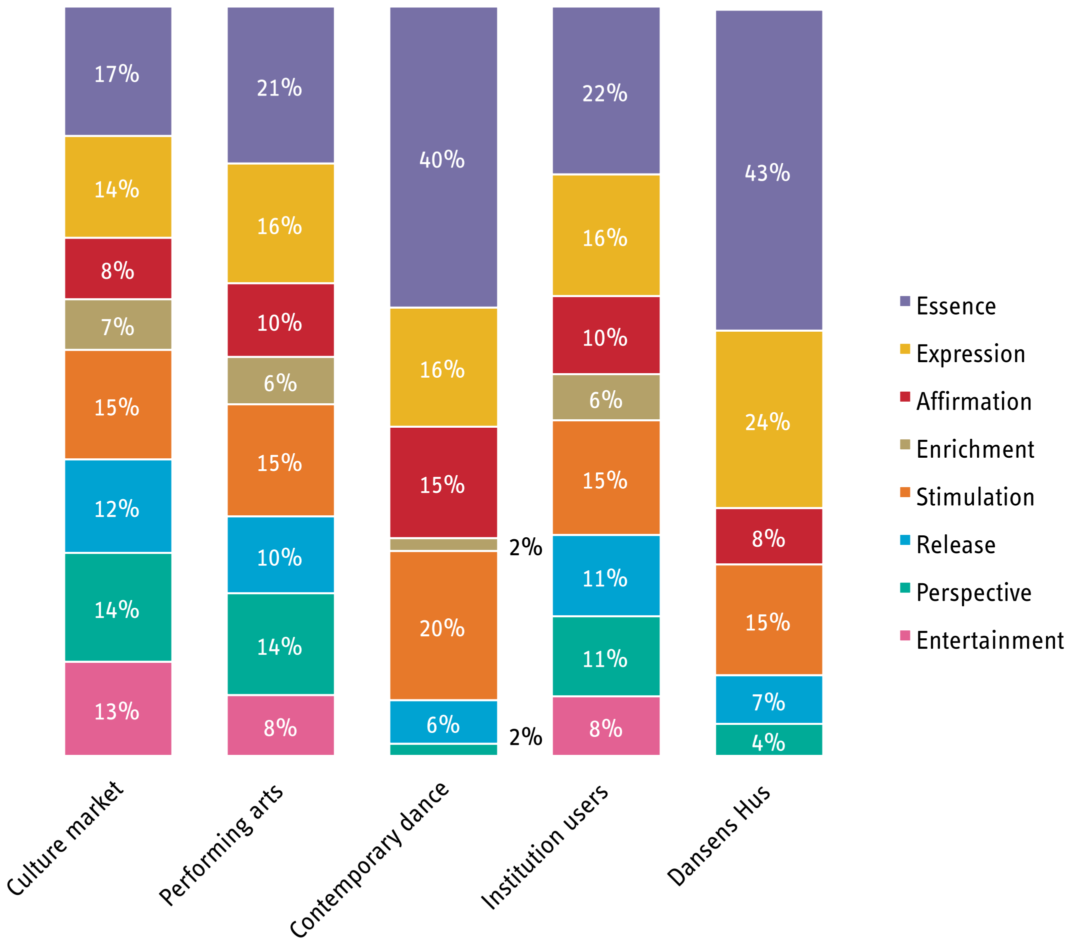
Figure 53 Culture Segment profile, been to Dansens Hus in the past 5 years



Base: 67

The largest segments in the Dansens Hus market are Essence and Expression. Together with Stimulation, these three segments make up 82% of the Dansens Hus market.

Figure 54 Culture Segment profile, been to Dansens Hus in the past 5 years, with culture and relevant artform markets



Bases: 1,497 (culture market), 1,160 (performing arts market), 254 (contemporary dance market), 969 (institution user market), 67 (Dansens Hus market)

This model compares the Culture Segments profile of those who have been to Dansens Hus in the past 5 years, with the larger contemporary dance, performing arts and overall culture market.

Given the profile of the contemporary dance market overall, we might expect Dansens Hus to attract larger proportions of the Stimulation and Affirmation segment than it currently does.

Market characteristics

Media channels

Figure 55 Media channels used to find out about leisure activities, been to Dansens Hus in the past 5 years, with culture and relevant artform markets

Sources used to find out what events are on or to plan activities, including cultural activities, for leisure time?	Culture market	Performing arts market	Contemporary dance market	User market	Dansens Hus Market
Base	1497	1160	254	969	67
Word of mouth/recommendation	61%	66%	71%	67%	73%
Local newspapers	59%	61%	64%	66%	63%
Television	58%	58%	48%	58%	53%
National newspapers	53%	59%	61%	65%	64%
Newspaper or magazine websites	51%	51%	56%	51%	61%
Venue websites	47%	52%	57%	50%	59%
Email newsletters	43%	45%	45%	47%	54%
Posters, boards and banners outside venue	43%	49%	59%	49%	57%
Advertising elsewhere	42%	45%	50%	45%	57%
Social networking sites	40%	42%	49%	43%	66%
Radio	36%	37%	34%	38%	38%
Posters on outdoor billboards	34%	37%	46%	37%	38%
Venue leaflet, brochure and flyers	33%	36%	49%	37%	51%
Posters on the Metro/Tunnelbane	32%	34%	45%	36%	34%
Posters on trams / in tram stations	24%	26%	39%	28%	32%
Online 'what's on' listings	23%	26%	32%	28%	34%
Posters in bus stations	22%	25%	31%	25%	26%
Venue mailing lists	20%	23%	26%	23%	31%
Posters in overground trains or railway stations	18%	20%	25%	20%	19%
Tourist maps/guidebooks/information centres	16%	18%	21%	18%	25%
Lifestyle / special interest magazines	15%	17%	24%	18%	27%
Online rating site	14%	16%	21%	17%	32%
Listings magazines	13%	13%	10%	12%	12%
Other websites	12%	14%	20%	14%	27%
Artist websites	9%	9%	14%	10%	27%
Microblogs	5%	5%	10%	6%	17%
Blogs	2%	3%	5%	3%	6%

Those who have attended Dansens Hus in the past 5 years are more likely than the culture market as a whole to use national newspapers to find out about cultural and leisure activities (64% vs. 53% in the culture market overall). They are also more likely than average to use listings magazines (27% vs. 12% of the culture market overall).

They are substantially more likely to use social networking sites (66% vs. 40% in the culture market overall) – the majority use this information source - and they are also likely to use artists' own websites (27% vs. 9% in the culture market overall).

Venue communications are important to Dansens Hus attenders - they are significantly more likely to use venue websites (59% vs. 47% in the culture market overall), posters, boards and banners outside venues (57% vs. 43% in the culture market overall) and venue leaflets, brochures and flyers (51% vs. 33% in the culture market overall).

Dansens Hus attenders are quite similar to the wider contemporary dance audience in their choice of media channels but they are more likely to use social networking sites (66% vs. 49% in the wider contemporary dance audience).

Cultural consumption

Figure 56 Cultural consumption, been to Dansens Hus in the past 5 years, with culture and relevant artform markets

Cultural consumption		Culture market	Performing arts market	Contemporary dance market	Dansens Hus market
	Base	1497	1160	254	67
Play	Plays by 'established' playwrights	54%	64%	76%	64%
	Contemporary theatre or new writing	39%	48%	64%	75%
	Children's theatre	50%	58%	52%	61%
	Other	8%	10%	6%	6%
Musical	Traditional musicals	51%	61%	70%	86%
	Jukebox musicals	38%	45%	53%	45%
	Cabaret or dinner shows	21%	25%	23%	18%
	Other	5%	5%	6%	11%
Dance	Ballet or classical dance	29%	36%	63%	53%
	Contemporary dance	24%	30%	78%	80%
	Folk or traditional dance	12%	15%	25%	19%
	Other	5%	5%	2%	8%
Concert	Jazz music	27%	31%	49%	54%
	Blues	24%	27%	35%	37%
	Rock or pop concert	60%	27%	77%	73%
	Contemporary music	11%	14%	29%	42%
	Traditional or folk music	21%	25%	35%	45%
	New classical, electronic, improvised or sound art concert	15%	14%	31%	39%
	Other	9%	9%	11%	8%
Art exhibition	Traditional art from the 19th Century or earlier	42%	49%	61%	69%
	20th Century art	51%	60%	73%	80%
	Art by contemporary artists or as yet unknown artists	34%	41%	62%	68%
	Photography from the 20th Century or earlier	12%	14%	29%	37%
	Contemporary photography	29%	35%	58%	66%
	Sculpture	34%	38%	56%	59%
	Digital or video art	16%	19%	38%	46%
	Other	6%	6%	14%	4%
Museum	Art museum	62%	72%	88%	92%
	Social history museum	64%	70%	76%	79%
	Natural history museum	53%	59%	70%	66%
	Other	11%	11%	7%	8%
Film	Mainstream or blockbuster films	89%	91%	89%	93%
	Independent or arthouse films	29%	32%	55%	58%
	Other	7%	7%	8%	5%

Perhaps unsurprisingly those who have attended Dansens Hus in the past 5 years are more likely than the culture market as a whole to have attended a range of artforms. We therefore compare them to the overall contemporary dance market.

Dansens Hus attenders are more likely to have attended contemporary theatre or new writing (75% vs. 64% in the contemporary dance market) but less likely to have attended plays by established playwrights (64% vs. 76% in the contemporary dance market). Interestingly they are more likely to have attended traditional musicals (86% vs. 70% in the contemporary dance market).

Online activities

Figure 57 Online activity in the past week, been to Dansens Hus in the past 5 years, with culture and relevant artform markets

Spent more than two hours on the following activities in the past week (Includes mobile and personal devices)	Culture market	Performing arts market	Contemporary dance market	User market	Dansens Hus Market
Base	1497	1160	254	969	67
Looking at newspaper content	54%	52%	53%	53%	68%
Reading and sending emails	46%	50%	54%	52%	62%
Other web browsing for information/entertainment	40%	41%	41%	39%	52%
Social networking	40%	41%	40%	39%	48%
Learning/gaining understanding/enriching my knowledge	20%	22%	34%	22%	29%
Listening to streaming audio	19%	20%	30%	18%	43%
Watching streaming video	15%	14%	13%	13%	18%
Playing networked games	11%	10%	8%	10%	5%
Online banking, paying bills etc.	9%	8%	8%	9%	7%
Online shopping of any kind	7%	6%	7%	6%	7%
Uploading photos	5%	5%	6%	5%	21%
Downloading video to watch later	4%	4%	6%	3%	3%
Downloading music to listen to later	3%	3%	4%	3%	4%
Microblogging (eg Twitter, Pinterest)	3%	2%	3%	3%	5%
Downloading podcasts to listen to later	3%	2%	2%	2%	2%
Uploading audio or video	2%	2%	2%	2%	5%
Online rating (eg TripAdvisor)	1%	2%	3%	2%	4%
Blogging	1%	1%	2%	1%	3%
None of these	16%	16%	19%	16%	9%

Dansens Hus attenders are significantly more likely than the culture market as a whole to have engaged in a number of activities online, 43% had listened to streamed audio for more than 2 hours (compared to 19% of the culture market as a whole) and 68% had spent more than 2 hours looking at newspaper content (compared to 54% of the culture market as a whole). On both these measures they also scored higher than the performing arts market and contemporary dance market.

Gadget ownership

Figure 58 Gadget ownership, been to Dansens Hus in the past 5 years, with culture and relevant artform markets

Gadget ownership	Culture market	Performing arts market	Contemporary dance market	Dansens Hus Market
Base	1497	1160	254	67
Portable Laptop computer	85%	87%	91%	89%
Smart phone	80%	82%	88%	90%
Tablet computer	52%	54%	62%	64%
Desktop computer	48%	48%	50%	47%
Audio/MP3 player	32%	35%	36%	35%

Dansens Hus attenders were slightly more likely to own a smartphone (90%) than the culture market as a whole (80%) and significantly more likely to own a tablet computer (64% vs. 52% for the culture market as a whole).

Newspaper readership

Figure 59 National newspaper readership, been to Dansens Hus in the past 5 years, with culture and relevant artform markets

National newspaper readership	Culture market	Performing arts market	Contemporary dance market	Dansens Hus Market
Base	1497	1160	193	67
Aftenposten	54%	59%	79%	61%
Verdens Gang	41%	41%	46%	45%
Dagbladet	34%	36%	56%	50%
Ditt Oslo – lokalavisen	23%	24%	42%	33%
Dagens Naeringsliv	19%	21%	32%	33%
Dagsavisen	11%	13%	26%	26%
Morgenbladet	6%	7%	16%	23%
Utrop	1%	1%	0%	4%
Other	24%	24%	23%	16%

Dansens Hus attenders were significantly more likely to read a range of national newspapers – 50% read Dagbladet (vs. 34% of the culture market) 26% read Dagsavisen (vs. 11% of the culture market) and 23% read Morgenbladet (vs. 6% of the culture market).

Venue cross over

Figure 60 Venues attended in the past 5 years, been to Dansens Hus in the past 5 years, with culture and relevant artform markets

Venues attended in the past 5 years	Culture market	Performing arts market	Contemporary dance market	User market	Dansens Hus market
Base	1497	1160	254	969	67
Oslo spectrum	61%	62%	81%	69%	78%
NationalTheatret	48%	54%	76%	75%	85%
Det Norske Teatret	45%	50%	72%	70%	78%
Den Norske Opera & Ballett	44%	50%	76%	68%	78%
Latter	43%	44%	55%	47%	50%
Oslo Konserthus	42%	46%	63%	60%	78%
Oslo Nye Teater	42%	47%	65%	60%	77%
Sentrum Scene	40%	42%	65%	46%	73%
Rockefeller Music Hall	40%	41%	63%	46%	68%
Chat Noir	39%	42%	50%	50%	61%
Telenor Arena	31%	32%	37%	34%	47%
Folketeatret	23%	26%	37%	34%	54%
Lillestrøm kultursenter	19%	21%	19%	19%	18%
Parkteatret	18%	20%	43%	24%	69%
Bærum kulturhus	15%	16%	27%	19%	21%
Christiania teater	13%	15%	21%	19%	36%
Torshovteatret	13%	15%	28%	19%	46%
Oslo Filharmonien	12%	13%	29%	18%	35%
Trikkerstallen	10%	12%	23%	13%	36%
Cosmopolite	10%	10%	23%	13%	42%
Ullensaker kulturhus	8%	8%	5%	8%	1%
Kolben kulturhus	8%	8%	10%	10%	10%
Asker kulturhus	8%	9%	6%	9%	12%
Black Box Teater	6%	7%	19%	9%	39%
Dansens Hus	4%	5%	18%	7%	100%
Rådhusteatret i Ski	4%	5%	4%	5%	3%
Nes kulturhus	3%	3%	1%	2%	2%
Dukketeatret på Frogner	2%	3%	5%	4%	8%
Det andre teatret	2%	3%	7%	3%	9%
Nordic Black Theatre	1%	1%	5%	2%	11%
Dramatikkens hus	1%	1%	5%	2%	10%
Akershus Teater	1%	1%	1%	1%	1%
Teater Manu - norsk tengspråkteater	0%	1%	1%	0%	2%

As with artform crossover, it is unsurprising that Dansens Hus attenders are more likely than the culture market overall to have attended a broad range of venues. These are culturally active audiences with eclectic and diverse tastes. We therefore compare them to the overall contemporary dance market.

Those who have attended Dansens Hus in the past 5 years were significantly more likely to have attended Parkteatret (69% vs. 43% in the contemporary dance market overall) and Black Box Teater (39% vs. 19% on the contemporary dance market overall). Whilst these are the two venues with the most marked difference in attendance, Dansens Hus attenders were more likely than the broader contemporary dance audience to attend a whole range of performing arts venues across Oslo, suggesting they are a highly culturally engaged group.

Venue-specific barriers

Respondents who were aware but had not visited Dansens Hus were asked why they had not visited. Respondents who had visited Dansens Hus were asked why they had not visited more often.

Figure 61 Barriers to attendance, Dansens Hus

Dansens Hus - barriers to attendance	Aware, never been	Ever been
Base	557	79
I do not know what is on at Dansens Hus	57%	41%
Other commitments in my life prevent me from having enough time to go	15%	43%
I would go to Dansens Hus if the tickets were cheaper	7%	13%
It is not convenient for me to travel to Dansens Hus	4%	6%
The timings of events at Dansens Hus are not convenient for me	6%	1%
I have not seen anything in the programme that appeals to me	10%	24%
I don't have anyone to go with, and I don't want to go alone	7%	17%
I have been discouraged by bad reviews (critics/friends/ family)	-	1%
Dansens Hus is not for the likes of me	5%	-
Going to Dansens Hus is not my idea of entertainment	7%	7%
Dansens Hus is not relevant or interesting to me	22%	15%
I assume that tickets are always sold out	1%	-
I have always meant to attend but have never got round to it	13%	28%
I don’t think I would understand or appreciate the work	14%	4%
There is too much choice with other Oslo-based theatres/performance venues	21%	20%
Don’t know/ can't say	7%	6%

The most commonly cited barriers for non-attenders were not knowing what is on (57%), Dansens Hus not being relevant or interesting (22%) and there being too much choice elsewhere (21%).

The most commonly cited reasons for not attending more often were other commitments (43%), not knowing what is on (41%) and not getting around to it (28%).

11 NationalTheatret market

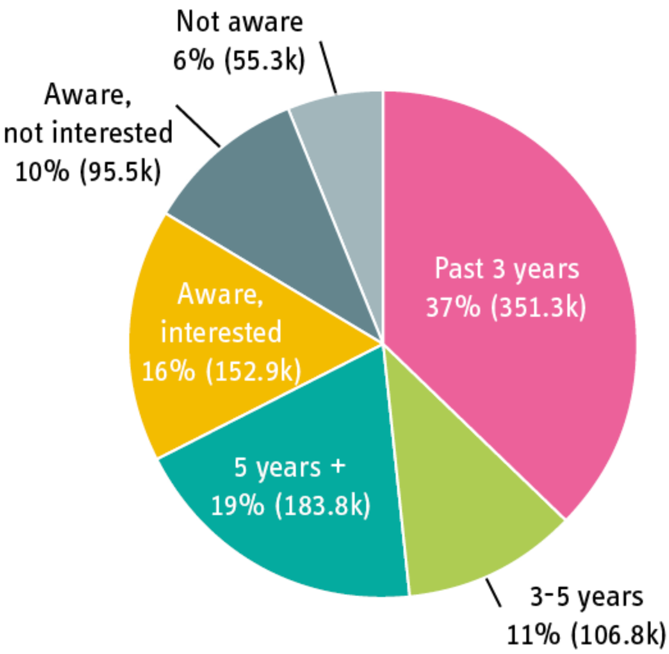
Market awareness

94% of the culture market is aware of NationalTheatret. This equates to 890,200 people. The model below illustrates the market potential for NationalTheatret within the whole culture market. It shows that over half of the 67% of the culture market who have ever been to NationalTheatret have been with in the past 3 years (37%).

Almost the whole culture market is aware of NationalTheatret and despite its overall high levels of penetration (67%), a further 15% are interested in attending.

Market penetration

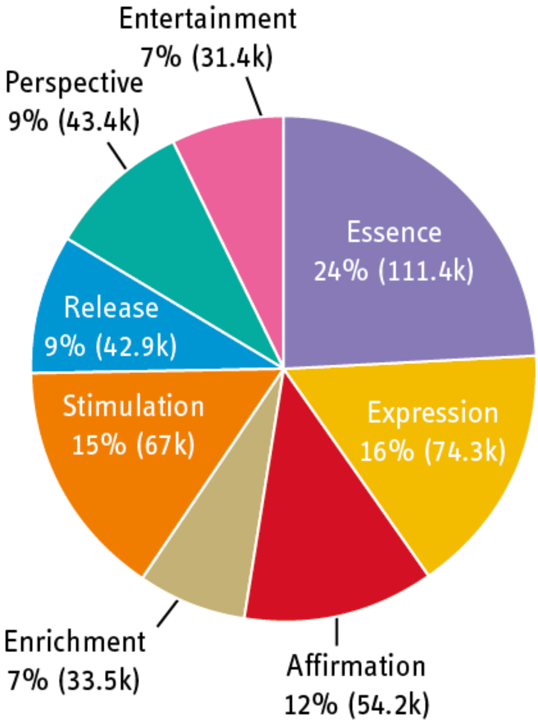
Figure 62 Market potential, NationalTheatret, of the whole culture market



Base: 1,497

Market profile

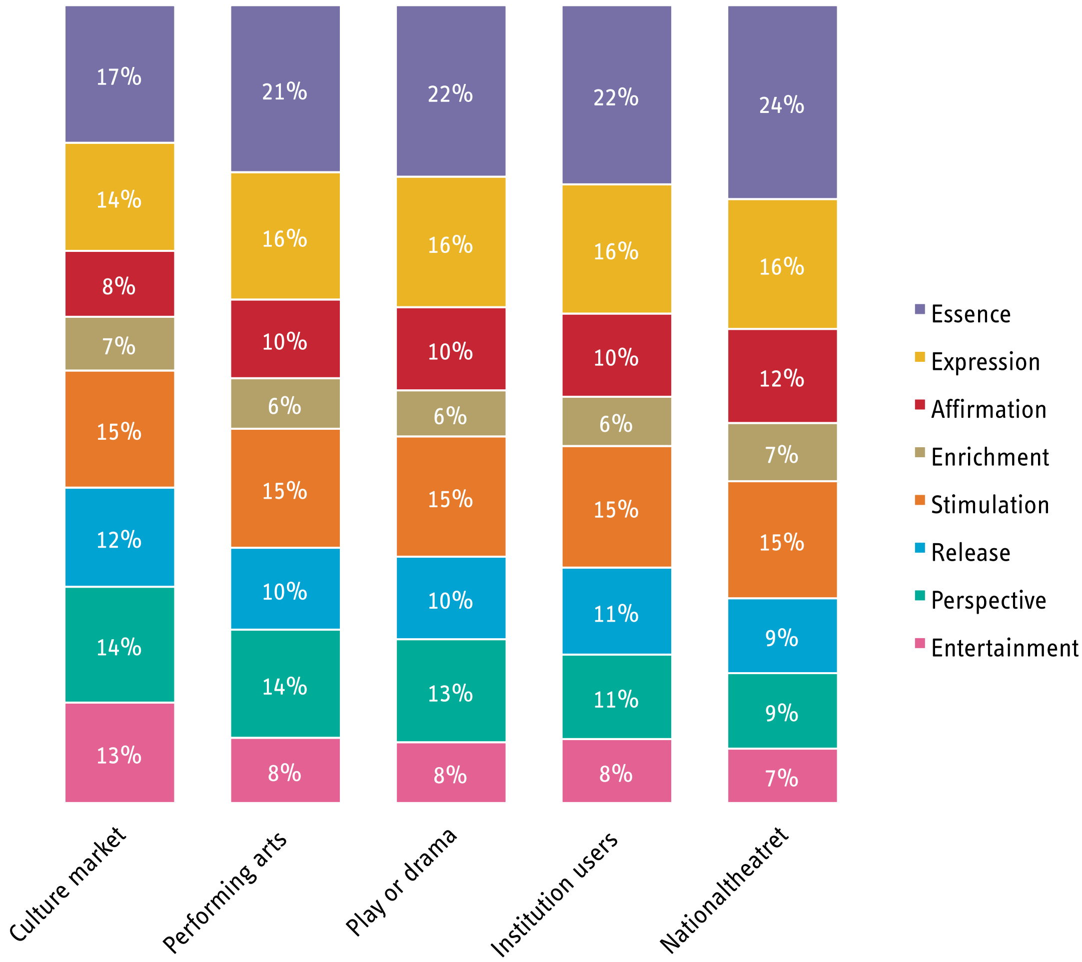
Figure 63 Culture Segment profile, been to NationalTheatret in the past 5 years



Base: 725

The three largest segments in the NationalTheatret market are Essence, Expression and Stimulation, collectively accounting for 55% of the market.

Figure 64 Culture Segment profile, been to NationalTheatret in the past 5 years with culture and relevant artform markets



Bases: 1,497 (culture market), 1,160 (performing arts market), 1,054 (play or drama market), 969 (institution user market), 725 (NationalTheatret market)

This model illustrates that the National Theatret market is largely similar in profile to the performing arts and culture markets representing strong penetration of the market. National Theatret attracts slightly larger proportions of Essence and Affirmation, and slightly smaller proportions of Perspective than might be expected.

Market characteristics

Media channels

Figure 65 Media channels used to find out about leisure activities, been to NationalTheatret in the past 5 years, with culture and relevant artform markets

Sources used to find out what events are on or to plan activities, including cultural activities, for leisure time?	Culture market	Performing arts market	Play or drama market	User market	National Theatret market
Base	1497	1160	1054	969	725
Word of mouth /recommendation	61%	66%	67%	67%	67%
Local newspapers	59%	61%	62%	66%	69%
Television	58%	58%	58%	58%	56%
National newspapers	53%	59%	61%	65%	71%
Newspaper or magazine websites	51%	51%	53%	51%	52%
Venue websites	47%	52%	53%	50%	52%
Email newsletters	43%	45%	47%	47%	47%
Posters, boards and banners outside venues	43%	49%	51%	49%	50%
Advertising elsewhere	42%	45%	46%	45%	46%
Social networking sites	40%	42%	44%	43%	41%
Radio	36%	37%	38%	38%	37%
Posters on outdoor billboards	34%	37%	38%	37%	35%
Venue leaflet, brochure and flyers	33%	36%	36%	37%	40%
Posters on the Metro/Tunnelbane	32%	34%	36%	36%	37%
Posters on trams / in tram stations	24%	26%	27%	28%	28%
Online 'what's on' listings	23%	26%	26%	28%	30%
Posters in bus stations	22%	25%	25%	25%	28%
Venue mailing lists	20%	23%	23%	23%	25%
Posters in overground trains or railway stations	18%	20%	21%	20%	22%
Tourist maps/guidebooks/information centres	16%	18%	19%	18%	22%
Lifestyle / special interest magazines	15%	17%	17%	18%	20%
Online rating sites	14%	16%	17%	17%	19%
Listings magazines	13%	13%	12%	12%	12%
Other websites	12%	14%	14%	14%	15%
Artist websites	9%	9%	9%	10%	11%
Microblogs	5%	5%	5%	6%	6%
Blogs	2%	3%	3%	3%	3%

Those who have attended NationalTheatret in the past 5 years were more likely than the culture market as a whole to use both local and national newspapers to find out about cultural or leisure activities (69% and 71% amongst NationalTheatret attenders vs. 59% and 53% amongst the culture market as a whole). They are also more likely to use online 'what's on' listings (30% vs. 23% amongst the culture market as a whole).

Cultural consumption

Figure 66 Cultural consumption, been to NationalTheatret in the past 5 years, with culture and relevant artform markets

Cultural consumption		Culture market	Performing arts market	Play or drama market	User market	National Theatret market
	Base	1497	1160	1054	969	725
Play	Plays by 'established' playwrights	54%	64%	68%	67%	73%
	Contemporary theatre or new writing	39%	48%	51%	47%	53%
	Children's theatre	50%	58%	61%	54%	55%
	Other	8%	10%	10%	9%	7%
Musical	Traditional musicals	51%	61%	63%	63%	67%
	Jukebox musicals	38%	45%	47%	46%	49%
	Cabaret or dinner shows	21%	25%	25%	24%	24%
	Other	5%	5%	6%	5%	5%
Dance	Ballet or classical dance	29%	36%	37%	39%	44%
	Contemporary dance	24%	30%	30%	30%	33%
	Folk or traditional dance	12%	15%	15%	16%	18%
	Other	5%	5%	5%	5%	5%
Concert	Jazz music	27%	31%	31%	35%	38%
	Blues	24%	27%	27%	27%	29%
	Rock or pop concert	60%	27%	65%	63%	65%
	Contemporary music	11%	14%	14%	15%	16%
	Traditional or folk music	21%	25%	25%	27%	29%
	New classical, electronic, improvised or sound art concert	15%	14%	17%	20%	19%
	Other	9%	9%	9%	10%	9%
Art exhibition	Traditional art from the 19th Century or earlier	42%	49%	50%	51%	54%
	20th Century art	51%	60%	61%	62%	66%
	Art by contemporary artists or as yet unknown artists	34%	41%	42%	43%	47%
	Photography from the 20th Century or earlier	12%	14%	13%	15%	15%
	Contemporary photography	29%	35%	36%	38%	38%
	Sculpture	34%	38%	39%	41%	41%
	Digital or video art	16%	19%	19%	20%	20%
	Other	6%	6%	7%	7%	6%
Museum	Art museum	62%	72%	74%	74%	77%
	Social history museum	64%	70%	71%	71%	71%
	Natural history museum	53%	59%	60%	60%	60%
	Other	11%	11%	10%	11%	9%
Film	Mainstream or blockbuster films	89%	91%	92%	90%	89%
	Independent or arthouse films	29%	32%	33%	34%	36%
	Other	7%	7%	7%	7%	8%

Those who have attended the NationalTheatret market in the past 5 years were significantly more likely than those in the culture market to have engaged with a range of performing arts; 73% had ever been to a play by an established playwright (54% of the culture market) and 67% had attended a traditional musical (51% of the culture market overall).

They were also more likely to have seen a 20th Century art exhibition (66% vs. 51% of the culture market overall) and an art museum (77% vs. 62% of the culture market overall).

Online activities

Figure 67 Online activity in the past week, been to NationalTheatret in the past 5 years, with culture and relevant artform markets

Spent more than two hours on the following activities in the past week (Includes mobile and personal devices)	Culture market	Performing arts market	Play or drama market	User market	National Theatret market
Base	1497	1160	1054	969	725
Looking at newspaper content	54%	52%	53%	53%	51%
Reading and sending emails	46%	50%	51%	52%	53%
Other web browsing for information/entertainment	40%	41%	41%	39%	36%
Social networking	40%	41%	41%	39%	37%
Learning/gaining understanding/enriching my knowledge	20%	22%	22%	22%	23%
Listening to streaming audio	19%	20%	20%	18%	18%
Watching streaming video	15%	14%	14%	13%	13%
Playing networked games	11%	10%	9%	10%	7%
Online banking, paying bills etc.	9%	8%	7%	9%	9%
Online shopping of any kind	7%	6%	6%	6%	5%
Uploading photos	5%	5%	5%	5%	3%
Downloading video to watch later	4%	4%	4%	3%	4%
Downloading music to listen to later	3%	3%	3%	3%	3%
Microblogging	3%	2%	2%	3%	3%
Downloading podcasts to listen to later	3%	2%	3%	2%	2%
Uploading audio or video	2%	2%	2%	2%	2%
Online rating	1%	2%	2%	2%	2%
Blogging	1%	1%	1%	1%	1%
None of these	16%	16%	15%	16%	18%

The online activities of NationalTheatret attenders are similar to those of the culture market as a whole. NationalTheatret market attenders are more likely to have spent more than 2 hours reading emails (53% vs. 46% of the culture market overall).

They are less likely to have spent more than 2 hours browsing for entertainment purposes (36% vs. 40% of the culture market overall), and also less likely to have spent more than 2 hours playing networked games (7% vs 11% of the culture market overall).

Gadget ownership

Figure 68 Gadget ownership, been to NationalTheatret in the past 5 years, with culture and relevant artform markets

Gadget ownership	Culture market	Performing arts market	Play or drama market	User market	NationalTheatret market
Base	1497	1160	1054	969	725
Portable Laptop computer	85%	87%	87%	87%	87%
Smart phone	80%	82%	83%	82%	82%
Tablet computer	52%	54%	54%	56%	55%
Desktop computer	48%	48%	49%	49%	49%
Audio/MP3 player	32%	35%	34%	35%	35%

There are no significant differences in gadget ownership between those who have attended NationalTheatret in the past 5 years, and broader artform and culture markets.

Newspaper readership

Figure 69 National newspaper readership, been to NationalTheatret in the past 5 years, with culture and relevant artform markets

National newspaper readership	Culture market	Performing arts market	Play or drama market	User market	NationalTheatret market
Base	1497	1160	791	969	725
Aftenposten	54%	59%	80%	67%	70%
Verdens Gang	41%	41%	55%	41%	41%
Dagbladet	34%	36%	49%	38%	39%
Ditt Oslo – lokalavisen	23%	24%	34%	28%	32%
Dagens Naeringsliv	19%	21%	28%	23%	27%
Dagsavisen	11%	13%	16%	13%	16%
Morgenbladet	6%	7%	10%	8%	9%
Utrop	1%	1%	0%	1%	1%
Other	24%	24%	32%	24%	23%

Those who have attended NationalTheatret in the past 5 years are more likely to read a range of national newspapers. 70% regularly read Aftenposten (vs. 54% of the culture market overall), 32% read Ditt Oslo (vs. 23% of the culture market overall) and 27% read Dagens Naeringsliv (vs. 19% of the culture market overall.

Venue cross over

Figure 70 Venues attended in the past 5 years, been to NationalTheatret in the past 5 years, with culture and relevant artform markets

Venues attended in the past 5 years	Culture market	Performing arts market	Play or drama market	User market	NationalTheatret market
Base	1497	1160	1054	969	725
Oslo spectrum	61%	65%	66%	69%	70%
NationalTheatret	48%	60%	63%	75%	100%
Det Norske Teatret	45%	55%	58%	70%	75%
Den Norske Opera & Ballett	44%	56%	56%	68%	69%
Latter	43%	46%	47%	47%	49%
Oslo Konserthus	42%	50%	52%	60%	65%
Oslo Nye Teater	42%	51%	54%	60%	69%
Sentrum Scene	40%	44%	45%	46%	48%
Rockefeller Music Hall	40%	44%	45%	46%	48%
Chat Noir	39%	45%	46%	50%	54%
Telenor Arena	31%	34%	35%	34%	35%
Folketeatret	23%	29%	30%	34%	38%
Lillestrøm kultursenter	19%	20%	20%	19%	17%
Parkteatret	18%	22%	22%	24%	26%
Bærum kulturhus	15%	18%	19%	19%	22%
Christiania teater	13%	16%	17%	19%	21%
Torshovteatret	13%	16%	17%	19%	23%
Oslo Filharmonien	12%	15%	15%	18%	22%
Trikkerstallen	10%	12%	13%	13%	15%
Cosmopolite	10%	11%	10%	13%	14%
Ullensaker kulturhus	8%	9%	8%	8%	6%
Kolben kulturhus	8%	9%	9%	10%	11%
Asker kulturhus	8%	8%	9%	9%	9%
Black Box Teater	6%	8%	8%	9%	11%
Dansens Hus	4%	6%	6%	7%	8%
Rådhusteatret i Ski	4%	5%	5%	5%	6%
Nes kulturhus	3%	3%	2%	2%	1%
Dukketeatret på Frogner	2%	3%	3%	4%	5%
Det andre teatret	2%	3%	3%	3%	3%
Nordic Black Theatre	1%	1%	2%	2%	2%
Dramatikkens hus	1%	1%	1%	2%	2%
Akershus Teater	1%	1%	1%	1%	1%
Teater Manu - norsk tengspråkteater	0%	0%	0%	0%	0%

Those how have attended NationalTheatret in the past 5 years were more likely than the culture market overall to have attended a range of venues. The most marked differences were in attendance at Det Norske Teatret (75% NationalTheatret attenders, 43% culture market overall), Oslo Nye Teater (69% NationalTheatret attenders, 42% culture market overall), and Den Norske Opera & Ballett (69% NationalTheatret attenders, 44% culture market overall).

Venue-specific barriers

Respondents who were aware but had not visited NationalTheatret were asked why they had not visited. Respondents who had visited NationalTheatret were asked why they had not visited more often.

Figure 71 Barriers to attendance, NationalTheatret

NationalTheatret - barriers to attendance	Aware, never been	Ever been
Base	399	1016
I do not know what is on at NationalTheatret	28%	18%
Other commitments in my life prevent me from having enough time to go	7%	28%
I would go to NationalTheatret if the tickets were cheaper	11%	24%
It is not convenient for me to travel to NationalTheatret	4%	1%
The timings of events at NationalTheatret are not convenient for me	3%	2%
I have not seen anything in the programme that appeals to me	9%	28%
I don't have anyone to go with, and I don't want to go alone	5%	8%
I have been discouraged by bad reviews (critics/friends/ family)	-	1%
NationalTheatret is not for the likes of me	3%	2%
Going to NationalTheatret is not my idea of entertainment	4%	3%
NationalTheatret is not relevant or interesting to me	16%	5%
I assume that tickets are always sold out	1%	4%
I have always meant to attend but have never got round to it	13%	18%
I don’t think I would understand or appreciate the work	7%	3%
There is too much choice with other Oslo-based theatres/performance venues	7%	13%
Don't know/ can't say	31%	14%

The most common barriers to attendance were not knowing what is on (28%), NationalTheatret not being interesting or relevant (16%) and not having got around to it (13%). The most common reasons for not attending more often were other commitments (28%), unappealing programme (28%) and ticket prices (24%).

12 Den Norske Opera & Ballett market[5]

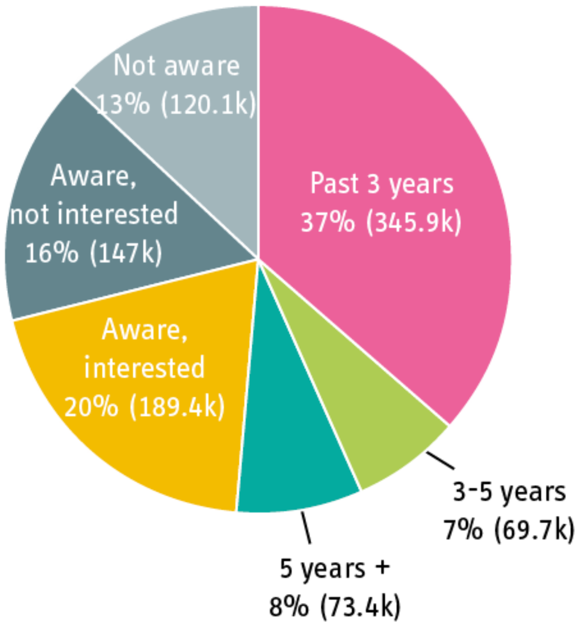
Market awareness

87% of the culture market is aware of Den Norske Opera & Ballett. This equates to 825,400 people. The model below illustrates the market potential for Den Norske Opera & Ballett within the whole culture market.

The vast majority of those who have ever attended Den Norske Opera and Ballett have done so in the past 3 years – 37% of the 52%. Almost 1 in 5 of the culture market have not been but would be interested in attending.

Market penetration

Figure 72 Market potential, Den Norske Opera & Ballett, of the whole culture market

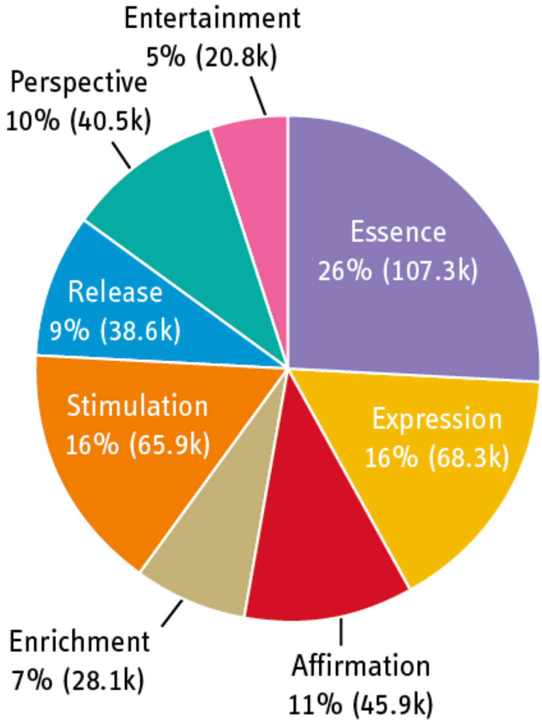


Base: 1,497

[5] Please note this questionnaire tested awareness and knowledge of 'Den Norske Opera & Ballett' rather than 'Operaen'. The use of this less well-known brand may have influenced overall awareness levels.

Market profile

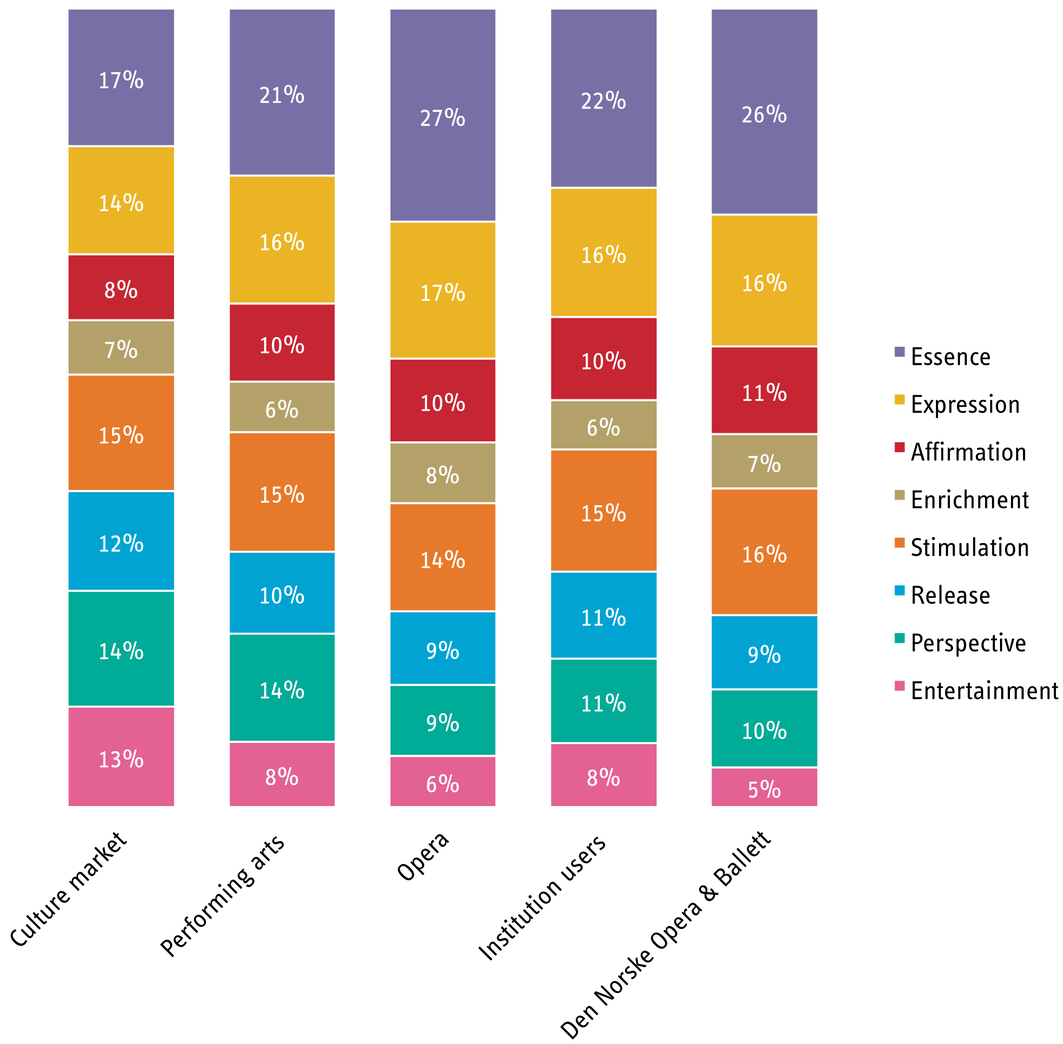
Figure 73 Culture Segment profile, been to Den Norske Opera & Ballett in the past 5 years



Base: 658

The Culture Segments are relatively evenly distributed amongst those who have attended Den Norske Opera & Ballett in the past 5 years. Although the largest segments are Essence, Expression and Stimulation, together these three segments only account for 58% of the audience.

Figure 74 Culture Segment profile, been to Den Norske Opera & Ballett in the past 5 years with culture and relevant artform markets



Bases: 1,497 (culture market), 1,160 (performing arts market), 546 (opera market), 969 (institution user market), 658 (Den Norske Opera & Ballett market)

This model illustrates that Den Norske Opera & Ballet's market is very similar to the Opera market overall. When compared to the performing arts market, Den Norske Opera & Ballett attracts larger proportions of Essence – though not to the extent of other venues tested. Here we see smaller proportions of Entertainment and Perspective. All other segments are present in similar proportions.

Market characteristics

Media channels

Figure 75 Media channels used to find out about leisure activities, been to Den Norske Opera & Ballett in the past 5 years, with culture and relevant artform markets

Sources used to find out what events are on or to plan activities, including cultural activities, for leisure time?	Culture market	Performing arts market	Opera market	User market	Den Norske Opera & Ballett market
Base	1497	1160	546	969	658
Word of mouth /recommendation	61%	66%	66%	67%	67%
Local newspapers	59%	61%	62%	66%	64%
Television	58%	58%	52%	58%	54%
National newspapers	53%	59%	66%	65%	66%
Newspaper or magazine websites	51%	51%	50%	51%	51%
Venue websites	47%	52%	53%	50%	53%
Email newsletters	43%	45%	45%	47%	49%
Posters, boards and banners outside venues	43%	49%	50%	49%	51%
Advertising elsewhere	42%	45%	44%	45%	46%
Social networking sites	40%	42%	42%	43%	45%
Radio	36%	37%	34%	38%	38%
Posters on outdoor billboards	34%	37%	32%	37%	37%
Venue leaflet, brochure and flyers	33%	36%	38%	37%	36%
Posters on the Metro/Tunnelbane	32%	34%	36%	36%	37%
Posters on trams / in tram stations	24%	26%	29%	28%	28%
Online 'what's on' listings	23%	26%	27%	28%	31%
Posters in bus stations	22%	25%	26%	25%	26%
Venue mailing lists	20%	23%	27%	23%	25%
Posters in overground trains or railway stations	18%	20%	22%	20%	22%
Tourist maps/guidebooks/information centres	16%	18%	22%	18%	19%
Lifestyle / special interest magazines	15%	17%	17%	18%	19%
Online rating sites	14%	16%	21%	17%	21%
Listings magazines	13%	13%	11%	12%	11%
Other websites	12%	14%	13%	14%	15%
Artist websites	9%	9%	10%	10%	12%
Microblogs	5%	5%	7%	6%	7%
Blogs	2%	3%	3%	3%	4%

Those who have been to Den Norske Opera & Ballett in the past 5 years are significantly more likely to use national newspapers to find out about cultural and leisure activities than the culture market overall (66% vs. 53% amongst the culture market). They are also more likely to use posters, boards and banners (51% vs. 43% for the culture market) and online rating sites (21% vs. 14% for the culture market overall).

Cultural consumption

Figure 76 Cultural consumption, been to Den Norske Opera & Ballett in the past 5 years, with culture and relevant artform markets

Cultural consumption		Culture market	Performing arts market	Opera market	User market	Den Norske Opera & Ballett market
	Base	1497	1160	546	969	658
Play	Plays by 'established' playwrights	54%	64%	75%	67%	71%
	Contemporary theatre or new writing	39%	48%	49%	47%	51%
	Children's theatre	50%	58%	50%	54%	54%
	Other	8%	10%	7%	9%	9%
Musical	Traditional musicals	51%	61%	74%	63%	68%
	Jukebox musicals	38%	45%	51%	46%	50%
	Cabaret or dinner shows	21%	25%	26%	24%	26%
	Other	5%	5%	5%	5%	4%
Dance	Ballet or classical dance	29%	36%	52%	39%	49%
	Contemporary dance	24%	30%	32%	30%	34%
	Folk or traditional dance	12%	15%	18%	16%	15%
	Other	5%	5%	3%	5%	4%
Concert	Jazz music	27%	31%	40%	35%	38%
	Blues	24%	27%	31%	27%	29%
	Rock or pop concert	60%	27%	65%	63%	64%
	Contemporary music	11%	14%	18%	15%	18%
	Traditional or folk music	21%	25%	34%	27%	30%
	New classical, electronic, improvised or sound art concert	15%	14%	21%	20%	23%
	Other	9%	9%	10%	10%	10%
Art exhibition	Traditional art from the 19th Century or earlier	42%	49%	59%	51%	58%
	20th Century art	51%	60%	66%	62%	67%
	Art by contemporary artists or as yet unknown artists	34%	41%	46%	43%	48%
	Photography from the 20th Century or earlier	12%	14%	17%	15%	16%
	Contemporary photography	29%	35%	38%	38%	43%
	Sculpture	34%	38%	47%	41%	45%
	Digital or video art	16%	19%	21%	20%	22%
	Other	6%	6%	8%	7%	6%
Museum	Art museum	62%	72%	81%	74%	80%
	Social history museum	64%	70%	75%	71%	73%
	Natural history museum	53%	59%	62%	60%	62%
	Other	11%	11%	10%	11%	12%
Film	Mainstream or blockbuster films	89%	91%	87%	90%	89%
	Independent or arthouse films	29%	32%	38%	34%	39%
	Other	7%	7%	8%	7%	7%

As with Culture Segments profile, there are few differences in artform consumption for the Opera market and attenders at Den Norske Opera & Ballett.

When Den Norske Opera & Ballett attenders are compared to the culture market as a whole they are significantly more likely to have attended an art museum (80% vs. 62% culture market overall), plays by 'established playwrights (71% vs. 54% culture market overall) and traditional musicals (68% vs. 51% culture market overall).

They are also more likely to have seen both traditional 19th Century and 20th Century art exhibitions (58% and 67% respectively, compared to 42% and 51% of the culture market).

Online activities

Figure 77 Online activity in the past week, been to Den Norske Opera & Ballett in the past 5 years, with culture and relevant artform markets

Spent more than two hours on the following activities in the past week (Includes mobile and personal devices)	Culture market	Performing arts market	Opera market	User market	Den Norske Opera & Ballett market
Base	1497	1160	546	969	658
Looking at newspaper content	54%	52%	51%	53%	53%
Reading and sending emails	46%	50%	56%	52%	57%
Other web browsing for information/entertainment	40%	41%	37%	39%	40%
Social networking	40%	41%	34%	39%	41%
Learning/gaining understanding/enriching my knowledge	20%	22%	25%	22%	25%
Listening to streaming audio	19%	20%	21%	18%	21%
Watching streaming video	15%	14%	12%	13%	13%
Playing networked games	11%	10%	7%	10%	7%
Online banking, paying bills etc.	9%	8%	9%	9%	9%
Online shopping of any kind	7%	6%	6%	6%	8%
Uploading photos	5%	5%	3%	5%	5%
Downloading video to watch later	4%	4%	2%	3%	4%
Downloading music to listen to later	3%	3%	3%	3%	3%
Microblogging	3%	2%	4%	3%	3%
Downloading podcasts to listen to later	3%	2%	3%	2%	2%
Uploading audio or video	2%	2%	2%	2%	2%
Online rating	1%	2%	2%	2%	2%
Blogging	1%	1%	2%	1%	2%
None of these	16%	16%	17%	16%	15%

The online activities of Den Norske Opera & Ballett attenders are similar to those of the culture market as a whole. Den Norske Opera & Ballett market attenders are more likely to have spent more than 2 hours reading emails (57% vs. 46% of the culture market overall).

They are less likely to have spent more than 2 hours playing networked games (7% vs. 11% of the culture market overall).

Gadget ownership

Figure 78 Gadget ownership, been to Den Norske Opera & Ballett in the past 5 years, with culture and relevant artform markets

Gadget ownership	Culture market	Performing arts market	Opera market	User market	Den Norske Opera & Ballett market
Base	1497	1160	546	969	658
Portable Laptop computer	85%	87%	87%	87%	86%
Smart phone	80%	82%	81%	82%	82%
Tablet computer	52%	54%	57%	56%	59%
Desktop computer	48%	48%	51%	49%	53%
Audio/MP3 player	32%	35%	38%	35%	36%

Those who have attended Den Norske Opera & Ballet in the past 5 years are more likely than the culture market as a whole to own a tablet computer (59% vs. 52% in the culture market overall).

Newspaper readership

Figure 79 National newspaper readership, been to Den Norske Opera & Ballett in the past 5 years, with culture and relevant artform markets

National newspaper readership	Culture market	Performing arts market	Opera market	User market	Den Norske Opera & Ballett market
Base	1497	1160	423	969	658
Aftenposten	54%	59%	90%	67%	69%
Verdens Gang	41%	41%	52%	41%	39%
Dagbladet	34%	36%	49%	38%	37%
Ditt Oslo - lokalavisen	23%	24%	41%	28%	32%
Dagens Naeringsliv	19%	21%	37%	23%	25%
Dagsavisen	11%	13%	18%	13%	13%
Morgenbladet	6%	7%	14%	8%	9%
Utrop	1%	1%	1%	1%	0%
Other	24%	24%	28%	24%	23%

Those who have attended Den Norske Opera & Ballet in the past 5 years are more likely than the culture market as a whole to read Aftenposten (69% vs. 54% in the culture market overall) and Ditt Oslo (32% vs. 23% in the culture market overall).

Venue cross over

Figure 80 Venues attended in the past 5 years, been to Den Norske Opera & Ballett in the past 5 years, with culture and relevant artform markets

Venues attended in the past 5 years	Culture market	Performing arts market	Opera market	User market	Den Norske Opera & Ballett market
Base	1497	1160	546	969	658
Oslo spektrum	61%	65%	70%	69%	72%
NationalTheatret	48%	60%	78%	75%	76%
Det Norske Teatret	45%	55%	72%	70%	73%
Den Norske Opera & Ballett	44%	56%	87%	68%	100%
Latter	43%	46%	51%	47%	49%
Oslo Konserthus	42%	50%	68%	60%	67%
Oslo Nye Teater	42%	51%	63%	60%	64%
Sentrum Scene	40%	44%	50%	46%	50%
Rockefeller Music Hall	40%	44%	48%	46%	51%
Chat Noir	39%	45%	52%	50%	52%
Telenor Arena	31%	34%	36%	34%	36%
Folketeatret	23%	29%	42%	34%	38%
Lillestrøm kultursenter	19%	20%	19%	19%	17%
Parkteatret	18%	22%	24%	24%	27%
Bærum kulturhus	15%	18%	22%	19%	25%
Christiania teater	13%	16%	22%	19%	20%
Torshovteatret	13%	16%	24%	19%	23%
Oslo Filharmonien	12%	15%	26%	18%	24%
Trikkerstallen	10%	12%	16%	13%	16%
Cosmopolite	10%	11%	16%	13%	16%
Ullensaker kulturhus	8%	9%	7%	8%	6%
Kolben kulturhus	8%	9%	12%	10%	11%
Asker kulturhus	8%	8%	10%	9%	10%
Black Box Teater	6%	8%	11%	9%	11%
Dansens Hus	4%	6%	9%	7%	8%
Rådhusteatret i Ski	4%	5%	6%	5%	6%
Nes kulturhus	3%	3%	1%	2%	1%
Dukketeatret på Frogner	2%	3%	5%	4%	5%
Det andre teatret	2%	3%	3%	3%	3%
Nordic Black Theatre	1%	1%	3%	2%	2%
Dramatikkens hus	1%	1%	2%	2%	2%
Akershus Teater	1%	1%	1%	1%	1%
Teater Manu - norsk tengspråkteater	0%	0%	0%	0%	0%

Those who have attended Den Norske Opera & Ballett in the past 5 years were more likely than the culture market overall to have attended a range of venues. The most marked differences were in attendance at Det Norske Teatret (73% Den Norkse Opera & Ballett attenders, 43% culture market overall), NationalTheatret (76% Den Norske Opera & Ballet, 45% culture market overall) and Oslo Nye Teater (64% Den Norske Opera & Ballet attenders, 42% culture market overall),

Venue-specific barriers

Respondents who were aware but had not visited Den Norske Opera & Ballett were asked why they had not visited. Respondents who had visited Den Norske Opera & Ballett were asked why they had not visited more often.

Figure 81 Barriers to attendance, Den Norske Opera & Ballett

Den Norske Opera & Ballett in Oslo – barriers to attendance	Aware, never been	Ever been
Base	535	774
I do not know what is on at Den Norske Opera & Ballett	29%	22%
Other commitments in my life prevent me from having enough time to go	11%	26%
I would go to Den Norske Opera & Ballett if the tickets were cheaper	23%	50%
It is not convenient for me to travel to Den Norske Opera & Ballett	7%	3%
The timings of events at Den Norske Opera & Ballett are not convenient for me	6%	4%
I have not seen anything in the programme that appeals to me	21%	34%
I don't have anyone to go with, and I don't want to go alone	7%	17%
I have been discouraged by bad reviews (critics/friends/ family)	-	0%
Den Norske Opera & Ballett is not for the likes of me	10%	7%
Going to Den Norske Opera & Ballett is not my idea of entertainment	13%	3%
Den Norske Opera & Ballett is not relevant or interesting to me	22%	9%
I assume that tickets are always sold out	10%	17%
I have always meant to attend but have never got round to it	27%	19%
I don't think I would understand or appreciate the work	11%	8%
There is too much choice with other Oslo-based theatres/performance venues	6%	14%
Don't know/ can't say	10%	5%

Most common barriers to attendance at Den Norske Opera & Ballet are not knowing what is on (29%), not getting around to it (27%) and ticket prices (23%). Most common reasons for not attending more often were ticket prices (50%), nothing interesting /appealing in the programme (34%) and other commitments (26%).

13 Det Norske Teatret market

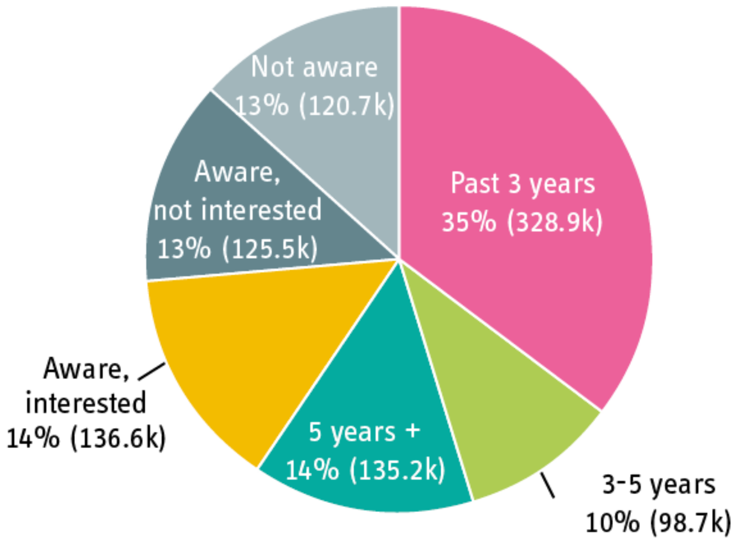
Market awareness

87% of the culture market are aware of Det Norske Teatret. This equates to 824,900 people. The model below illustrates the market potential for Det Norske Teatret within the whole culture market.

Slightly more than half of those who have ever attended Det Norske Teatret (59%) have done so in the past 3 years (35%). 15% are aware and interested in attending.

Market penetration

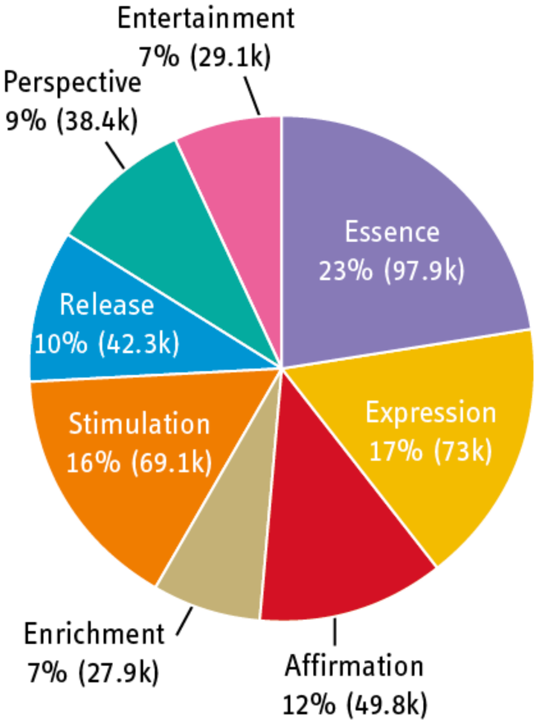
Figure 82 Market potential, Det Norske Teatret, of the whole culture market



Base: 1,497

Market profile

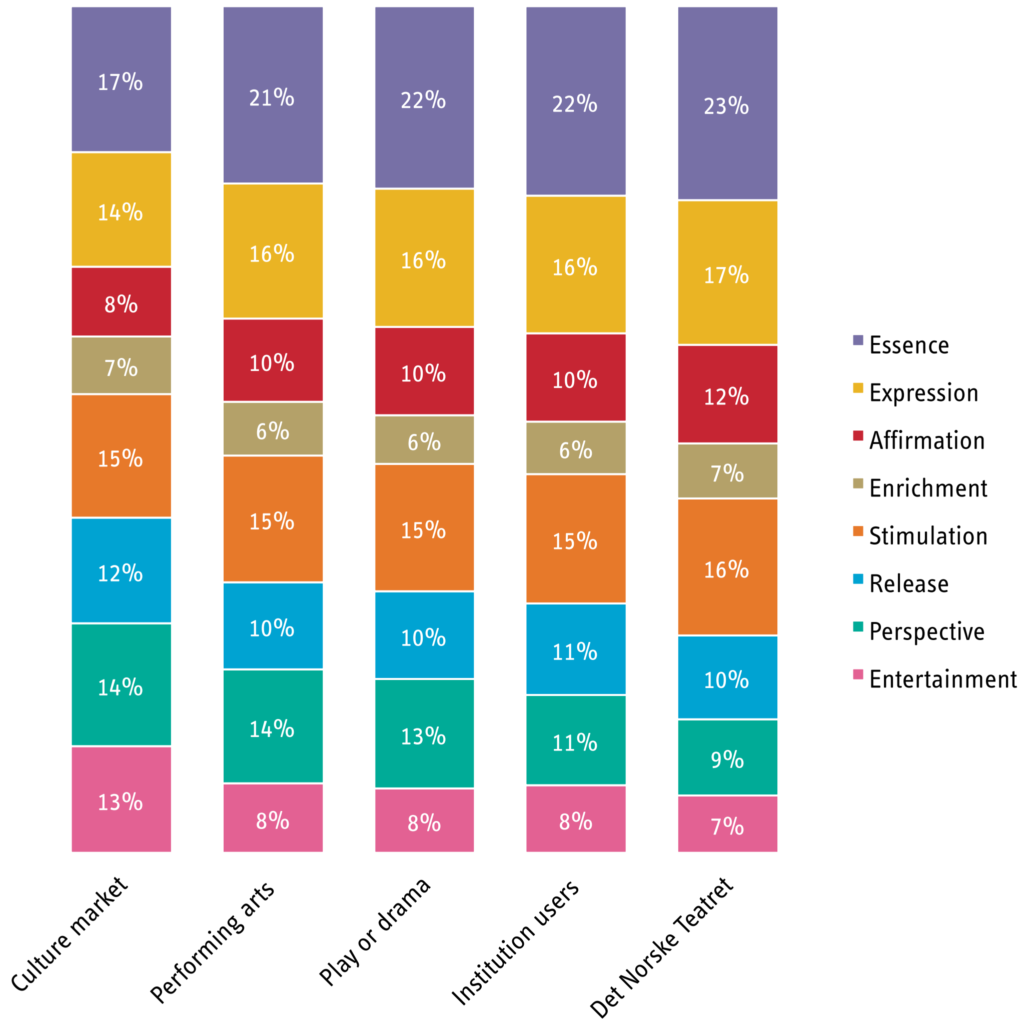
Figure 83 Culture Segment profile, been to Det Norske Teatret in the past 5 years



Base: 677

The Culture Segments are relatively evenly distributed amongst those who have attended Det Norske Teatret in the past 5 years. Although the largest segments are Essence, Expression and Stimulation, together these three segments only account for 56% of the audience.

Figure 84 Culture Segment profile, been to Det Norske Teatret in the past 5 years with culture and relevant artform markets



Bases: 1,497 (culture market), 1,160 (performing arts market), 1,054 (play or drama market), 969 (institution user market), 677 (Det Norske Teatret market)

The Culture Segments distribution of those who have attended Det Norske Teatret in the past 5 years is broadly similar to both the play or drama market and the performing arts market.

When the profile is compared to the overall culture market, Det Norske Teatret is similar to the Play or drama market but attracts a larger proportion of Essence, and slightly large proportions of Expression and Affirmation.

Market characteristics

Media channels

Figure 85 Media channels used to find out about leisure activities, been to Det Norske Teatret in the past 5 years, with culture and relevant artform markets

Sources used to find out what events are on or to plan activities, including cultural activities, for leisure time?	Culture market	Performing arts market	Play or drama market	User market	Det Norske Teatret market
Base	1497	1160	1054	969	677
Word of mouth /recommendation	61%	66%	67%	67%	66%
Local newspapers	59%	61%	62%	66%	71%
Television	58%	58%	58%	58%	56%
National newspapers	53%	59%	61%	65%	70%
Newspaper or magazine websites	51%	51%	53%	51%	52%
Venue websites	47%	52%	53%	50%	49%
Email newsletters	43%	45%	47%	47%	48%
Posters, boards and banners outside venues	43%	49%	51%	49%	49%
Advertising elsewhere	42%	45%	46%	45%	46%
Social networking sites	40%	42%	44%	43%	41%
Radio	36%	37%	38%	38%	38%
Posters on outdoor billboards	34%	37%	38%	37%	38%
Venue leaflet, brochure and flyers	33%	36%	36%	37%	40%
Posters on the Metro/Tunnelbane	32%	34%	36%	36%	37%
Posters on trams / in tram stations	24%	26%	27%	28%	30%
Online 'what's on' listings	23%	26%	26%	28%	29%
Posters in bus stations	22%	25%	25%	25%	26%
Venue mailing lists	20%	23%	23%	23%	27%
Posters in overground trains or railway stations	18%	20%	21%	20%	21%
Tourist maps/guidebooks/information centres	16%	18%	19%	18%	21%
Lifestyle / special interest magazines	15%	17%	17%	18%	18%
Online rating sites	14%	16%	17%	17%	19%
Listings magazines	13%	13%	12%	12%	12%
Other websites	12%	14%	14%	14%	14%
Artist websites	9%	9%	9%	10%	10%
Microblogs	5%	5%	5%	6%	6%
Blogs	2%	3%	3%	3%	3%

Those who have attended Det Norske Teatret in the past 5 years were more likely than the culture market as a whole to use both local and national newspapers to find out about cultural or leisure activities (71% and 70% amongst Det Norske Teatret attenders vs. 59% and 53% amongst the culture market as a whole). They are also more likely to use posters on trams/tram stations (30% vs. 24% amongst the culture market as a whole).

Cultural consumption

Figure 86 Cultural consumption, been to Det Norske Teatret in the past 5 years, with culture and relevant artform markets

Cultural consumption		Culture market	Performing arts market	Play or drama market	User market	Det Norske Teatret market
	Base	1497	1160	1054	969	677
Play	Plays by 'established' playwrights	54%	64%	68%	67%	72%
	Contemporary theatre or new writing	39%	48%	51%	47%	50%
	Children's theatre	50%	58%	61%	54%	55%
	Other	8%	10%	10%	9%	8%
Musical	Traditional musicals	51%	61%	63%	63%	66%
	Jukebox musicals	38%	45%	47%	46%	50%
	Cabaret or dinner shows	21%	25%	25%	24%	23%
	Other	5%	5%	6%	5%	5%
Dance	Ballet or classical dance	29%	36%	37%	39%	42%
	Contemporary dance	24%	30%	30%	30%	33%
	Folk or traditional dance	12%	15%	15%	16%	17%
	Other	5%	5%	5%	5%	3%
Concert	Jazz music	27%	31%	31%	35%	37%
	Blues	24%	27%	27%	27%	31%
	Rock or pop concert	60%	27%	65%	63%	61%
	Contemporary music	11%	14%	14%	15%	15%
	Traditional or folk music	21%	25%	25%	27%	30%
	New classical, electronic, improvised or sound art concert	15%	14%	17%	20%	23%
	Other	9%	9%	9%	10%	9%
Art exhibition	Traditional art from the 19th Century or earlier	42%	49%	50%	51%	55%
	20th Century art	51%	60%	61%	62%	65%
	Art by contemporary artists or as yet unknown artists	34%	41%	42%	43%	45%
	Photography from the 20th Century or earlier	12%	14%	13%	15%	18%
	Contemporary photography	29%	35%	36%	38%	39%
	Sculpture	34%	38%	39%	41%	43%
	Digital or video art	16%	19%	19%	20%	21%
	Other	6%	6%	7%	7%	8%
Museum	Art museum	62%	72%	74%	74%	77%
	Social history museum	64%	70%	71%	71%	73%
	Natural history museum	53%	59%	60%	60%	61%
	Other	11%	11%	10%	11%	10%
Film	Mainstream or blockbuster films	89%	91%	92%	90%	88%
	Independent or arthouse films	29%	32%	33%	34%	37%
	Other	7%	7%	7%	7%	7%

Those who have attended Det Norske Teatret in the past 5 years were more likely to have engaged with a variety of artforms. The greatest differences were in attendance at plays by traditional playwrights (75% vs. 54% in the culture market overall) and traditional musicals (66% vs. 51% in the culture market overall).

Beyond the performing arts, Det Norske Teatret attenders were more likely to have attended exhibitions of both 19th and 20th century art (55% and 65% respectively, compared to 42% and 51% of the culture market). They were also more likely to have attended an art museum (77% vs. 62% in the culture market).

Online activities

Figure 87 Online activity in the past week, been to Det Norske Teatret in the past 5 years, with culture and relevant artform markets

Spent more than two hours on the following activities in the past week (Includes mobile and personal devices)	Culture market	Performing arts market	Play or drama market	User market	Det Norske Teatret market
Base	1497	1160	1054	969	677
Looking at newspaper content	54%	52%	53%	53%	52%
Reading and sending emails	46%	50%	51%	52%	53%
Other web browsing for information/entertainment	40%	41%	41%	39%	34%
Social networking	40%	41%	41%	39%	35%
Learning/gaining understanding/enriching my knowledge	20%	22%	22%	22%	24%
Listening to streaming audio	19%	20%	20%	18%	19%
Watching streaming video	15%	14%	14%	13%	12%
Playing networked games	11%	10%	9%	10%	9%
Online banking, paying bills etc.	9%	8%	7%	9%	9%
Online shopping of any kind	7%	6%	6%	6%	6%
Uploading photos	5%	5%	5%	5%	2%
Downloading video to watch later	4%	4%	4%	3%	4%
Downloading music to listen to later	3%	3%	3%	3%	2%
Microblogging	3%	2%	2%	3%	2%
Downloading podcasts to listen to later	3%	2%	3%	2%	2%
Uploading audio or video	2%	2%	2%	2%	2%
Online rating	1%	2%	2%	2%	2%
Blogging	1%	1%	1%	1%	1%
None of these	16%	16%	15%	16%	18%

Generally respondents who had attended Det Norske Teatret in the past 5 years were as likely or slightly less likely to have spent more than 2 hours engaging in any of the tested activities. They were more likely to have spent 2 hours + reading and sending emails (53% vs. 46% amongst the culture market overall).

However, those who have attended Det Norske Teatret in the past 5 years are less likely to have spent time using social networking sites (35% vs. 40% amongst the culture market overall) and browsing for information/entertainment (34% vs. 40% for the culture market overall).

Gadget ownership

Figure 88 Gadget ownership, been to Det Norske Teatret in the past 5 years, with culture and relevant artform markets

Gadget ownership	Culture market	Performing arts market	Play or drama market	User market	Det Norske Teatret market
Base	1497	1160	1054	969	677
Portable Laptop computer	85%	87%	87%	87%	86%
Smart phone	80%	82%	83%	82%	80%
Tablet computer	52%	54%	54%	56%	59%
Desktop computer	48%	48%	49%	49%	52%
Audio/MP3 player	32%	35%	34%	35%	34%

Those who have attended Det Norske Teatret in the past 5 years are more likely than the culture market as a whole to own a tablet computer (59% vs. 52% in the culture market overall).

Newspaper readership

Figure 89 National newspaper readership, been to Det Norske Teatret in the past 5 years, with culture and relevant artform markets

National newspaper readership	Culture market	Performing arts market	Play or drama market	User market	Det Norske Teatret market
Base	1497	1160	791	969	677
Aftenposten	54%	59%	80%	67%	72%
Verdens Gang	41%	41%	55%	41%	43%
Dagbladet	34%	36%	49%	38%	41%
Ditt Oslo - lokalavisen	23%	24%	34%	28%	32%
Dagens Naeringsliv	19%	21%	28%	23%	25%
Dagsavisen	11%	13%	16%	13%	15%
Morgenbladet	6%	7%	10%	8%	9%
Utrop	1%	1%	0%	1%	0%
Other	24%	24%	32%	24%	25%

Those who have attended Det Norske Teatret in the past 5 years are more likely than the culture market as a whole to read Aftenposten (72% vs. 54% in the culture market overall) and Ditt Oslo (32% vs. 23% in the culture market overall).

Venue cross over

Figure 90 Venues attended in the past 5 years, been to Den Norske Teatret in the past 5 years, with culture and relevant artform markets

Venues attended in the past 5 years	Culture market	Performing arts market	Play or drama market	User market	Det Norske Teatret market
Base	1497	1160	1054	969	677
Oslo spektrum	61%	65%	66%	69%	71%
NationalTheatret	48%	60%	63%	75%	80%
Det Norske Teatret	45%	55%	58%	70%	100%
Den Norske Opera & Ballett	44%	56%	56%	68%	71%
Latter	43%	46%	47%	47%	46%
Oslo Konserthus	42%	50%	52%	60%	69%
Oslo Nye Teater	42%	51%	54%	60%	75%
Sentrum Scene	40%	44%	45%	46%	49%
Rockefeller Music Hall	40%	44%	45%	46%	47%
Chat Noir	39%	45%	46%	50%	59%
Telenor Arena	31%	34%	35%	34%	30%
Folketeatret	23%	29%	30%	34%	40%
Lillestrøm kultursenter	19%	20%	20%	19%	20%
Parkteatret	18%	22%	22%	24%	27%
Bærum kulturhus	15%	18%	19%	19%	23%
Christiania teater	13%	16%	17%	19%	23%
Torshovteatret	13%	16%	17%	19%	24%
Oslo Filharmonien	12%	15%	15%	18%	23%
Trikkerstallen	10%	12%	13%	13%	15%
Cosmopolite	10%	11%	10%	13%	15%
Ullensaker kulturhus	8%	9%	8%	8%	6%
Kolben kulturhus	8%	9%	9%	10%	10%
Asker kulturhus	8%	8%	9%	9%	11%
Black Box Teater	6%	8%	8%	9%	13%
Dansens Hus	4%	6%	6%	7%	8%
Rådhusteatret i Ski	4%	5%	5%	5%	6%
Nes kulturhus	3%	3%	2%	2%	2%
Dukketeatret på Frogner	2%	3%	3%	4%	5%
Det andre teatret	2%	3%	3%	3%	3%
Nordic Black Theatre	1%	1%	2%	2%	2%
Dramatikkens hus	1%	1%	1%	2%	2%
Akershus Teater	1%	1%	1%	1%	2%
Teater Manu - norsk tengspråkteater	0%	0%	0%	0%	0%

Those who have attended Det Norske Teatret in the past 5 years were more likely than the culture market overall to have attended a range of venues. The most marked differences were in attendance at Oslo Nye Teatret (75% Det Norske Teatret attenders, 42% culture market overall), NationalTheatret (80% Det Norske Teatret attenders, 48% culture market overall), Den Norske Opera & Ballett (71% Det Norske Teatret, 45% culture market overall) and Oslo Konserthus (69 Det Norske Teatret, 42% culture market overall)

Venue-specific barriers

Respondents who were aware but had not visited Det Norske Teatret were asked why they had not visited. Respondents who had visited Det Norske Teatret were asked why they had not visited more often.

Figure 91 Barriers to attendance, Det Norske Teatret

Det Norske Teatret - barriers to attendance	Aware, never been	Ever been
Base	416	891
I do not know what is on at Det Norske Teatret	48%	24%
Other commitments in my life prevent me from having enough time to go	11%	27%
I would go to Det Norske Teatret more often if the tickets were cheaper	9%	23%
It is not convenient for me to travel to Det Norske Teatret	4%	2%
The timing of events at Det Norske Teatret are not always convenient for me	2%	2%
I have not seen anything in the programme that appeals to me	10%	29%
I don’t always have anyone to go with, and I don't want to go alone	9%	9%
I have been discouraged by bad reviews (critics/friends/ family)	-	0%
Det Norske Teatret is not for the likes of me	4%	2%
Going to Det Norske Teatret is not my idea of entertainment	6%	3%
Det Norske Teatret is not relevant or interesting to me	18%	6%
I assume that tickets are always sold out	1%	1%
I have always meant to attend but have never got round to it	5%	19%
I don’t think I would understand or appreciate the work	9%	3%
There is too much choice with other Oslo-based theatres/performance venues	13%	16%
Don't know/ can't say	20%	15%

The most common barriers to attendance were not knowing what is on (48%), Det Norske Teatret not being interesting or relevant (18%) and too much choice elsewhere (13%). The most common reasons for not attending more often were nothing in the programme appeals (29%), other commitments (27%) and not knowing what is on (24%).

14 Oslo Filharmonien market

Market awareness

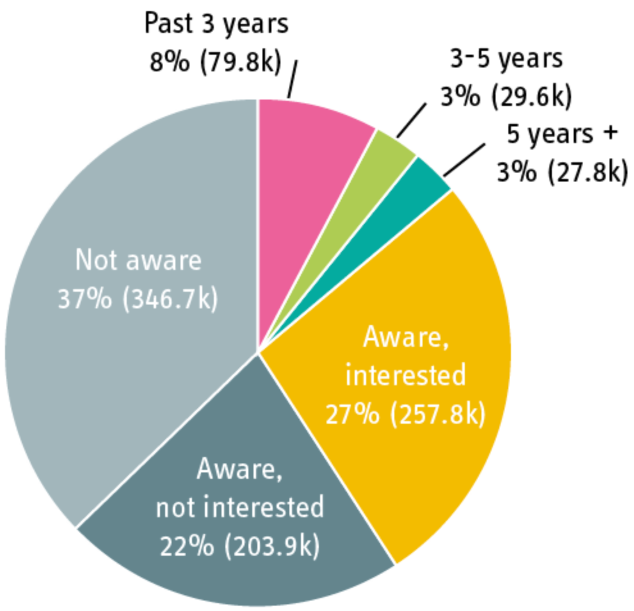
63% of the culture market are aware of Oslo Filharmonien. This equates to 598,800 people. The model below illustrates the market potential for Oslo Filharmonien within the whole culture market.

Slightly more than half of those who had ever attended Oslo Filharmonien (14%) had attended in the past 3 years (8%). Oslo Filharmonien has a large potential market - over 1 in 4 of those in the culture market (27%) are interested in attending.

However a substantial minority of the culture market (37%) are not aware of Oslo Filharmonien.

Market penetration

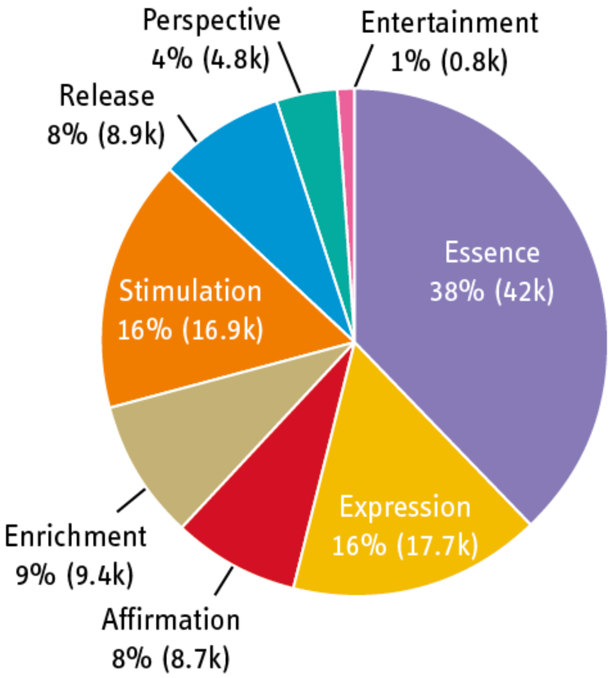
Figure 92 Market potential, Oslo Filharmonien of the whole culture market



Base: 1,497

Market profile

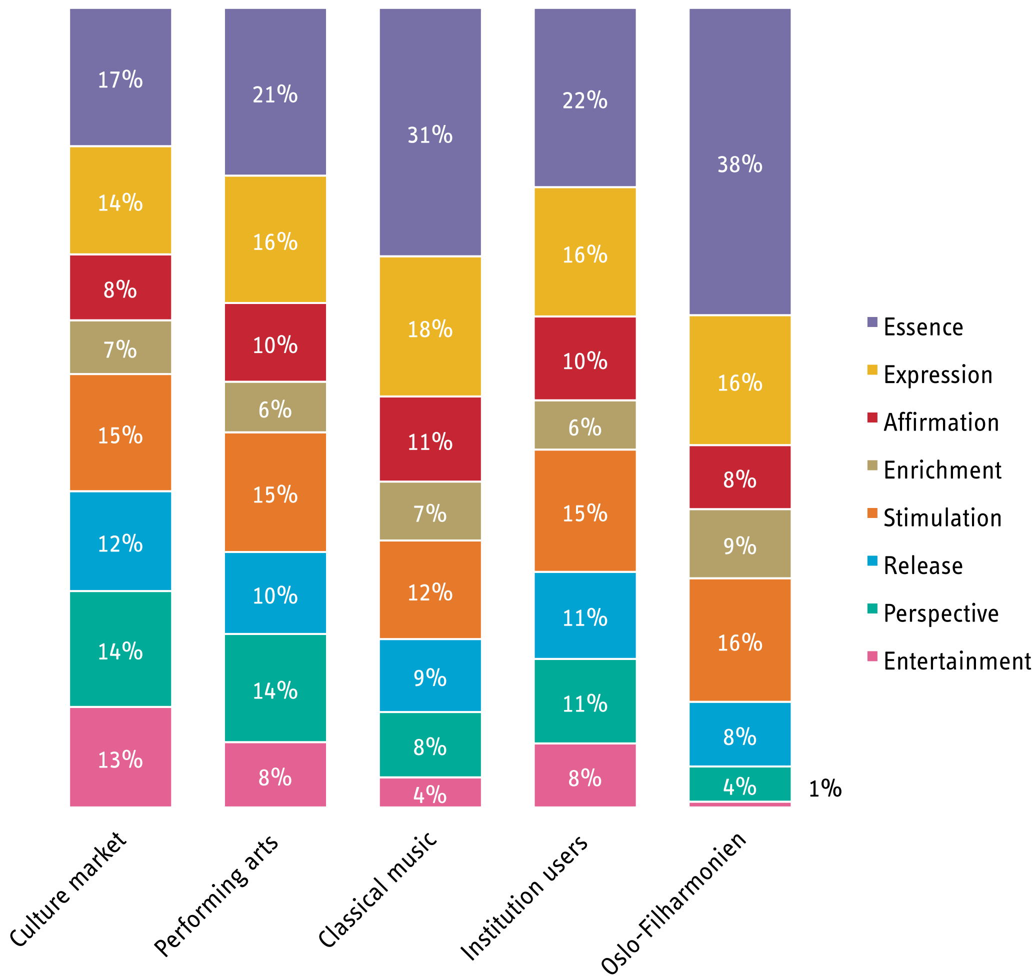
Figure 93 Culture Segment profile, been to Oslo Filharmonien in the past 5 years



Base: 173

Essence is by far the largest segment in the audience – accounting for more than twice as many people as the next largest segments. Together the three largest segments (Essence, Expression, Stimulation) account for 70% of the market.

Figure 94 Culture Segment profile, been to Oslo Filharmonien in the past 5 years with culture and relevant artform markets



Bases: 1,497 (culture market), 1,160 (performing arts market), 511 (classical music market), 969 (institution user market), 173 (Oslo Filharmonien market)

Oslo Filharmonien attenders are more likely to fall into the Essence segment than all of the larger artform / culture markets included in the model above. The Stimulation segment is also over-represented when compared to the classical music market.

Oslo Filharmonien attracts significantly smaller proportions of Entertainment and Perspective than any of the comparator markets.

Market characteristics

Media channels

Figure 95 Media channels used to find out about leisure activities, been to Oslo Filharmonien in the past 5 years, with culture and relevant artform markets

Sources used to find out what events are on or to plan activities, including cultural activities, for leisure time?	Culture market	Performing arts market	Classical music market	User market	Oslo Filharmonien market
Base	1497	1160	511	969	173
Word of mouth /recommendation	61%	66%	70%	67%	63%
Local newspapers	59%	61%	64%	66%	74%
Television	58%	58%	54%	58%	46%
National newspapers	53%	59%	66%	65%	74%
Newspaper or magazine websites	51%	51%	50%	51%	55%
Venue websites	47%	52%	56%	50%	52%
Email newsletters	43%	45%	54%	47%	53%
Posters, boards and banners outside venues	43%	49%	52%	49%	48%
Advertising elsewhere	42%	45%	45%	45%	44%
Social networking sites	40%	42%	40%	43%	32%
Radio	36%	37%	38%	38%	36%
Posters on outdoor billboards	34%	37%	37%	37%	29%
Venue leaflet, brochure and flyers	33%	36%	42%	37%	46%
Posters on the Metro/Tunnelbane	32%	34%	37%	36%	37%
Posters on trams / in tram stations	24%	26%	33%	28%	31%
Online 'what's on' listings	23%	26%	27%	28%	30%
Posters in bus stations	22%	25%	25%	25%	21%
Venue mailing lists	20%	23%	29%	23%	37%
Posters in overground trains or railway stations	18%	20%	21%	20%	23%
Tourist maps/guidebooks/information centres	16%	18%	25%	18%	30%
Lifestyle / special interest magazines	15%	17%	17%	18%	19%
Online rating sites	14%	16%	18%	17%	20%
Listings magazines	13%	13%	10%	12%	9%
Other websites	12%	14%	16%	14%	20%
Artist websites	9%	9%	12%	10%	15%
Microblogs	5%	5%	8%	6%	6%
Blogs	2%	3%	3%	3%	2%

Those who have attended Oslo Filharmonien in the past 5 years are more likely to use national newspapers (74% vs. 53% in the culture market overall) and venue mailing lists (37% vs. 20% in the culture market overall) to find out about leisure activities.

Oslo Filharmonien attenders are less likely than the culture market as a whole to use social networking sites (32% compared to 40% amongst the culture market as a whole) and listings magazines (9% compared to 13% amongst the culture market as a whole).

Cultural consumption

Figure 96 Cultural consumption, been to Oslo Filharmonien in the past 5 years, with culture and relevant artform markets

Cultural consumption		Culture market	Performing arts market	Classical music market	User market	Oslo Filharmonien market
	Base	1497	1160	511	969	173
Play	Plays by 'established' playwrights	54%	64%	76%	67%	84%
	Contemporary theatre or new writing	39%	48%	56%	47%	51%
	Children's theatre	50%	58%	53%	54%	43%
	Other	8%	10%	7%	9%	3%
Musical	Traditional musicals	51%	61%	75%	63%	74%
	Jukebox musicals	38%	45%	52%	46%	49%
	Cabaret or dinner shows	21%	25%	27%	24%	27%
	Other	5%	5%	5%	5%	2%
Dance	Ballet or classical dance	29%	36%	53%	39%	55%
	Contemporary dance	24%	30%	33%	30%	40%
	Folk or traditional dance	12%	15%	20%	16%	22%
	Other	5%	5%	3%	5%	2%
Concert	Jazz music	27%	31%	45%	35%	51%
	Blues	24%	27%	35%	27%	31%
	Rock or pop concert	60%	27%	64%	63%	52%
	Contemporary music	11%	14%	21%	15%	25%
	Traditional or folk music	21%	25%	41%	27%	40%
	New classical, electronic, improvised or sound art concert	15%	14%	27%	20%	34%
	Other	9%	9%	11%	10%	14%
Art exhibition	Traditional art from the 19th Century or earlier	42%	49%	63%	51%	69%
	20th Century art	51%	60%	71%	62%	81%
	Art by contemporary artists or as yet unknown artists	34%	41%	49%	43%	56%
	Photography from the 20th Century or earlier	12%	14%	20%	15%	22%
	Contemporary photography	29%	35%	45%	38%	48%
	Sculpture	34%	38%	52%	41%	59%
	Digital or video art	16%	19%	23%	20%	28%
	Other	6%	6%	8%	7%	9%
Museum	Art museum	62%	72%	82%	74%	87%
	Social history museum	64%	70%	75%	71%	81%
	Natural history museum	53%	59%	65%	60%	68%
	Other	11%	11%	11%	11%	6%
Film	Mainstream or blockbuster films	89%	91%	88%	90%	84%
	Independent or arthouse films	29%	32%	42%	34%	57%
	Other	7%	7%	10%	7%	12%

Those who have attended Oslo Filharmonien in the past 5 years are more likely than the culture market as a whole to have engaged with almost all tested artforms. For this reason, below we compare them to the classical music market.

Oslo Filharmonien attenders are more likely than the classical music market to have attended Jazz (51% compared to 45% amongst the classical music market) and new classical, electronic, improvised or sound art (34% compared to 27% in the classical music market overall); but they are less likely to have attended a pop or rock concert (52% vs. 64% in the classical music market).

Oslo Filharmonien attenders are also more likely to have attended an exhibition of 20th century art (81% vs. 71% in the classical music market overall).

Online activities

Figure 97 Online activity in the past week, been to Oslo Filharmonien in the past 5 years, with culture and relevant artform markets

Spent more than two hours on the following activities in the past week (Includes mobile and personal devices)	Culture market	Performing arts market	Classical music market	User market	Oslo Filharmonien market
Base	1497	1160	511	969	173
Looking at newspaper content	54%	52%	51%	53%	55%
Reading and sending emails	46%	50%	57%	52%	61%
Other web browsing for information/entertainment	40%	41%	38%	39%	41%
Social networking	40%	41%	37%	39%	38%
Learning/gaining understanding/enriching my knowledge	20%	22%	26%	22%	39%
Listening to streaming audio	19%	20%	22%	18%	23%
Watching streaming video	15%	14%	10%	13%	9%
Playing networked games	11%	10%	9%	10%	9%
Online banking, paying bills etc.	9%	8%	9%	9%	13%
Online shopping of any kind	7%	6%	5%	6%	6%
Uploading photos	5%	5%	5%	5%	2%
Downloading video to watch later	4%	4%	3%	3%	10%
Downloading music to listen to later	3%	3%	4%	3%	3%
Microblogging	3%	2%	3%	3%	5%
Downloading podcasts to listen to later	3%	2%	3%	2%	3%
Uploading audio or video	2%	2%	2%	2%	4%
Online rating	1%	2%	2%	2%	3%
Blogging	1%	1%	2%	1%	3%
None of these	16%	16%	15%	16%	13%

Those who have attended Oslo Filharmonien in the past 5 years are significantly more likely than the culture market overall to use the internet for learning/gaining understanding/enriching my knowledge (39% spent more than 2 hours doing this vs. 20% in the culture market overall).

Conversely they are less likely to have spent more than 2 hours per week streaming video (9% vs. 15% amongst the culture market as a whole).

Gadget ownership

Figure 98 Gadget ownership, been to Oslo Filharmonien in the past 5 years, with culture and relevant artform markets

Gadget ownership	Culture market	Performing arts market	Classical music market	User market	Oslo Filharmonien market
Base	1497	1160	511	969	173
Portable Laptop computer	85%	87%	86%	87%	87%
Smart phone	80%	82%	83%	82%	77%
Tablet computer	52%	54%	59%	56%	62%
Desktop computer	48%	48%	56%	49%	63%
Audio/MP3 player	32%	35%	42%	35%	39%

Those who have attended Oslo Filharmonien in the past 5 years are more likely than the culture market overall to own a desktop computer (63% vs. 48% in the culture market overall) and a tablet computer (62% vs. 52% in the culture market overall).

Newspaper readership

Figure 99 National newspaper readership, been to Oslo Filharmonien in the past 5 years, with culture and relevant artform markets

National newspaper readership	Culture market	Performing arts market	Classical music market	User market	Oslo Filharmonien market
Base	1497	1160	404	969	173
Aftenposten	54%	59%	87%	67%	74%
Verdens Gang	41%	41%	49%	41%	36%
Dagbladet	34%	36%	51%	38%	43%
Ditt Oslo - lokalavisen	23%	24%	41%	28%	40%
Dagens Naeringsliv	19%	21%	34%	23%	33%
Dagsavisen	11%	13%	21%	13%	18%
Morgenbladet	6%	7%	13%	8%	14%
Utrop	1%	1%	1%	1%	0%
Other	24%	24%	32%	24%	27%

Those who have attended Oslo Filharmonien in the past 5 years are more likely to read a range of national newspapers. 74% regularly read Aftenposten (vs. 54% of the culture market overall), 40% read Ditt Oslo (vs. 23% of the culture market overall) and 33% read Dagens Naeringsliv (vs. 19% of the culture market overall.

Venue cross over

Figure 100 Venues attended in the past 5 years, been to Oslo Filharmonien in the past 5 years, with culture and relevant artform markets

Venues attended in the past 5 years	Culture market	Performing arts market	Classical music market	User market	Oslo Filharmonien market
Base	1497	1160	511	969	173
Oslo spektrum	61%	65%	69%	69%	75%
NationalTheatret	48%	60%	74%	75%	91%
Det Norske Teatret	45%	55%	71%	70%	90%
Den Norske Opera & Ballett	44%	56%	75%	68%	90%
Latter	43%	46%	48%	47%	52%
Oslo Konserthus	42%	50%	74%	60%	96%
Oslo Nye Teater	42%	51%	65%	60%	85%
Sentrum Scene	40%	44%	55%	46%	54%
Rockefeller Music Hall	40%	44%	52%	46%	53%
Chat Noir	39%	45%	52%	50%	66%
Telenor Arena	31%	34%	34%	34%	27%
Folketeatret	23%	29%	38%	34%	43%
Lillestrøm kultursenter	19%	20%	22%	19%	20%
Parkteatret	18%	22%	27%	24%	31%
Bærum kulturhus	15%	18%	25%	19%	28%
Christiania teater	13%	16%	21%	19%	28%
Torshovteatret	13%	16%	26%	19%	30%
Oslo Filharmonien	12%	15%	30%	18%	100%
Trikkerstallen	10%	12%	17%	13%	19%
Cosmopolite	10%	11%	17%	13%	23%
Ullensaker kulturhus	8%	9%	9%	8%	3%
Kolben kulturhus	8%	9%	10%	10%	11%
Asker kulturhus	8%	8%	11%	9%	12%
Black Box Teater	6%	8%	13%	9%	19%
Dansens Hus	4%	6%	10%	7%	14%
Rådhusteatret i Ski	4%	5%	5%	5%	4%
Nes kulturhus	3%	3%	3%	2%	1%
Dukketeatret på Frogner	2%	3%	5%	4%	8%
Det andre teatret	2%	3%	4%	3%	5%
Nordic Black Theatre	1%	1%	3%	2%	6%
Dramatikkens hus	1%	1%	3%	2%	6%
Akershus Teater	1%	1%	1%	1%	1%
Teater Manu - norsk tengspråkteater	0%	0%	0%	0%	1%

As with artform crossover, it is unsurprising that Oslo Filharmonien attenders are more likely than the culture market overall to have attended a broad range of venues. We therefore compare them to the classical music market.

Oslo Filharmonien attenders are significantly more likely to have attended Oslo Konserthus (96% vs 42% of the culture market), Oslo Nye Teater (85% vs. 42% of the culture market) and Den Norske Teatret (90% vs. 45% of the culture market). This suggests their interests' range far beyond classical music.

Venue-specific barriers

Respondents who were aware but had not visited Oslo Filharmonien were asked why they had not visited. Respondents who had visited Oslo Filharmonien were asked why they had not visited more often.

Figure 101 Barriers to attendance, Oslo Filharmonien

Oslo Filharmonien - barriers to attendance	Aware, never been	Ever been
Base	739	217
I do not know what is on at Oslo Filharmonien	33%	20%
Other commitments in my life prevent me from having enough time to go	13%	25%
I would go to Oslo Filharmonien if the tickets were cheaper	7%	31%
It is not convenient for me to travel to Oslo Filharmonien	5%	1%
The timings of events at Oslo Filharmonien are not convenient for me	5%	1%
I have not seen anything in the programme that appeals to me	15%	41%
I don't have anyone to go with, and I don't want to go alone	8%	10%
I have been discouraged by bad reviews (critics/friends/ family)	-	0%
Oslo Filharmonien is not for the likes of me	5%	1%
Going to Oslo Filharmonien is not my idea of entertainment	12%	1%
Oslo Filharmonien is not relevant or interesting to me	26%	3%
I assume that tickets are always sold out	2%	5%
I have always meant to attend but have never got round to it	14%	15%
I don't think I would understand or appreciate the work	10%	1%
There is too much choice with other Oslo-based theatres/performance venues	11%	12%
Don't know/ can't say	18%	7%

The most common barriers to attendance for Oslo Filharmonien are not knowing what is on (33%), the programme not being interesting or relevant (26%) and programme not being appealing (15%). The most common reasons for not attending regularly were not seeing anything interesting in the programme (41%), ticket price (31%) and other commitments (25%).

Non-users

15 Non-users

The chapters above serve to understand and shed light on the whole market – those who are interested in attending and those who are attending a wide variety of artforms at a range of venues.

Within this market, the five partner institutions[6] in this research are also particularly interested in those that are not currently attending their work or venues and how understanding and insight can help them collectively reach out into the wider market.

Therefore in this chapter we focus on respondents who have not attended any of the 5 partner institutions in the past 5 years. The aim is to explore similarities and differences between users and non-users, to understand what stops them from engaging and how they might be encouraged to do so.

15.1 Key findings and Culture Segment profile among non-users

Non-users are generally less active

Non-users are generally less active in their leisure time – they are not replacing arts activity with large numbers of alternative pastimes. The differences between users and non-users are broader than art and culture, with non-users also less likely to be engaged in an extensive list of other activities, interests or pastimes.

Socio demographic profile

Factors such as age, income and level of education do not currently preclude engagement with the 5 institutions. In terms of socio demographic profile there are only small differences between users and nonusers.

Users of the 5 institutions have slightly higher proportions of older people, are more likely to have liberal political views and are perhaps unsurprisingly and more likely to be living in Oslo than Akershus. There are higher proportions of people with only basic education and below average household income among the non-users. However there are also significant numbers of users with lower levels of education and income, and non-users with higher levels. While these factors may describe modest differences in the profile of these

[6] Dansens Hus, NationalTheatret, Den Norske Opera & Ballett, Det Norske Teatret and Oslo Filharmonien.

different groups, they do not define them. The sections below explore this in greater detail.

Not barriers – lack of motivation

When asked to select possible motivations for engaging with culture, non-users were less able to identify reasons to go. Those that they did cite were social. Users, on the other hand, cited multiple motivations and benefits for attendance including not just social but intellectual, emotional and spiritual benefits. Non-users don't not go because they feel excluded – they don't go because they are yet to be convinced of the benefits above - which they feel they can enjoy elsewhere.

Focus group research with non-users further explored the attitudes, values and perceptions of the arts and cultural offer of the 5 institutions and revealed consistent themes that support and develop on findings from Audiences Atlas.

- Non-users are happy and do not feel they are missing out
- The current performing arts brand doesn't reflect their own self image
- The offer is perceived to be lacking in relevance
- Marketing does not often reach non-users and when it does it fails to capture their imagination
- Price is not the barrier – lack of perceived benefit or value is

Strategies and approaches to addressing these challenges might differ depending which Culture Segment you are trying to engage – in order to address their specific needs.

Using Culture Segments to engage non-users

All of the Culture Segments are represented in the non-users as well as users but in different proportions. The two largest segments within the users are Essence (22%) and Expression (16%).

However the segments found in largest numbers among non-users are Perspective (22%) and Entertainment (21%). There are also higher numbers of Release and lower numbers of Affirmation in the non-users market. Enrichment and Stimulation are found in similar proportions in both markets.

Therefore in seeking to extend further into the market of non-users there are a number of possible approaches for example:

1. Targeting Entertainment, Release or Perspective

Campaigns seeking to reach the segments with largest proportions of non-users would need to do more to convince these people that there is something positive, unique and valuable to be gained from the experiences offered. Reaching these segments would also require a more hand-to-hand audience development approach, since marketing campaigns through the usual channels are unlikely to reach them, raise awareness or stimulate desire to participate.

Understanding the nature of these segments can help craft messages to resonate with each of these segments. Entertainment will be attracted by evidence of popular appeal and mass endorsement and Release will not want to risk wasting their all too precious time on an activity that will not be convenient or meet all of their needs and ultimately prove to have been worth the considerable effort required. Perspective could be challenging to engage because they instinctively rely on their own judgement and discovery so the invitation will need to be very carefully offered with a compelling reason to accept.

Campaigns to bring members of these segments in would also need to be backed up by organisation wide strategies to be poised to better meet the needs of these segments. As discussed in more detail later in this chapter there are issues around perceived relevance and how the brands of the institutions are currently seen. A more developed, relevant and sophisticated brand would need to be developed and articulated and an audit of each brand touch point undertaken to ensure that the brand promise is consistently delivered upon.

2. Targeting Essence, Expression, Stimulation

Whilst these segments contain larger proportions of users, there remain non-users within them. Whilst still requiring considerable effort, it may be possible to convince these less engaged individuals of the benefit of attendance. Issues persist around lack of relevance and motivation but better and more compelling communications, alongside more highly developed brands, may reach further into these markets. Each segment will require different communications and messages that can be delivered across the platforms most likely to reach them.

For example Expression are likely to respond to an offer that encourages and facilitates participation and discussion (as they may currently fear the experiences offered are passive) and will respond to opportunities to connect with like-minded people.

Stimulation are likely to respond to more contemporary brand communications. Guarantee an interesting, engaging sociable experience that will be populated by others with whom they associate. For Stimulation any suspicion that these events are populated by 'their grandparents' and 'purple scarf wearers' and their peers needs to be dispelled.

While Essence are generally a highly engaged segment, there still remain those in this segment who have not yet been given a compelling reason to attend.

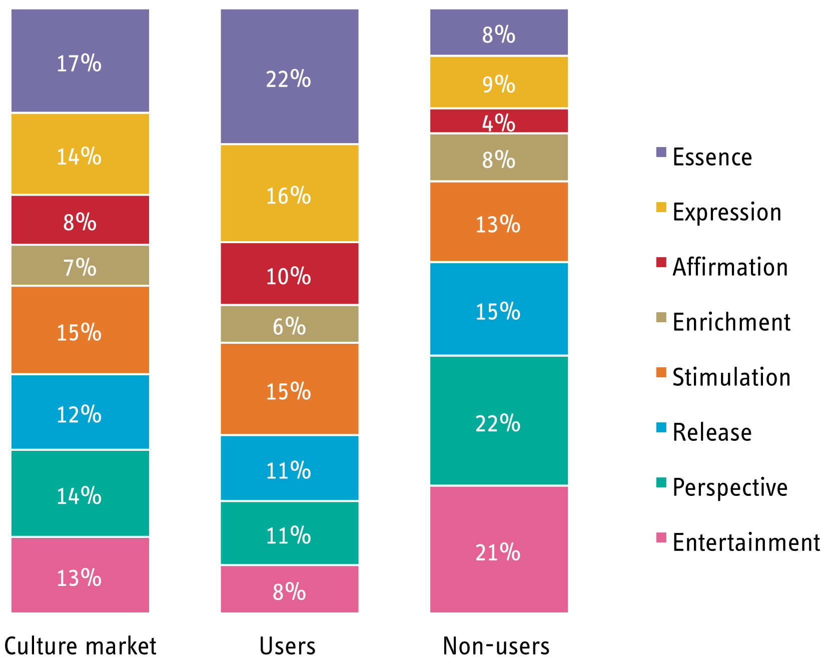
In identifying which segment(s) to prioritise there are a number of considerations. These include (not in order)

- **Audience development objective** – is this a strategy to reach a particular kind of audience or a plan to attract those most likely to respond?
- **Prevalence in your current audience** – is there a natural attraction to your current offer?
- **Brand affinity of current audiences** – what kind of relationship might you enjoy with people in this segment?
- **Prevalence in the potential market** – are there more of them to go after?
- **Artistic ambition and organisation vision** – does this segment help you achieve your vision and mission? Are they open to the kind of work you would like to programme? Will they support your artistic vision and help make your programming choices viable?

15.2 Non-users Culture segments profile

The model below illustrates the profound differences in Culture Segment profile of the user and non-user markets. The two largest segments in the user market are Essence (22%) and Expression (16%) whilst the largest segments in the non-user market are Perspective (22%) and Entertainment (21%). Only Enrichment and Stimulation are of similar proportions in both the user and non-user markets.

Figure 102 Culture Segments profile, users and non-users



Bases: 1,497 (culture market), 969 (users), 529 (non-users)

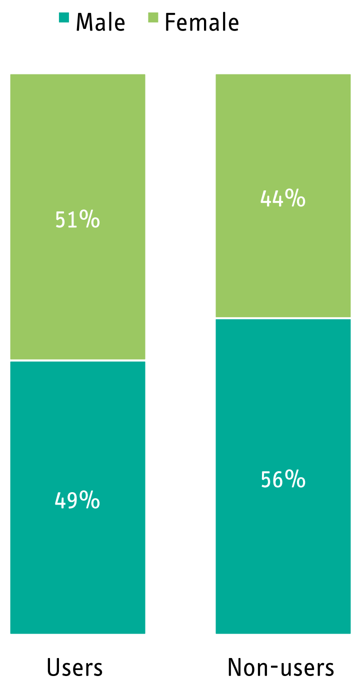
15.3 Demographics

There are some modest differences in demographics between users and non-users.

Gender

Users are slightly more likely to be female (51%) rather than male (49%). In contrast, non-users are more likely to be male than female (56% compared to 44% respectively).

Figure 103 Users and Non-users by age

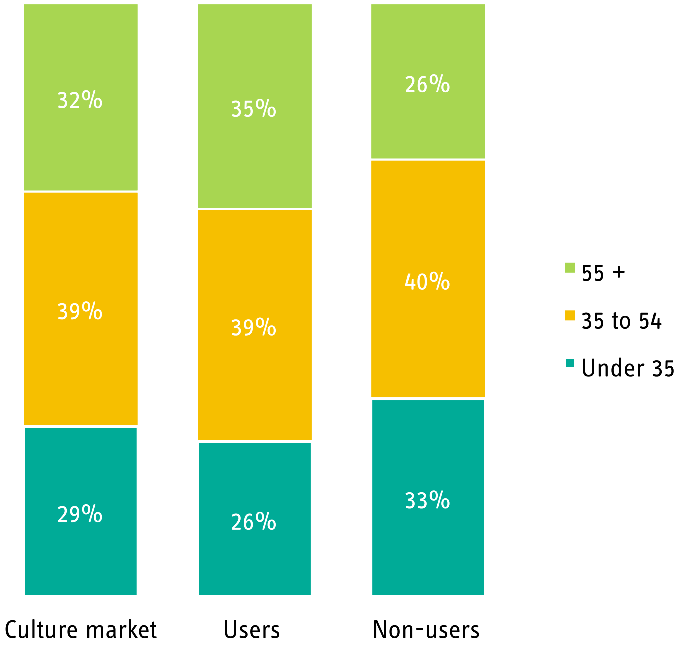


Bases: 1497 (Users), 529 (Non-users)

Age

Users are more likely to be older, with 35% aged 55 or over (compared to 26% of non-users). In contrast, non-users are more likely to be younger, 33% are under 35, compared to 26% of users.

Figure 104 Age profile, users and non-users



Bases: 1,497 (culture market), 969 (users), 529 (non-users)

Geographic origin

Non-users are more likely to be from Akershus – 58% of non-users are from Akershus compared to 40% of users. The table below gives a detailed breakdown of origin, and shows that non-users are more likely to live in Grorud, Oslo (6% vs. 3% users), Skedsmo, Akershus (7% vs. 2% users), and Nes, Akershus (4% vs. 0% users). Non-users are less likely to live in Sagene, Oslo (1% vs. 5% users) and Ullern, Oslo (0% vs. 5% users).

Figure 105 Geographic origin, users and non-users

Where in Oslo/Akershus do you live?	Culture market	User or non-user	
		User	Non-user
	1497	969	529
Akershus - Ås	2%	1%	4%
Akershus - Asker	4%	4%	5%
Akershus - Aurskog-Høland	1%	1%	1%
Akershus - Bærum	10%	10%	10%
Akershus - Eidsvoll	1%	1%	1%
Akershus - Enebakk	1%	1%	1%
Akershus - Fet	1%	1%	1%
Akershus - Frogn	1%	1%	0%
Akershus - Gjerdrum	0%	0%	0%
Akershus - Hurdal	0%	0%	0%
Akershus - Lørenskog	2%	3%	2%
Akershus - Nannestad	1%	0%	2%
Akershus - Nes (Ak.)	2%	0%	4%
Akershus - Nesodden	1%	1%	3%
Akershus - Nittedal	2%	1%	4%
Akershus - Oppegård	2%	3%	2%
Akershus - Rælingen	1%	1%	1%
Akershus - Skedsmo	4%	2%	7%
Akershus - Ski	4%	3%	5%
Akershus - Sørum	2%	3%	0%
Akershus - Ullensaker	3%	2%	4%
Akershus - Vestby	1%	1%	1%
Oslo - Alna	4%	3%	6%
Oslo - Bjerke	3%	2%	4%
Oslo - Frogner	4%	5%	2%
Oslo - Gamle Oslo	4%	5%	2%
Oslo - Grorud	4%	3%	6%
Oslo - Grünerløkka	5%	6%	2%
Oslo - Marka	0%	0%	0%
Oslo - Nordre Aker	4%	5%	2%
Oslo - Nordstrand	3%	3%	3%
Oslo - Østensjø	4%	4%	3%
Oslo - Sagene	3%	5%	1%
Oslo - Sentrum	1%	1%	1%
Oslo - Søndre Nordstrand	3%	3%	2%
Oslo - St. Hanshaugen	3%	4%	1%
Oslo - Stovner	2%	2%	3%
Oslo - Ullern	3%	5%	0%
Oslo - Vestre Aker	3%	4%	1%

Politics

Non-users are more likely to have voted for Fremskrittspartiet (Conservative liberal/classical liberal Progress Party) and less likely to have voted for Høyre (Conservative Party). They are also more likely to have voted for Det Norske Arbeiderparti (Labour party), suggesting that their politics are more likely to be left wing than users.

Figure 106 Party voted for during 2009 elections, users and non-users

Which political party did you vote for in the last Norwegian parliamentary elections in 2009?	Culture market	User or non-user	
		User	Non-user
Base	1497	969	529
DNA (Det Norske Arbeiderparti)	27%	24%	31%
H (Høyre)	24%	27%	18%
FRP (Fremskrittspartiet)	10%	6%	18%
V (Venstre)	7%	8%	5%
SV (Sosialistisk Venstreparti)	6%	7%	5%
Miljøpartiet de grønne	5%	7%	1%
KrF (Kristelig Folkeparti)	4%	5%	2%
R Rødt	3%	4%	3%
SP - Senterpartiet	2%	1%	2%
Other party	2%	0%	4%
Don't know/can't say	4%	5%	3%
Prefer not to say	7%	6%	8%

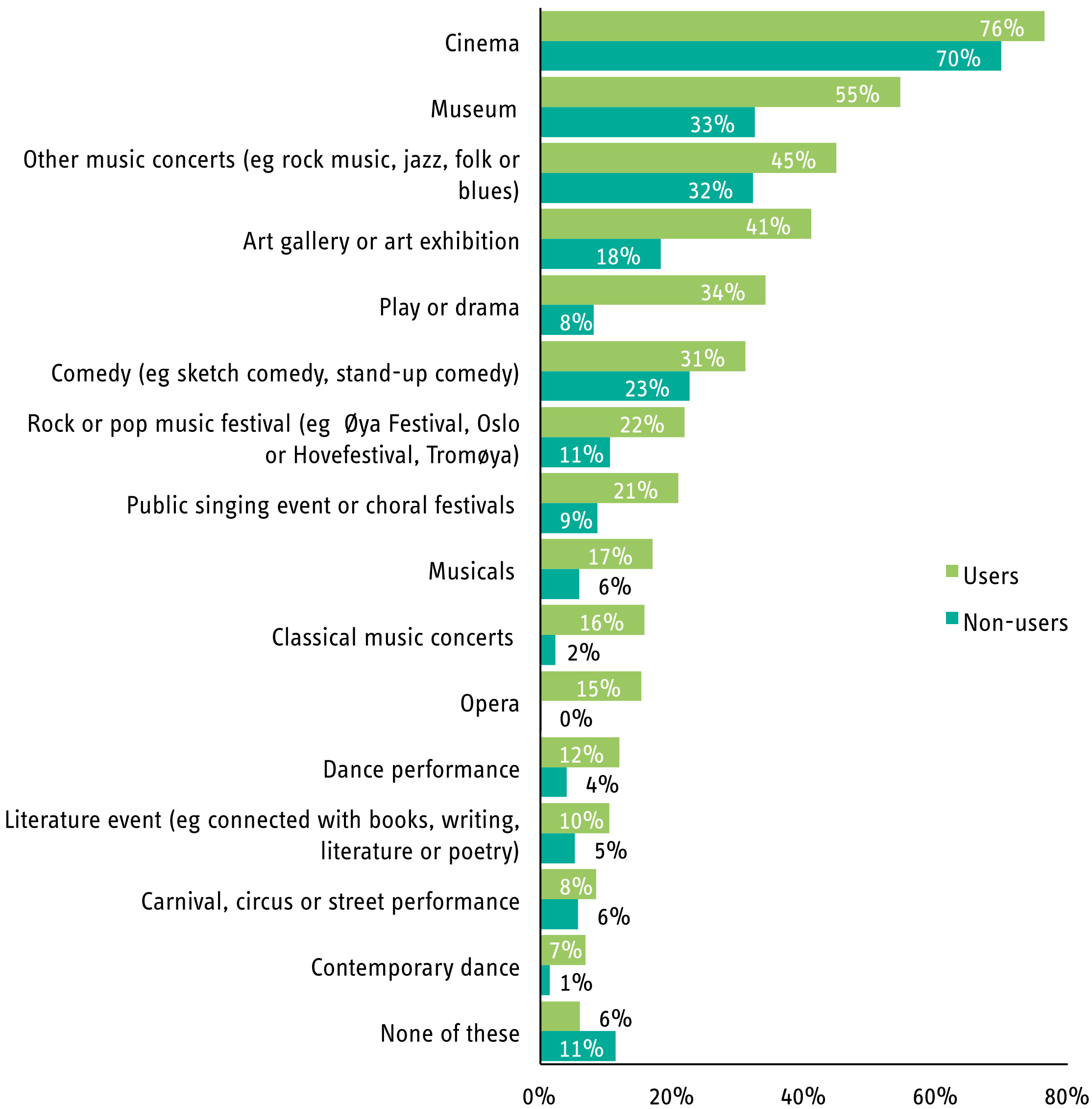
15.4 Artform engagement

Non-users of the five participating institutions are also less likely to engage with each of the other artforms examined – users being more likely to have engaged with a variety of other artforms in the past 12 months.

While a high proportion of non-users (70%) attended the cinema within the past 12 months, this is still fewer than the proportion of users who have done this (76%). A third of non-users (33%) visited a museum (again fewer compared to 55% of users).

Almost a third of non-users (32%) had attended a music concerts in the past 12 months but again this remains lower than users, 45% of whom had done so.

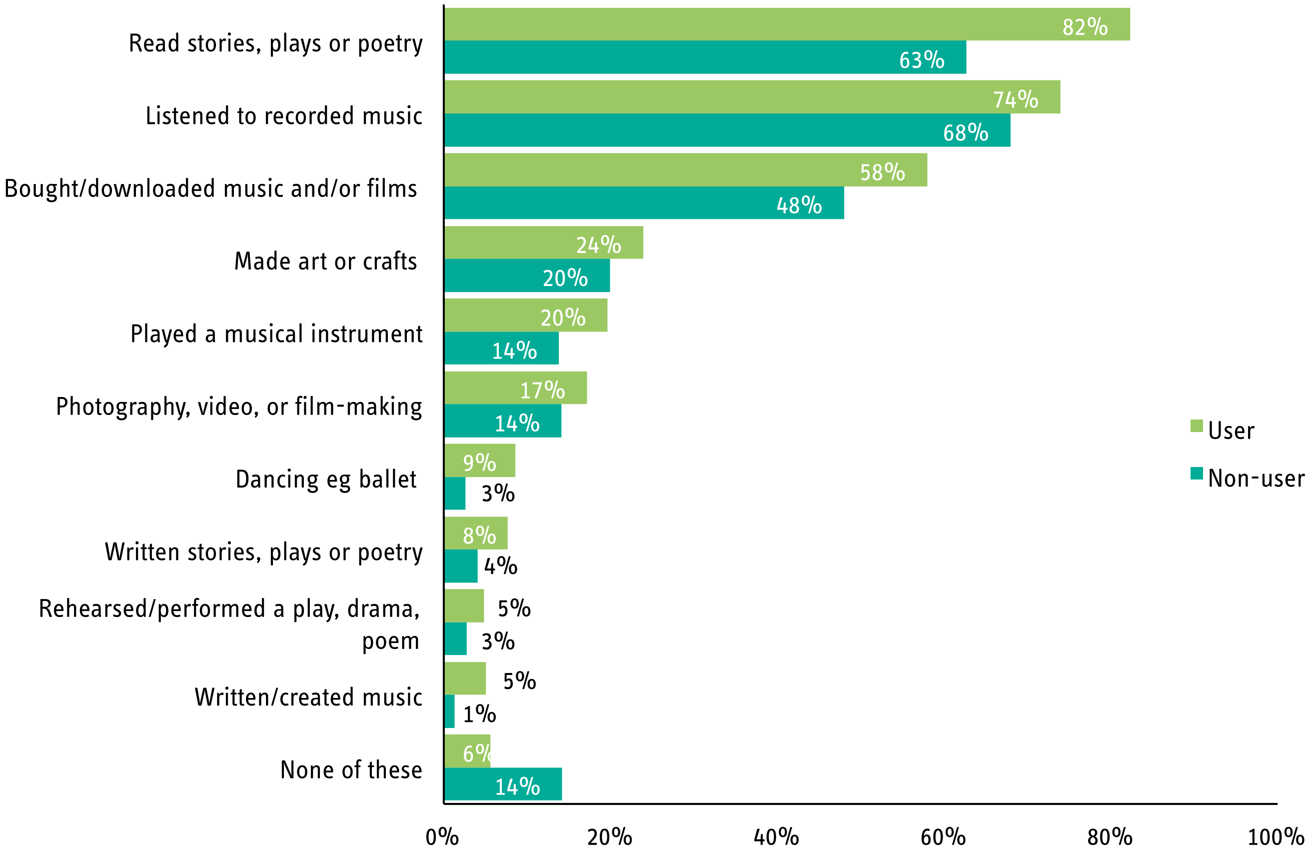
Figure 107 Artform engagement, past 12 months by users and non-users



15.5 Hobbies and interests

Overall data shows that non-users were less likely to engage in a range of hobbies, interests and activities than users. This suggests that rather than choosing culture instead of other things, users are engaging with cultural and non-cultural activities; and non-users are generally less likely to have hobbies and interests – both within and beyond the cultural sphere.

Figure 108 Cultural activities participated in in the past 12 months, users and non-users

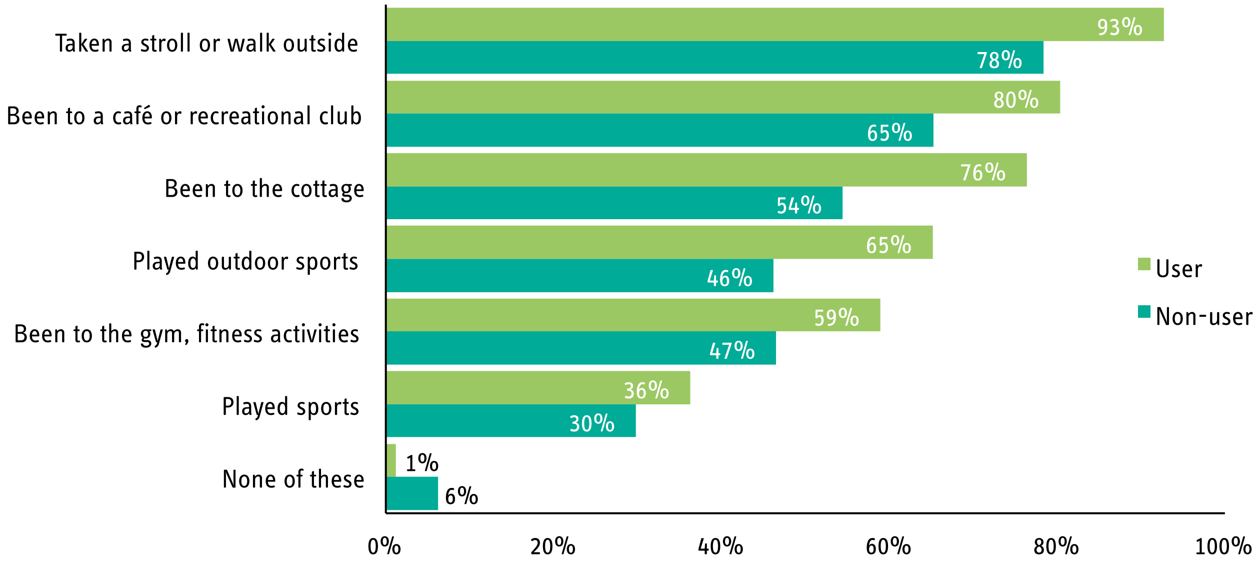


Bases: 969 (users), 529 (non-users)

Non-users are less likely than users to have participated in a range of cultural activities in the past 12 months. Most notably they are less likely to have read stories plays or poetry (63% vs. 82% amongst users) and to have bought or downloaded music or films (48% vs. 58% amongst users).

Non-users were more likely to have done none of the tested activities in the past 12 months.

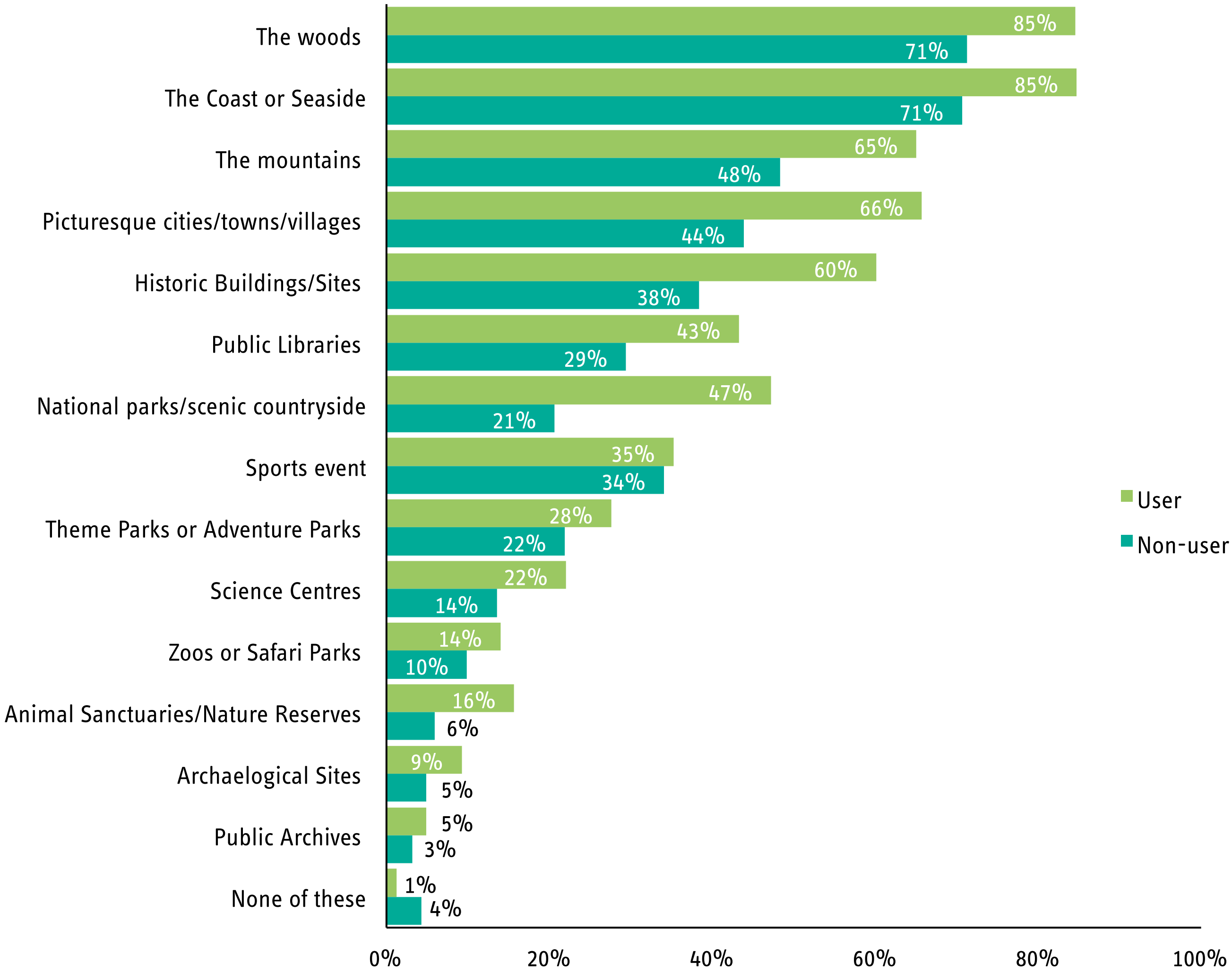
Figure 109 Hobbies undertaken in the past 12 months, users and non-users



Bases: 969 (users), 529 (non-users)

Users are more likely than non-users to engage in the activities above – including playing outdoor sports, fitness activities and going to the cottage. As was the case above, non-users were less likely to have engaged on all tested measures.

Figure 110 Recreational visits made in the past 12 months, users and non-users

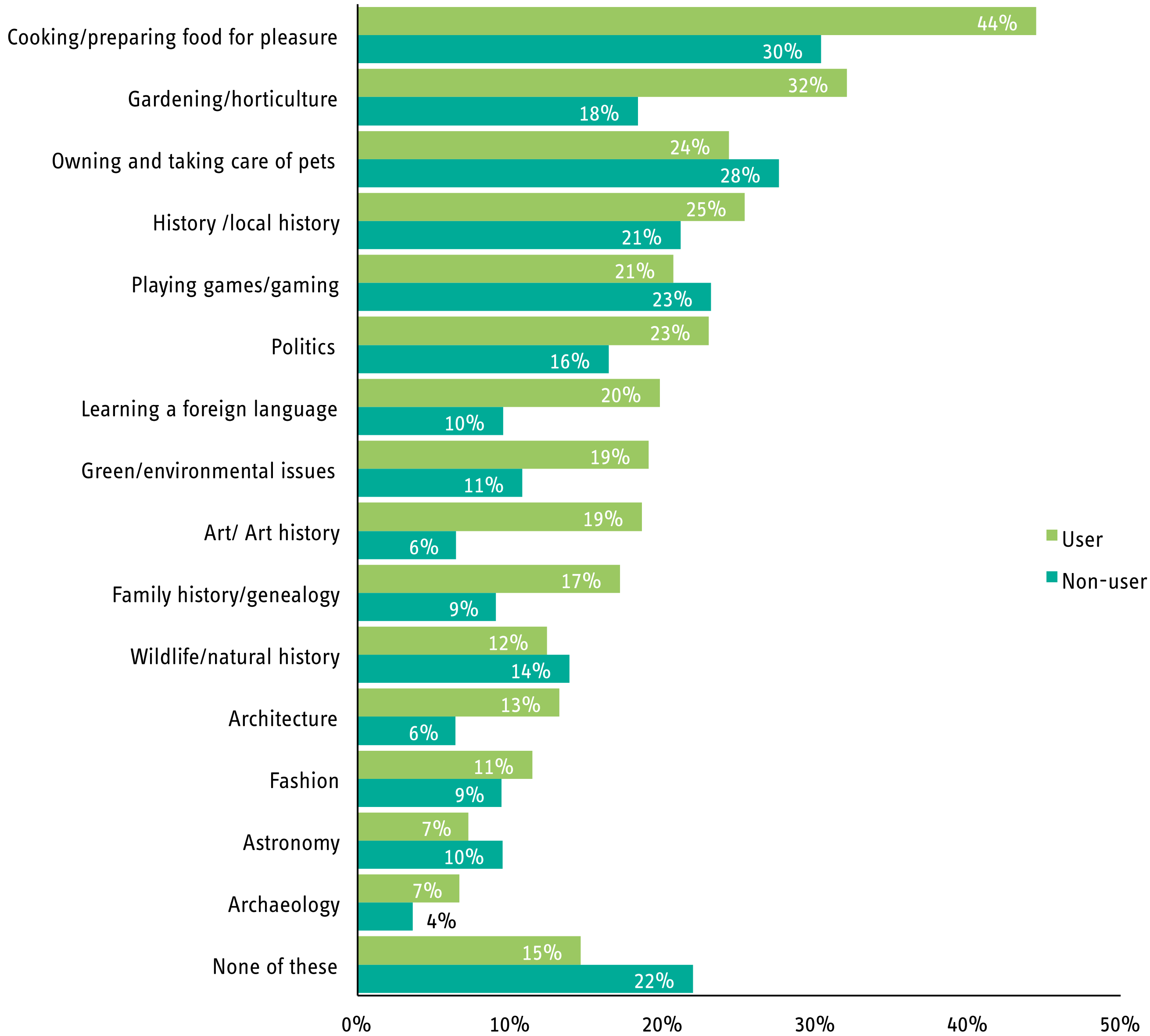


Bases: 969 (users), 529 (non-users)

Non-users were less likely to have engaged in most of the recreational visits tested in the past 12 months. Differences were most marked in natural parks / scenic countryside (47% of users, 27% of non-users had engaged in the past 12 months), historic buildings and sites (60% of users, 38% of non-users had engaged in the past 12 months) and picturesque or interesting cities, towns or villages (66% of users, 44% of non-users had engaged in the past 12 months).

The smallest difference between users and non-users was in attendance at sports events – 35% of users and 34% of non-users had attended a sports event in the past 12 months.

Figure 111 Interests, users and non-users



Bases: 969 (users), 529 (non-users)

Non-users were less likely than users to cite a range of interests or hobbies in the tested areas. The differences between users and non-users were much broader than art and culture, with non-users also less likely to be interested in cooking, gardening, politics, languages, green issues, genealogy and architecture.

There were a small number of interests where there was no difference between users and non-users – pets and gaming.

Non-users were more likely than users not to cite any of the tested interests.

15.6 Motivations for engaging in culture

Figure 112 All motivations for engaging in culture, users and non-users

Motivations for engaging in culture	Culture market	User or non-user		%-point difference
		User	Non-user	
Base	1497	969	529	1497
... helps me leave my daily life behind	74%	78%	68%	-10%
... is a pleasant form of entertainment or a way to pass the time	73%	78%	64%	-14%
... allows me to spend time with friends and family	61%	66%	53%	-13%
... expands my knowledge	59%	66%	46%	-20%
... allows me to see beautiful things in an attractive setting	53%	59%	41%	-18%
... allows me to see interesting buildings or places	52%	58%	42%	-17%
... allows me to enjoy being part of a communal or shared experience	51%	57%	41%	-16%
... enriches my quality of life, helps me to live life	49%	56%	37%	-19%
... allows me to explore new interests and/or collect new experiences	44%	52%	29%	-24%
... allows me to pursue a hobby or personal interest	44%	48%	37%	-11%
... helps me control stress	43%	44%	41%	-3%
... helps me keep fit, for my health	40%	44%	34%	-10%
... allows me to reflect and contemplate on the world	38%	45%	26%	-18%
... gives me something new to talk about	38%	41%	32%	-9%
... allows me to feel the extremities of emotion	36%	40%	27%	-13%
... broadens my horizons and those of my family/children	31%	35%	22%	-13%
... develops my creativity and imagination	28%	34%	16%	-18%
... lets me keep up with what others are talking about	26%	30%	17%	-13%
... allows me to discover new ways of doing things, innovation or new works of art	24%	30%	15%	-15%
... gives me a sense of nostalgia, a sense of stepping back in time	23%	25%	20%	-5%
... allows me to experience awe and wonder	21%	25%	15%	-10%
... develops my children's interests	20%	23%	14%	-9%
... enriches my own cultural or personal identity or feel a personal connection	16%	18%	13%	-5%
... develops my skills, knowledge and give me a sense of accomplishment	15%	17%	11%	-6%
... helps me to express myself and my feelings	13%	17%	5%	-12%
... helps me to express my ideas	8%	9%	6%	-3%
Don't know / can't say	4%	2%	7%	5%
None of these	1%	1%	2%	1%

This table summarises motivations for engaging in culture amongst users and non-users. The final column illustrates the percentage point difference between non-users and users, in the proportion citing each motivation. It shows that non-users are less likely than users to cite almost all of the tested motivations.

Non-users are significantly less likely than users to cite explore new interests and/or collect new experiences', 'expanding my knowledge', and 'enriches my quality of life'.

Overall this data suggests that non-users are less aware of the broad array of benefit conferred by culture, than users.

The motivations where the gap between users and non-users are smallest include 'controlling stress' and 'feeling nostalgia'. This suggests that cultural organisations can engage non-users based on more social motivations, whilst articulating the broader range of benefits which culture can deliver.

15.7 Attitude to government subsidy

The table below illustrates attitudes toward government subsidy. Overall the majority of the culture market (69%) agrees that subsidising the arts is a good use of government money. However, users (46%) are significantly more likely than non-users (22%) to say they definitely agree.

Figure 113 Attitude towards government subsidy, users and non-users

Subsidising the arts is a good use of government money	Culture market	User or non-user	
		User	Non-user
Base	1497	969	529
Definitely agree	38%	46%	22%
Tend to agree	31%	30%	33%
Neither agree or disagree	21%	17%	27%
Tend to disagree	5%	3%	9%
Definitely disagree	5%	3%	9%
Total agree (definitely + tend to)	**69%**	**77%**	**54%**

15.8 The role of income and education in engaging in culture?

Differences in income and education levels across users and non-users

There is evidence to suggest that non-users are more likely to earn smaller amounts than users, and that non-users are less likely to have completed tertiary level education. However, there are users with lower levels of education and income, and non-users with higher levels. This suggests that lower levels of education and income do not preclude cultural engagement.

Figure 114 Income, users and non-users

Income Grouped (excluding 'prefer not to say')	Culture market	User or non-user	
		User	Non-user
Base	1312	855	457
0 – 499,999 NOK	32%	27%	40%
500,000 – 999,999 NOK	48%	47%	50%
1 million +	20%	26%	10%

Figure 115 Education, users and non-users

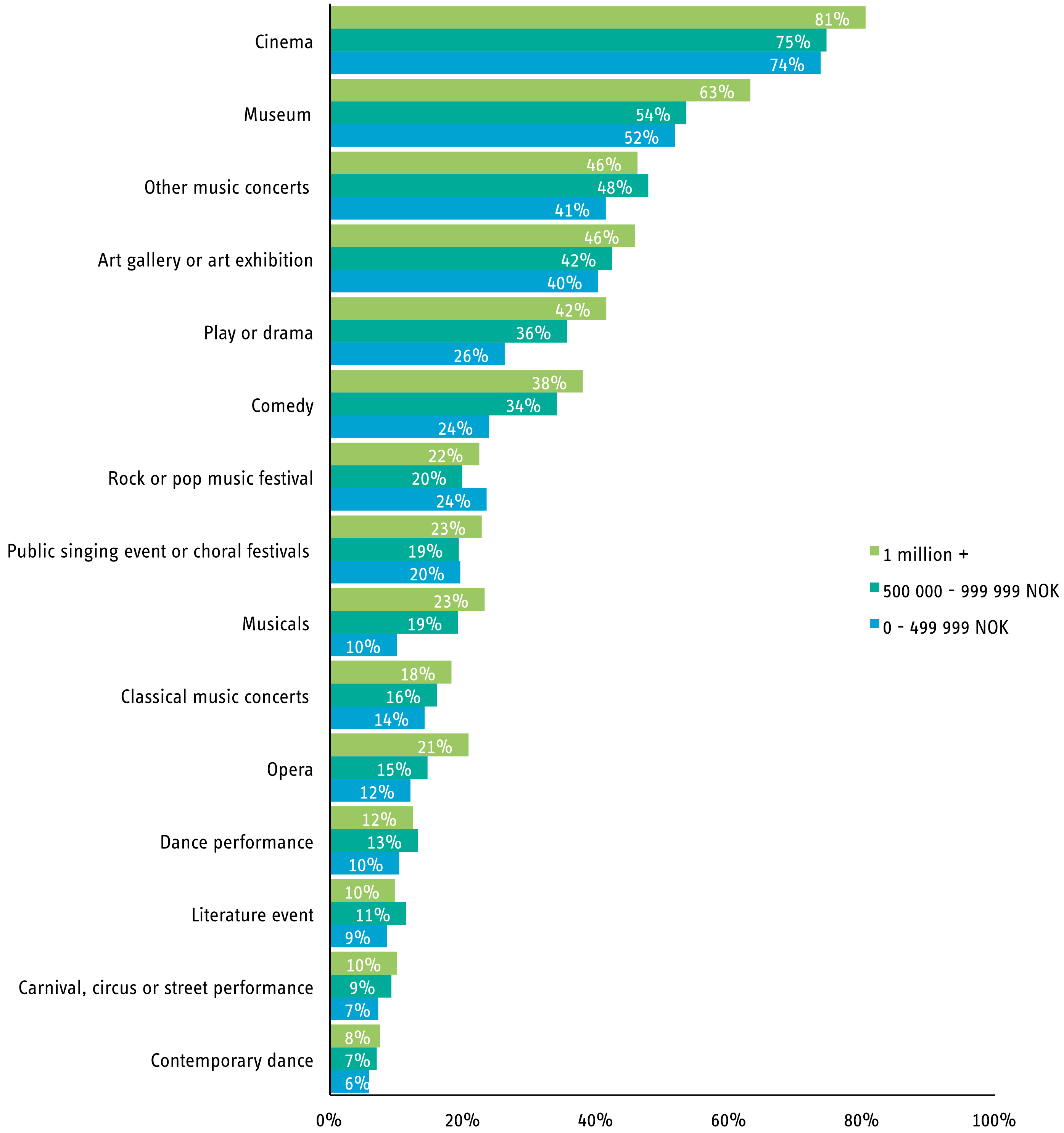
Education (grouped)	Culture market	User or non-user	
		User	Non-user
Base	1497	969	529
Unknown/none	0%	-	0%
Basic	15%	13%	18%
Secondary	43%	36%	55%
Tertiary	42%	50%	27%

The relationship between income and education, and cultural engagement?

Figure 116 illustrates that there are few significant differences in cultural engagement by income. Those earning more than 1 million NOK are more likely to have attended a play or drama, comedy musical or opera, than those earning less than 499,999 NOK, but in all cases lower earners do still engage. There are no other significant differences in artform engagement by income. This suggests that whilst income may show a weak correlation to engagement, it is not a fundamental factor.

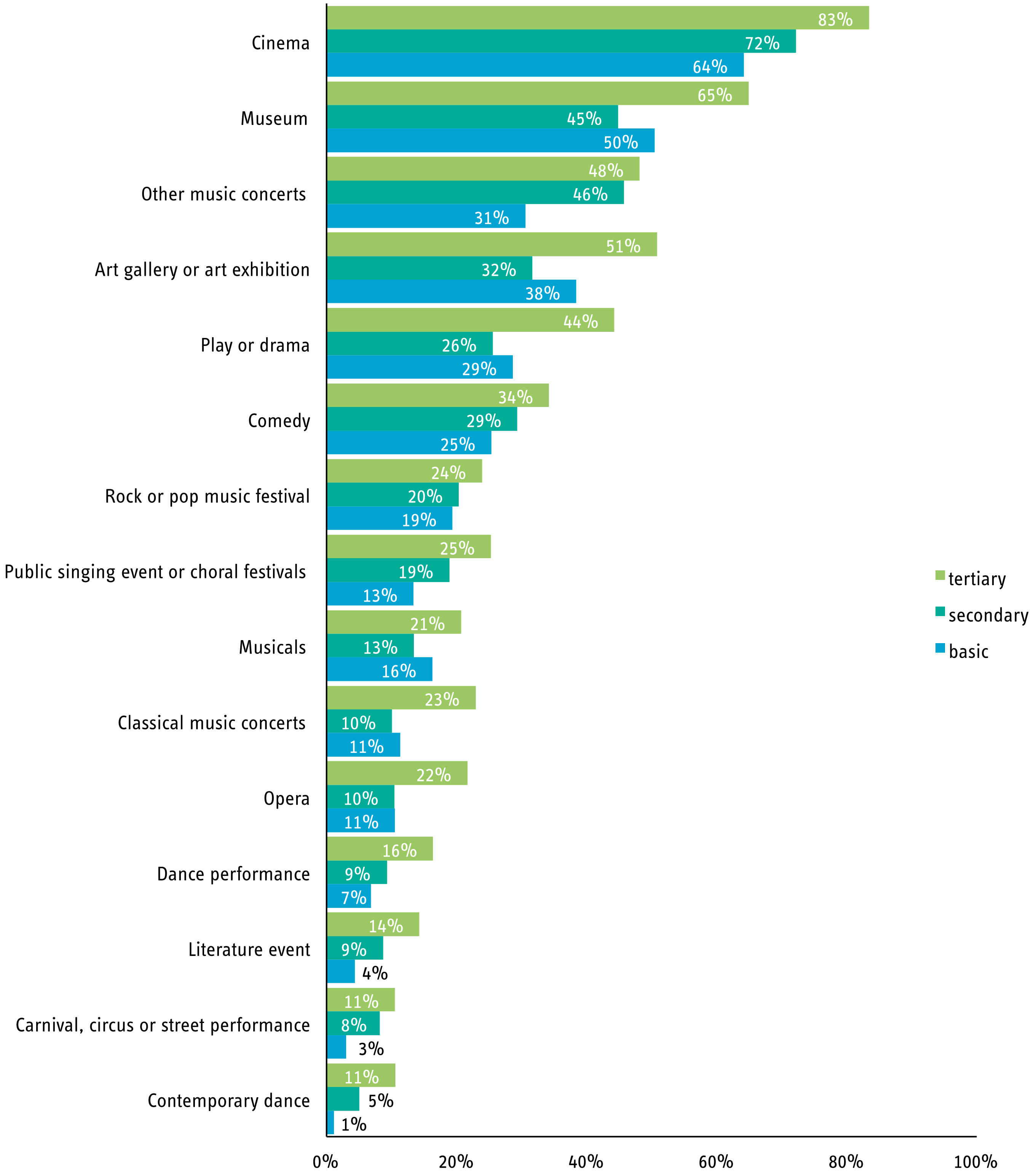
There are some apparent differences when cultural consumption is examined by education (Figure 117). Those with tertiary level education are more likely to have engaged with a range of cultural activities in the past 12 months. Differences are smallest for pop or rock festivals and musicals. However, as is the case with income, those with basic education do still engage in a range of cultural activities.

Figure 116 Artforms engaged with, past 12 months, by income



Bases: 262 (1 million NOK +), 630 (500,000 – 999,999NOK), 420 (Up to 499,999NOK)

Figure 117 Artforms engaged with, past 12 months, by education



Bases: 629 (tertiary), 644 (secondary), 225 (basic)

15.9 Reaching non-users – media consumption

Model of media habits of Users and Non-users

Media habits and information sources are analysed by Culture Segment in section 6.7. There are also differences in media habits and media consumption amongst users and non-users.

Figure 118 Media habits by Users and Non-users

	Average total	Users	Non-users
Base	1071	767	305
Aftenposten	75%	85%	51%
Verdens Gang	57%	52%	69%
Dagbladet	48%	47%	50%
Other	34%	31%	44%
Ditt Oslo - lokalavisen	32%	36%	23%
Dagens Naeringsliv	26%	30%	18%
Dagsavisen	15%	17%	11%
Morgenbladet	8%	10%	3%
Utrop	1%	1%	1%

Non-users are significantly more likely than users to read Verdens Gang (69% compared to 52% respectively).

Figure 119 Information sources used by Users and Non-users

	Average total	Users	Non-users
Base	1513	969	544
Word of mouth / recommendation	60%	66%	49%
Local newspapers	59%	66%	46%
Television	58%	58%	57%
National newspapers	53%	65%	32%
Newspaper / magazine websites	51%	51%	51%
Venue websites	47%	50%	42%
Email newsletters	43%	47%	35%
Posters / boards outside venue	42%	49%	31%
Advertising elsewhere	42%	45%	35%
Social networking sites	40%	43%	34%
Radio	35%	38%	30%
Posters on outdoor billboards	34%	37%	27%
Venue leaflet / brochure	32%	37%	23%

	Average total	Users	Non-users
Base	1513	969	544
Posters on Metro/ Tunnelbane	31%	36%	23%
Posters on trams/in tram stations	23%	28%	15%
Online 'what's on' listings	22%	28%	12%
Posters in bus stations	22%	25%	17%
Venue mailing lists	20%	23%	13%
Posters in railway stations	17%	20%	13%
Tourist maps / guidebooks information centres	16%	18%	12%
Lifestyle / specialist-magazines	15%	18%	9%
Online rating sites	14%	17%	8%
Listings magazines	13%	12%	15%
Other websites	12%	14%	8%
Artist websites	9%	10%	8%
None of these	3%	2%	6%

Those who have visited any of the 5 participating institutions in the past five years are more likely to use a wide range of information sources to find out what is on or to plan activities (including cultural) for leisure time.

Of the sources asked about, non-users are most likely to look to television and radio to inform them of what's on as well as newspaper or magazine's websites.

Perhaps unsurprisingly non-users are also less likely to seek information directly from institutions such as venue leaflets, brochures and mailing lists. Since they are currently not proactively seeking to attend the arts they also do not read online what's on listings.

The platforms traditionally associated with arts marketing are not reaching non-users. Interestingly they are also less likely than users to gather information from posters on public transport and billboards suggesting they are less attuned to noticing things that they naturally dismiss or perceive as not aimed at them.

16 Reasons for non-attendance and strategic considerations

This section pulls together insight from Audience Atlas and analysis of the focus groups with non-users and explores the strategic implications of these findings.

Focus groups further supported the understanding that there are universal factors resulting in non attendance but that individual segments had different reasons for these concerns and differing priorities and needs that could be potentially be met if through attendance if these issues could be overcome.

Non-users in the **Expression** segment were particularly concerned that experiences should be participative, inclusive, engaging, social and relevant.

If **Essence** are non-users it is largely because they have not yet been given a compelling reason to engage. They are perhaps more able to imagine what others might get out of it but don't feel that it has ever really been well enough presented as a proposition to them.

Non-users in **Stimulation** are particularly concerned by the lack of brand affinity. They feel that the performing arts scene really does not reflect their self-image and instead these artforms appear distant and irrelevant. They are instead brought to mind of other people who they don't identify with and don't aspire to spend time with. They would be more inclined to engage if the offer were better marketed.

For non-users in **Perspective** the issue is that the arts are not a priority in life. They are self-sufficient and satisfied, enjoying a quieter more home-oriented life. Again it is not that there is a barrier to attendance but at the same time there is no real compelling need to attend.

Entertainment are usually less culturally active, their needs are predominantly social and they veer towards mainstream, risk-free elements for all their leisure activities. It has probably not occurred to them to attend one of the 5 institutions though they would be happy to pay the ticket price for something popular that they knew they were keen to see – such as a rock or pop band or festival. With no desire to stand out from the crowd brand is once again a barrier, as is lack of large-scale commercial style advertising. Before attending they would seek endorsement from significant numbers of people or people they know and identify with.

16.1 Lack of motivation

In our survey, non-users were more likely than users to fail to name any motivations for engaging in culture (9% vs. 3% of users). The motivations they selected were largely social.

Focus group respondents expressed that attending was simply not a priority. They felt there were other things that they could do in their spare time that met their social needs. They do not feel that they are missing out. In not recognising that there were further intrinsic benefits to attendance – intellectual, emotional or spiritual – they were satisfied that their existing hobbies and pastimes adequately fulfilled their needs.

> *I've sort of got other things to do, I do not feel that I need it.* ***Expression***

> *I have no interest in it. I can do other things.* ***Entertainment***

> *You do not feel that you are missing out on things you do not want to participate in to begin with.* ***Expression***

> *Have heard of it but do not know where it is ... and have probably never thought of going there.* ***Essence***

In contrast, users in our survey, as well as selecting social motivations, selected intellectual, emotional and spiritual motivations. These outcomes are less commonly delivered by the pastimes more regularly engaged in by non-users. It is understandable that if competing on social benefits, performing arts attendance may suffer.

In the focus groups those who were in the Essence and Expression segments (segments more commonly culturally engaged) found it less difficult to begin to imagine what other people might gain from the experience. However these individuals had yet to be convinced that attending was for them.

If non-users could be convinced of the additional benefits to be derived from arts engagement this would make it a more compelling proposition.

16.2 Brand

Respondents felt that the performing arts scene does not reflect their own self-image. They imagined that the people attending were not like them. It is clear that institutions need to develop far stronger, relevant, contemporary brand to appeal to this wider audience. It is typical of Stimulation to want to associate with brands that are positively reflective of their own self-image. As consumers, Entertainment are also brand driven and not wishing to stand out from the crowd they are unlikely to engage with a brand they perceive to be out of touch or under developed.

> *I think that anyone who likes classical music is a bit square. It sounds silly, but they are very proper in everything they do, and very good at school.* ***Stimulation***
>
> *They talk about it then when they come to dinner parties, and they talk about the performances they have been to, and they are often from the west side, higher educated, and now retired. Entertainment*
>
> *If I had come on a Monday and told buddies and friends that I was at the theater on the weekend ... you are, in a way ... what do you call it? Socially undesirable.* ***Entertainment***
>
> *...but in my circle of friends there are not that many who are interested in theatre, and so that becomes a bit of the reason why you don't go.* ***Expression***

In Oslo where take up of culture is high, it has perhaps not been necessary to focus on developing cultural brands that resonate with a broader kind of person. In London where 90% are in the market for culture, brands such as Southbank Centre, Tate and Sadler's Wells have worked hard to develop powerful brands that resonate with a wider, younger, more image conscious market.

16.3 Relevance and appeal

The second most cited reason among non-users for not attending was 'not being relevant or interesting'.

The perception of non-users in our focus groups was also that the offer available from the institutions was lacking in relevance to them. This may reflect lack of knowledge and understanding of productions and approaches but also results in a lack of interest in attending. Messages about the more contemporary and up to date nature of some of the work are not penetrating into general consciousness.

For my part, many of the plays are so old that the attitudes reflected are a bit antiquated, and it does not represent society today... they've got several productions of new plays now. More than before. ***Affirmation***

Probably because a lot of the things playing are things that have been played for 50 or 100 years, and it is so instilled in us, because we have heard it so many times in different versions that it becomes almost a cliché. I could very well imagine going to see newer stuff, like Shockheaded Peter, which I have heard should be very good. ***Expression***

I think many see the new plays because they are perhaps relevant issues, and to debate what is being discussed in the play afterwards, to get some kind of input. ***Expression***

On my part there is little relevance in adult theatre, but children's theatre, absolutely. ***Stimulation***

Det Norske Teatret. It is an institutional theatre. I associate it with something that is boring and predictable. ***Stimulation***

There is also a fear that this will result in boredom – that it will not be immediately engaging or retain attention. Expression in particular do not want to take a passive role as an audience member and fear that the way work is presented by the participating institutions is formal and to be consumed quietly rather than being involving, engaging and participative, proving opportunities for self expression and discussion.

When you are there, you sit on your ass all the time in the first place, you do not sit and clap and sing, and you are somehow not a part of it in the same way. ***Expression***

16.4 Price

Survey data suggests that price may be a bigger barrier for users than non-users.

When it came to ticket price focus group respondents agreed that they would be willing to spend 400 NOK on something that they were very keen to see but would hesitate to spend any money (or time) on something that they do not believe they will enjoy.

> *It is only because it does not appeal to me, for my own part, anyway. I am not interested in paying for it...but then those who want to can go to it.* ***Expression***
>
> *If there is something I know does not interest me, there is no point in spending 100 NOK and lots of time on it.* ***Stimulation***
>
> *I do not think 400 NOK is too expensive if it's just once in a while.* ***Stimulation***
>
> *It's not really something I feel I want to spend money on. Would rather do other things, like free things, like play football, board games with friends.* ***Expression***
>
> *But if it is something I really would have liked to see, something I really like, then I gladly open my purse. Then I'll tighten the belt on something else instead.* ***Expression***

Our survey demonstrated that those on a lower income were slightly less likely to participate but that those on lower income still did participate with a range of artforms suggesting that it is not income that is precluding engagement. Instead it is lack of perceived value that prevents people spending their money in that way. People will only pay for something in which they identify value and personal benefit.

If these audiences were persuaded that this was something they wanted to engage with and that the experience would be positive, then price would not be a barrier. However in the absence of this desire it is possible that price incentives or free tickets could help entice some of these segments. However it is important in these instances not to allow this to communicate lack of value – rather to represent a special invitation and opportunity.

16.5 Convenience

Focus group respondents pointed out that performances and information about them are less readily available, making it easier to default to the cinema and other more mainstream events.

> *At the cinema you can always repeat the same movie throughout the day, so you can choose what time you want to go. At the theatre you must find out more about it yourself, and then you need to organize yourself according to the theatre's schedule.* ***Stimulation***

With something that is already not a high priority, they are less likely to make the extra effort required.

> *It's really not hard to figure it out. Just go to the website of each theatre, but of course, that involves the effort of doing so.* ***Stimulation***

> *But it's such a project! It has to be planned a long time in advance. It should be a little more like 'I'll go to the theatre tomorrow maybe', like the way it is with the cinema.* ***Expression***

People are not going to go out of their way to organise something they are not keen to do but improvements could be made in communicating ease of booking and raising awareness of all available services. If institutions are seeking to engage new audiences, removing all inconveniences and making the process as easy and smooth as possible is an essential hygiene factor.

Exploring digital distribution could address availability issues – with indications from the survey that some would be open to watching performances online.

However the other way to address this is to increase desire to attend and articulating the unique benefits of live theatre over perennially available digital channels.

16.6 Invitations and trusted sources

Several respondents agreed that if it was handed to them – they were invited by a friend or given tickets as a gift, this might entice them to try it.

> *I think probably it is more something that I have to get thrown into my lap. Someone invites me. I do not know if I could find my way there just by looking at it if I saw it in the newspaper.* ***Entertainment***
>
> *It is possible that it could take me by surprise, like if I had gone with my parents to the opera for instance, but it's not something I would initiate myself.* ***Stimulation***
>
> *If it was through my work, whether you won it or it was a pleasant gathering, I would have been receptive.* ***Expression***
>
> *If I'd been given the tickets as a gift, for example how about gift cards – it's very nice, because then you have to go.* ***Perspective***
>
> *It's not like I'm against it, but it's not something I would have taken the initiative to do on my own.* ***Perspective***

Respondents also agreed that they are more likely to take a risk on something that comes recommended by someone who knows them or who they trust.

> *I think the important thing is, say that you get a recommendation from a friend, someone you trust ... I think probably I would rely more on that, than on what my grandmother says.* ***Expression***
>
> *Good acclaim, possibly from friends.* ***Expression***
>
> *Yes, that I trust, someone who knows me and my tastes.* ***Expression***
>
> *I assume that those who invite me know it's something that's alright.* ***Entertainment***

Developing incentives for audiences to bring friends and identifying ambassadors within particular communities could be effective approaches. This would also help to tackle negative brand associations for those who assume that the rest of the audience is less like them.

16.7 Awareness and marketing

The most commonly cited reason for not attending among non-users for all 5 institutions was 'not knowing what's on'.

Focus group respondents agreed that marketing on the whole didn't reach them and if it did, it did not go far enough to explain what it was all about or capture their imagination.

> *Better marketing might do it. Get it out there what this is really all about.* ***Stimulation***
>
> *Advertise more. I have no idea what goes on in the theatre. But it would have to be something that captivates me.* ***Expression***
>
> *But all the big boards around there are about movies, not theatre…* ***Release***
>
> *I always know about it if there is a new movie in the cinema, and I do not really know how, but … the theatre however, I know nothing about it, so maybe others get up to date with the theatre.* ***Entertainment***
>
> *Why you are so willing to go to the movies, but not the theatre? I think it has to do with the commercials you get from the cinema. I makes it so incredibly exciting to see posters all around, while with the theatre, advertisement like that is so minimal. You do not quite catch that it is advertisement for the theatre.* ***Entertainment***
>
> *It has to do with being able to present it in a better way. You cannot be bothered to sit down to figure out what you want to see.* ***Essence***

In the absence of movie-size budgets for billboard advertising and the like, it is clear therefore that marketing will need to be more targeted and work harder to resonate with those it wishes to reach. By taking a segmented approach to marketing and communications – focusing on priority target Culture Segments – differentiated messages can be crafted to appeal to the likely needs and motivations of individual segments, making marketing more efficient and more effective and budgets go further.

Culture Segments Oslo pen portraits provide detailed insight into how to reach the different segments.

17 List of tables and figures