



Culture Segments Malta

Audience Atlas & Pen Portraits

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Partner organisations:



TEATRU MANOEL



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Culture Segments Malta

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Culture Segments Malta maps out in detail the profile of the culture market in Malta, examining the attitudes, motivations and behaviour which determine how those in the country **engage with culture**.

Broken down by both **artform and Culture Segment**, this report examines who is currently going to arts and culture events, as well as measuring potential markets to provide detailed audience insight. This provides **usable data** and will help you set **realistic targets**.

The report will improve your understanding of your market using data that's **rich, practical, and powerful**.



How to use this report

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

It supports a **deeper understanding of your market** using segmentation and data that is **rich and powerful**.

This report comprises three main sections which you can use to **tailor the insight** about your entity or artform, as well as giving you a rich **understanding of the Maltese culture market** as a whole.

Section 1: Malta's culture market

In the first section we provide a broad overview of Malta's cultural landscape and introduce Culture Segments.

See pages 5 to 15

Section 2: Culture market by artform

This section explores the Maltese culture market by artform. We not only examine who is currently going to arts and culture events, but we reveal the potential market for each artform to provide detailed audience insight and powerful data for the sector.

See pages 16 to 74

Section 3: Culture Segments

The final section includes pen portraits for each Culture Segment, bringing Malta's audiences to life through detailed descriptions, profile information and media preferences.

Here you'll meet each segment in depth, gain understanding of how valuable they are to your sector, and work out how best to engage them.

See pages 75 to 104

Key terms

There are a number of key terms used to describe the market throughout this report:

The overall definition of the culture market is inclusive. It's defined in its broadest sense, from attending the opera or an art exhibition, to going to see a film or popular music concert.

Culture market

Those in the population who have ever attended one of the artforms tested, or would be interested in doing so.

Current market

Those who have attended a given artform in the past three years.

Potential market

Those who last visited a given artform more than three years ago, or have never visited but would be interested in doing so in the future.

Not in the market

Those who have never visited a given artform and would not be interested in doing so in the future.

Section 1: Malta's culture market

Contextualising the culture market

Three-quarters of adults in Malta are in the **current** culture market, comparable with other developed nations. A further sixth are **potential** cultural visitors.

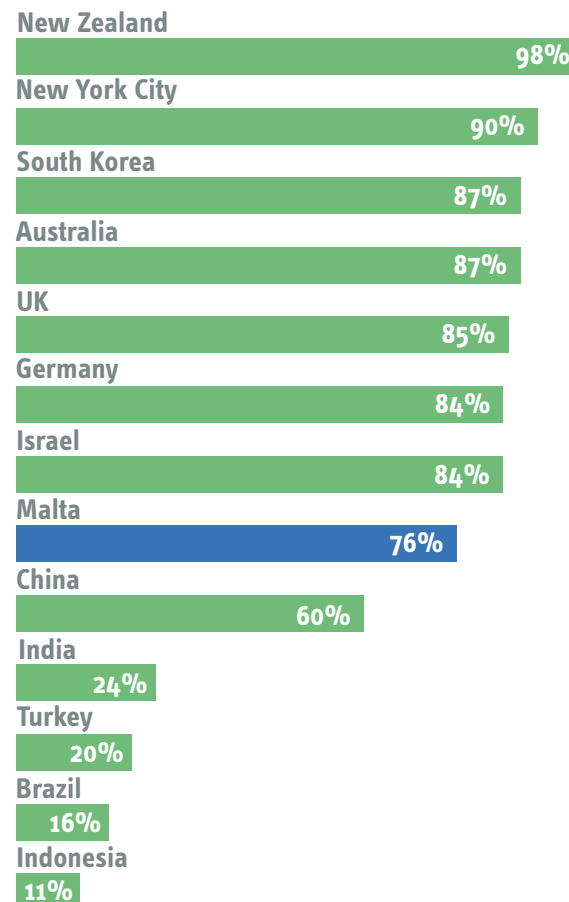
Comparable to other developed nations

The current culture market in Malta – those who have visited a cultural event in the past three years – is comparable to other developed nations.

76% of those in Malta are in the current culture market. While lagging behind the clear leader New Zealand (98%), this is not dissimilar to other developed nations such as the UK (85%), Germany and Israel (both 84%).

It is also significantly higher than the likes of India (24%), Turkey (20%) and Brazil (16%).

Current culture market



A significant potential market

An additional 17% of those in Malta last visited a cultural event more than three years ago, or have never done so but would be interested. These people can be considered within the potential culture market.

Please note: throughout this report we will refer to the Maltese culture market. By this, we mean those in the current and potential markets, or 92% of adults in Malta.

This opens up our analysis to include those who are interested but may not have engaged in the past.

Malta has a culturally-engaged population

The Maltese culture market – those who have visited an arts or cultural venue or event, or would be interested – includes **more than nine in ten** of the population.

This includes **more than three-quarters** who have visited an arts or cultural venue or event in the past three years, and **two-thirds** in the **past twelve months**.

There is **little distinction between the regions** of Malta in terms of the culture market; perhaps not unexpected due to the relative distances between regions.

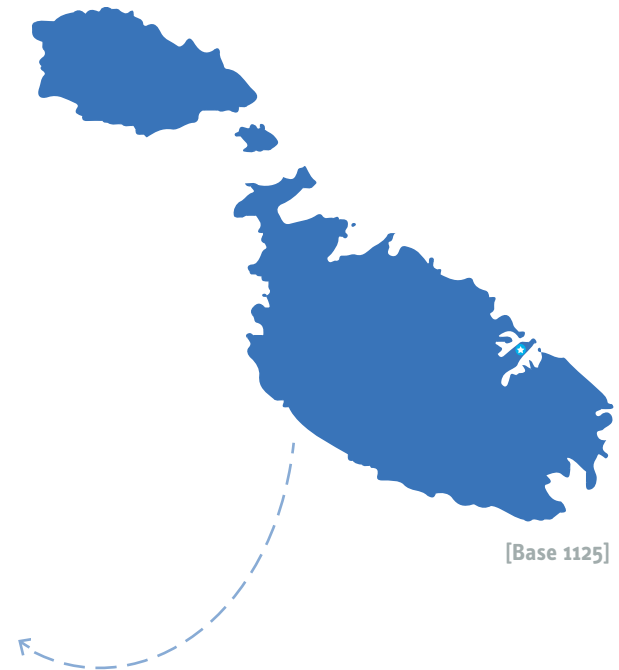
Fewer than one in ten adults have never visited an arts or culture event or venue and are not interested, suggesting a country with **high levels of cultural engagement**.

A culturally active nation

92% of the Maltese adult population can be considered in the culture market. This means that they have visited an arts or cultural venue or event before, or would be interested in doing so in the future.

This is equivalent to more than 330k people, and demonstrates the significant cultural potential, and openness to culture, within the Maltese audience.

92% (more than 330k)
of the adult population in Malta are part of
the culture market



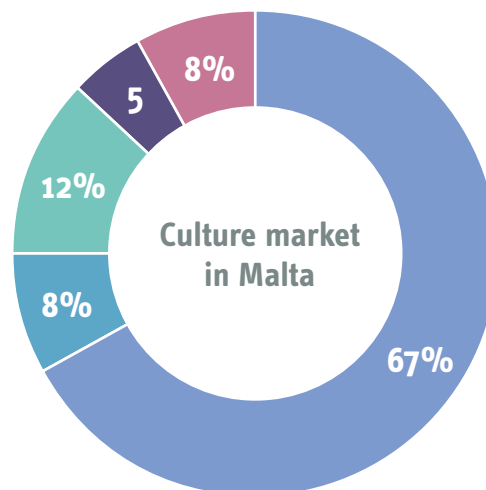
Most have engaged in past three years

76% of adults in Malta have visited an arts or cultural venue or event in the past three years, representing more than 272k people. This section represents the **current** audience.

The current audience includes 67% of the population who have made a visit within the past twelve months, and 8% who last visited an arts or cultural venue or event between one and three years ago.

A further 17% of Maltese people could be considered in the **potential** culture market, meaning they last visited an arts or cultural venue or event more than three years ago, or have never visited but would be interested in doing so. This audience represents more than 60k adults.

8%, or more than 27k adults, have never visited an arts or cultural venue or event and are not interested in doing so; they can be considered **not in the market**.



[Base 1125]

- Past 12 months
- 1 to 3 years ago
- More than 3 years ago
- Never been but interested
- Never been, not interested

76% (more than 272k)

in the **Current** culture market

[Past 12 months + 1 to 3 years ago]

17% (more than 60k)

in the **Potential** culture market

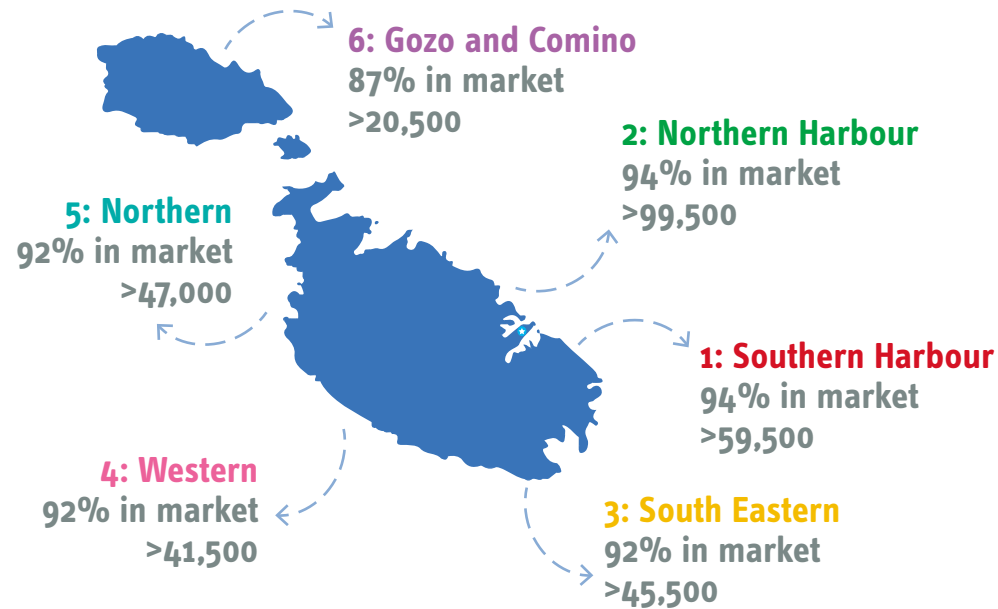
[> 3 years ago + never been but interested]

8% (more than 27k)

not in the culture market

[Never been, not interested]

Culture market and market size by region



Equal cultural engagement across Malta

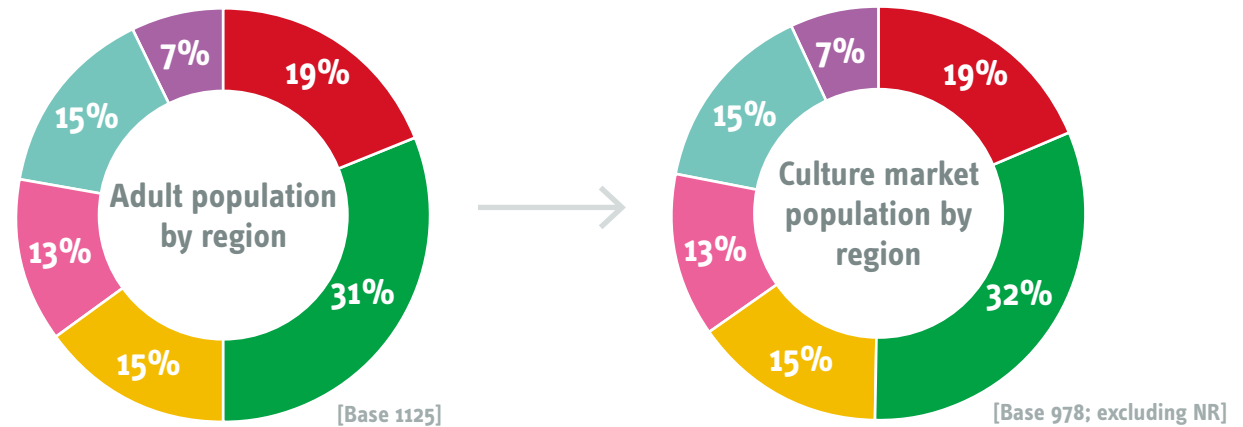
Across Malta, the majority of the population can be considered within the culture market.

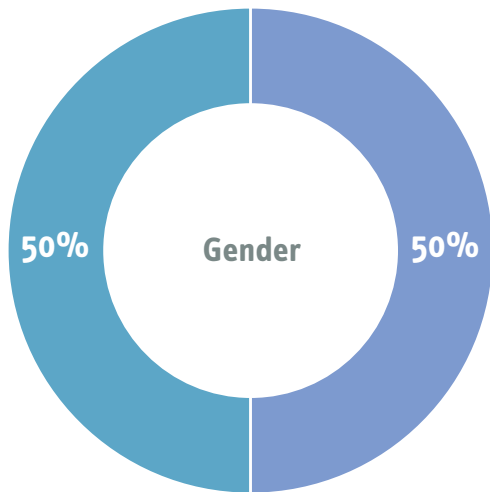
Southern and Northern Harbour (94% each) demonstrate the highest value for culture market membership, and Gozo and Comino (87%) the lowest. However, none of these differences can be considered statistically significant.

The adjacent pie charts highlight the consistency by region; the proportions of the adult population overall and the population within the culture market within each region are startlingly similar.

This suggests that while there may be areas or cities with greater or lesser arts and culture provision, this does not correspond with variation in engagement or interest.

Please note: region data was not available for all respondents. Consequently, population estimates in the adjacent model have been articulated as greater than (>) a value, on the basis that the unclassified respondents are likely to be distributed unevenly across Malta. This figure should be treated as a minimum; the actual figure may be higher.





[Base 1032]

■ Male ■ Female

The majority of the Maltese population is also in the Maltese culture market (92%). Consequently, the demographics proportions observed within the culture market are largely in line with the population overall.

However, it is worth noting that this means there are no obvious biases in how the population engages with culture; old or young, male or female, and so on.

Age



[Base 1032]

■ 16 to 24 ■ 45 to 54
 ■ 25 to 34 ■ 55 to 64
 ■ 35 to 44 ■ 65+

An equal gender split in the market

There is an even gender split in the Maltese culture market; 50% are male, and 50% female.

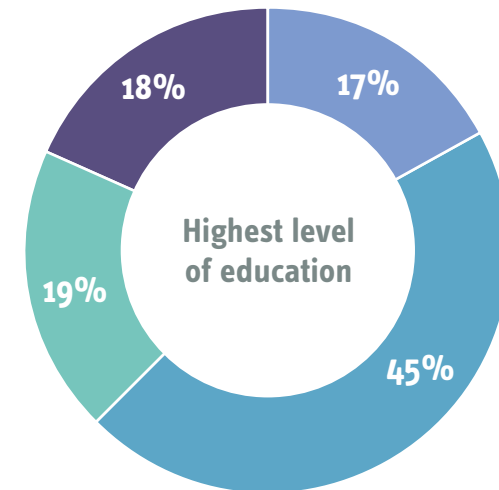
Culture market age is well distributed

Age is relatively evenly distributed amongst those in the Maltese culture market. The greatest proportion is aged over 65 (20%), although this is generally consistent with other age brackets.

Two-fifths educated beyond secondary level

38% of the Maltese culture market have been educated beyond secondary level; 19% to post-secondary, and 18% to tertiary.

Almost half (45%) of the market have been educated to secondary level.

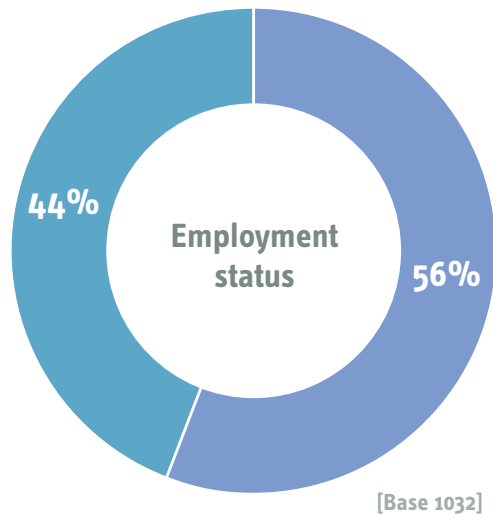


[Base 1032]

■ Primary or lower
 ■ Secondary
 ■ Post-secondary
 ■ Tertiary

More than half of the market are employed

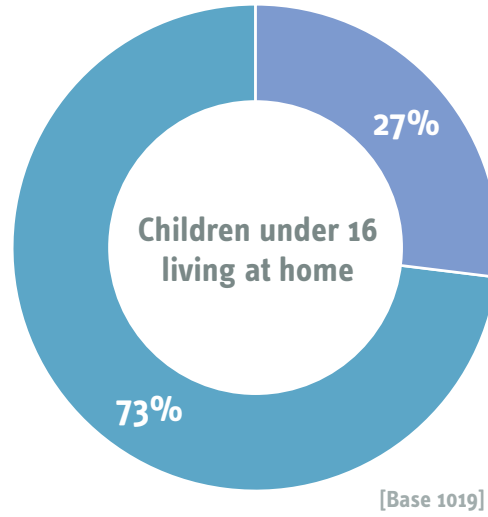
56% of those within the Maltese culture market are currently employed. 44% are currently unemployed or inactive.



- Employed
- Unemployed / inactive

A quarter have children living at home

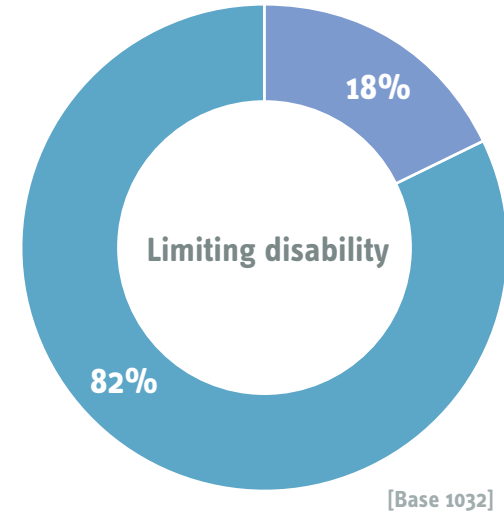
27% of those in the culture market have children aged under 16 living at home. This is most prevalent amongst those aged between 25 and 45.



- Yes
- No

A fifth have a limiting disability

18% of those in the Maltese culture market consider themselves to have a health problem which limits their activities. 4% consider this to limit their activities to a large extent.



- Yes
- No

Introducing Culture Segments

Two decades of audience segmentation have exhausted old-fashioned demographics, proven that commercial consumer profiling translates poorly to cultural engagement and exposed the limits of box office or behavioural data.

Culture Segments is specific to the **arts, culture and heritage sector** and based on **deep-seated cultural values** and beliefs. It delivers rich, powerful insights to help you target people more accurately, engage them more deeply and build lasting relationships.

It provides a **compelling, shared language** for you and your colleagues to talk about and **understand your audiences**.

Meet the segments



Essence (8% of the Maltese culture market)
Discerning, Spontaneous,
Independent, Sophisticated

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



Expression (24%)
Receptive, Confident,
Community, Expressive

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



Affirmation (8%)
Self-identity, Aspirational,
Quality time, Improvement

See culture as a way of enjoying quality time with friends and family at the same time as improving themselves. The arts tend to be one of many leisure choices.



Enrichment (14%)
Traditional, Learning
Familiar, Nostalgia

Tend to have a mature outlook on life and established tastes. They are risk averse and tend to be most comfortable with familiar things.



Stimulation (8%)
Active, Experimental,
Discovery, Contemporary

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



Entertainment (21%)
Consumers, Popularist,
Leisure, Mainstream

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



Perspective (12%)
Settled, Self-sufficient,
Focused, Content

Fulfilled and home-oriented. Perspective are very self-sufficient, however a spontaneous nature and appetite for discovery drive their engagement.



Release (5%)
Busy, Ambitious,
Priorities, Wistful

Used to enjoy popular arts and culture, but other things have taken priority. Often have limited time and resources to enjoy the arts and culture, although they would like to do more.

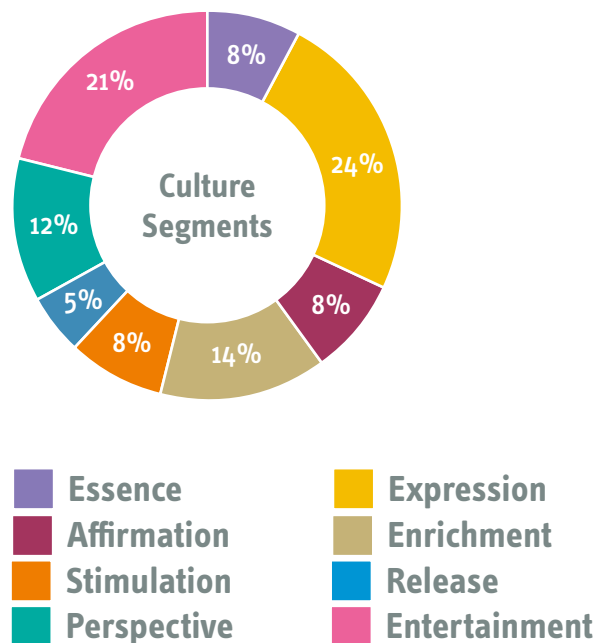
Expression and Entertainment are the largest segments in Malta

The Expression segment is the largest in Malta, making up almost a quarter of the culture market (24%). A confident and creative segment, they are in tune with their spiritual side and often gravitate towards more mainstream or inclusive events.

The Entertainment segment make up around a fifth of those within the Maltese culture market (21%). The arts and culture tend to be on the periphery of the lives of those in this segment, favouring more mainstream leisure pursuits. In the arts and culture sector, only blockbuster and must-see events tend to get their attention.

The traditional Enrichment (14%) and settled Perspective (12%) segments also represent significant proportions of the market.

Although accounting for fewer people in the culture market, the Essence (8%) and Stimulation (8%) segments are made up of engaged, regular cultural attenders. They are responsible for a significantly greater number of visits than their relative sizes represent.



Summarising optimal messages

Culture and the benefits that it offers are perceived differently by each segment, and successful messaging needs to acknowledge this.

The adjacent illustration summarises the core differentiated messages that should be considered when targeting individual segments.

The ideas presented here offer a useful preamble ahead of the next section which explores each segment in detail.

Key messages for targeting each Culture Segment

Essence The programming team has credentials It has depth Seriously high quality Not mainstream entertainment	Expression It will be immersive, emotional escapism Everyone will enjoy a shared experience It will be something to discuss You'll appreciate artistic expression	Affirmation It's had good reviews - best of the crop You'll get something out of it It is modern & relevant (but not 'out there') It will be something to tell others I did	Enrichment Familiar or classic themes or features It will be well done and enjoyable The evening out will be a success It offers good value
Stimulation New, unusual, different Like nothing you've seen before Best kept secret - see before they catch on It offers new perspectives & shows you're in the know	Perspective It will be personally rewarding It's nice to do something special occasionally It will be interesting, engaging & spark the imagination	Entertainment It's popular It's a great night out and 'easy sell' to others It's got a celebrity in it It will be fun	Release It will be a relaxing trip If you only do one thing this month it's this - guaranteed pleaser The venue has everything needed Online booking is quick, easy & free

Section 2: Culture market by artform

Exploring the artform markets

The following chapters examine the Maltese culture market broken down by **individual artforms**.

Each section explores the **penetration** of that artform into the culture market, and presents each artform audience's **Culture Segment breakdown**, cultural spending and crossover with other artforms.

This insight can help organisations **understand each market**, its composition and how it can be **targeted** and **developed**.

A variety of artform markets

There are a wide variety of artform markets to be explored. These include, in order of market size:

- Film or cinema
- Historical site
- Museum
- Art gallery
- Play or drama
- Comedy
- Pantomime
- Rock or pop music

- Musical
- Library or archive
- Classical music
- Literature event
- Traditional Maltese music
- Jazz or blues music
- Contemporary dance
- Opera or operetta
- Ballet or classical dance

We have also included reference to typical Maltese folk cultural events within this section.



A variety of artforms with different audiences

There are a multitude of artforms within the Maltese culture market, with different levels of penetration; from film or cinema, with more than four-fifths in the current or potential audience, to opera or operetta, with just a quarter.

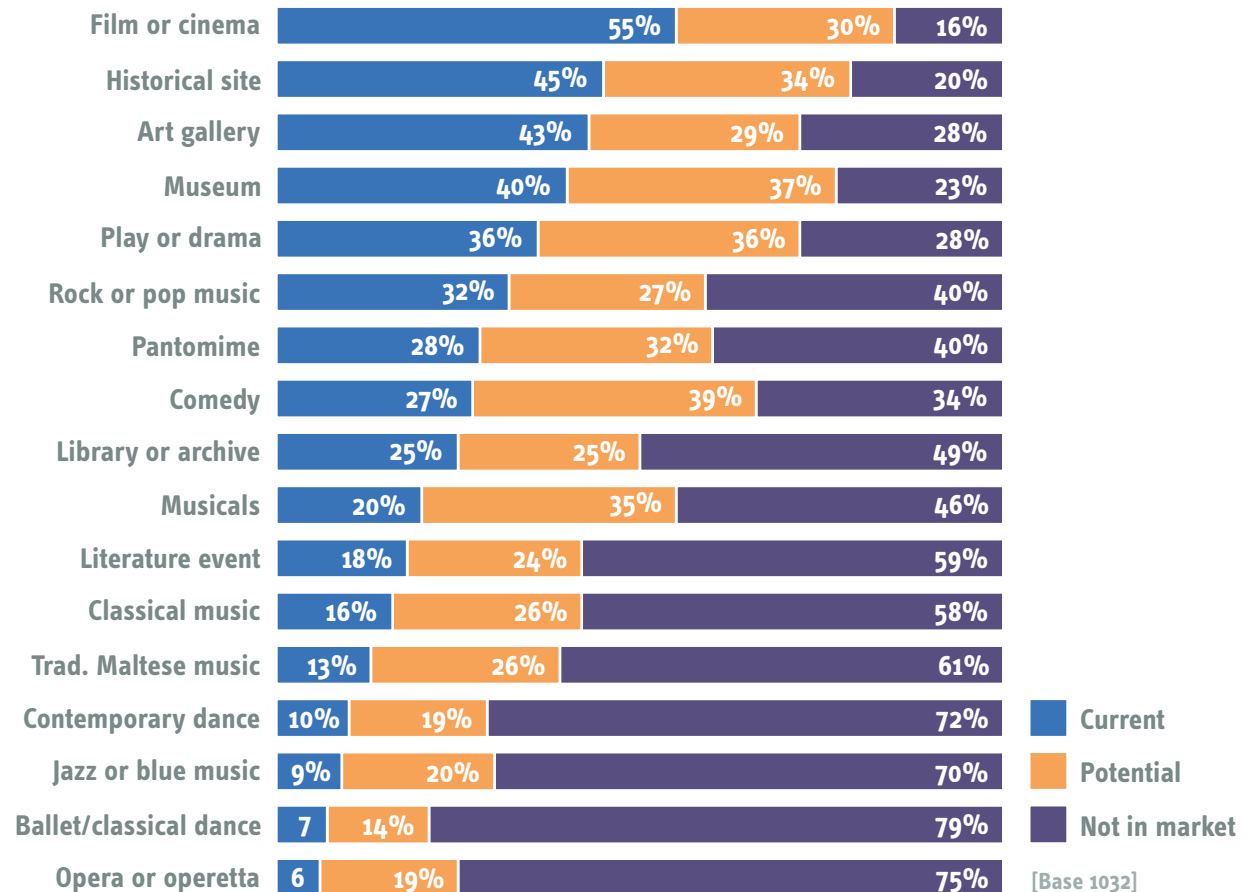
It is clear that there is potential within the market, whichever artform you're talking about. For all but the largest artforms, the size of the potential audience outstrips that of its current audience.

For some, such as comedy performances, the potential audience is significantly larger than other similarly-sized artforms. For other, smaller artforms, such as jazz or blues music, the potential audience is significantly larger than current visitation.

Some artforms are clearly more specialist than others, and will likely remain so. But by thinking about audiences and marketing in a more targeted fashion, organisations in Malta will be able to maximise their potential within the culture market.

Please note: this model is sorted by current market, rather than market size overall.

Artform markets within Maltese culture market



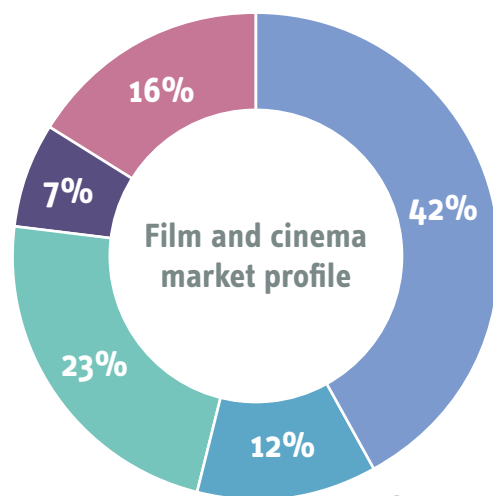
280k in the film or cinema market

Malta's film or cinema market is the largest of all artforms. It comprises **84% of the culture market**, or 280k within the adult population of Malta.

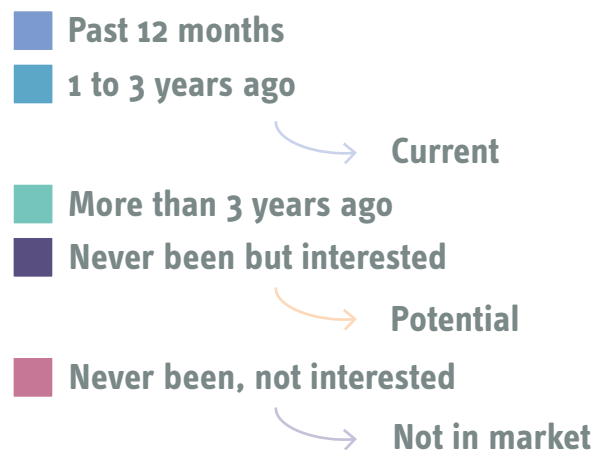
Because of its relatively **high penetration**, the film or cinema market possesses **similar qualities** to the Maltese culture market. Its Culture Segment profile, spend on entrance tickets and use of marketing sources are all consistent with proportions found in the overall market.

Defining the film or cinema market

The film or cinema market refers to anyone who has attended *a film or other projected artistic performance at a cinema or other venue previously, or would be interested in doing so.*



[Base 1032]



181k in the current audience

The film or cinema market is the largest in Malta. 84% of the culture market is within the film and cinema market, equivalent to 280k people.

More than half (55%) are within the current film or cinema audience. This includes 42% who have attended a film or cinema performance in the past twelve months, and a further 12% who last attended between one and three years ago. Collectively, around 181k of those in the Maltese population have attended a film or cinema performance in the past three years.

98k in the potential audience

As the film or cinema market demonstrates high current penetration within the culture market, its potential audience is smaller relative to some other artforms.

Around one in three (30%) of the culture market can be considered potential film or cinema visitors, equivalent to around 98k people. This includes 7% of the culture market for whom this would be their first film or cinema visit.

Profile similar to culture market overall

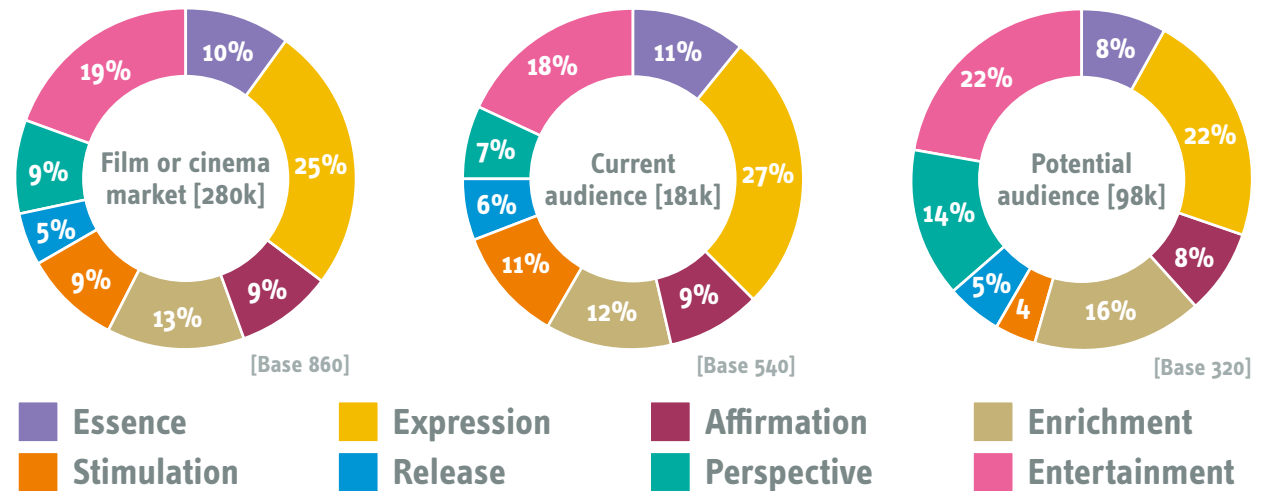
The Culture Segments profile of the film or cinema market is in line with the Maltese culture market overall; unsurprising, given the crossover between the two.

Expression is the largest segment within the film or cinema market. This segment is particularly culturally engaged and are a more significant part of the current audience than the potential one.

The Perspective segment is less likely to fall within the current film or cinema audience than the culture market overall. Arts and culture are low amongst the priorities of this segment, and its habitual and home-orientated nature mean those in this segment are not always recent attenders at arts or cultural events.

Less culturally-active segments, such as Entertainment, Enrichment and Perspective are amongst the largest in the potential market. The broad appeal of film and cinema means that there is some interest from all segments. Drawing regular repeat visits is as important as inspiring new visits from less frequent attenders, and will be easier and less costly to achieve.

Film or cinema market: Culture Segment breakdown



Index compared to Maltese culture market



Please note: in this model, the Maltese culture market represents an index of 100.

Spending in line with culture market

Those in the film or cinema market spend a similar amount on entrance tickets to the culture market overall; one in five had spent more than €100 in the past twelve months.

The current audience are significantly more likely to have spent over €100 in the past twelve months (26%) than potential cinema visitors (8%).

Annual spend on entrance tickets; over €100

Film or cinema market

21% [Base 631]

Current film or cinema audience

26% [Base 440]

Potential film or cinema audience

8% [Base 186]

Maltese culture market

20% [Base 734]

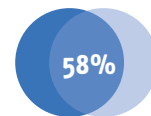
Please note: this refers to entrance tickets in general, not only film or cinema tickets. Those who declined to answer have been omitted.

Significant overlap with other artforms

As a result of the popularity of film and cinema, there is significant crossover between the current film or cinema audience and other artforms' current audiences.

58% (+12) of the current audience are also within the historical site audience, while there is also more significant-than-average crossover with the current art gallery (58%, +14) and rock or pop music audiences (47%, +15).

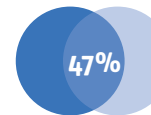
Current audience crossover (greatest difference)



58% of the current film or cinema audience is also in the current historical site audience



58% of the current film or cinema audience is also in the current art gallery audience



47% of the current film or cinema audience is also in the current rock or pop music audience

265k in the historical site market

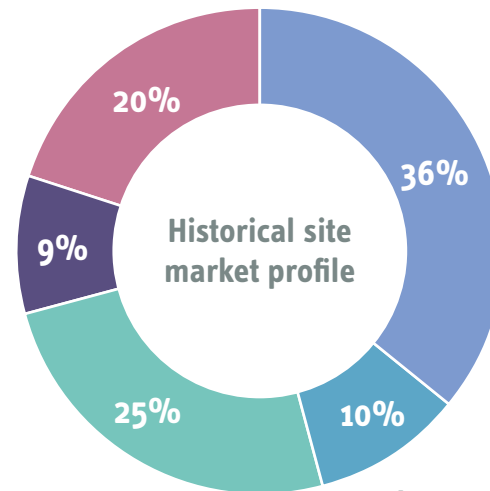
Malta's historical site market is one of the largest of all artforms. It comprises **80% of the culture market**, or 265k within the adult population of Malta.

Because of its **high penetration**, the film or cinema market possesses **similar qualities** to the Maltese culture market, with greatest engagement from the most culturally-active segments.

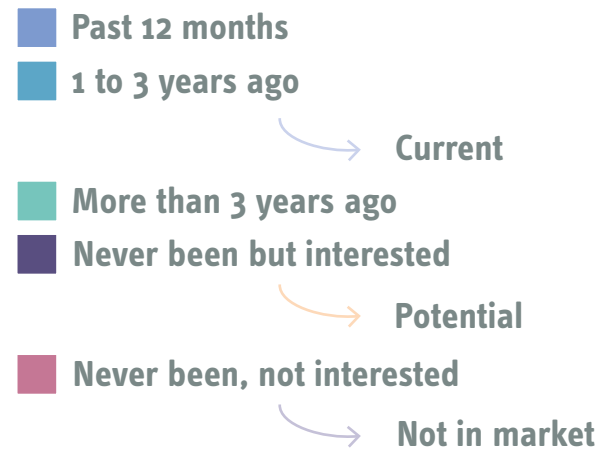
There is **significant crossover** between the historical site market and the museum market in Malta.

Defining the historical site market

The historical site market refers to anyone who has visited *a historical site* previously, or would be interested in doing so.



[Base 1032]



151k in the current audience

The historical site market is amongst the largest in Malta. 80% of the culture market is within the historical site market, equivalent to 265k people.

Almost half (45%) are within the current historical site audience. This includes 36% who have visited a historical site in the past twelve months, and a further 10% who last visited between one and three years ago. Collectively, around 151k of those in the Maltese population have visited a historical site in the past three years.

114k in the potential audience

More than a third (34%) of the culture market can be considered potential historical site visitors, equivalent to around 114k people. This includes 25% of the culture market who last visited more than three years ago, and 9% for whom this would be their first visit to a historical site.

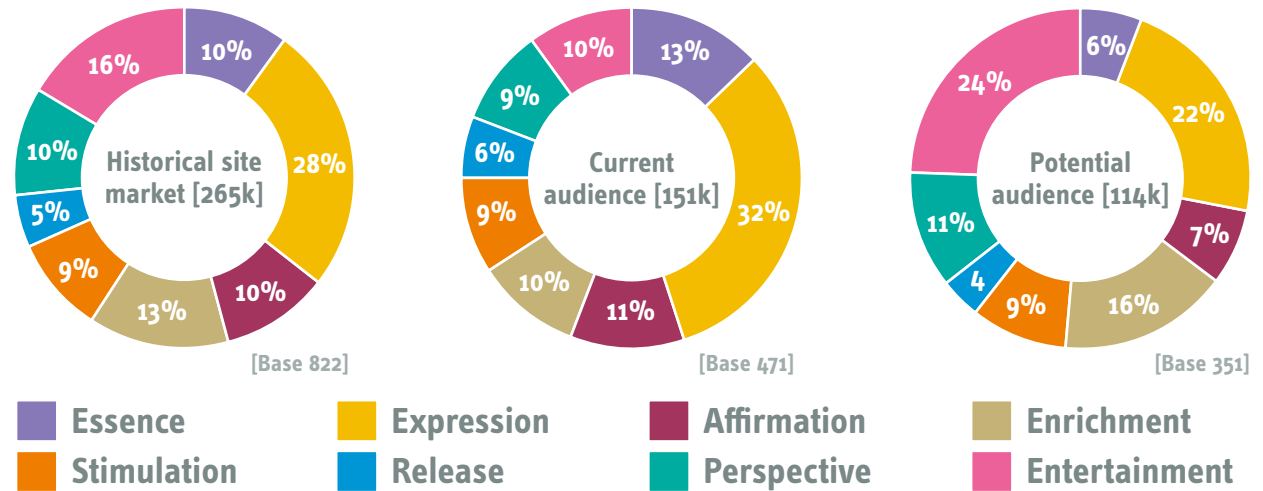
Lacking appeal among less-engaged segments

Expression is the largest segment in the historical site market and the current audience. Open to a variety of activities and share experiences, this segment is often socially-motivated to visit historic sites, but also have a spiritual side which seeks out a connection to the past.

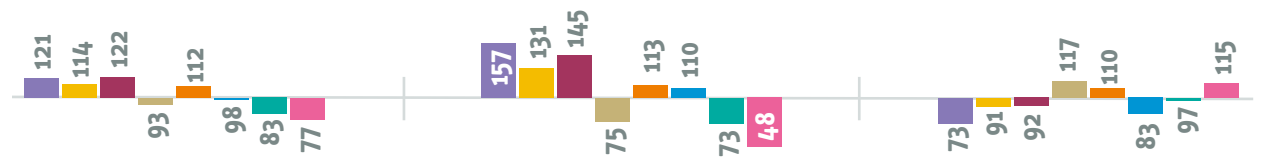
The Essence and Affirmation segments over-index within the current audience. Essence hold a great appreciation for history, heritage and authenticity and are looking to learn in a beautiful setting. Affirmation, on the other hand, look for both a good day out and self-improvement, and like to build the memories that historical sites can deliver.

However, the Enrichment and Entertainment segments under-index within the current audience. Enrichment is a segment typically interested in history and heritage, but they are often risk- and price-sensitive. Entertainment, on the other hand, is a predominantly socially-motivated segment who stick to things which guarantee a fun time; they are unlikely to visit a historical site unless it could be considered 'must-see'. Both segments offer a little potential, but it would be difficult to reach.

Historical site market: Culture Segment breakdown



Index compared to Maltese culture market



Please note: in this model, the Maltese culture market represents an index of 100.

Spending in line with culture market

Those in the historical site market spend a similar amount on entrance tickets to the culture market overall; one in five had spent more than €100 in the past twelve months.

The current audience are significantly more likely to have spent over €100 in the past twelve months (26%) than potential historical site visitors (14%).

Annual spend on entrance tickets; over €100

Historical site market

21% [Base 605]

Current historical site audience

26% [Base 392]

Potential historical site audience

14% [Base 214]

Maltese culture market

20% [Base 734]

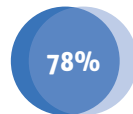
Please note: this refers to entrance tickets in general, not only historical site tickets. Those who declined to answer have been omitted.

Link between historical sites and museums

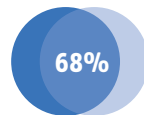
As a result of the popularity of historical sites, there is significant crossover between the current historical site audience and other artforms' current audiences.

Those in the current historical site audience are especially likely to be current museum visitors (78%, +38), while there is also significant crossover with the current art gallery (68%, +25) and play or drama audiences (51%, +15).

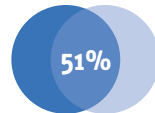
Current audience crossover (greatest difference)



78% of the current historical site audience is also in the current museum audience



68% of the current historical site audience is also in the current art gallery audience



51% of the current historical site audience is also in the current play or drama audience

257k in the museum market

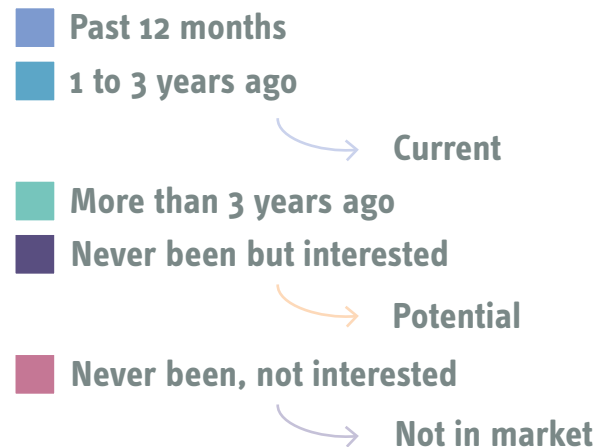
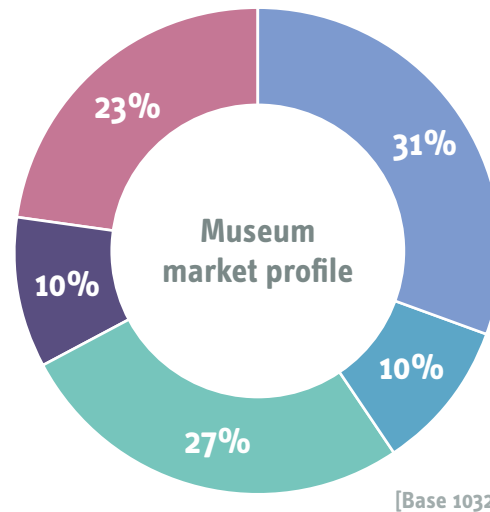
Malta's museum market is the third largest in Malta. It comprises **77% of the culture market**, or 257k within the adult population of Malta.

Those in the **Essence segment** tend to be the most over-represented within the current museum audience, although other spending and use of marketing sources is not dissimilar to the culture market overall.

There is **significant crossover** between the museum market and the historical site market in Malta.

Defining the museum market

The museum market refers to anyone who has visited *a museum* previously, or would be interested in doing so.



134k in the current audience

The museum market is amongst the largest in Malta, including almost four-fifths (77%) of the culture market. This is equivalent to 257k people.

Two-fifths (40%) are within the current museum audience. This includes those 31% who have visited a museum in the past twelve months, and a further 10% who last visited between one and three years ago. Collectively, around 134k of those in the Maltese population have visited a museum in the past three years.

123k in the potential audience

The potential museum market is of a similar size to the current audience; 37% of the culture market can be considered potential museum visitors, equivalent to around 123k people.

This includes 27% of the culture market who last visited a museum more than three years ago, and 10% who have never been to one before, but would be interested in doing so.

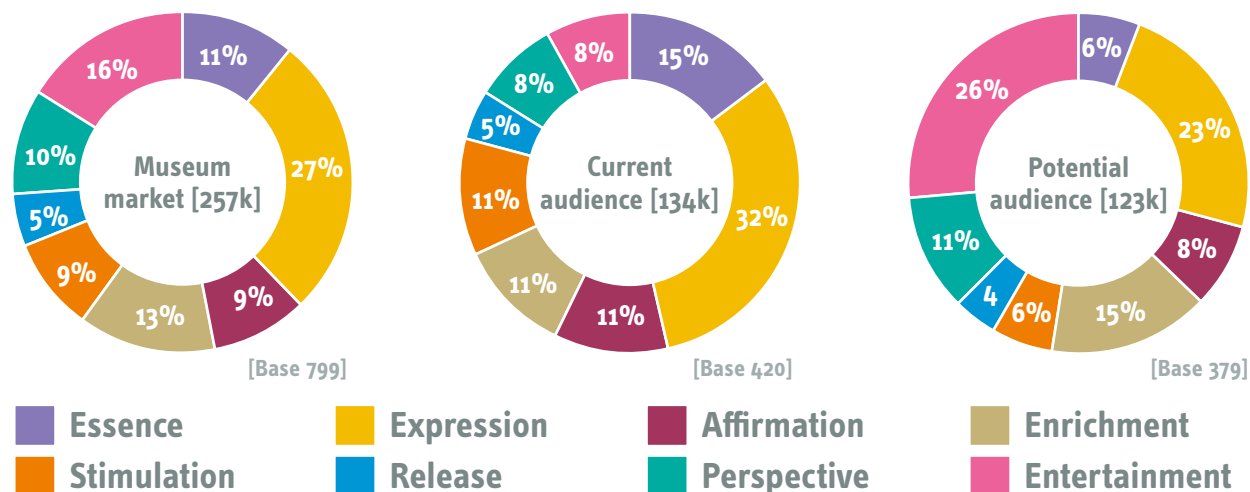
Essence demonstrate most museum interest

Although Expression remains the largest segment in the museum market and current museum audience, the Essence segment over-index most when compared to the culture market.

Those in the Essence segment are often well-educated and are committed to further learning and development. They visit cultural locations seeking personal and profound outcomes, expecting to engage intellectually. Stimulation, seeking out new ideas, venues and subjects and Affirmation, looking for wholesome leisure activities, also over-index in the current market. All of these segments are a good fit for museums, but would need messaging in different ways.

The Entertainment segment do not typically want to spend their leisure time learning or doing anything too taxing; museums are not their ideal destination. They significantly under-index within the current audience. Although they are within the potential audience in greater volume, it would take something to match the thrill or escapism available in many of their other leisure activities outside of the cultural sector.

Museum market: Culture Segment breakdown



Index compared to Maltese culture market



Please note: in this model, the Maltese culture market represents an index of 100.

Quarter of current audience are high spenders

Those in the museum market spend a similar amount on entrance tickets to the culture market overall; one in five had spent more than €100 in the past twelve months.

The current audience are more than twice as likely to have spent over €100 in the past twelve months (27%) than potential museum visitors (13%).

Annual spend on entrance tickets; over €100

Museum market

21% [Base 586]

Current museum audience

27% [Base 355]

Potential museum audience

13% [Base 232]

Maltese culture market

20% [Base 734]

Please note: this refers to entrance tickets in general, not only museum tickets. Those who declined to answer have been omitted.

Link between historical sites and museums

As previously noted, there is a significant overlap in current museum and current historical site visits (88%, +42).

Those within the current museum audience are also significantly more likely to be in current art gallery (73%, +30) and play or drama audiences (53%, +17).

Current audience crossover (greatest difference)

88% of the current museum audience is also in the current historical site audience

73% of the current museum audience is also in the current art gallery audience

53% of the current museum audience is also in the current play or drama audience

240k in the art gallery market

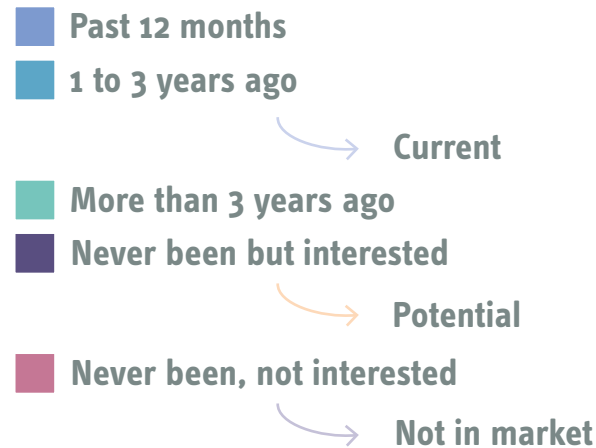
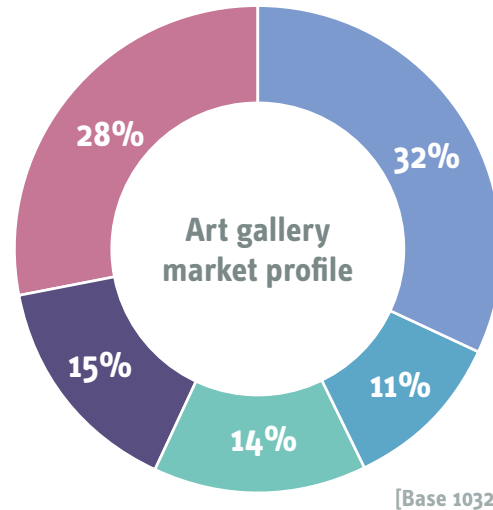
Malta's art gallery market is amongst the largest in Malta. It comprises **72% of the culture market**, or 240k within the adult population of Malta.

Those in the **Essence segment** tend to be the most over-represented within the current art gallery audience, while the current and potential audience demonstrate relatively high spending compared to similarly-sized artform markets.

Both **traditional** and **digital marketing sources** are important to this artform market.

Defining the art gallery market

The art market refers to anyone who has visited *an art gallery, exhibition or craft display* previously, or would be interested in doing so.



144k in the current audience

The market for art galleries is the fourth largest in Malta. 72% of the culture market is within the art gallery market, equivalent to 240k people.

43% are within the current art gallery audience. This includes 32% who have visited an art gallery in the past twelve months, and a further 11% who last visited between one and three years ago. Collectively, around 144k of those in the Maltese population have visited an art gallery in the past three years.

97k in the potential audience

Almost a third (29%) of the culture market can be considered potential art gallery visitors, equivalent to around 97k people. This includes 14% of the culture market who last visited more than three years ago, and 15% for whom this would be their first visit to an art gallery.

However, there is also a similar volume of people in the Maltese population who aren't in the art gallery market; 28% have never visited an art gallery and are not interested in doing so, equivalent to 92k people.

Similar to museum market breakdown

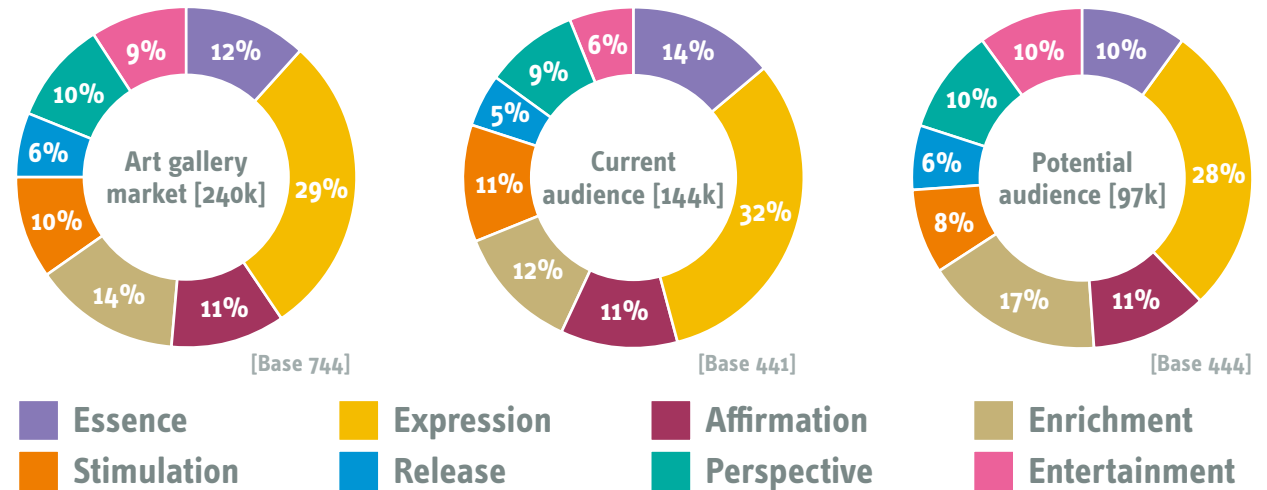
The art gallery market shares many similarities with the museum market, not surprising given their market sizes. Essence, for whom the arts is an essential part of life, also significantly over-index in the current art gallery audience.

Similarly, the omnipresent Expression segment, Stimulation and Affirmation all account for the same proportion of the current art gallery audience as in the current museum audience.

For the art gallery market, its potential market is a point of difference. As in other countries, the Entertainment segment show less openness towards art galleries than museums. While they may be interested by a social museum visit, a trip to an art gallery would be a step too far.

The Affirmation segment over-index within the potential audience. They often look to develop themselves but are not as independently-minded as some other segments. Enrichment also over-index, and would be inclined towards more traditional artwork. Both of these segments would require reassurance that their decision to visit was the right one, that their visit will be a success and that there will be sufficient interpretation for them to get the most out of their visit.

Art gallery market: Culture Segment breakdown



Index compared to Maltese culture market



Please note: in this model, the Maltese culture market represents an index of 100.

Higher spend amongst potential audience

Spend over €100 on entrance tickets is similar between the art gallery market and culture market overall.

Current visitors are more likely to have spent over €100 on tickets (29%). Similarly, the proportion of the potential audience having spent over this value is quite high compared to similar artforms (16%).

Annual spend on entrance tickets; over €100

Art gallery market

23% [Base 568]

Current art gallery audience

29% [Base 365]

Potential art gallery audience

16% [Base 318]

Maltese culture market

20% [Base 734]

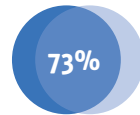
Please note: this refers to entrance tickets in general, not only art gallery tickets. Those who declined to answer have been omitted.

Crossover with museums and historical sites

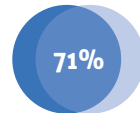
Those in the current art gallery audience are more likely than average to fall within the current audiences for museums (68%, +28) and historical sites (71%, +26).

There is also a significant overlap with the current film or cinema audience (73%, +18), the largest current audience in the culture market.

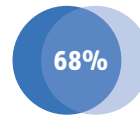
Current audience crossover (greatest difference)



73% of the current art gallery audience is also in the current film or cinema audience



71% of the current art gallery audience is also in the current historical site audience



68% of the current art gallery market is also in the current museum audience

238k in the play or drama market

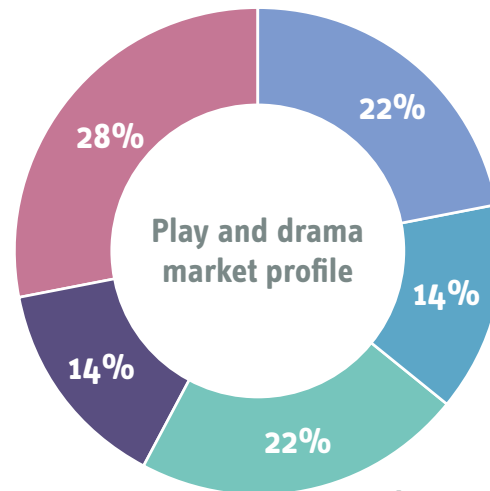
Malta's play or drama market comprises **72% of the culture market**, or 238k within the adult population of Malta.

Those in the **Stimulation segment** tend to be the most over-represented within the current play or drama audience. The current audience also includes a significant proportion of high-spenders.

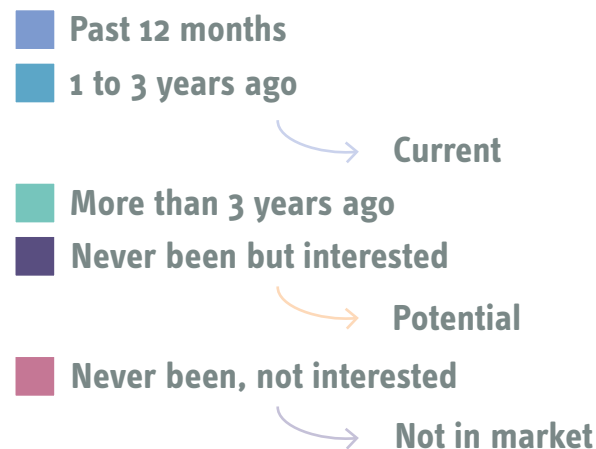
There is a **large crossover** between the play or drama market and **other theatrical genres**, such as pantomime and musicals.

Defining the play or drama market

The play or drama market refers to anyone who has attended *a play or drama performance* previously, or would be interested in doing so.



[Base 1032]



119k in the current audience

The market for plays or dramas includes 72% of the culture market, equivalent to 238k people.

36% are within the current play or drama audience. This includes 22% who have visited a play or drama in the past twelve months, and a further 14% who last visited between one and three years ago. Collectively, around 119k of those in the Maltese population have visited a play or drama in the past three years.

120k in the potential audience

Significantly, however, a greater number still can be considered potential play or drama visitors, equivalent to around 120k people (36%). This includes 22% of the culture market who last visited more than three years ago, and 14% for whom this would be their first visit to a play or drama.

However, there is also a significant volume of people in the Maltese population who aren't in the market for plays or dramas; 28% have never visited and are not interested in doing so.

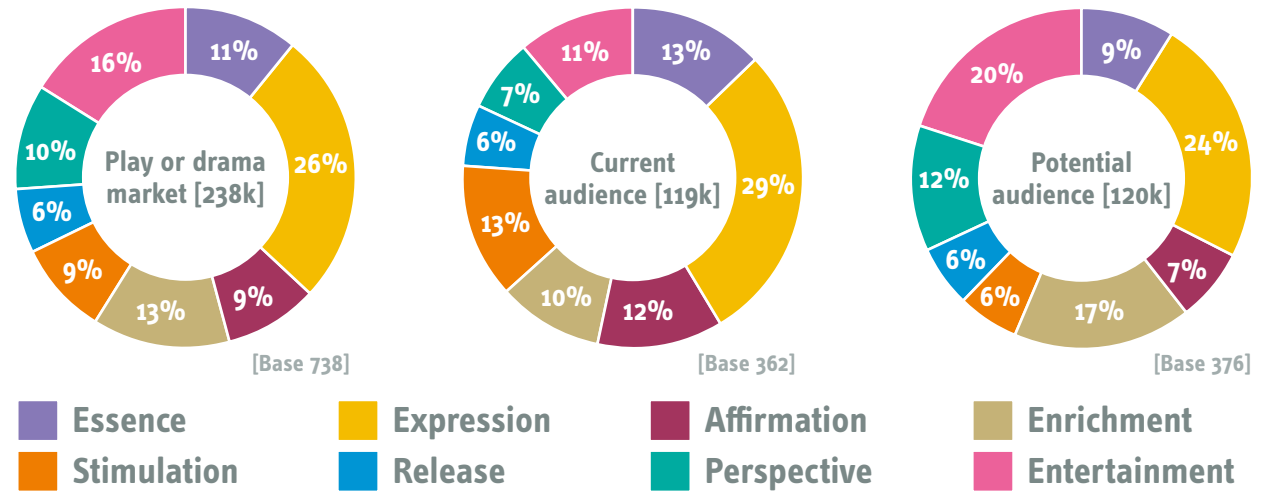
Plays or dramas draw Stimulation to visit

Although Expression remains the largest segment in the play or drama market and current museum audience, the Stimulation segment is the most actively found in the current audience. The Stimulation segment is always on the lookout for new experiences and open to trying new things. They are likely to favour what they consider to be interesting or unusual theatrical performances and aren't put off by smaller productions or that which has not yet been tested.

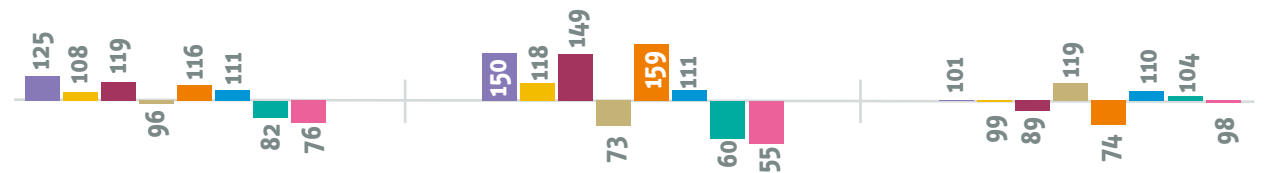
The current play or drama audience also has a greater proportion of Essence and Affirmation than the culture market overall. The appeal of the theatre is obvious for the confident, discerning and culturally-active Essence; little would be off the table for them. Affirmation would tend to look for a degree of reassurance and favour bigger, more mainstream productions, perhaps with well-known faces or positive reviews.

There is little significant difference within the potential play or drama market. The wide range of possibilities when it comes to productions would likely mean that, outside of the most engaged segments, interest will vary by event.

Play or drama market: Culture Segment breakdown



Index compared to Maltese culture market



Please note: in this model, the Maltese culture market represents an index of 100.

High spending amongst current visitors

Those in the current play or drama market are significantly more likely to have spent over €100 on tickets than the culture market average; almost a third of the current audience have done so.

The overall play or drama market spend over €100 on entrance tickets is similar to the culture market overall.

Annual spend on entrance tickets; over €100

Play or drama market

24% [Base 544]

Current play or drama audience

32% [Base 304]

Potential play or drama audience

13% [Base 240]

Maltese culture market

20% [Base 734]

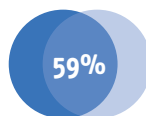
Please note: this refers to entrance tickets in general, not only play or drama tickets. Those who declined to answer have been omitted.

High crossover between theatrical genres

Those in the current play or drama audience are significantly more likely than average to have attended a comedy performance in the past three years (59%, +32).

This higher-than-average visitation extends to other theatrical genres, such as the current pantomime (54%, +26) and musicals audiences (46%, +26).

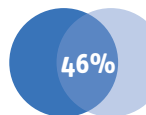
Current audience crossover (greatest difference)



59% of the current play or drama audience is also in the current comedy audience



54% of the current play or drama audience is also in the current pantomime audience



46% of the current play or drama audience is also in the current musicals audience

219k in the comedy market

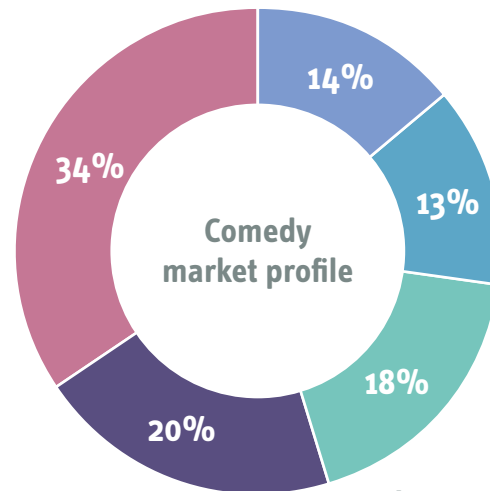
Malta's comedy market comprises **66% of the culture market**, or 219k within the adult population of Malta.

Those in the **Stimulation segment** tend to be the most over-represented within the current comedy audience. The current audience demonstrates relatively high spending.

Other live performance artforms, such as plays or dramas, pantomimes and musicals demonstrate significant crossover with the comedy market.

Defining the comedy market

The comedy market refers to anyone who has attended a comedy performance previously, or would be interested in doing so.



[Base 1032]

Past 12 months

1 to 3 years ago

More than 3 years ago

Never been but interested

Never been, not interested

Current

Potential

Not in market

91k in the current audience

66% of the culture market is within the comedy market, equivalent to 219k people.

27% are within the current comedy audience. This includes 14% who have visited a comedy performance in the past twelve months, and a further 13% who last visited between one and three years ago. Collectively, around 91k of those in the Maltese population have visited a comedy performance in the past three years.

128k in the potential audience

A further 38% of the culture market can be considered potential comedy visitors, equivalent to around 128k people. This includes 18% of the culture market who last visited more than three years ago, and 20% for whom this would be their first visit to a comedy performance. Comedy is amongst the artforms which attracts the greatest interest from non-visitors, alongside musicals and classical music (both 20%).

More than a third of the population are not in the comedy market; 34% have never visited a comedy performance and are not interested in doing so.

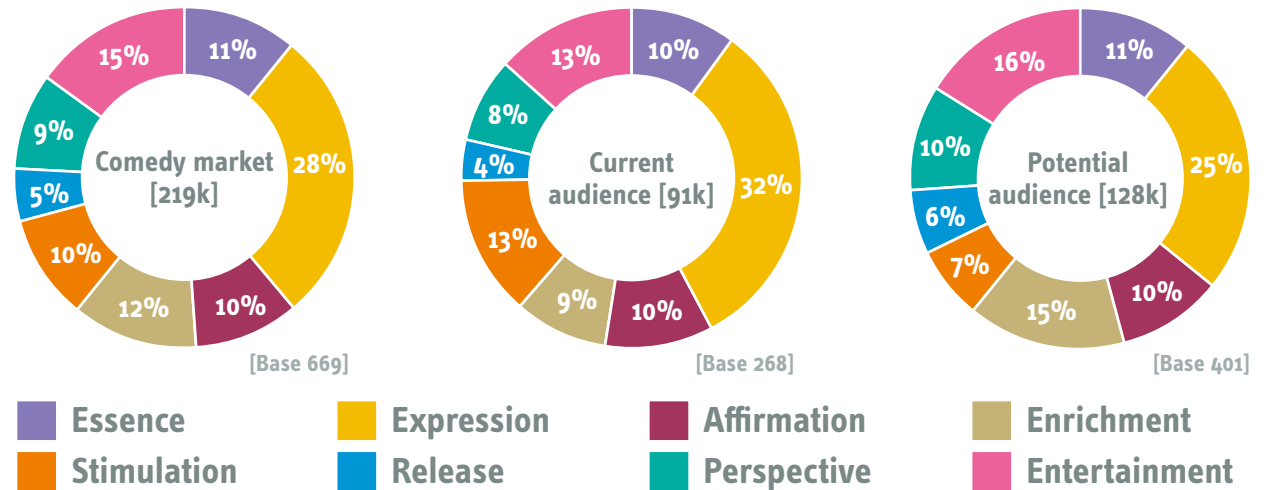
Stimulation over-index in the current audience

The fun-loving and adventurous Stimulation segment demonstrates the greatest significance within the current comedy audience. Live comedy is a particularly social event, offering the opportunity for a night out with friends. There is also a diverse range of options, including up-and-coming, less mainstream comedians to discover and providing new and unusual experiences to engage with and tell their friends about.

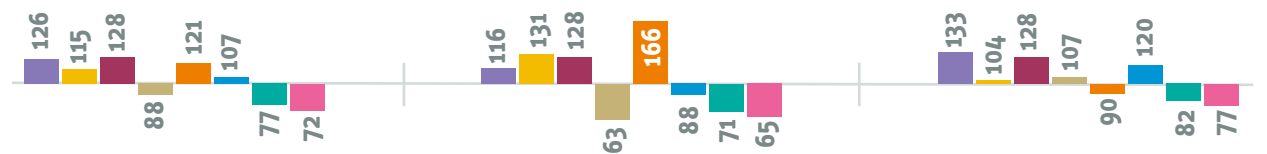
The Expression segment also over-penetrates the comedy market. They value communal, participatory experiences such as live comedy, and have no aversion to mainstream, popular acts.

There is little significant difference between the potential comedy audience and the culture market. The Essence segment may offer some opportunity given a more sophisticated offer, while the Entertainment segment, although positively predisposed to mainstream events, do not demonstrate an obvious proclivity towards attending comedy performances in the future.

Comedy market: Culture Segment breakdown



Index compared to Maltese culture market



Please note: in this model, the Maltese culture market represents an index of 100.

Current visitors amongst highest spenders

Those in the current comedy market are amongst the highest spending in the culture market; almost two-fifths have spent more than €100 on entrance tickets in the past twelve months.

The potential audience are not high spenders, however, bringing the comedy market spend in line with the culture market.

Annual spend on entrance tickets; over €100

Comedy market

23% [Base 511]

Current comedy audience

37% [Base 223]

Potential comedy audience

12% [Base 287]

Maltese culture market

20% [Base 734]

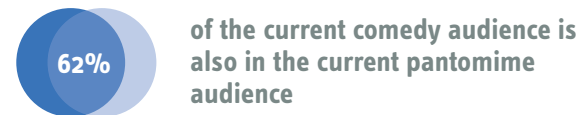
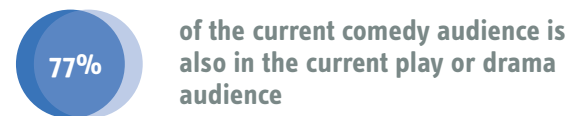
Please note: this refers to entrance tickets in general, not only comedy tickets. Those who declined to answer have been omitted.

High crossover between similar genres

Those in the current comedy audience are significantly more likely than average to have attended a play or drama in the past three years (77%, +41).

The current audience also demonstrates significant crossover with other similar genres, such as the current pantomime (62%, +34) and musicals audiences (49%, +30).

Current audience crossover (greatest difference)



200k in the pantomime market

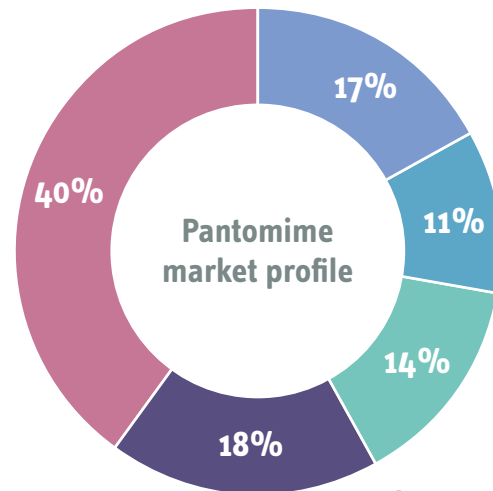
Malta's pantomime market comprises **60% of the culture market**, or 200k within the adult population of Malta.

Those in the **Essence segment** tend to be the most over-represented within the current pantomime audience, while **Affirmation** could be a suitable fit for pantomime.

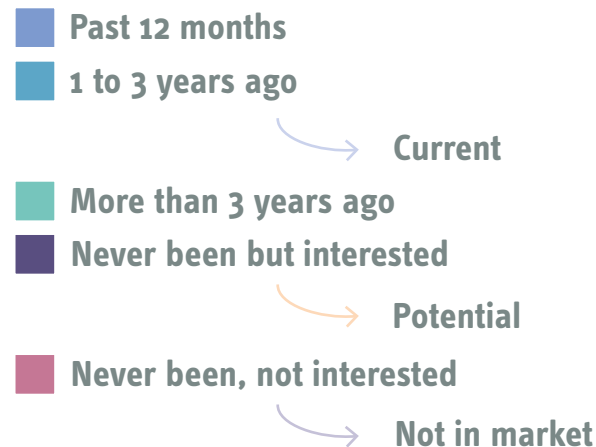
Although there is **significant overlap** with similar artforms, the pantomime market uses a **wider range** of marketing sources, from venue print and posters to online newspapers and apps.

Defining the pantomime market

The pantomime market refers to anyone who has attended *a pantomime performance* previously, or would be interested in doing so.



[Base 1032]



93k in the current audience

60% of the culture market is within the pantomime market, equivalent to 200k people.

28% are within the current pantomime audience. This includes 17% who have attended a pantomime performance in the past twelve months, and a further 11% who last visited between one and three years ago. Collectively, around 93k of those in the Maltese population have visited a pantomime performance in the past three years.

107k in the potential audience

Almost a third (32%) of the culture market can be considered potential pantomime visitors, equivalent to around 107k people. This includes 14% of the culture market who last visited more than three years ago, and 18% who have yet to experience a pantomime but are interested.

However, pantomime is not an artform for all; 40% have never visited one previously and are not interested in doing so.

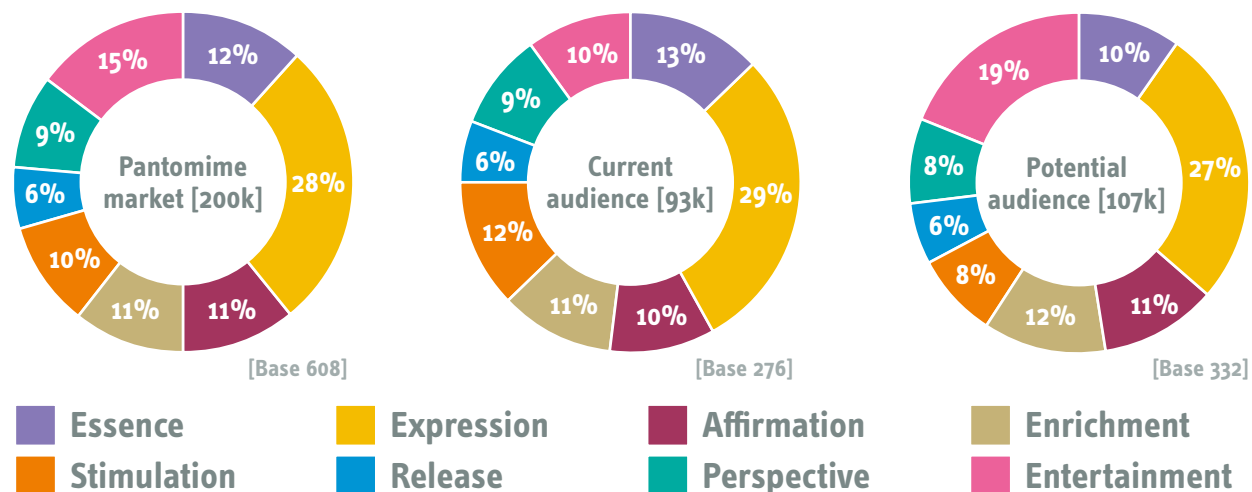
Pantomime appeals to Affirmation

The Affirmation segment is amongst those demonstrating greatest significance in the pantomime market. It is an artform which could have great appeal for them, offering the opportunity to engage with culture in a fun, family-friendly way whilst possessing few barriers – they like to know what they are getting in to.

Both the Essence and Stimulation segments demonstrate greater significance within the current audience. When visiting as adults both of these segments favour more sophisticated programming however both will encourage their children’s interest in theatre and will value this opportunity to introduce them.

Alongside Affirmation, the Expression and Entertainment segments may offer some opportunity. Expression is the largest segment within the potential audience, and we have seen them embrace the inclusive, participatory and shared experience of pantomime. Similarly, despite under-indexing, Entertainment are sizable in the potential audience and could fit well with the relaxed, all-round family entertainment nature of pantomime.

Pantomime market: Culture Segment breakdown



Index compared to Maltese culture market



Please note: in this model, the Maltese culture market represents an index of 100.

Spend in line with overlapping artforms

The proportion of those in the current pantomime audience who spent more than €100 on entrance tickets – more than a third – is significantly higher than the culture market average.

This is in line with other genres with which it shares significant overlap – such as plays or dramas, comedy and musicals – where tickets may be more expensive than other artforms.

Annual spend on entrance tickets; over €100

Pantomime market

24% [Base 471]

Current pantomime audience

34% [Base 230]

Potential pantomime audience

15% [Base 240]

Maltese culture market

20% [Base 734]

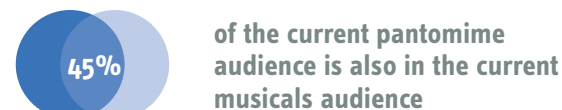
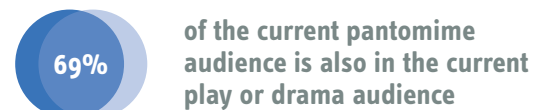
Please note: this refers to entrance tickets in general, not only pantomime tickets. Those who declined to answer have been omitted.

Significant crossover with comedy and theatre

Those within the current pantomime audience are significantly more likely than average to have been to a play or drama performance in the past three years (69%, +34).

The current pantomime audience also demonstrates significant crossover with other theatrical genres, such as the current comedy (60%, +33) and musicals audiences (45%, +25).

Current audience crossover (greatest difference)



198k in the rock or pop music market

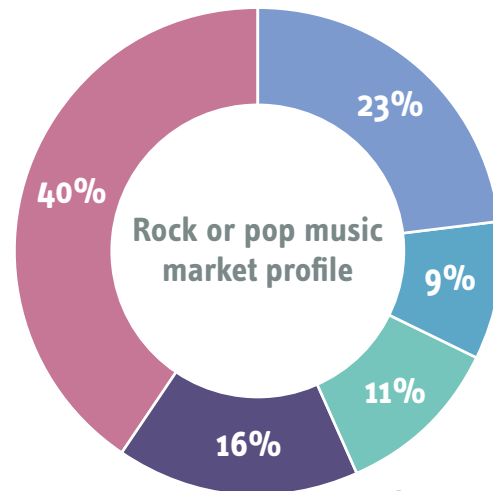
Malta's rock or pop music market comprises **60% of the culture market**, or 198k within the adult population of Malta.

This artform can be quite **divisive for segments**; really attractive for Stimulation and Essence, but not interesting for the more traditional Enrichment and Perspective.

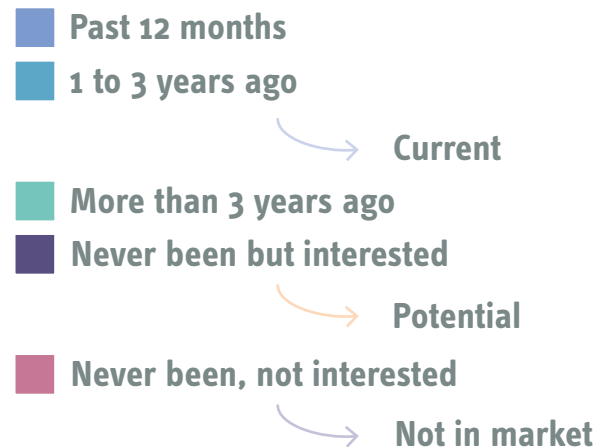
This is an often young artform, with **Facebook** being of particular importance for seeking information. Crossover with **other musical genres** is significant.

Defining the rock or pop music market

The rock or pop music market refers to anyone who has attended a *rock, pop or electronic music concert or festival* previously, or would be interested in doing so.



[Base 1032]



107k in the current audience

60% of the culture market is within the rock or pop market, equivalent to 198k people.

Although the rock or pop market is similarly sized to the pantomime market, it is an artform with a greater current audience. 32% are within the current rock or pop audience, including 23% who have visited a rock or pop performance in the past twelve months, and a further 9% who last visited between one and three years ago. Collectively, around 107k of those in the Maltese population have visited a a rock or pop performance in the past three years.

91k in the potential audience

27% of the culture market can be considered potential rock or pop visitors, equivalent to around 91k people. This includes 11% of the culture market who last visited more than three years ago, and 16% who have yet to experience a rock or pop performance but are interested in doing so.

40% of the Maltese population have never attended a rock or pop performance previously and are not interested in doing so.

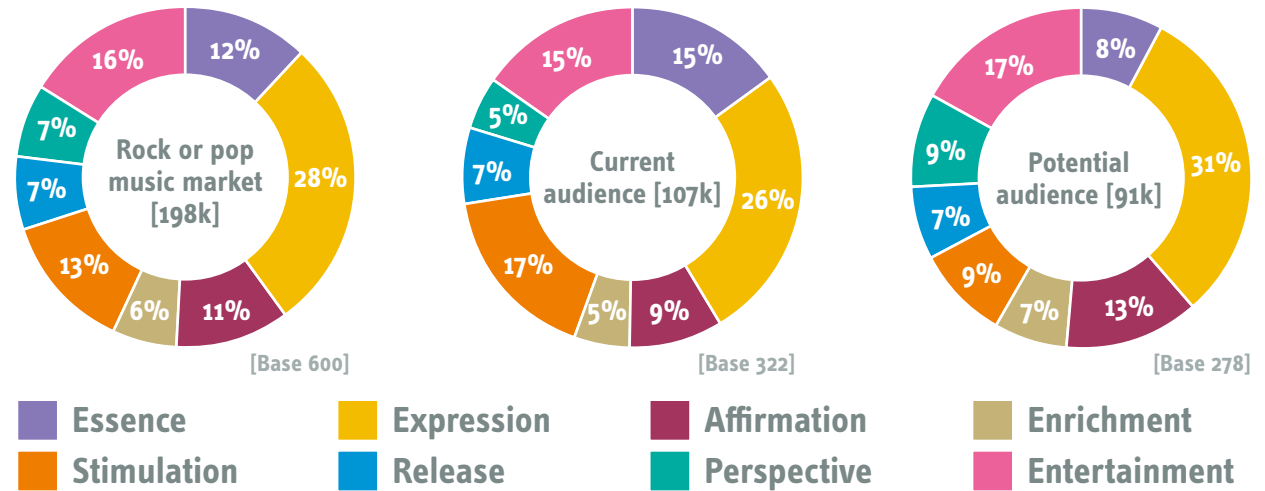
Segments divided on rock or pop music

The rock or pop music market demonstrates a clear divide amongst segments. Those in the Stimulation segment significantly over-index in the rock or pop market and current audience. Live, contemporary music is something which the Stimulation segment value, whether it be satisfying a passion for a major artist they love, or seeing a new band before they make it big.

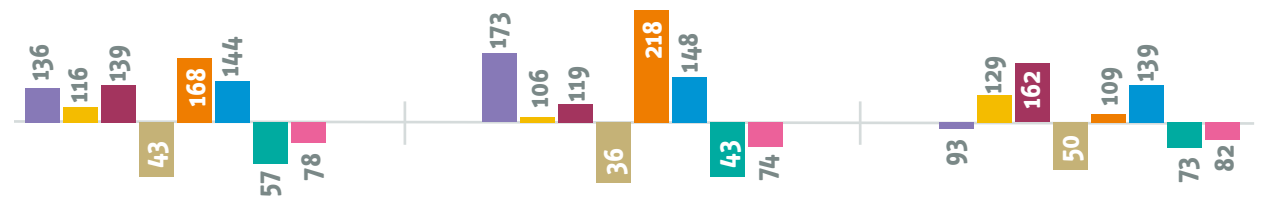
The Essence segment also over-index within the current audience, although their attendance is likely to be far more selective. Expression, along with being the largest segment in the market, also demonstrate significance in the potential market; they are open to all artforms.

Conversely, both the Enrichment and Perspective segments do not index well with rock or pop music. Representing more traditional, home-orientated members of the culture market, neither of these segments particularly associate with contemporary arts and culture and are unlikely to step out of their comfort zone. Enrichment, in particular, is significantly under-represented in the current and potential rock or pop music audiences.

Rock or pop music market: Culture Segment breakdown



Index compared to Maltese culture market



Please note: in this model, the Maltese culture market represents an index of 100.

Big gulf between current and potential spend

The current rock or pop audience are high spenders; over a third have spent more than €100 on tickets in the past twelve months. This is an artform where expensive tickets may be common.

However, the potential audience are not big spenders. Just a tenth have spent more than €100 on tickets in the past twelve months, suggesting cost could be a barrier to audience development.

Annual spend on entrance tickets; over €100

Rock or pop music market

24% [Base 479]

Current rock or pop music audience

35% [Base 276]

Potential rock or pop music audience

9% [Base 202]

Maltese culture market

20% [Base 734]

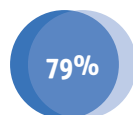
Please note: this refers to entrance tickets in general, not only rock or pop tickets. Those who declined to answer have been omitted.

Largest crossover in mainstream artforms

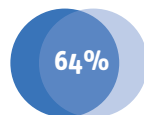
The biggest crossover within the current rock or pop audience is with other mainstream artforms such as the current film or cinema (79%, +25) and play or drama audiences (58%, +22).

However, the current rock or pop audience demonstrates crossover with a variety of other artforms, including other music genres such as the current classical music audience (32%, +16).

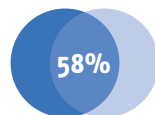
Current audience crossover (greatest difference)



of the current rock or pop music audience is also in the current film or cinema audience



of the current rock or pop music audience is also in the current historical site audience



of the current rock or pop music audience is also in the current play or drama audience

181k in the musicals market

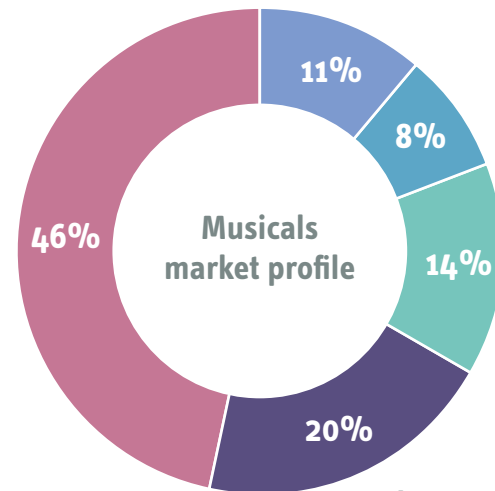
Malta's musicals market comprises **54% of the culture market**, or 181k within the adult population of Malta.

The **breadth of options** means that musicals appeal to a number of segments; Essence is interested in more traditional repertoire, while Affirmation and Expression may favour popular, hit musicals.

The current audience tend to be quite high spenders, while there is also **significant crossover** with both theatrical and music genres.

Defining the musicals market

The musicals market refers to anyone who has attended *a musical* previously, or would be interested in doing so.



[Base 1032]

Past 12 months

1 to 3 years ago

More than 3 years ago

Never been but interested

Current

Potential

Never been, not interested

Not in market

66k in the current audience

54% of the culture market is within the musicals market, equivalent to 181k people.

20% are within the current musicals audience. This includes 11% who have attended the performance of a musical in the past twelve months, and a further 8% who last visited between one and three years ago. Collectively, around 66k of those in the Maltese population have visited a pantomime performance in the past three years.

115k in the potential audience

A far greater number can be considered in the potential musical audience; more than a third (35%). This is equivalent to around 115k people. This includes 14% of the culture market who last visited more than three years ago, and 20% who have yet to attend a musical but are interested in the idea.

Despite this, however, almost half (46%) of the culture market are not in the musical market, having never been to one and showing no interest in doing so.

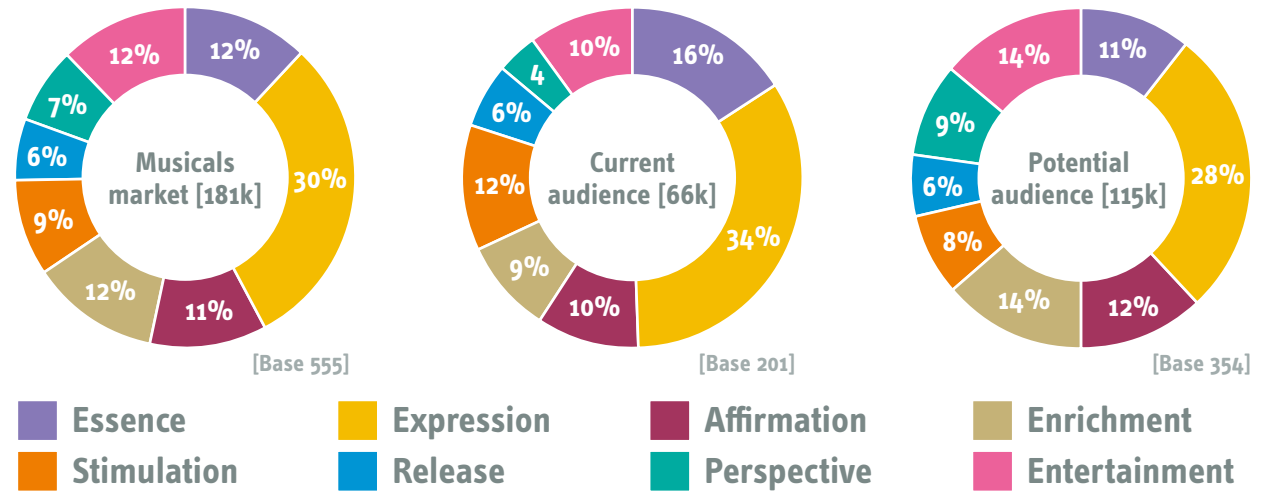
Breadth of musicals provides variety

As the musicals market offers a range of types of events, there could be the opportunity to appeal to a variety of Culture Segments. As in many artform markets, the Essence segment demonstrate the most significance within the current audience. This discerning segment would likely be drawn by more 'traditional' musical performances.

Those in the Affirmation segment over-index in the potential audience for musicals. Although they like to feel open to all culture, they may be inclined towards productions with proven credentials and reputation for high quality they can enjoy with family and friends. While Expression, the largest segment amongst all musicals audiences, embrace this inclusive artform that everyone can share and enjoy together. They will be open to a wider range of repertoire, comfortable with risk but equally not dismissive of the most popular parts of the genre.

Musicals do not typically appeal as much to the Enrichment and Perspective segments, who often have narrow, more traditional interests. Entertainment segment, on the other hand, while not ordinarily drawn to the performing arts could be drawn in by a blockbuster show such as jukebox musicals or celebrity casting.

Musicals market: Culture Segment breakdown



Index compared to Maltese culture market



Please note: in this model, the Maltese culture market represents an index of 100.

Potential musicals audience are high spenders

The potential musicals audience spent a relatively high amount on tickets in the past twelve months; a fifth spent over €100, in line with the culture market overall.

This is higher than artforms with which it has the greatest crossover – plays, comedy and pantomime – and puts the possible future spend closer to more specialist artforms such as opera and dance.

Annual spend on entrance tickets; over €100

Musicals market

27% [Base 432]

Current musicals audience

40% [Base 170]

Potential musicals audience

19% [Base 262]

Maltese culture market

20% [Base 734]

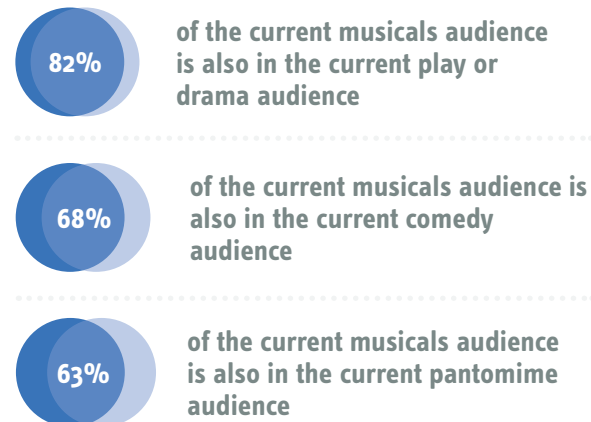
Please note: this refers to entrance tickets in general, not only musicals tickets. Those who declined to answer have been omitted.

Crossover with musicals is quite extensive

The most significant crossover with the current musicals audience is the current play or drama (82%, +47), comedy (68%, +41) and pantomime (63%, +35) audiences.

There is also significant crossover with genres such as current rock or pop music (58%, +26) and classical music audiences (40%, +24) demonstrating how an interest in one type of musical performance might influence another.

Current audience crossover (greatest difference)



169k in the library or archive market

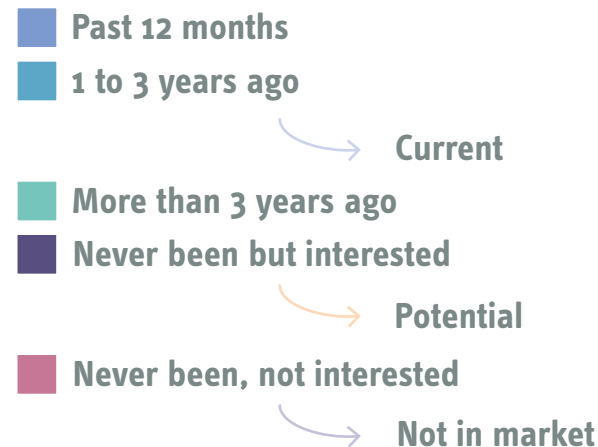
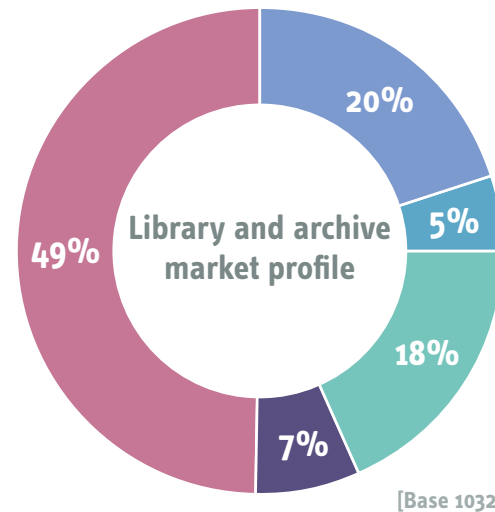
Malta's library or archive market comprises **51% of the culture market**, or 169k within the adult population of Malta.

The most **avid readers** in the culture market – Essence and Stimulation – demonstrate greatest significance within the current audience. Those not looking for intellectual development are unlikely to participate.

There is a **natural crossover** between those in the library and archive market and those who attend **literature events**.

Defining the library or archive market

The library or archive market refers to anyone who has visited *a library or archive* previously, or would be interested in doing so.



85k in the current audience

51% of the culture market is within the library or archive market, equivalent to 169k people.

25% are within the current library and archive audience. This market demonstrates relative recency, with 20% having visited a library or archive in the past twelve months, compared to 5% who last visited between one and three years ago. Collectively, around 85k of those in the Maltese population have visited a library or archive in the past three years.

84k in the potential audience

A similar proportion of the culture market can be considered potential library or archive visitors (25%), equivalent to around 84k people. This includes 18% of the culture market who last visited more than three years ago, and 7% who have yet to visit a library or archive but are interested. The relatively low proportion of non-visitors suggests typically functional usage; most who want or need to use a library or archive have done so.

49% of those in the culture demonstrate no interest in visiting a library or archive.

Interest in books aligns with library market

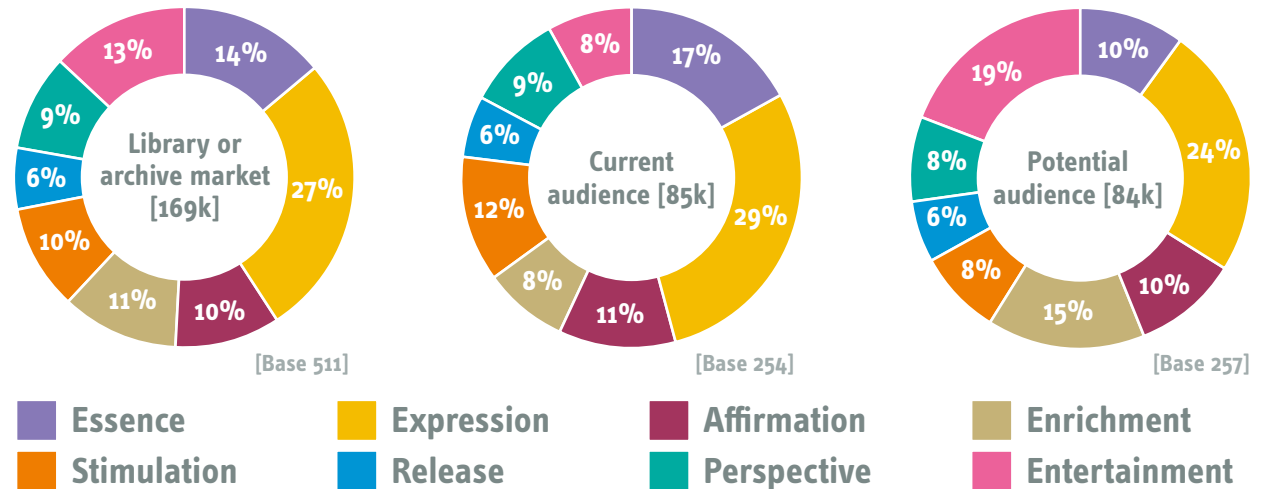
Essence and Stimulation – the segments most likely to have read multiple books in the past year – demonstrate the greatest significance amongst the current library or archive audience.

Those in the Essence segment over-index most significantly within the current library or archive audience. Culture is a very important part of their lives and they are looking for intellectual stimulation and self-fulfilment. Stimulation, on the other hand, are also avid readers, naturally curious and looking to explore new ideas.

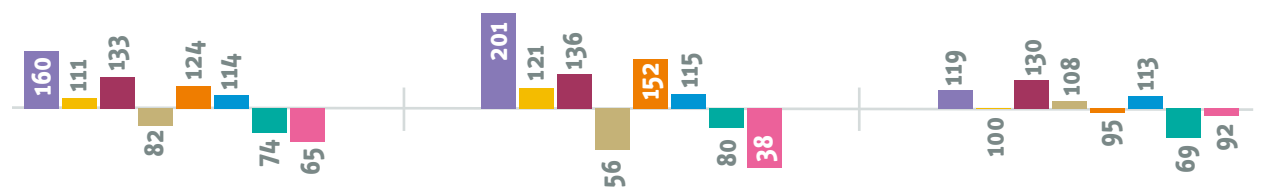
The Affirmation segment, aspirational and always looking for personal development, also over-indexes within the current and the potential library and archive audiences.

The Enrichment, Perspective and Entertainment segments typically under-index in the library and archive markets. Both Enrichment and Perspective have established interests and are unlikely to want to expand their horizons, although the latter do like to learn on their own terms. Entertainment, on the other hand, have little interest in intellectual development during their leisure time and would prioritise other leisure pursuits.

Library or archive market: Culture Segment breakdown



Index compared to Maltese culture market



Please note: in this model, the Maltese culture market represents an index of 100.

Narrow gap in current and potential spend

Those in the library or archive market demonstrate the narrowest gap between current and potential spend (7 percentage-points). As libraries are typically free to use, current use does not necessarily correlate with higher cultural spend.

A quarter of the library or archive market spent over €100 on entrance tickets in the past twelve months, similar to the culture market.

Annual spend on entrance tickets; over €100

Library or archive market

25% [Base 400]

Current library or archive audience

28% [Base 227]

Potential library or archive audience

21% [Base 173]

Maltese culture market

20% [Base 734]

Please note: this refers to entrance tickets in general, not only library / archive tickets. Those who declined to answer have been omitted.

Significant relationship with literature events

Those within the current library and archive audience are significantly more than twice as likely to be in the current literature event audience (47%, +29).

They also demonstrate significant overlap with the current film or cinema (81%, +27) and art gallery audiences (70%, +27), amongst other artforms.

Current audience crossover (greatest difference)

81% of the current library or archive audience is also in the current film or cinema audience

70% of the current library or archive audience is also in the current art gallery audience

47% of the current library or archive audience is also in the current literature event audience

140k in the classical music market

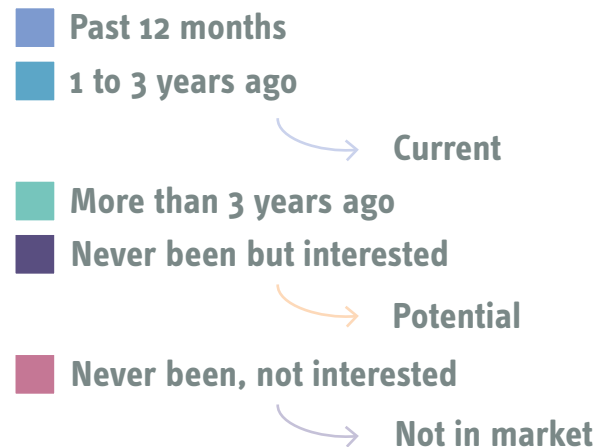
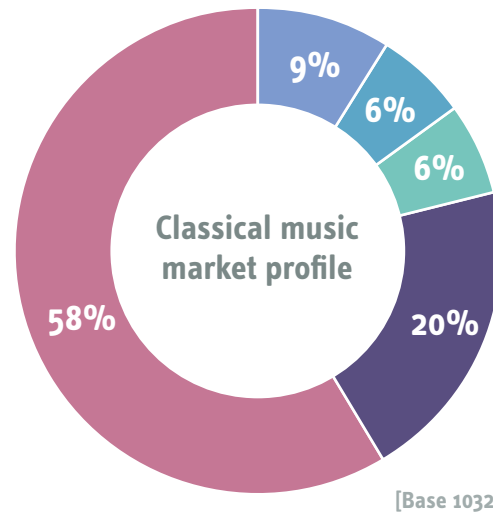
Malta's classical music market comprises **42% of the culture market**, or 140k within the adult population of Malta.

Classical music attracts the most **culturally-active**; Essence, Expression and Stimulation. It can be inaccessible for other segments, although Affirmation like the idea of engaging with classical music.

The current audience represents **some of the highest spenders** in the culture market, while its overlap with a variety of genres reinforces that it is an artform dominated by the culturally-active.

Defining the classical music market

The classical music market refers to anyone who has attended a *classical music performance* previously, or would be interested in doing so.



53k in the current audience

42% of the culture market is within the market for classical music, equivalent to 140k people.

However, just 16% are within the current classical music audience. This includes 9% who have visited a classical music performance in the past twelve months, and a further 6% who last visited between one and three years ago. Collectively, around 53k of those in the Maltese population have visited a classical music performance in the past three years.

87k in the potential audience

More significantly, a quarter (26%) of the culture market can be considered potential classical music visitors, equivalent to around 87k people. This includes 6% of the culture market who last visited more than three years ago, and 20% who have yet to experience a classical music performance but are interested. Only the comedy market has a greater number of non-visitors interested in future attendance than classical music.

It is not for everyone, though; 58% have never visited a classical music performance previously and are not interested in doing so.

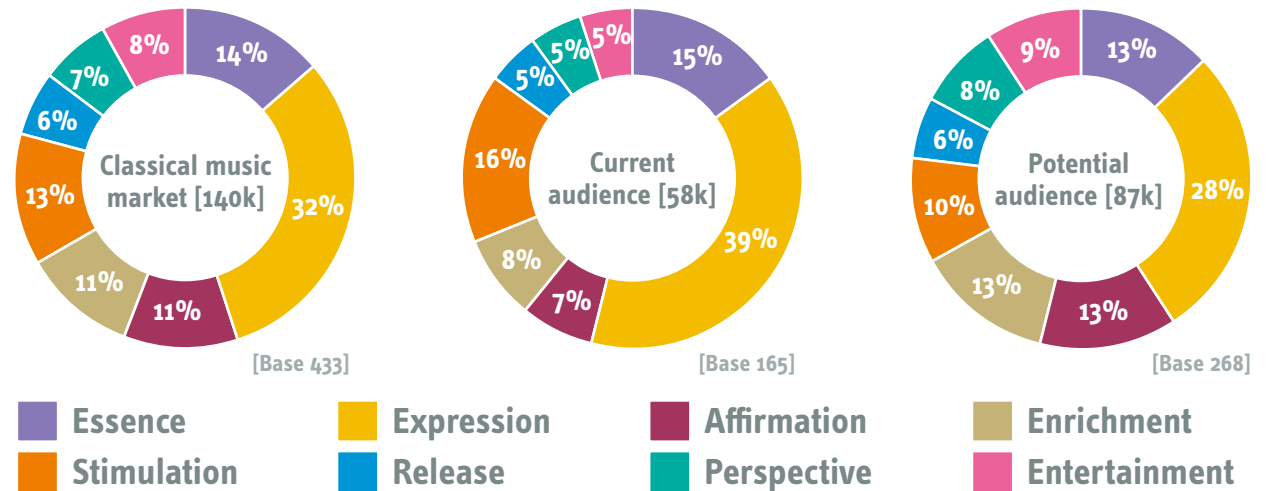
Expression, Stimulation and Essence are key

Looking at the make-up of the current classical music audience, the importance of the Expression, Stimulation and Essence segments is clear; they collectively represent more than two-thirds of the current audience.

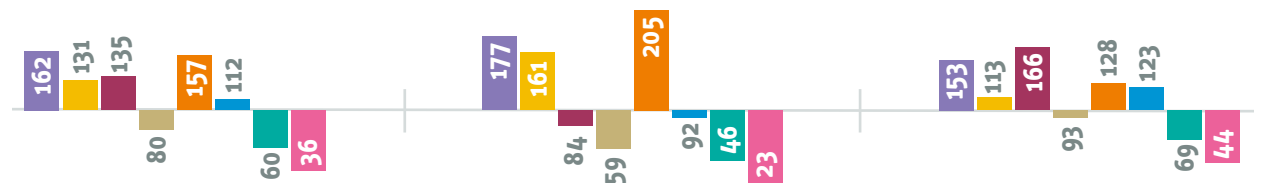
Those in the Stimulation segment demonstrate the greatest significance; their size within the current classical music audience is more than twice as large as in the culture market overall. Although not as natural a fit for classical music as say, the discerning and sophisticated Essence, they demonstrate an openness to a range of experiences and willingness to try new things. Contemporary twists on the conventional classical music model may be more interesting to them.

Outside of these segments, the classical music market appears to lack appeal for others. Those in the Affirmation segment, however, demonstrate a more significant presence in the potential audience. While their behaviour is not often out of the ordinary, the Affirmation segment like to think they would try out more cultural pursuits. Providing accessible events, full and comprehensive details and reassuring them of their decision would be key to attracting them.

Classical music market: Culture Segment breakdown



Index compared to Maltese culture market



Please note: in this model, the Maltese culture market represents an index of 100.

High spend in the current classical audience

Current classical music attenders are amongst the highest cultural spenders; almost half have spent over €100 on tickets in the past year.

More than a quarter of the classical music market has spent over €100 on tickets in the past year, significantly more than the average. Typically, those interested in classical music are amongst the highest spenders in the culture market.

Annual spend on entrance tickets; over €100

Classical music market

27%

[Base 341]

Current classical music audience

45%

[Base 135]

Potential classical music audience

16%

[Base 207]

Maltese culture market

20%

[Base 734]

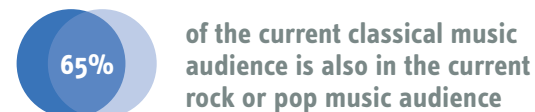
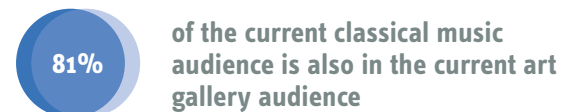
Please note: this refers to entrance tickets in general, not only classical music tickets. Those who declined to answer have been omitted.

One of the artforms with greatest overlap

Those in the current classical music audience demonstrate significant overlap with the majority of other artforms; they are especially culturally-engaged people, open to a variety of events.

In particular, the current art gallery (81%, +37), historical site (77%, +31) and rock or pop audiences (65%, +33) offer significant correlation with the current classical music audience.

Current audience crossover (greatest difference)



138k in the literature event market

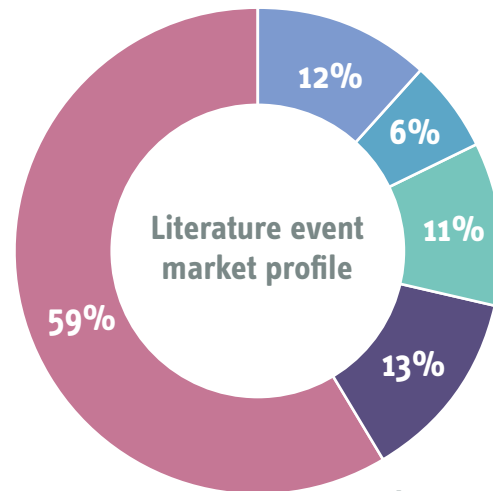
Malta's literature event market comprises **41% of the culture market**, or 138k within the adult population of Malta.

This market shares similarities with the library or archive market. Essence over-index significantly, while Affirmation's relative importance suggest a **desire for self-improvement** is key.

Those interested in literature events can typically be considered high spenders and engaged with a variety of artforms and marketing sources.

Defining the literature event market

The literature event market refers to anyone who has attended *an event connected with books, writing, literature or poetry* previously, or would be interested in doing so.



[Base 1032]

Past 12 months

1 to 3 years ago

More than 3 years ago

Never been but interested

Never been, not interested

Current

Potential

Not in market

59k in the current audience

41% of the culture market is within the literature event market, equivalent to 138k people.

18% are within the current literature event audience. This includes 12% who have visited a literature event in the past twelve months, and a further 6% who last visited between one and three years ago. Collectively, around 59k of those in the Maltese population have visited a literature event in the past three years.

79k in the potential audience

Almost a quarter (24%) of the culture market can be considered potential literature event visitors, equivalent to around 79k people. This includes 11% of the culture market who last visited more than three years ago, and 13% who have never attended a literature event but would be interested in doing so.

59% of those within the culture market have never been to a literature event and would not be interested in doing so.

Similarities between literature and libraries

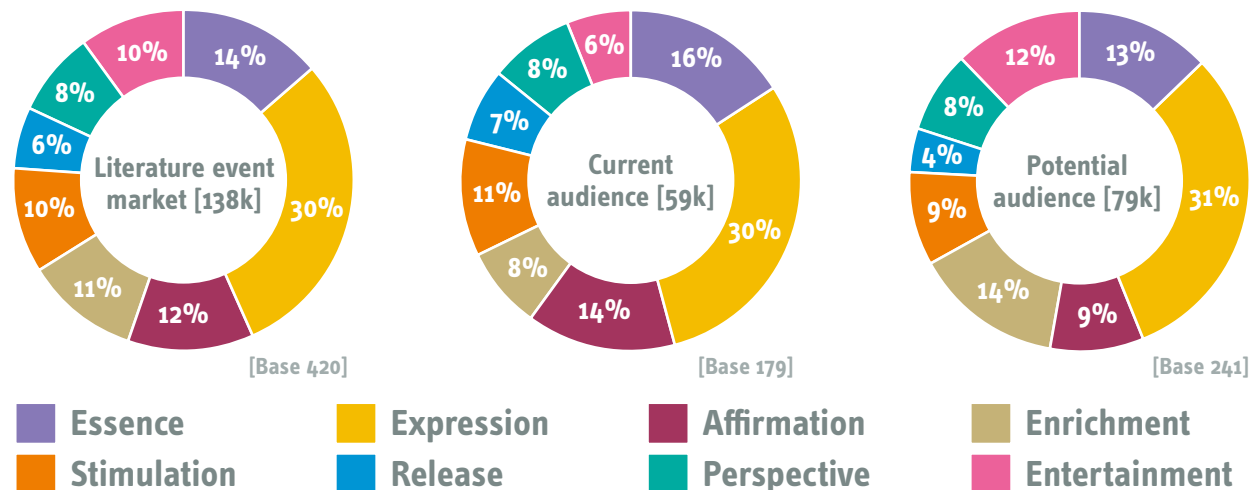
As with the library or archive market, an interest in reading is crucial within the literature event market. Those in the Essence segment over-index most within the literature event market and the current audience.

Although the curious-minded Stimulation segment slightly over-index within the market, literature events seem to align more clearly with a desire for self-development. Those in the Affirmation segment, for example, are a close second in significant difference in the current literature event audience compared to the culture market overall.

The Expression segment is the biggest within the literature event market. A confident and expressive segment, they could be drawn towards events such as creative writing sessions or poetry readings.

Literature events are typically more attractive to those segments with the greatest interest in arts and culture. Amongst those for whom culture is on the periphery of their lives, such as Enrichment, Perspective and Entertainment, these types of events may not be considered the best use of leisure time.

Literature event market: Culture Segment breakdown



Index compared to Maltese culture market



Please note: in this model, the Maltese culture market represents an index of 100.

A relatively high-spending market

More than a quarter of the literature event market have spent more than €100 on tickets in the past year, significantly higher than the culture market.

This places the literature market in the upper-tier in terms of spend, behind only specialist artforms. A high-spending potential audience contributes to this; one-fifth have spent more than €100 in the past year, in line with the culture market average.

Annual spend on entrance tickets; over €100

Literature event market

27% [Base 342]

Current literature event audience

34% [Base 160]

Potential literature event audience

20% [Base 181]

Maltese culture market

20% [Base 734]

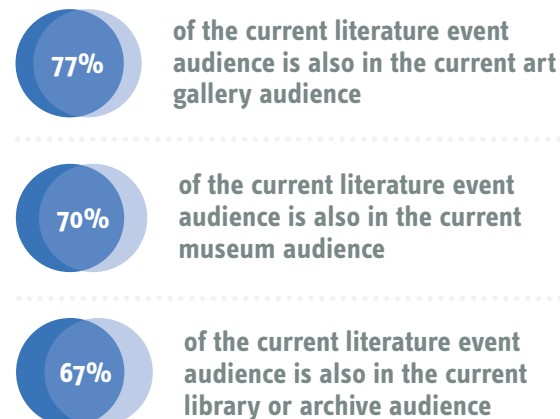
Please note: this refers to entrance tickets in general, not only literature tickets. Those who declined to answer have been omitted.

More likely to visit a library or archive

Naturally, those in the current literature event audience are significantly more likely to have visited a library or archive in the past three years (67%, +42). Only the relationship between contemporary and traditional dance has a greater correlation.

This market has a high crossover with most artforms, in particular the current art gallery (77%, +34%) and museum audiences (70%, +30%).

Current audience crossover (greatest difference)



130k in traditional Maltese music market

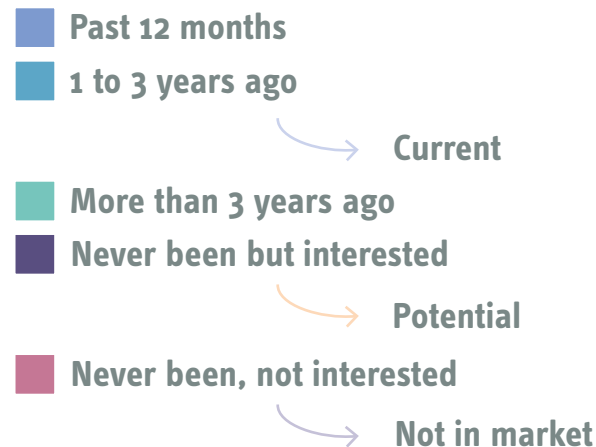
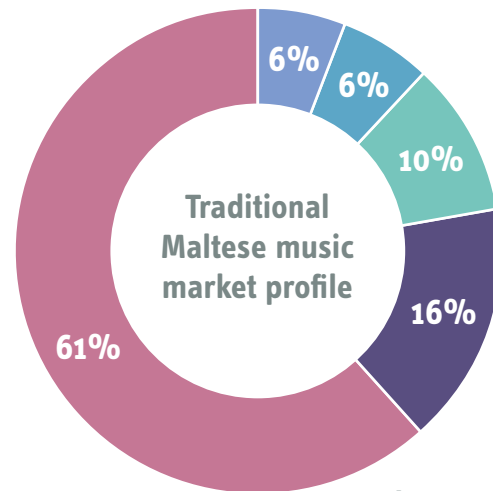
The traditional Maltese music market comprises **39% of the culture market**, or 130k within the adult population of Malta.

The Culture Segments breakdown is **atypical** compared to other artforms. Although the Stimulation segment over-index in the current audience, few segments are significantly under-represented in the market. This could be a reflection on the **social position** of this artform.

Compared to other music genres, Maltese music **does not** demonstrate particularly high spending, crossover or use of marketing sources.

Defining the traditional Maltese music market

The traditional Maltese music market refers to anyone who has attended a *traditional Maltese music performance* (i.e. *Ghanafest*) previously, or would be interested in doing so.



42k in the current audience

39% of the culture market is within the traditional Maltese music market, equivalent to 130k people.

The current audience is relatively small (13%). This includes 6% who have visited a traditional Maltese music performance in the past twelve months, and a further 6% who last visited between one and three years ago. Collectively, around 42k of those in the Maltese population have visited a traditional Maltese music performance in the past three years.

88k in the potential audience

The potential audience is twice as large; more than a quarter (26%) of the culture market can be considered potential traditional Maltese music visitors, equivalent to around 88k people. This includes 10% of the culture market who last visited more than three years ago, and 16% who have never attended a traditional Maltese music performance but would be interested in doing so.

61% of those within the culture market have never been to a traditional Maltese music performance and would not be interested in doing so.

A relatively distinct segment profile

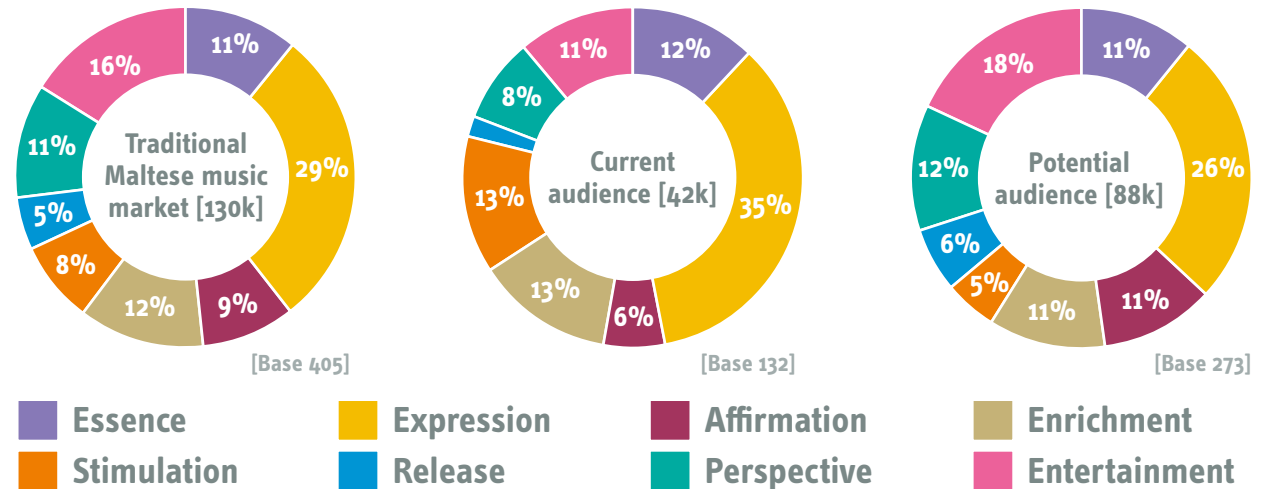
The Culture Segment profile for traditional Maltese music is quite different to many other artforms. Its position as more of a social or societal exercise means that, while the current audience is dominated by more culturally-engaged segments, no segment explicitly rejects it.

The Stimulation, Expression and Essence segments over-index within the current audience, collectively representing three-fifths. The Stimulation segment, in particular, are inclined towards live music performances, while these three segments tend to be the most active in the culture market.

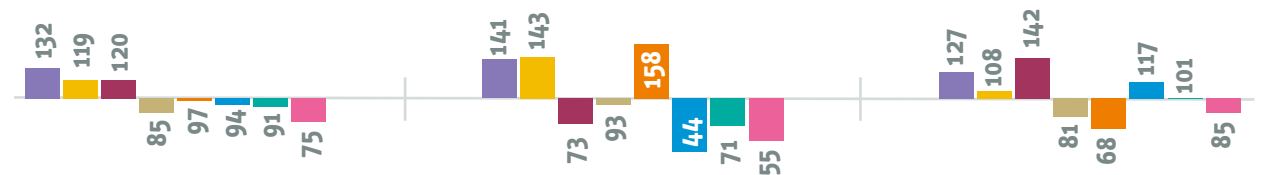
The Affirmation segment over-index within the potential audience. Although their current visitation is lower, this is a segment looking to conform, perhaps thinking they *should* be visiting these types of events.

Although current visitation amongst some segments – such as Release and Entertainment – is under-indexed, their proportions within the traditional Maltese music market are not dissimilar to the culture market overall. These segments could be drawn to must-attend events or societally-relevant Maltese festivals.

Traditional Maltese music market: Culture Segment breakdown



Index compared to Maltese culture market



Please note: in this model, the Maltese culture market represents an index of 100.

Spending in line with the culture market

Those in the traditional Maltese music market are typically less likely to have spent over €100 on tickets in the past year when compared to other music genres.

Their spending is very much in line with the culture market average; one fifth of the traditional Maltese music market spent over €100 on tickets in the past year.

Annual spend on entrance tickets; over €100

Traditional Maltese music market

20% [Base 297]

Current traditional Maltese music audience

25% [Base 104]

Potential traditional Maltese music audience

17% [Base 193]

Maltese culture market

20% [Base 734]

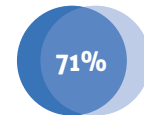
Please note: this refers to entrance tickets in general, not only Maltese music tickets. Those who declined to answer have been omitted.

Crossover with mainstream artforms

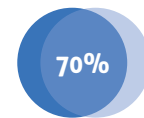
The greatest crossover with the current traditional Maltese music audience comes with other mainstream artforms, such as the current historical site (71%, +25%) and art gallery audiences (70%, +27%).

Its crossover with other music genres is not as great as others. It's possible that traditional music attendance is seen as a social or societal decision by some, rather than being a reflection on preference.

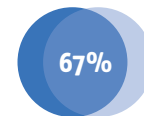
Current audience crossover (greatest difference)



of the current traditional Maltese music audience is also in the current historical site audience



of the current traditional Maltese music audience is also in the current art gallery audience



of the current traditional Maltese music audience is also in the current museum audience

98k in the jazz or blues music market

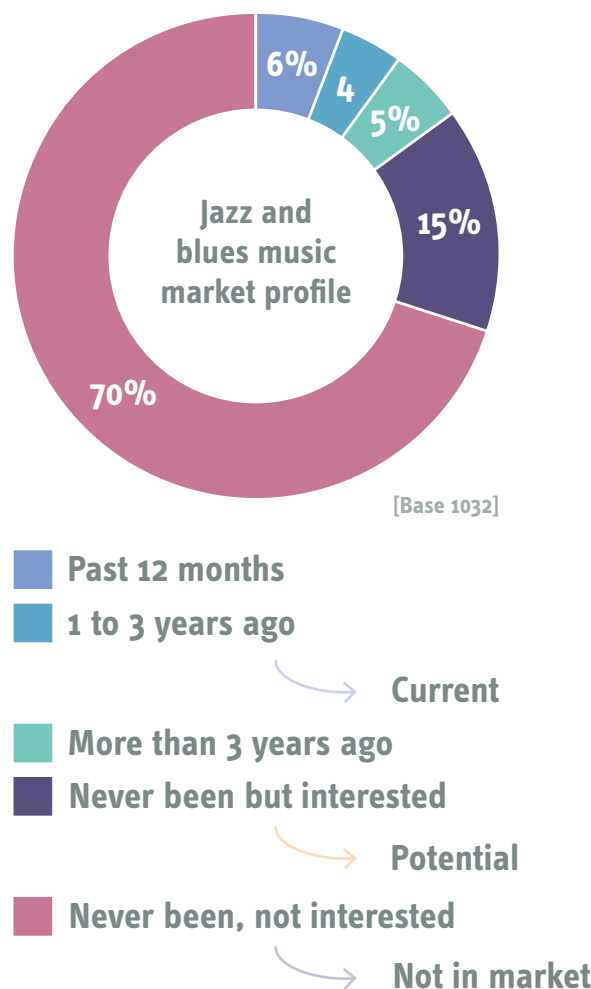
Malta's jazz or blues music market comprises **30% of the culture market**, or 98k within the adult population of Malta.

The often experimental nature of the artform appeals most to the **Stimulation** segment, and could attract **Essence** and **Affirmation** in the future.

The potential jazz or blues audience **spend more** on tickets than any other potential audience, while there is significant crossover with other music genres.

Defining the jazz or blues music market

The jazz or blues music market refers to anyone who has attended a *jazz or blues music performance* previously, or would be interested in doing so.



31k in the current audience

30% of the culture market is within the jazz or blues music market, equivalent to 98k people.

The current audience is one of the smallest amongst artforms in the culture market (9%). This includes 6% who have visited a jazz or blues music performance in the past twelve months, and a further 4% who last visited between one and three years ago. Collectively, around 31k of those in the Maltese population have visited a jazz or blues music performance in the past three years.

67k in the potential audience

The potential audience is significantly larger; a fifth (20%) of the culture market can be considered potential jazz or blues music visitors, equivalent to around 67k people. This includes 5% who last visited more than three years ago, and, more significantly, 15% who have never attended but would be interested in doing so.

Jazz and blues is not an artform which interests most people, however. 70% of those within the culture market have never been to a jazz or blues music performance and would not be interested in doing so.

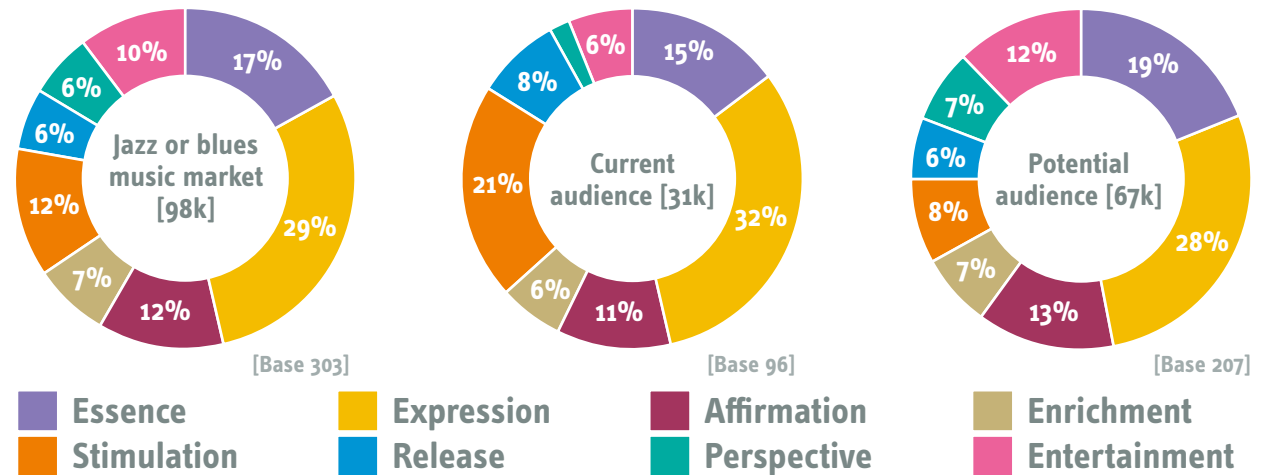
Jazz or blues offers chance to experiment

The Stimulation segment demonstrates the greatest significance within the current jazz or blues audience. This artform has always been experimental and unpredictable, something which appeals greatly to a segment looking to be challenged by something new and different.

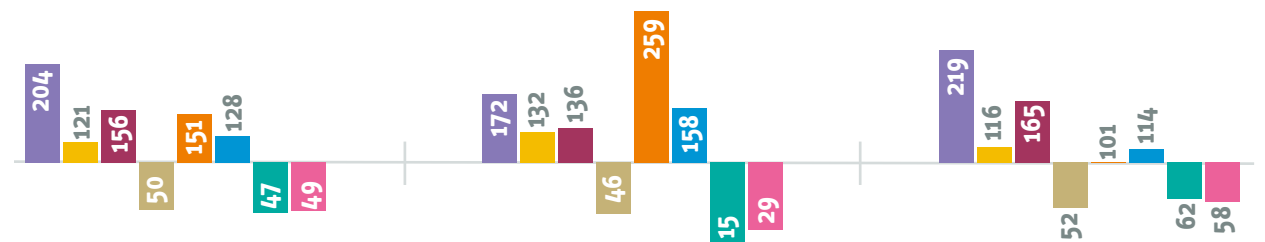
The Essence segment greatly over-index within the jazz or blues market. This is predominantly because of the size within the potential audience which, at 67k people, is twice as large as the current audience. They would likely be drawn to more refined performances demonstrating artistic quality; practitioners at the peak of their musical powers.

The Affirmation segment over-index within the potential audience, while the Perspective and Entertainment segments, in particular, do not demonstrate much interest in jazz or blues music. Perspective, rather than looking to experiment, want to stick to things which cover their own interests, while those in the Entertainment segment would be more inclined towards familiar, mainstream and popular music.

Jazz or blues music market: Culture Segment breakdown



Index compared to Maltese culture market



Please note: in this model, the Maltese culture market represents an index of 100.

The largest potential audience spenders

The potential jazz or blues audience, at over a quarter, demonstrates the highest current spend on tickets amongst potential artform audiences.

In combination with the high spend of the current audience, those in the jazz or blues market can be viewed as some of the highest spending members of the culture market. Almost a third have spent over €100 on tickets in the past year.

Annual spend on entrance tickets; over €100

Jazz or blues music market

29% [Base 243]

Current jazz or blues music audience

35% [Base 80]

Potential jazz or blues music audience

27% [Base 163]

Maltese culture market

20% [Base 734]

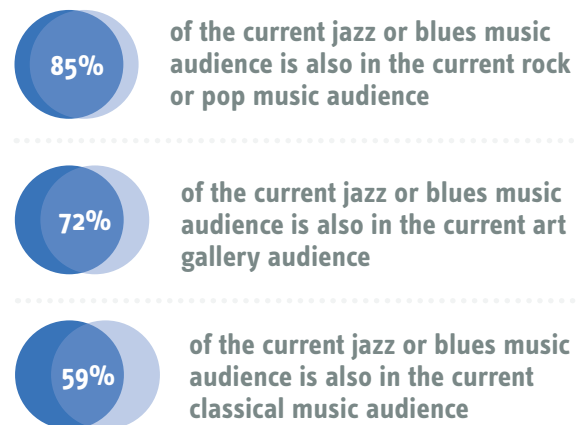
Please note: this refers to entrance tickets in general, not only jazz or blues tickets. Those who declined to answer have been omitted.

Great overlap with rock, pop and classical

Those in the current jazz or blues audience are significantly more likely than average to have attended a rock or pop (85%, +53) or classical performance (59%, +43) in the past three years.

Other areas of significant overlap include the current art gallery audience (72%, +28%), while some of the less-common current audiences such as the current ballet or classical dance audience (23%, +16) significantly over-index compared to the culture market.

Current audience crossover (greatest difference)



95k in the contemporary dance market

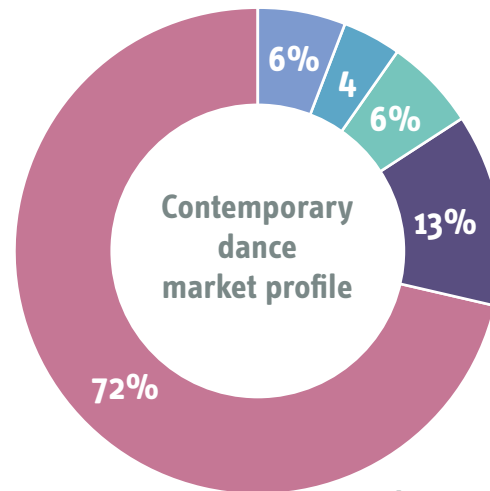
Malta's contemporary dance market comprises **28% of the culture market**, or 95k within the adult population of Malta.

The Affirmation and Essence segments are **significantly larger** within the contemporary dance market, although it **can prove inaccessible** to other segments.

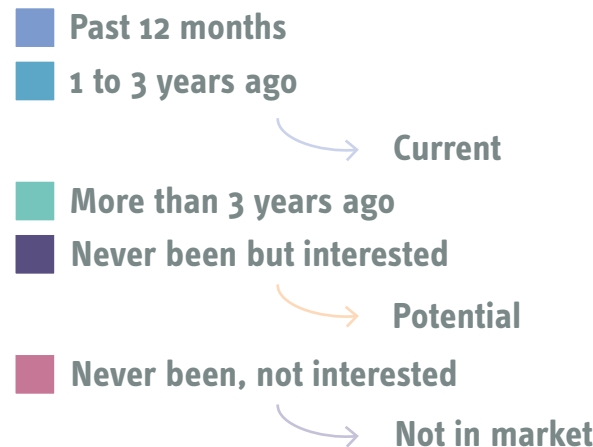
Recent contemporary dance performance attenders tend to be **amongst the highest cultural spenders**. Crossover between contemporary and classical dance is also of great significance.

Defining the contemporary dance market

The contemporary dance market refers to anyone who has attended a contemporary dance performance previously, or would be interested in doing so.



[Base 1032]



32k in the current audience

28% of the culture market is within the contemporary dance market, equivalent to 95k people. It is the third smallest artform market.

The current audience is relatively small (10%). This includes 6% who have visited a contemporary dance performance in the past twelve months, and a further 4% who last visited between one and three years ago. Collectively, around 32k in the culture market have visited a contemporary dance performance in the past three years.

63k in the potential audience

The potential audience is almost twice as large; almost a fifth (19%) of the culture market can be considered potential visitors, equivalent to around 63k people. This includes 6% who last visited more than three years ago, and 13% who have never attended a contemporary dance performance but would be interested in doing so.

As one of the smallest artform markets, a majority of the population are not in the market. 72% of those within the culture market have never been to a contemporary music performance and would not be interested in doing so.

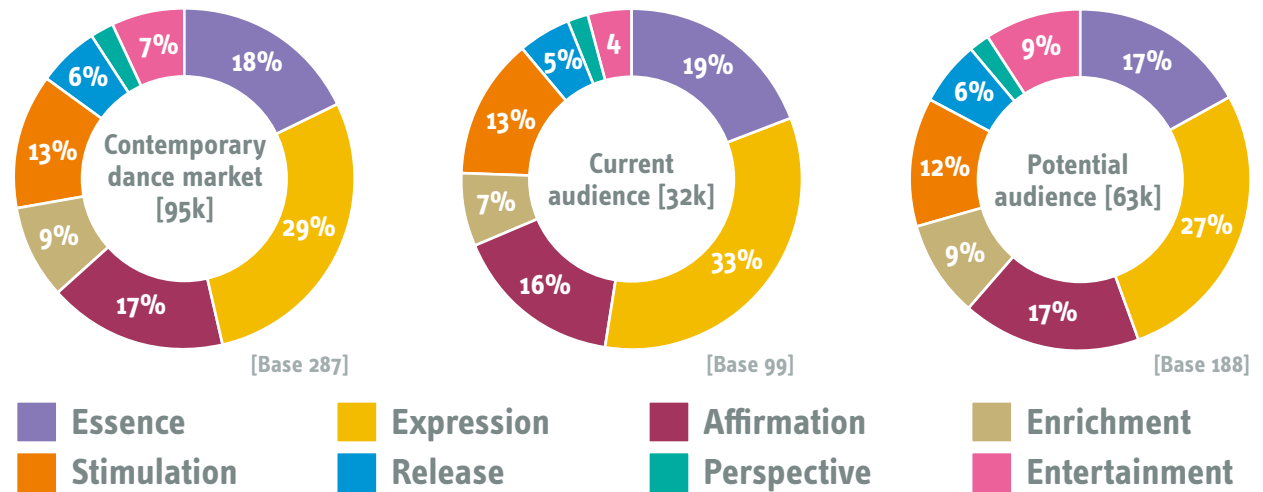
Affirmation are big in the dance markets

The Affirmation segment have proved to be crucial within the dance markets in Malta. They significantly over-index within the contemporary dance market, which is consistent with many Audience Atlases across the world.

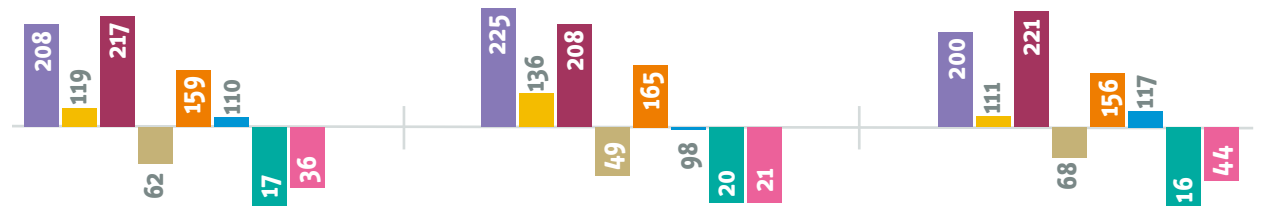
The Essence segment over-index within the current audience, drawn in by the combination of the sophistication of contemporary dance with the opportunity to explore new events of high quality. Similarly, the Stimulation segment are drawn by the often-experimental contemporary style of some performances, although dance is not an artform with which they are as naturally aligned.

Contemporary dance can often be a challenging artform, however, and some segments are unlikely to be attracted to visit. The Perspective segment, in particular, simply have no interest in dance or most contemporary cultural events; they are habitual and won't be drawn to new artforms. Similarly, contemporary dance is often too specialist for those in the Entertainment segment, a barrier they are unlikely to want to overcome.

Contemporary dance market: Culture Segment breakdown



Index compared to Maltese culture market



Please note: in this model, the Maltese culture market represents an index of 100.

Current audience spending particularly high

More than half of the current contemporary dance audience have spent over €100 on entrance tickets in the past year. This is 32 percentage-points higher than the culture market average.

Including the potential audience, of whom one-fifth have spent over €100 on tickets in the past year, almost a third of the contemporary dance have reached this milestone.

Annual spend on entrance tickets; over €100

Contemporary dance market

32% [Base 234]

Current contemporary dance audience

52% [Base 91]

Potential contemporary dance audience

20% [Base 144]

Maltese culture market

20% [Base 734]

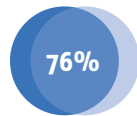
Please note: this refers to entrance tickets in general, not only contemporary dance. Those who declined to answer have been omitted.

Interest in dance can bridge genre

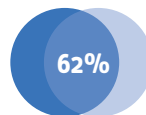
Those in the contemporary dance market are significantly more likely to be within the ballet or classical dance market (49%, +42%).

There is also a strong correlation with some of the other more similar artforms; three-quarters in the current play or drama audience (76%, +40%) and half in the current musicals audience (52%, +33%).

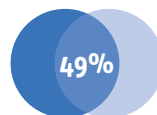
Current audience crossover (greatest difference)



76% of the current contemporary dance audience is also in the current play or drama audience



62% of the current contemporary dance audience is also in the current comedy audience



49% of the current contemporary dance audience is also in the current ballet or classical dance audience

84k in the opera or operetta market

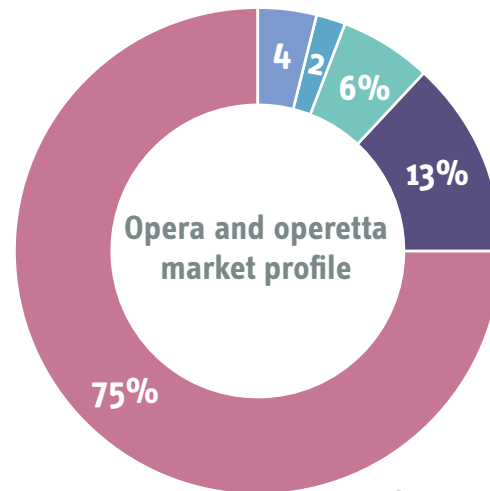
Malta's opera market comprises **25% of the culture market**, or 84k within the adult population of Malta, half of whom are yet to attend.

The Essence and Expression segments dominate the sophisticated current audience. While the current audience is **small**, members are typically **very high spenders**.

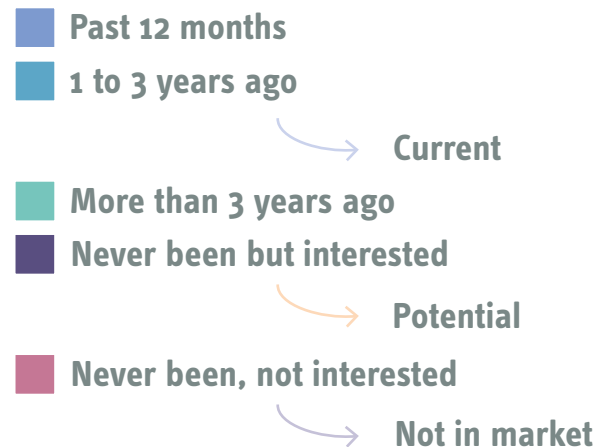
Opera attenders correlate well with **classical music and dance**, highlighting areas for targeting. Online marketing sources demonstrate the greatest significance for this market.

Defining the opera or operetta market

The opera or operetta market refers to anyone who has attended *an opera or operetta performance* previously, or would be interested in doing so.



[Base 1032]



20k in the current audience

25% of the culture market is within the opera or operetta market, equivalent to 84k people. It is the second smallest artform market.

The current audience is the smallest of all artforms (6%). This includes 4% who have visited an opera in the past twelve months, and a further 2% who last visited between one and three years ago. Collectively, around 20k in the culture market have visited an opera operetta in the past three years.

64k in the potential audience

The potential audience is more than three times as large; almost a fifth (19%) of the culture market can be considered potential visitors, equivalent to around 64k people. This includes 6% who last visited more than three years ago, and 13% who have never attended an opera or operetta but would be interested in doing so.

As one of the smallest artform markets, a majority of the population are not in the market. 75% of those within the culture market have never been to an opera or operetta and would not be interested in doing so.

Essence and Expression dominate opera scene

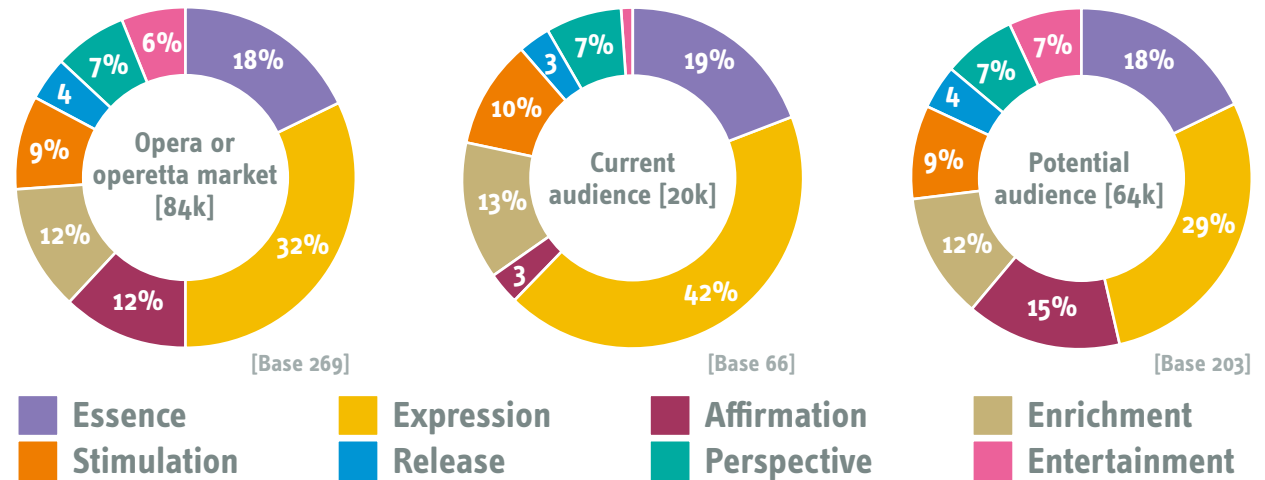
Those in the Essence segment demonstrate the greatest significance within the current opera or operetta audience. They are also significantly over-represented in the potential opera audience. This segment prides itself on its sophisticated tastes and engaging in activities which are perceived as 'intellectual', making opera a natural fit.

The Expression segment is also significantly over-represented in the current opera audience. This segment have a broad and frequent cultural consumption, often looking for events which will have an effect on them.

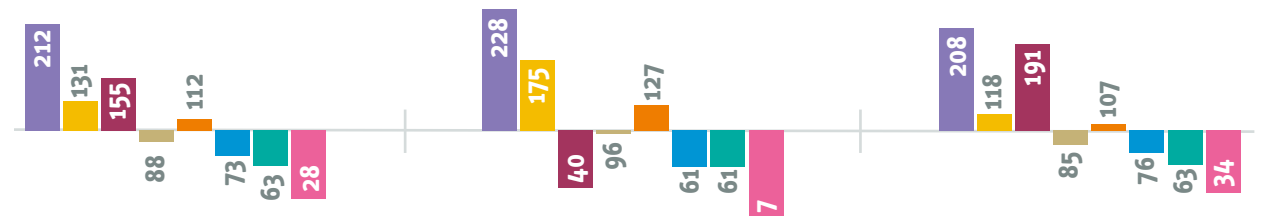
Opera is widely perceived to be an inaccessible artform, reflected in the relatively small current audience it possesses. Entertainment, for example, simply do not attend opera performances currently and offer little potential for the future.

The Affirmation segment, on the other hand, demonstrates significance in the potential audience despite low current attendance. Opera appears to sit alongside artforms such as dance and classical music as something Affirmation feel they *should* attend. This could have a significant implication for the marketing approach in order to convince them to take the plunge.

Opera or operetta market: Culture Segment breakdown



Index compared to Maltese culture market



Please note: in this model, the Maltese culture market represents an index of 100.

Small base of high current spenders

The current opera or operetta audience are high spenders; half have spent more than €100 on tickets in the past year, putting them alongside contemporary and classical dance in spend. However, the current audience is relatively small.

Almost a third of the opera and operetta market have spent more than €100 on tickets in the past year, significantly higher than the culture market.

Annual spend on entrance tickets; over €100

Opera or operetta market

29% [Base 209]

Current opera or operetta audience

52% [Base 57]

Potential opera or operetta audience

21% [Base 152]

Maltese culture market

20% [Base 734]

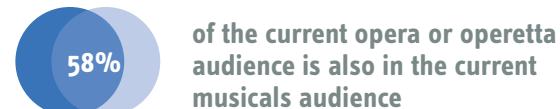
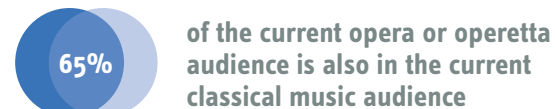
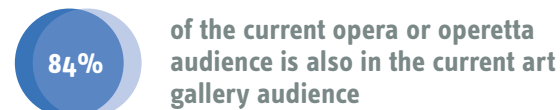
Please note: this refers to entrance tickets in general, not only opera or operetta. Those who declined to answer have been omitted.

Opera market tends to enjoy classical music

A majority of those in the current opera or operetta audience are also in the current classical music audience (65%, +49). It is easy to see why, although the correlation is not reciprocated equally, suggesting that opera is perhaps more difficult to appreciate.

Those in the opera market also demonstrate significant crossover with the current art gallery (84%, +41%) and musicals audiences (58%, +38).

Current audience crossover (greatest difference)



71k in the ballet or classical dance market

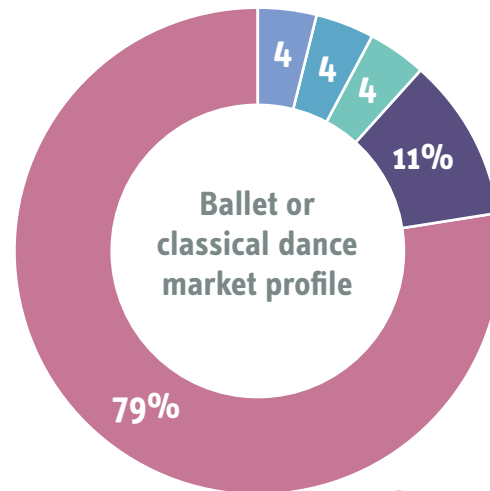
Malta's ballet market comprises **21% of the culture market**, or 71k within the adult population of Malta.

The **Affirmation** segment is even larger within the classical dance market than contemporary dance. However, like the contemporary dance market, some segments will not be interested.

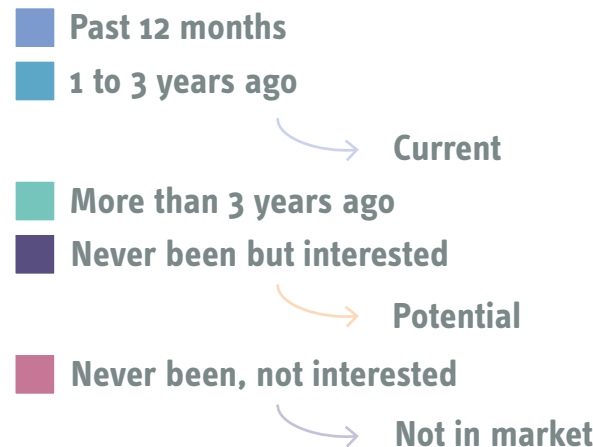
Those in the ballet market will be **culturally-active, spending money** on tickets and using a variety of marketing sources.

Defining the ballet or classical dance market

The ballet or classical dance market refers to anyone who has attended a *ballet or classical dance performance* previously, or would be interested in doing so.



[Base 1032]



24k in the current audience

21% of the culture market is within the ballet market, equivalent to 71k people. It is the smallest artform market in Malta.

The current audience is relatively small (8%). This includes 4% who have visited a ballet performance in the past twelve months, and a further 4% who last visited between one and three years ago. Collectively, around 24k in the culture market have visited a ballet performance in the past three years.

47k in the potential audience

Around one in seven (14%) of the culture market can be considered potential visitors, equivalent to around 47k people. This includes 4% who last visited more than three years ago, and 11% who have never attended a ballet performance but would be interested in doing so. The potential audience for ballet is not as great as that of contemporary dance.

79% of the culture market have never been to a ballet performance and would not be interested in doing so, the greatest number of all artforms.

Affirmation even larger within classical dance

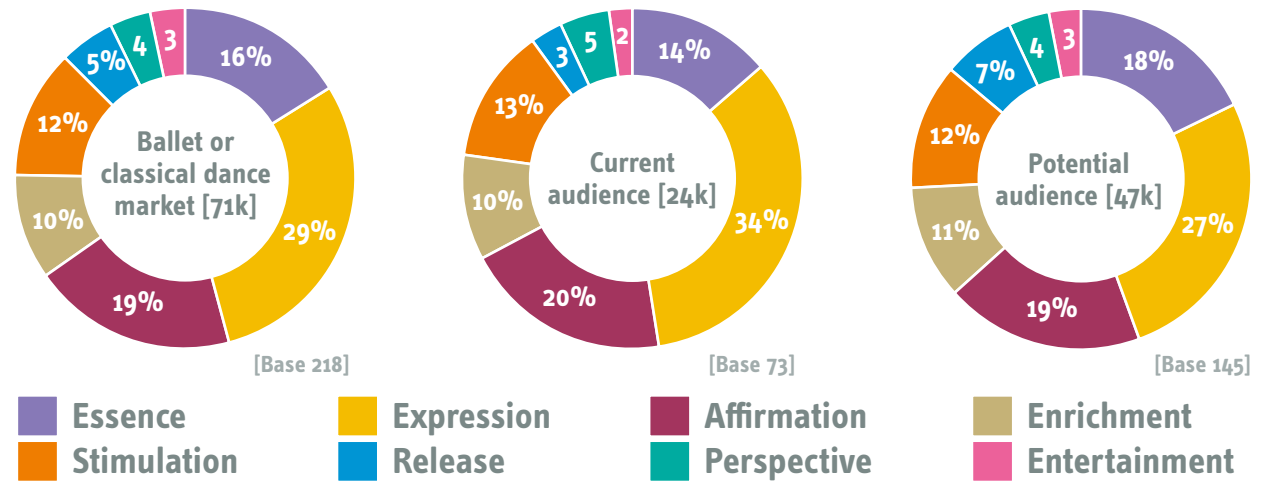
As in the contemporary dance market – and in line with the UK market – the Affirmation segment demonstrates the greatest significance within the ballet audience when compared to the culture market overall. They also significantly over-index in the potential audience.

The Essence segment over-index within the current audience, but are less interested than in contemporary dance.

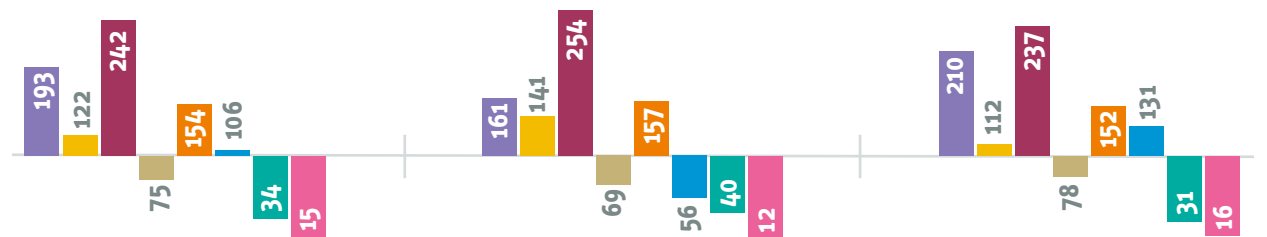
As with contemporary dance, ballet is perceived as inaccessible and less relevant by segments for whom arts and culture is on the periphery of their lives. Lacking wide or popular appeal, ballet does not typically appear on the Entertainment segment’s radar.

Similarly, unless it represents a particularly personal passion, those in the Perspective segment are unlikely to move out of their comfort zone to engage with classical dance.

Ballet or classical dance market: Culture Segment breakdown



Index compared to Maltese culture market



Please note: in this model, the Maltese culture market represents an index of 100.

The highest spending current audience

The current ballet or classical dance audience are the largest spenders in the market; 55% have spent more than €100 on tickets in the past year. They comprise a small number of high cultural consumers.

33% of the ballet or classical dance market have spent more than €100 on tickets in the past year, significant higher than the culture market (20%).

Annual spend on entrance tickets; over €100

Ballet or classical dance market

33% [Base 173]

Current ballet or classical dance audience

55% [Base 62]

Potential ballet or classical dance audience

21% [Base 111]

Maltese culture market

20% [Base 734]

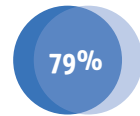
Please note: this refers to entrance tickets in general, not only ballet / classical dance. Those who declined to answer have been omitted.

Step from classical to contemporary is easy

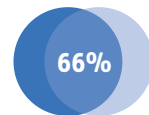
More than half of the current ballet or classical dance audience is also within the current contemporary dance audience (66%, +56). This represents the largest crossover in the culture market and highlights great potential for growth.

Ballet or classical dance also demonstrates strong crossover with the current play or drama (79%, +43%) and musicals audiences (64%, +44).

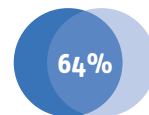
Current audience crossover (greatest difference)



of the current ballet or classical dance audience is also in the current play or drama audience



of the current ballet or classical dance audience is also in the current contemporary dance audience



of the current ballet or classical dance audience is also in the current musicals audience

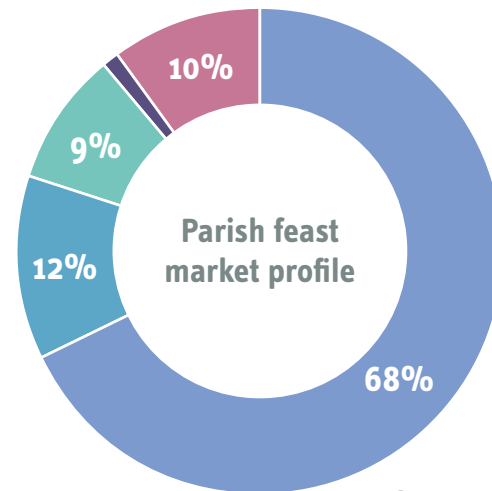
The market for folk cultural events

More than half of the Maltese culture market attend parish feast or Good Friday events each year, and **a third** go to Carnival or local council festivals annually.

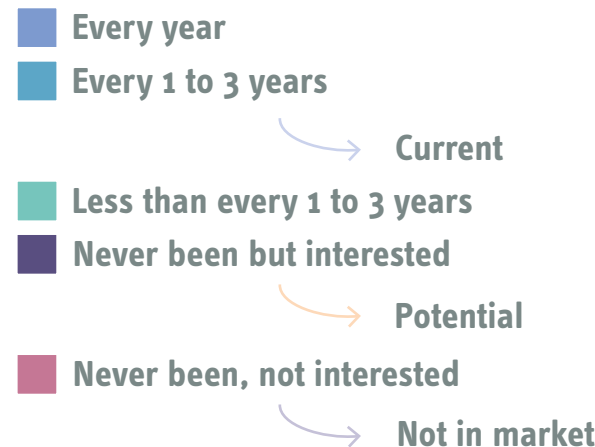
Events related to national or public holidays are not attended as regularly; **a fifth** do so every year.

Those in the Expression segment are **generally the most likely** to attend a folk cultural event yearly; they over-index across all types of event. Conversely, the Release segment **does not** demonstrate a particular likelihood to attend any of the event types on a regular basis.

Those in the Essence segment may be more regular local council festival attenders, but less regular parish feast goers. Similarly, Stimulation are amongst the most recent Carnival visitors but do not visit Good Friday events as regularly.



[Base 1032]

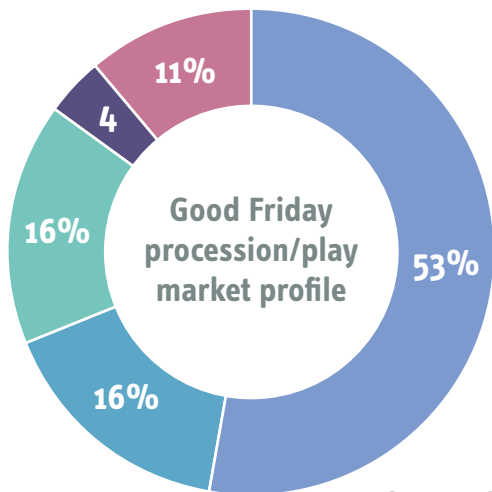


Parish feasts are regularly attended

Those within the Maltese culture market regularly attend parish feasts; more than two-thirds (68%) attend at least one every year. A further 12% attend every one to three years, collectively representing a current audience of 80% of the culture market.

Around one in ten (10%) can be considered within the potential market; 9% visit less frequently than every one to three years, and 1% have never been to one but would be interested.

A further 10% have never attended a parish feast and are not interested. These people are not in the market for this particular cultural event.



[Base 1032]

- Every year
 - Every 1 to 3 years
 - Less than every 1 to 3 years
 - Never been but interested
 - Never been, not interested
- Current
→ Potential
→ Not in market

Half attend Good Friday activities annually

More than half (53%) of those in the Maltese culture market attend a Good Friday activity every year, and a further 16% attend every one to three years; a current audience of 69%.

Around one in six (16%) can be considered within the potential market, and a further 4% have never attended but would be interested.

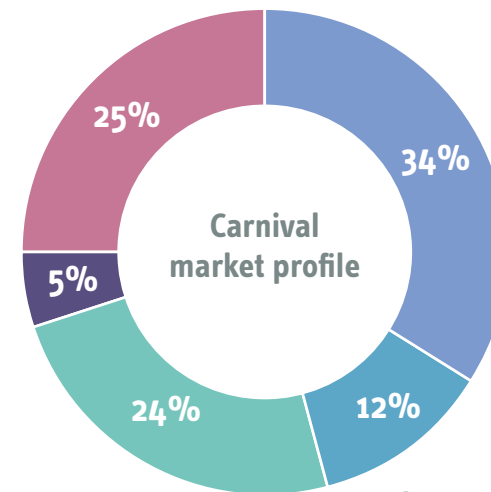
11% have never attended a Good Friday activity and are not interested.

Many attend Carnival, but not regularly

Although almost half (46%) of the Maltese culture market are current Carnival attenders – visiting every year (34%) or every one to three years (12%) – almost a quarter (24%) visit less frequently.

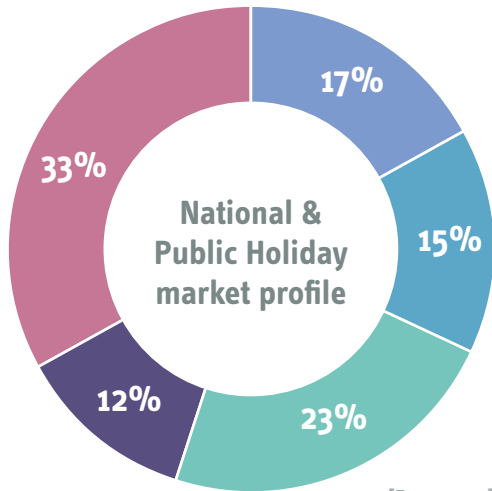
As with parish feasts and Good Friday activities, only a minority have not visited but are interested; 5% feel this way about Carnival.

Furthermore, a quarter of the culture market (25%) have never been and would not be interested.

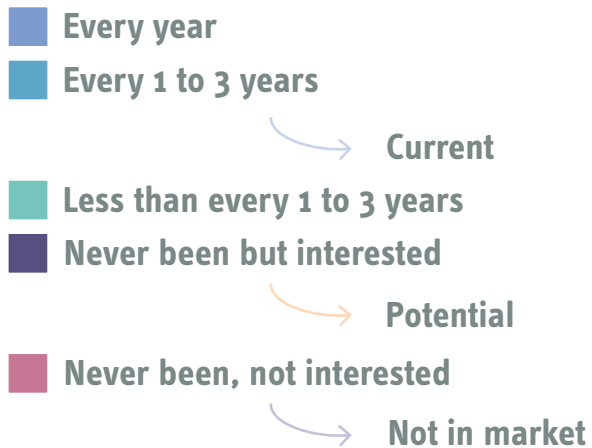


[Base 1032]

- Every year
 - Every 1 to 3 years
 - Less than every 1 to 3 years
 - Never been but interested
 - Never been, not interested
- Current
→ Potential
→ Not in market



[Base 1032]



Public holiday events not attended annually

Less than a fifth (17%) of those in the Maltese culture market attend a national or public holiday event, such as Mnarja, every year. A similar proportion (15%) attend one every one to three years, making a current audience of 33%.

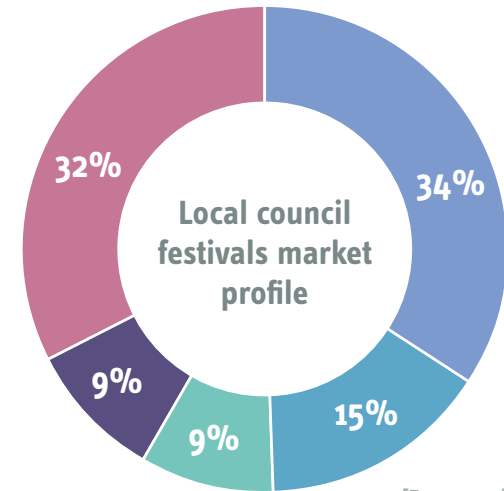
The potential audience is of a similar size (35%); 23% attend less than every three years, and 12% have never attended but would be interested.

However, the greatest proportion within the audience are those who have never been and are not interested; 33% of the market feel this way.

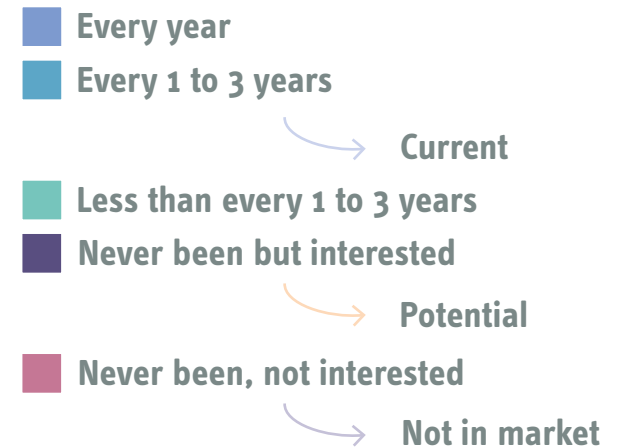
Most attend council events either annually or not at all

More than a third of the Maltese culture market attend local council festivals annually (34%). However, a similar proportion (32%) have never attended a local council festival event and are not interested in doing so.

Around one in six (15%) attend every one to three years, and one in ten attend less than every one to three years (9%) or have never been but would be interested (9%), respectively.



[Base 1032]

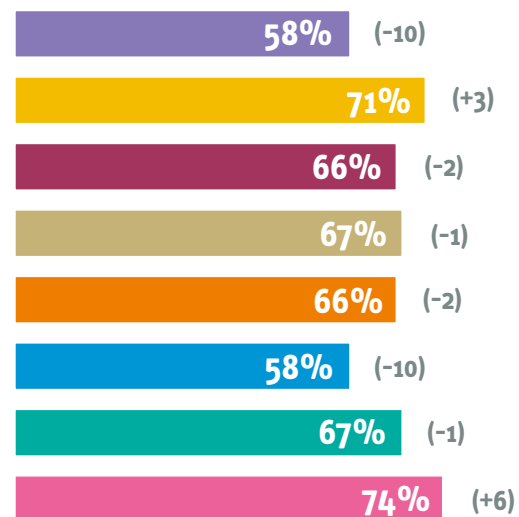


Parish feasts draw Entertainment, Expression

The sociable Entertainment segment are most likely to attend a parish feast annually (74%), while the community-minded Expression segment also over-index (71%).

Annual attendance of parish feasts is typically high in Malta. Those in the Essence and Release segments are least likely to do so (both 58%).

Parish feasts: attended in past year

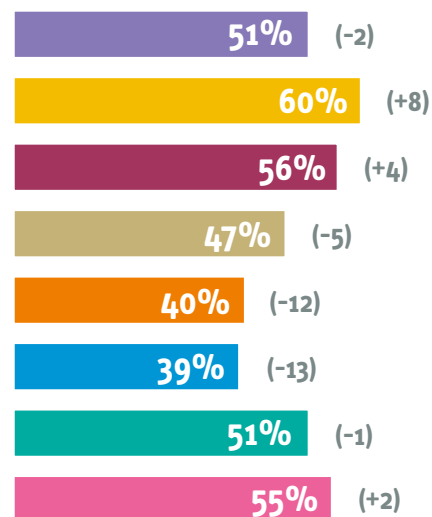


Expression most drawn to Good Friday events

The proportion attending Good Friday events annually is highest amongst Expression (60%).

While a number of segments are within this range, the Stimulation (40%) and Release (39%) are significantly less likely to do so.

Good Friday procession/play: attended in past year

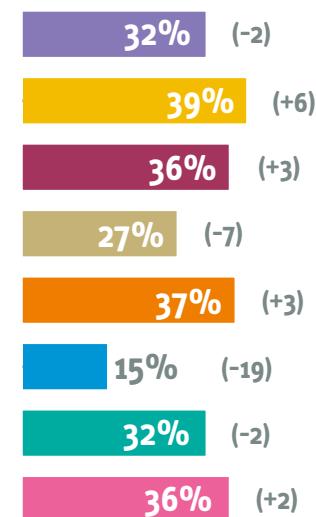


Stimulation amongst recent Carnival attenders

The fun-loving Stimulation segment is amongst the most likely to attend Carnival every year (37%). Expression (39%), Affirmation (36%) and Entertainment (36%) are as frequent attenders.

As elsewhere, those in the busy Release segment are significantly less likely to visit annually (15%).

Carnival: attended in past year

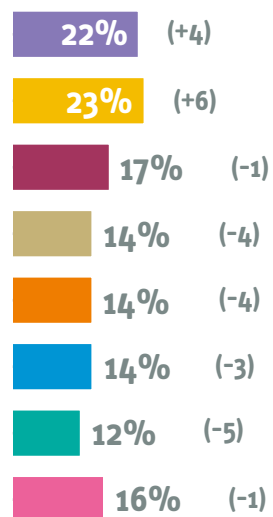


Public holidays events not attended annually

Most in the Maltese culture market do not attend public holiday events annually. Those in the engaged Expression (23%) and Essence (22%) segments are most likely to do so.

Those in the inner-directed Perspective segment (12%) are particularly unlikely to attend an event annually.

National and public holidays: attended in past year

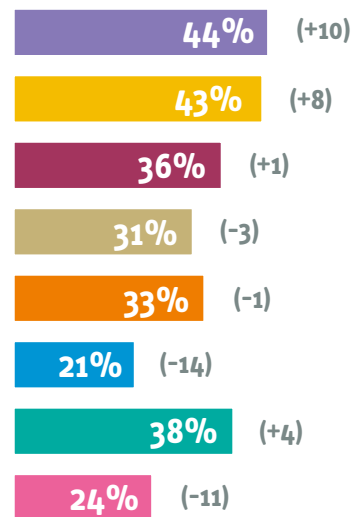


Essence most likely local council attenders

Those in the Essence segment are most likely to attend local council festivals every year (44%), with the Expression segment close behind (43%).

The Release segment is significantly less likely to do so (21%), as is the Entertainment segment (24%).

Local council festivals: attended in past year

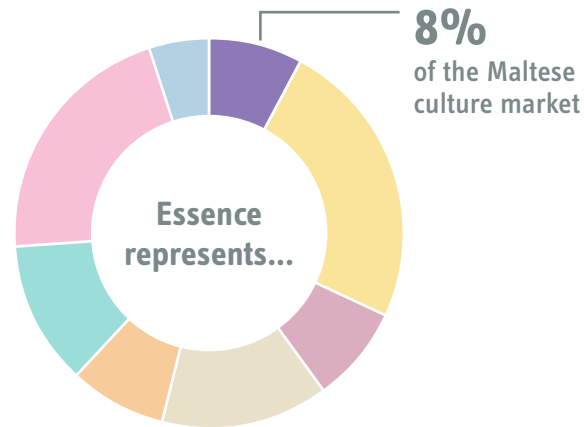


Section 3: Culture Segments

Please note: in this section, you will see plus and minus figures alongside many percentages. These refer to the percentage-point difference between the given figure and culture market average; for example, +10 means that the figure given is ten percentage-points higher than the culture market average.

In some instances, an equals sign has been used to indicate no difference when compared to the culture market average.

Essence



The **Essence** segment tends to be well-educated professionals who are **highly active cultural consumers** across a wide range of artforms.

They are **leaders** rather than followers and are **confident in their own tastes**.

Attitudes and life priorities

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

Discerning
Spontaneous
Independent
Sophisticated

Cultural activities are an essential part of their lives

Culture is a **key part of life** for Essence. They always make time in their busy lives for cultural experiences, their appetite taking them to a **wide range of venues**.

They are **discerning** and **well-informed**. Rather than simply a social activity or a form of entertainment, culture is a source of **self-fulfilment** and **change**; a means for experiencing life.

They are **inner-directed**, **sophisticated** and **confident**. What other people think is of little importance, and they often steer clear of the mainstream.

8% of the culture market in Malta, their **regular attendance** means they represent a **far greater proportion of visits**.

Have visited a cultural event in the past 12 months



Spent > €100 on entrance tickets in past year



Level of education: post-secondary or higher



Rated life satisfaction at eight or higher



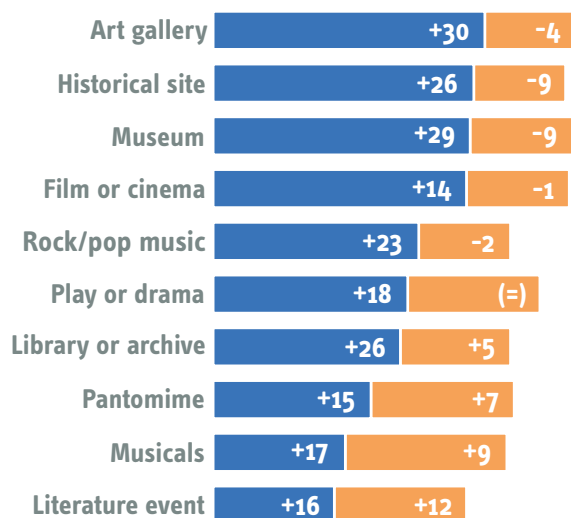
I want a new way of looking at things; being challenged; getting food for my brain



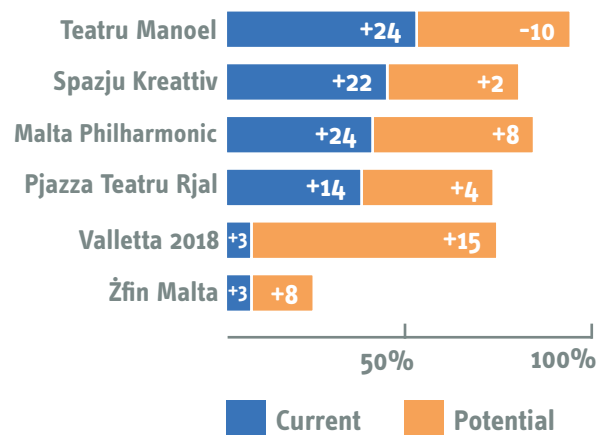
Essence prize quality and artistic integrity above all else, actively avoiding works they perceive to be amateur or populist. They delight in discovering little-known names and will pay little attention to others when pursuing their artistic interests.

They pride themselves on the breadth and sophistication of their tastes and enjoy activities which they perceive to be 'intellectual'. They are a happy and fulfilled segment.

Current and potential artform attendance (top ten)



Current and potential organisation attendance



Essence are dedicated to arts and culture; they index significantly above the market average for a variety of artforms, from art galleries and museums, to more specialist ones such as musicals and literature events.

As their current attendance is so great, they are less likely to be found in the potential market. Some artforms with lower current attendance, however, such as classical music and comedy events, index above average for future potential.

80%

agree taxpayers' money should be used to finance arts and cultural initiatives (+16)

53%

agree they would donate money to support an arts or cultural organisation (+16)

56%

agree they would volunteer time to support an arts or cultural organisation (+25)

64%

watch live theatre productions in English, or English and Maltese equally (+27)

Unsurprisingly, this translates to high current attendance amongst the cultural organisations in Malta. Teatru Manoel and the Malta Philharmonic demonstrate the greatest current significance, while the Valletta 2018 Foundation displays significant potential.

This is a segment that is drawn to many different artforms and should therefore present a great opportunity for all organisations.

Essence place high value on cultural experiences and will invest to get their fix. They are the highest spenders in the Maltese culture market, advocates of the arts and strong believers in the benefits it brings both to themselves and society.

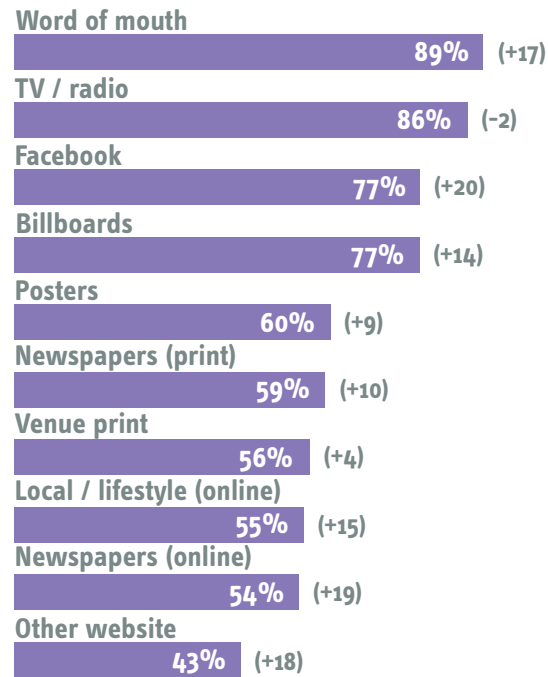
They are the segment most altruistically inclined towards the arts, both through donation and volunteering, and support public subsidy.

Unlike other segments, they often favour English over Maltese, and less than half of the Essence segment say they prefer Maltese art and culture. This is a segment for whom quality is imperative, and highly respected or internationally-acclaimed productions will attract their attention.

46%

agree they prefer Maltese art and culture (-12)

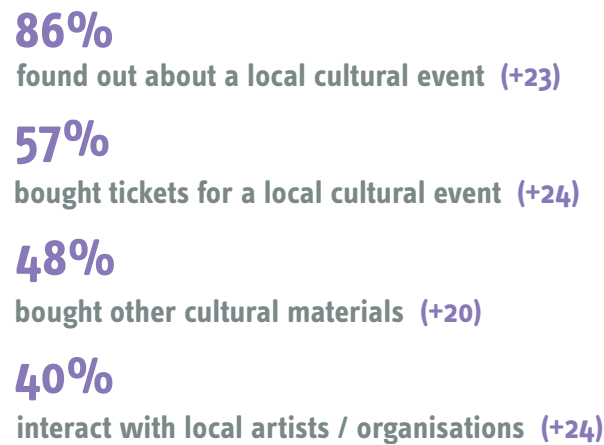
Use of marketing sources for culture (top ten)



Essence are keen attenders, and so are pro-active in staying informed about cultural events. They use a wide range of information sources to keep up-to-date about what's on.

Essence don't like to feel 'marketed' to. They will follow independent, impartial guidance as well as information from venues themselves. Word of mouth was cited frequently for information gathering, while they also use digital sources, such as Facebook, and more traditional sources, such as TV and radio and billboards.

Online behaviour in past twelve months



Those in the Essence segment are very active online; their general digital behaviour is significantly above the culture market average.

They are more likely to, in a typical week, read news stories online, send e-mails, use social media, engage with audio or video content and do practical tasks such as banking or shopping.

More crucially for this segment, however, the internet plays an important role in how they engage with culture and cultural organisations. Those in the Essence segment are far more likely than others to find out about local cultural events online, to buy tickets or other merchandise, or interact with artists or organisations. Thinking about this segment should be a key consideration for any organisation's online offer.

How do we develop them?

Engaging Essence is, on the surface of things, not difficult. Culture is not what they do – *it is part of who they are* – so they are pro-active in keeping themselves up-to-date with the arts scene.

However, they are fiercely independent-minded; they will listen to but won't follow the crowd. They take pride in being specialists and actively avoid productions which they consider too 'mainstream' or in any way amateur.

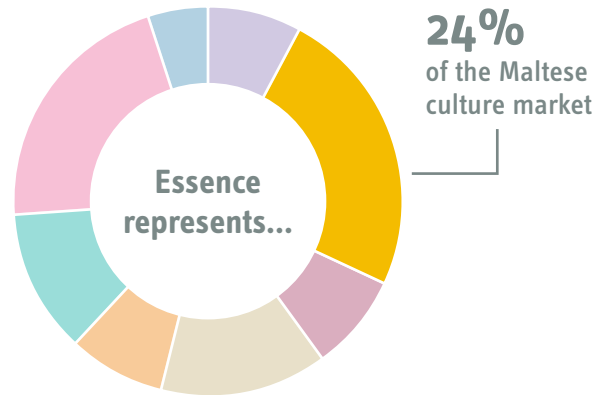
Therefore, rather than attempting to sell to them – they inherently mistrust and reject overt 'marketing speak' – organisations should provide them with the tools that help them filter the various options available to them.

Pull marketing is most effective for this segment – they will come on their own terms and seek impartial reviews that signpost the quality of your productions.

Messaging should focus on:

- 1 The **quality** and **sophistication** of the organisation or production.
- 2 An appreciation of their **discerning knowledge and tastes**.
- 3 Demonstrating the opportunity to **develop** their tastes further.

Expression



The largest segment in Malta, the Expression segment is **in tune with their spiritual side**.

Confident and fun-loving people, they **accommodate a range of interests**, from culture and learning to community and nature. Their interests gravitate towards **mainstream**, guaranteed enjoyment.

Attitudes and life priorities

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

Receptive
Confident
Community
Expressive

Arts and culture are a key element of their lifestyle

Members of the Expression segment **actively pursue life** and place high value on their free time. Their openness to different experiences, cultures and new ideas means that their cultural consumption is **broad** and **frequent**; they are amongst the more culturally-active segments.

Arts and culture are key elements of their lifestyle: **a means of self-expression**, a way of connecting with other like-minded individuals, and fulfilling their need for a **sense of community**.

Their engagement meets a **wide range of needs** from creative inspiration through to entertainment.

24% of the culture market in Malta, they are also **repeat cultural visitors**.

Have visited a cultural event in the past 12 months



Spent > €100 on entrance tickets in past year



Level of education: post-secondary or higher



Rated life satisfaction at eight or higher



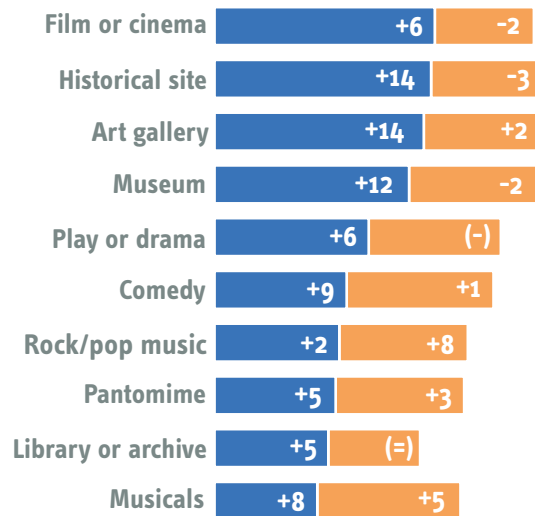
I like being affected by what I see – whether emotionally, humorously, by a spectacle, because it makes me think...



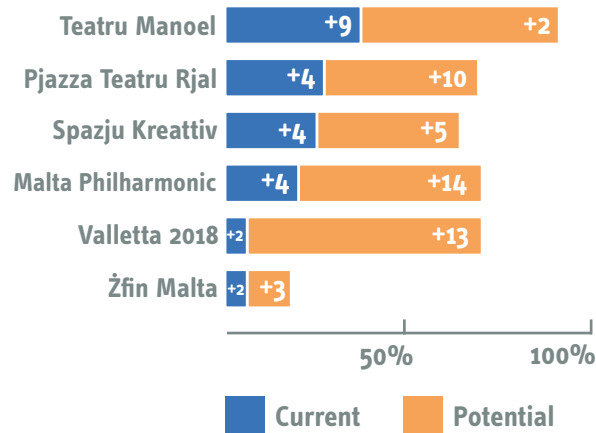
Open to new ideas, the Expression segment have wide-ranging interests such as culture, learning and nature. They like experiences to be authentic and enjoy opportunities to understand the creative process.

They tend to respond to opportunities to participate, share and discuss and are the segment most likely to have taken part in a number of artistic or creative activities.

Current and potential artform attendance (top ten)



Current and potential organisation attendance



Although open to a range of cultural forms, Expression prize inclusivity and shared experience. They index significantly above average for mainstream artforms, such as historical sites and art galleries, but less so when it comes to artforms considered specialist such as music or dance.

Their potential for many artforms is not as great as other segments, often in line with culture market average. They are, however, more likely to engage with community cultural events such as Good Friday or local council festivities.

86%
agree they are happiest seeing things with a track record and proven popularity (+35)

49%
agree they would donate money to support an arts or cultural organisation (+12)

42%
agree they would volunteer time to support an arts or cultural organisation (+11)

77%
agree taxpayers' money should be used to finance arts and cultural initiatives (+12)

Those in the Expression segment demonstrate a wide awareness of cultural organisations in Malta, but their current behaviour is typically in line with the culture market overall.

They are certainly open to visiting however, and they over-index significantly in terms of potential for a number of organisations. Crucial to engaging this segment will be to demonstrate openness and inclusion. They want to feel that all are welcome and any signs of exclusivity may put them off.

Those in the Expression segment value the contribution that arts and culture makes to society. They are amongst the most likely to believe in both public subsidy and private sponsorship of the arts, and recognise the importance of the arts on producing well-rounded members of society.

Their sense of community and willingness to help towards the greater good mean they are amongst the segments most likely to donate money or volunteer time within the cultural sector.

They are the segment most likely to consider themselves as 'spiritual', something which directs their creative passions and engagement with culture and those around them.

83%
agree they consider themselves as spiritual (+20)

Use of marketing sources for culture (top ten)

TV / radio

91% (+3)

Word of mouth

78% (+6)

Billboards

72% (+9)

Posters

65% (+15)

Facebook

63% (+6)

Venue print

60% (+8)

Newspapers (print)

57% (+8)

Local / lifestyle (online)

46% (+6)

Newspapers (online)

42% (+7)

Mailing list

32% (+9)

Expression use a wide range of different sources to find out about cultural events. They like to keep up-to-date with what's going on, both culturally and in their community, and use sources from print newspapers and magazines, to Facebook and online media.

They are amongst the most likely segments to use venue posters, print and mailing lists. This suggests official communications provide a reassurance of quality and popularity.

Online behaviour in past twelve months

72%

found out about a local cultural event (+9)

42%

bought tickets for a local cultural event (+9)

28%

bought other cultural materials (=)

19%

interact with local artists/organisations (+3)

As those in the Expression segment are amongst the highest cultural consumers in the market, their use of online platforms to find out about and buy tickets for cultural events is above the average.

Typically, however, their online interaction with organisations is not out of the ordinary. They don't particularly tend to buy cultural materials online, perhaps choosing to purchase programmes or souvenirs onsite, seeing the shopping as part of the overall experience.

As an artist-focused segment they only demonstrate an average proclivity to interact with local artists or organisations online. It is likely they value real-life interactions and will be more inclined to interact onsite, or with others.

How do we develop them?

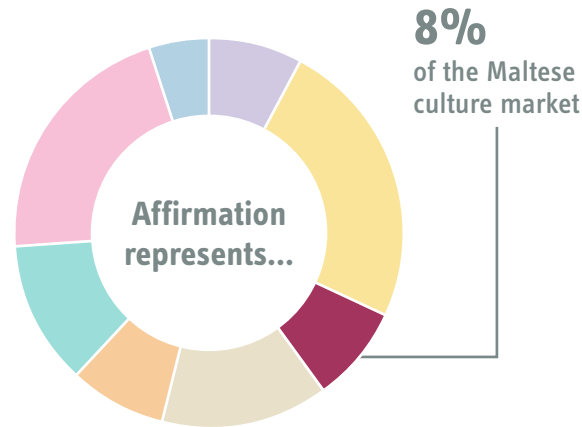
Although they like adventure, innovation and discovery, Expression prize inclusivity and value venues who demonstrate a warm welcome to all. It is crucial in engaging them that marketing doesn't imply elitism or required extant knowledge.. Their receptiveness to the views of others and popular or well-endorsed activities means they are open to reviews and recommendations. Expression like to feel part of a crowd and enjoy shared experiences, so offering opportunity for dialogue and discussion appeals to them.

Expression don't need to be the first to know but they love to share. They are involved in all sorts of community activities giving them good networks, are extremely good at spreading the word and a valuable source of advocacy. Bringing them closer and helping them to feel part of a community – through, for example, membership schemes and participatory events – can be a useful way to maintain a dialogue with those in the segment.

Messaging should focus on:

- 1 An **inclusive**, shared experience **for all**.
- 2 Helping **build cultural networks** which appeal to their **community spirit**.
- 3 Highlighting the **opportunities** for them to be **creative and participate**.

Affirmation



The Affirmation segment tend to see cultural engagement as accounting for both **enjoyment** and **their development**.

They have an **adventurous spirit** when it comes to their arts and culture consumption, but are careful decision-makers and make **cautious** choices between available options.

Attitudes and life priorities

- Family needs
- Personal development
- Popular leisure activities
- Enjoyable experiences

Self identity
Aspirational
Quality time
Improvement

Culture provides opportunities for quality time

Affirmation welcomes culture as a way of **enjoying quality time** at the same time as **improving themselves as individuals**.

This segment is interested in less traditional artforms but will continue to attend **large, mainstream events** and activities as they offer a **low-risk** means of satisfying their needs.

Arts and culture also provide a means for Affirmation to **validate themselves**. This segment cares about what others think and as a result **want to be seen to be engaging** with cultural activities, not just popular entertainment.

8% of the Maltese culture market, Affirmation are a **relatively small** segment. But they do offer significant potential with some artforms.

Have visited a cultural event in the past 12 months



Spent > €100 on entrance tickets in past year



Level of education: post-secondary or higher



Rated life satisfaction at eight or higher



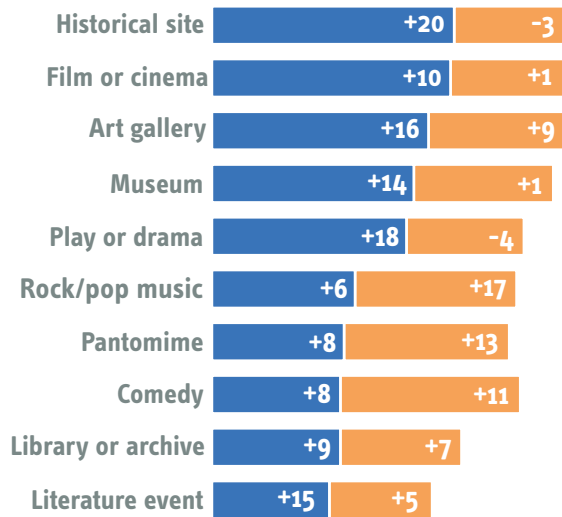
Seeing something exciting and thought-provoking with loved ones



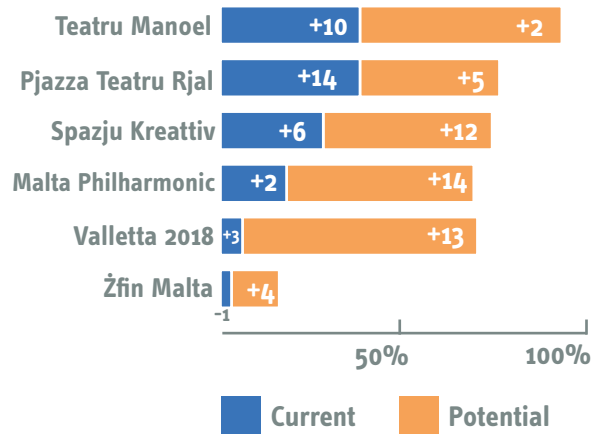
They view arts and cultural organisations as a resource providing them with enjoyment, education and offering an environment for spending quality time with others – in other words, a form of ‘wholesome leisure’.

They have the propensity to be regular visitors to a small number of cultural organisations; ones they know from experience can meet their needs.

Current and potential artform attendance (top ten)



Current and potential organisation attendance



The Affirmation segment demonstrates significant engagement with many artforms in the culture market, from intellectual trips to a historical site or museum, to more fun days out at the cinema. They also demonstrate a great deal of significance amongst the lesser-visited dance artforms.

This segment suggests potential; they want to be open to a variety of artforms. The challenge to organisations is turning this potential interest into a visit, which may require some convincing.

65%
agree they are happiest seeing things with a track record and proven popularity (+14)

37%
agree they are happy to do their own thing regardless of what others might think (-39)

42%
agree they would donate money to support an arts or cultural organisation (+5)

39%
agree they would volunteer time to support an arts or cultural organisation (+8)

Those in the Affirmation segment have average awareness of the cultural organisations in Malta. They over-index in the current Pjazza Teatru Rjal audience, but typically feature more prominently within potential organisation audiences.

As there is little that the Affirmation segment are not open to, relying heavily on them as a potential audience can often be difficult. However, with a targeted approach and the right messaging they can be encouraged towards many cultural events.

The Affirmation segment, although open to many artforms and productions, will naturally gravitate towards more mainstream and popular options.

What other people think makes a difference to them, and they will rarely stride out on their own to pursue something new or different. Rather, positive recommendation, or validation of their choices, impact in their decision-making process.

The Affirmation segment are very value-conscious and as such are not the biggest spenders in the culture market, but they do demonstrate an average likelihood to donate money to cultural organisations, as well as volunteer their time.

71%
agree taxpayers' money should be used to finance arts and cultural initiatives (+5)

Use of marketing sources for culture (top ten)

TV / radio

89% (+2)

Word of mouth

80% (+8)

Billboards

66% (+3)

Venue print

53% (+1)

Newspapers (print)

52% (+3)

Facebook

52% (-5)

Posters

48% (-2)

Newspapers (online)

42% (+7)

Local / lifestyle (online)

42% (+2)

Special interest magazines

40% (+14)

Those in the Affirmation segment demonstrate an average use of a variety of marketing sources. They are keen to make the 'right' choice when it comes to their activities, so will make use of special interest magazines and word-of-mouth, in particular.

The opinions of others is an important barometer for the Affirmation segment, so positive feedback from peers, in print or online can be influential.

Online behaviour in past twelve months

63%

found out about a local cultural event (=)

25%

bought tickets for a local cultural event (-8)

26%

bought other cultural materials (-2)

19%

interact with local artists/organisations (+4)

This segment demonstrate average online engagement; like others, they will check e-mails, read the news, shop, bank and use social media.

When it comes to engaging with cultural organisations, their behaviour is in line with this. While some segments are significantly more likely to buy tickets online, those in the Affirmation segment do not display as frequent an inclination.

Similarly, a quarter have bought other cultural materials online in the past twelve months, in line with the culture market average. This segment often likes to buy mementos to serve as a reminder of their cultural visit, so may be more likely to do this at the time of the event.

How do we develop them?

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

They need marketing to help them work out the 'best' option, so they can be sure they are doing the right thing. Cultural institutions must clearly articulate the benefits they will get from engaging not just the features of an event.

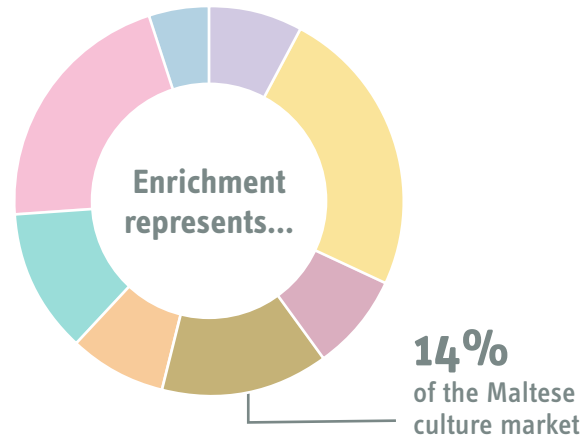
Conscientious decision makers, Affirmation often research their visits carefully. Messaging should demonstrate the value a visit provides through offering a more worthwhile way of having a fun time with others. Reviews, star ratings and other endorsements hold big sway with this segment.

Affirmation wear their cultural consumption as a badge and want to be viewed by others as 'cultural consumers'. Organisations can capitalise on this by offering easy mechanisms for sharing content online.

Messaging should focus on:

- 1 Informing them about events and what's on **well in advance**.
- 2 Promoting **both the enjoyable and educational** elements of an event.
- 3 Letting them **make up their own mind** by presenting them with **choices**.

Enrichment



Those in the Enrichment segment typically have a **mature outlook on life** and like spending their leisure time close to the home.

They have **established tastes** and enjoy culture that links into their **own interests** and more traditional artforms.

Attitudes and life priorities

- Nature, gardening, countryside
- Traditional artforms
- Homelife
- The past
- Arts and crafts

Traditional
Learning
Familiar
Nostalgia

Enrichment are driven by their own interests

The Enrichment segment is a mature segment, often with plenty of spare time. Culture is on the periphery of their lives and they generally have **established tastes**.

They know what they like and their visits to cultural organisations are very much **driven by their interests**, not those of others. They are one of the more **risk-averse** segments, actively avoiding more contemporary and new artforms.

Their interests in **the past**, **gardening** and **nature**, as well as the desire to experience nostalgia, awe and wonder are what motivates them to engage with culture.

14% of the culture market in Malta, they are **relatively infrequent visitors** to cultural events.

Have visited a cultural event in the past 12 months



Spent > €100 on entrance tickets in past year



Level of education: post-secondary or higher



Rated life satisfaction at eight or higher

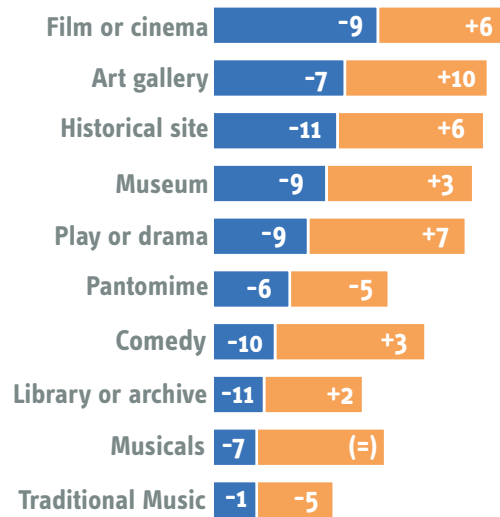


Relaxing, reminiscing and having a good-value trip out

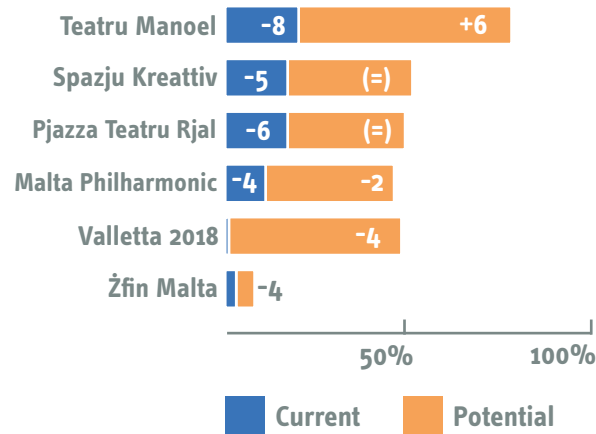


Rather than the opportunity to seek out new experiences, the arts provides members of the Enrichment segment with a form of escapism, offering a means to reach even greater fulfilment within their lives.

Current and potential artform attendance (top ten)



Current and potential organisation attendance



This segment is made up by traditionally-minded people who tend to avoid contemporary or overtly mainstream productions. They under-index for current live music attendance, particularly rock or pop, as well as for comedy performances.

They over-index within some potential artform audiences which could satisfy their tastes, such as art galleries or plays or dramas. But, as with other segments, they may require a lot of persuasion or incentive to actually visit.

7%
agree they like to enjoy life and don't worry about the future (-41)

8%
agree they are usually the first amongst their friends to know what is going on (-32)

70%
agree they prefer Maltese art and culture (+13)

39%
agree they would donate money to support an arts or cultural organisation (+2)

Those in the Enrichment segment demonstrate average awareness of cultural organisations in Malta.

This segment typically under-index within the organisations' current audiences. Their potential is more in line with the culture market average and, although requiring significant effort to reach, could be somewhat suitable given the more traditional artforms which are often available.

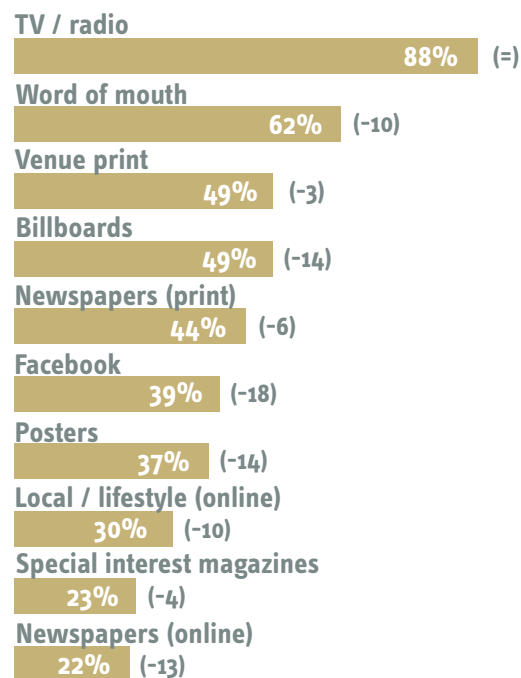
The Enrichment segment is cautious by nature and try to avoid risk in their lives. Their caution means they are not at the forefront of information or trends. But that does not necessarily concern them.

Those in the Enrichment segment tend to value home and heritage, and are amongst the most likely to speak Maltese. They often prefer explicitly Maltese art and culture over international options.

Although they are careful with their money and always looking for savings, that is not to say they lack disposable income or generosity. The Enrichment segment demonstrate an average level of cultural donation, but are unlikely to volunteer.

23%
agree they would volunteer time to support an arts or cultural organisation (-8)

Use of marketing sources for culture (top ten)



The Enrichment segment are amongst those least likely to use marketing sources to find out about cultural events. They stick to traditional mediums such as TV or radio and print newspapers, avoiding some online sources such as Facebook or newspaper websites or apps.

They can be quite headstrong and difficult to persuade; they are not easily swayed by others and as such word-of-mouth is not of as great importance to them.

Online behaviour in past twelve months



Enrichment is not a naturally digital segment. While they will use the internet regularly, it is often for functional uses and is typically less frequently than most other segments.

Their online cultural behaviour tends to be below average. While their propensity to buy things online – whether it be tickets or merchandise – is not far from the culture market average, this represents practical behaviour and convenience.

When it comes to seeking out information about cultural events, or engaging with local artists or organisations, their incidence is significantly below the market average. This would represent a step outside of their comfort zone, something which they do not do often.

How do we develop them?

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

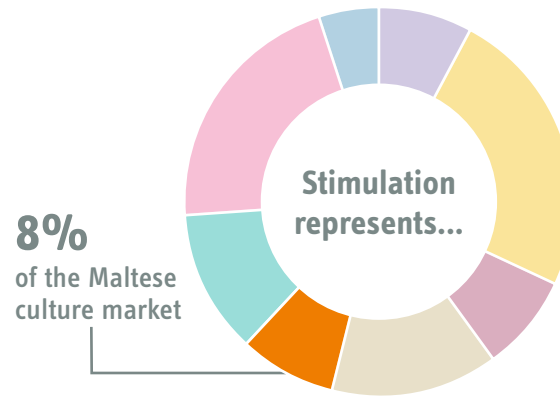
They are suspicious of marketing – to them it is an unpleasant feature of the modern world. Communications should focus on established and traditional features, always avoiding gimmicks, to ensure it is well received. This segment is conscious of value so respond to discounts or reduced risk through opportunities to ‘try before you buy’.

Organisations can successfully engage them by reassuring them that a visit meets their needs and interests, and, since when they do visit they tend to meticulously plan, offering easy access to information in advance.

Messaging should focus on:

- 1 Focus on **nostalgia** and **familiarity**.
- 2 Highlight the **traditional** or **established** aspects of each production or company.
- 3 Point out opportunities to **make savings** or enjoy **excellent value**.

Stimulation



The Stimulation segment is an active group who **live life to the full**, looking for new experiences and challenges.

They are open to a wide range of experiences, from culture to sports and music, but like to be **at the cutting-edge** of everything they do.

Attitudes and life priorities

- Enjoying life and going out
- Taking risks
- Live music
- Food and drink
- Contemporary event

Active
Experimental
Discovery
Contemporary

Engagement is driven by a thirst for new experiences

Stimulation pride themselves on being **early adopters**; 'do something different' is a maxim for their life. They are **naturally curious** and open to a **wide range of experiences**. Their interest is particularly piqued by experiences promising to be out of the ordinary.

They seek a varied and entertaining life of **novelty** and **challenge**, hence the variety of artforms and level of risk they are open to.

As well as curiosity, their reasons for attending arts events tend to include the **social experience** and to ensure they remain the ones '**in the know**' within their peer group.

8% of the Maltese culture market, they represent a **far greater proportion** of visits.

Have visited a cultural event in the past 12 months



Spent > €100 on entrance tickets in past year



Level of education: post-secondary or higher



Rated life satisfaction at eight or higher



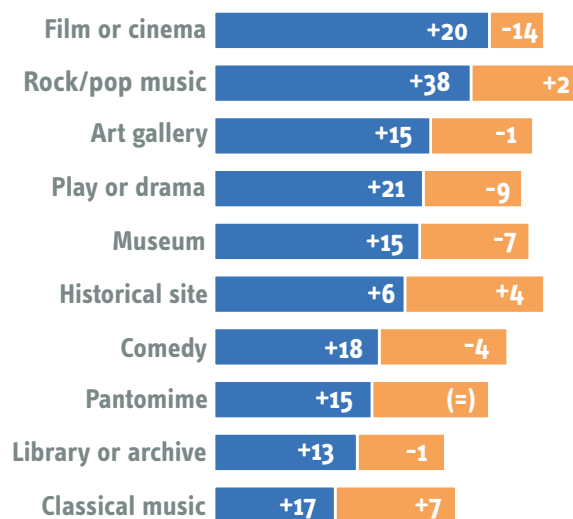
The thrill of something different ...
coming away feeling fulfilled and buzzing



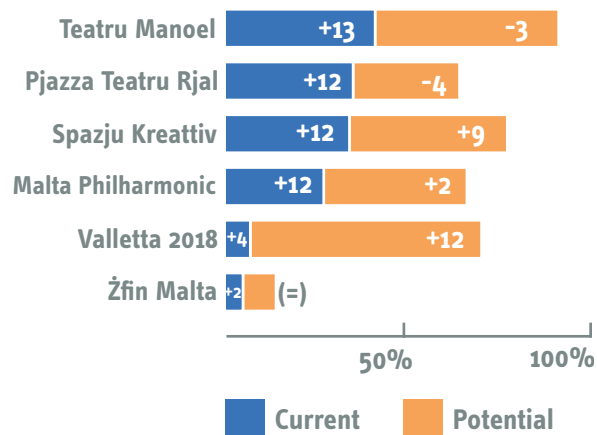
As innovators and early adopters they are not guided by the opinions of others. Rather, they are keen to break away from the mainstream, and are at the head of the pack in terms of finding out about new events and activities.

Their strong sense of adventure and desire to stand out from the crowd constantly encourages them to try new things, even if it means going out on their own.

Current and potential artform attendance (top ten)



Current and potential organisation attendance



Those in the Stimulation segment are avid cultural attenders, significantly over-indexing with the audiences for many artforms. They demonstrate a particular inclination for live music and comedy, but are typically engaged across the spectrum.

Their openness towards new things means they possess potential across a number of artforms. Outside of the most traditional, the Stimulation segment could likely be persuaded to try anything if positioned as interesting and fun enough.

79% agree they are usually the first amongst their friends to know what is going on (+40)

88% agree they are happiest doing their own thing regardless of what others think (+12)

22% agree they are happiest seeing things with a track record and proven popularity (-29)

37% agree they prefer Maltese arts and culture (-20)

As a result of their wide artform engagement, those in the Stimulation segment significantly over-index within the current audience for a number of organisations in Malta.

They are amongst the highest current visitors to Teatru Manoel, Pjazza Teatru Rjal, Spazju Kreattiv and Malta Philharmonic Orchestra performances.

Always with their ear to the ground, they are the most likely to be aware of the European Capital of Culture and the Valletta 2018 Foundation.

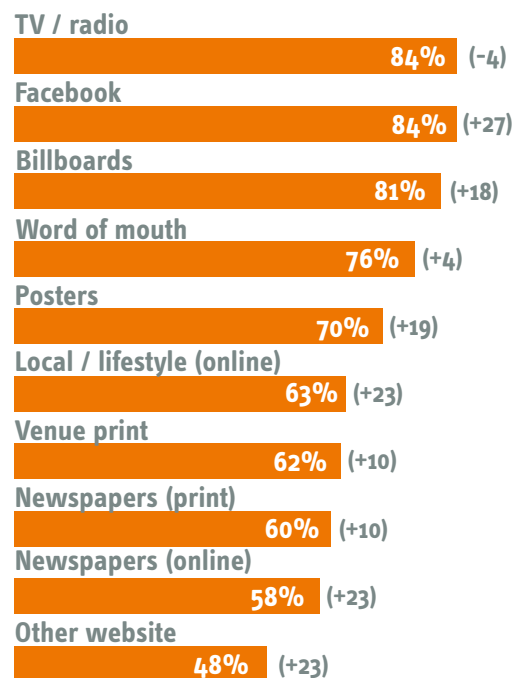
Those in the Stimulation segment are typically independent-minded, happy to do their own thing when it comes to the arts and culture.

They are risk-takers; they aren't concerned with going to events or seeing productions which are overtly popular. This segment are always looking for new things to try and are happy to experiment and push their limits. The Stimulation segment tend to favour 'international' events over the more traditional Maltese cultural pursuits.

While they show an average disposition for donating or volunteering, they do recognise the benefits of culture to them personally.

33% agree that public funding of the arts does not benefit them personally (-11)

Use of marketing sources for culture (top ten)



Those in the Stimulation segment pride themselves on keeping up to date with the latest information, always being ahead of the curve.

When finding out about cultural events, they over-index particularly with online sources such as Facebook and online newspapers and magazines. However, printed marketing is also firmly on their radar. As regular cultural visitors they often see posters onsite, while also being easily distracted by posters or billboards in their daily lives.

Online behaviour in past twelve months



This is a segment for whom the internet is very important; they are the most likely to use it to send e-mails or messages, look at news content or listen to music.

Their online engagement with cultural organisations is also typically above-average. A majority have found out about local cultural events online in the past year, while half have booked tickets.

They are amongst the most likely to buy additional cultural souvenirs via the internet. Ensuring the product line has unique qualities and strong design credentials is something to consider when thinking about an online shop offer.

How do we develop them?

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

They look for activities and brands reflective of their own self image. They pride themselves in being the first to know and will respond to clever marketing and particularly value high-quality design.

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

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

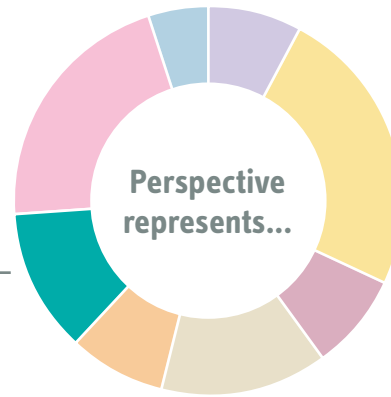
Messaging should focus on:

- 1 Promote the **social element** for weekend and evening activities.
- 2 Highlight the **unusual**; how is your production **different from the norm**?
- 3 Offer them **good value** for money.

Perspective



12%
of the Maltese
culture market



Attitudes and life priorities

- Optimistic
- Prioritise their own needs
- Inner directed
- Reading and learning
- The outdoors

The Perspective segment is **settled**, **fulfilled** and **home-oriented**.

A **self-sufficient** segment with personal passions, they are not looking to others - or organisations - for fulfilment. Their underlying spontaneous nature and **desire to learn** provides a focus for engaging with arts and culture.

Settled
Self-sufficient
Focused
Content

Culture is something they will try, but it's not essential

The Perspective segment is comfortable and satisfied, with an optimistic outlook.

They are **inner-directed**, happy doing their own thing and like to feel that they are **making their own discoveries**. While this means they are highly content, their horizons have become **somewhat narrowed**.

They tend to gravitate to a limited **'days out' focus** in their leisure time, based around a **small number of interests** that have become habitual over time.

12% of the Maltese culture market, they are **infrequent visitors** to arts and cultural events.

Have visited a cultural event in the past 12 months



Spent > €100 on entrance tickets in past year



Level of education: post-secondary or higher



Rated life satisfaction at eight or higher



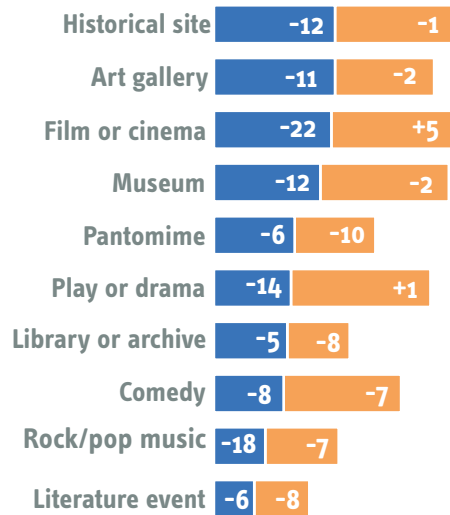
Being interested and absorbed ... and having an enjoyable experience



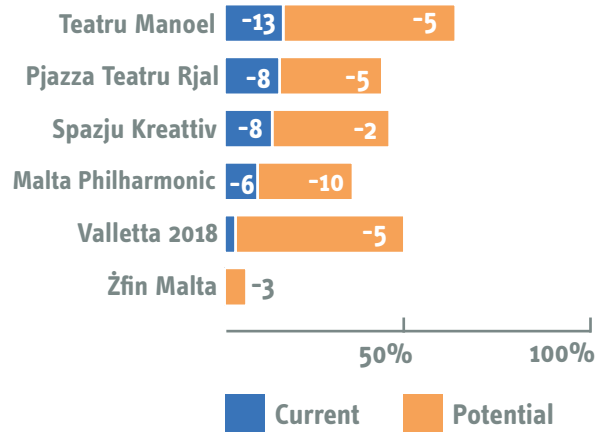
Perspective don't see arts and culture as essential or as part of their identity. Nevertheless, they see some forms of culture as providing the opportunity to pursue an interest or broaden their horizons.

This is where the greatest potential to increase the scope of their cultural consumption lies – by offering them a new perspective on life and the things they are already interested in.

Current and potential artform attendance (top ten)



Current and potential organisation attendance



Although Perspective can, and have, engaged with artforms in the past, they are often ambivalent towards much of the sector. This is reflected in low current attendance across a breadth of artforms, notably with film and rock or pop music.

While they do sometimes appear to offer average potential, this would have to be on their terms and related to something they are interested in. There is no particular pattern to this and they will often fail to see the personal relevance of marketing.

14%

agree that the arts and culture are essential to their lives (-20)

41%

agree that arts and cultural events are not for the likes of them (+10)

91%

agree they are happiest doing their own thing regardless of what others think (+16)

11%

agree they are usually the first amongst their friends to know what is going on (-29)

However, the Perspective segment are not cultural hermits. They possess average awareness of organisations with the sector in Malta. But, as with their artform attendance, they demonstrate low current attendance across the board.

Their potential for future engagement with cultural organisations is also low. They are more likely to be drawn to events that interest them on an ad-hoc basis, rather than favouring individual venues or companies.

The arts and culture are very much on the periphery for those in the Perspective segment; while they do engage from time to time, it's not something which is essential. They are more likely than average to feel that cultural events are not for people like them.

They're unlikely to be the first to find out about something – and rarely seek to do so – and are happy to get on with their own pursuits.

Although they are not inclined to volunteer their time, they may donate financially to an arts or cultural organisation.

37%

agree they would donate money to support an arts or cultural organisation (=)

Use of marketing sources for culture (top ten)

TV / radio

88% (=)

Word of mouth

69% (-3)

Billboards

62% (-1)

Facebook

45% (-12)

Posters

44% (-7)

Newspapers (print)

44% (-6)

Venue print

43% (-9)

Local / lifestyle (online)

31% (-8)

Newspapers (online)

29% (-6)

Special interest magazines

19% (-8)

The Perspective segment is inner-directed. They do not actively seek out information, and are also less likely to be influenced by it. Explicit marketing is unlikely to gain their favour; it is more important for them to feel they are acting on their own terms and towards their own interests.

Their use of traditional marketing sources is average, but they under-index for some online sources such as Facebook, online video and 'what's on' listings.

Online behaviour in past twelve months

58%

found out about a local cultural event (-5)

20%

bought tickets for a local cultural event (-13)

22%

bought other cultural materials (-6)

11%

interact with local artists/organisations (-5)

Those in the Perspective segment are not always particularly digitally-savvy; much of their life is based offline. They are less likely than average to use the internet to send e-mails, connect with others or make purchases.

Despite this, their online behaviour is not significantly different from the average. If something is of interest to them, they would often find out about local cultural events, buy souvenirs, or interact with artists or organisations online.

The exception to this appears to be in terms of buying tickets. By virtue of infrequently attending cultural events, they are less likely to have bought tickets online.

How do we develop them?

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

Organisations cannot rely on them to proactively keep themselves up-to-date and they are unlikely to subscribe to mailing lists, so push rather than pull marketing is required. Local newspapers offer a potential avenue for communicating with them.

Strategically placing articles or messages where they can 'stumble across' things that are relevant and interesting to them will be most effective. Messaging that informs them on how a visit can chime with specific interests will resonate, although they are wary of events that can seem artificial or too family-focused.

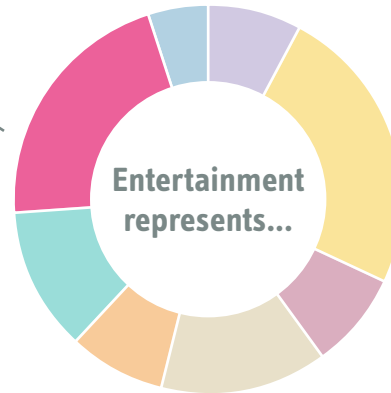
Messaging should focus on:

- 1 Tapping into their **desire** to focus on their **own interests**.
- 2 Respect their **individuality** while **subtly encouraging** some exploration.
- 3 Highlight **opportunities** for **learning** or **self-development**.

Entertainment



21%
of the Maltese
culture market



Attitudes and life priorities

- Home and socialising
- TV, celebrity, sports
- Thrill
- Escapism

The Entertainment segment tends to be **conventional** and **contemporary**, a group for whom the arts are **on the periphery** of their lives.

Their occasional forays into culture are usually for **spectacular**, **entertaining** or **must-see** events.

Consumers

Popularist

Leisure

Mainstream

'Blockbuster' events are core to their engagement

For Entertainment, leisure time is for **fun, not learning** or applying oneself intellectually – this is something they look to **escape** from through leisure pursuits.

Culture needs to **compete** against a wide **range of leisure activities** for them, and they tend to veer towards must-see events. **Guaranteed entertainment** and escapism that provide quality time with friends and family is their goal.

They don't typically envisage art and culture as being able to fulfil these needs, and typically have a **narrow artform engagement** within the culture market.

21% of the Maltese culture market, they are active in the leisure market but **infrequent cultural visitors**.

Have visited a cultural event in the past 12 months



Spent > €100 on entrance tickets in past year



Level of education: post-secondary or higher



Rated life satisfaction at eight or higher



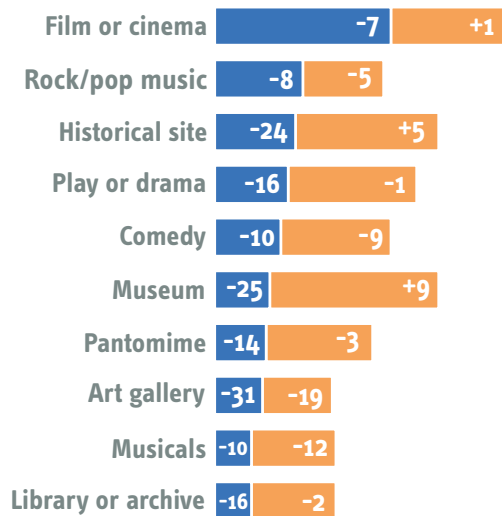
I like taking time out with friends or family and being thoroughly entertained.



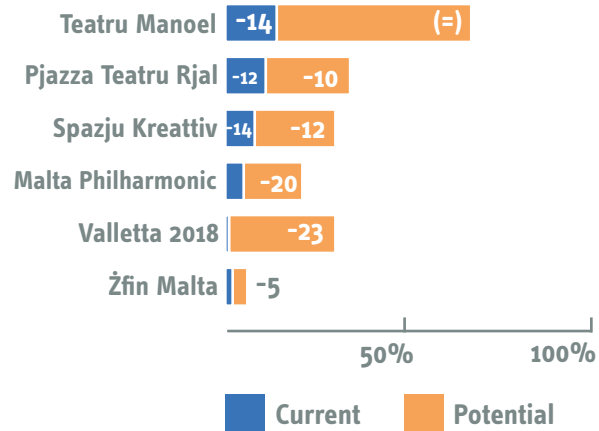
The Entertainment segment tends to stick to the tried and tested – using wide appeal and popularity as endorsements of the best things to see.

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

Current and potential artform attendance (top ten)



Current and potential organisation attendance



The Entertainment segment are not naturally predisposed to cultural artforms. They significantly under-index within current audiences across a wide variety, from art galleries and museums, to historical sites and plays.

While current attendance is low, potential interest of those in the segment is in line with the average. Therefore, because they have a low tolerance for 'cultural events' compared to mainstream leisure pursuits, it may prove difficult to encourage visits.

5% agree that the arts and culture are essential to their lives (-29)

12% agree that in the arts they like to try new ideas and innovations (-21)

65% agree they are happiest doing their own thing regardless of what others think (-10)

19% agree they would donate money to support an arts or cultural organisation (-18)

Those in the Entertainment segment typically have below-average awareness of cultural organisations in Malta.

They under-index most significantly across most organisations in terms of current attendance. With the exception of the most well-known, Teatru Manoel, most in the segment are not in the market for visiting any cultural organisations. They are particularly under-represented in terms of awareness and interest in the Capital of Culture.

The Entertainment segment are all about having fun in their leisure time; they would generally consider that 'arts and culture' are a more intellectual pursuit, of little interest in their lives. Often they can't understand what's going on in the sector, and believe it simply isn't for them.

When they do engage with the arts, they will want to know that what they're doing has a positive reputation. They're unlikely to push out on their own and try something new or different.

Because of their distance from the sector, they are unlikely to donate or volunteer. They also can't see the benefit of subsidy and wouldn't support it.

16% agree they would volunteer time to support an arts or cultural organisation (-15)

Use of marketing sources for culture (top ten)

TV / radio

84% (-4)

Word of mouth

62% (-10)

Facebook

53% (-4)

Billboards

50% (-13)

Venue print

39% (-12)

Newspapers (print)

38% (-11)

Posters

36% (-15)

Local / lifestyle (online)

27% (-13)

Newspapers (online)

21% (-14)

Venue mailing

17% (-7)

Those in the Entertainment segment are not inclined to seek out information about cultural events. They under-index in the use of a majority of marketing sources, both traditional and digital.

Physical marketing, such as posters and flyers, are not on their radar as they are so rarely onsite and do not look out for them elsewhere. Options which fit more closely within their everyday leisure time, such as TV and Facebook, are more in line with the market average.

Online behaviour in past twelve months

46%

found out about a local cultural event (-17)

17%

bought tickets for a local cultural event (-16)

18%

bought other cultural materials (-10)

5%

interact with local artists/organisations (-11)

Typically, this segment are less likely to use the internet to do a variety of things, from accessing media content and reading newspaper articles to shopping. The one area in which their behaviour is more in line with the market average is for communication, such as e-mail or social media.

Unsurprisingly, this means that their cultural behaviour online tends to be amongst the least engaged. As cultural events form a less important part of their thinking than for other segments, they are less likely to seek out information or buy tickets or merchandise.

Although they are frequent social media users, they don't use it often to engage with artists or organisations, and wouldn't be expected to.

How do we develop them?

Entertainment are consumers so like marketing that helps them know what to choose and highlights what is popular.

They are heavily influenced by advertising through mainstream media and will only pay for something they are convinced will meet their needs. They are looking for things with established reputations and will respond to celebrity endorsement. They don't identify with overtly 'cultural' activities, so 'culture' needs to be downplayed in messaging, as well as emphasising the 'must-see', 'blockbuster', 'spectacular' elements of the offer.

Visually, marketing needs to compete on a commercial playing field. Linking cultural propositions to the mainstream – for example through films and TV shows – has the potential to get their attention.

Messaging should focus on:

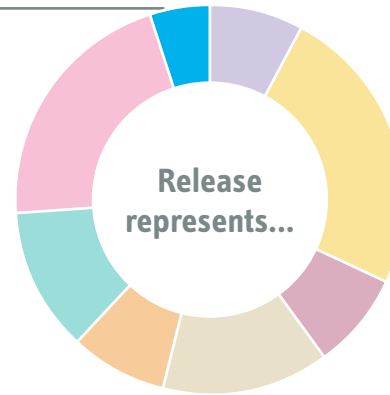
- 1 Linking to the **mainstream**, for example through TV, sports or celebrity.
- 2 Emphasising **thrilling**, '**must see**' or **spectacular** events.
- 3 Promoting spectacle and occasion to **assure** them it is a **major event**.

Release

Please note: as Release represent a small proportion of the market, the sample was not sufficient to analyse individual data. This page has been included to introduce the segment.



5%
of the Maltese
culture market



Attitudes and life priorities

- Work and family
- Socialising outside of home
- Relaxation
- Entertainment
- Priorities close to home

The Release segment tend to have **busy lives**. They used to enjoy arts and culture but now have **other priorities**.

Consequently, they have **limited time** and **resources** to enjoy the arts and culture, although they **would like to do more**.

Busy
Ambitious
Priorities
Wistful

Research parameters

This study was carried out for Arts Council Malta by Morris Hargreaves McIntyre.

It was commissioned in May 2016 and work by MHM began in June 2016.

Target group for the research

The Culture Participation Survey is a population survey whose objective was to provide an overview of several characteristics associated with culture participation in Malta. Individuals aged 16 and over residing in private households in Malta and Gozo were targeted.

Sample size

A net sample of 1,125 cases was collected. Within this, MHM have used a sub-sample of 1032 cases, defined as the Maltese culture market.

Date of fieldwork

26/10/2016 to 16/11/2016.

Sampling method

The 2011 Population and Housing Census was used to select a stratified random sampling frame for individuals aged 16 or over residing in private households in Malta and Gozo. The sample is based on the variables of sex, age group and district.

Data collection method

Surveys were conducted face-to-face by part-time interviewers engaged by the NSO.

Weighting procedures

Post-stratification at one level was undertaken use sex, age group and district as variables. By using this process, the NSO could produce estimates on all the parameters of the target population at district levels categorised according to sex and age. Furthermore, by using this technique, the weighting served to reduce the effect of non-response bias, which would reduce the accuracy of estimates.

Reliability of findings

For any percentage given on the sample of 1,125, we can estimate confidence intervals within which the true values are likely to fall. At a confidence level of 95%, this sample has a confidence interval (margin of error) of +/- 2.92 at 50% (i.e. where the result is 50%, the actual result may fall between 47.08% and 52.92%).

Results based on sub-groups

For any percentage given on the sample of 1032, we can estimate confidence intervals within which the true values are likely to fall. At a confidence level of 95%, this sample has a confidence interval (margin of error) of +/- 3.05 at 50% (i.e. where the result is 50%, the actual result may fall between 46.95% and 53.05%).



This report was prepared for Arts Council Malta, June 2017.

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

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

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