



Audience Atlas Jordan

Audience insight for the Jordan culture market

April 2017





This publication is produced with the financial support of the European Union, through its implementing partner EUNIC Jordan



The contents of this publication are the sole responsibility of the British Council and can in no way be taken to reflect the views of the European Union.

EUNIC members in Jordan are:



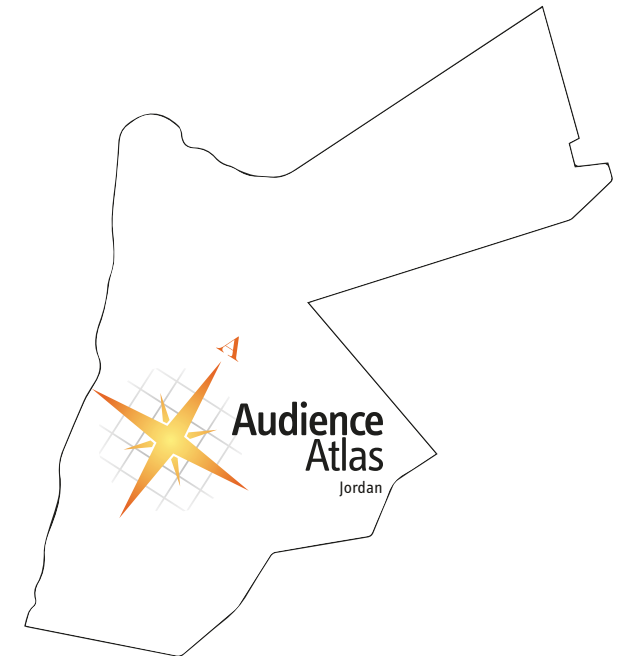
A global benchmark for culture

Audience Atlas is fast becoming the **international benchmark** for audience market evaluation. **Morris Hargreaves McIntyre** launched Audience Atlas in the UK in 2011 and have since produced **standardised, benchmarkable studies** across the globe from **New York** to Indonesia, Australia to **Turkey**.

Many of these studies, including Brazil, Turkey and Germany have been carried out in partnership with the British Council.

Audience Atlas is a unique, international databank of audiences and potential audiences for arts and culture. The data is collected with robust samples and is carefully weighted using local census data to ensure accuracy. It includes detailed information about audience demographics, behaviours, motivations and attitudes which enables us to accurately determine current, lapsed and potential market sizes for artforms and genres as well as individual entities covered by the study.

The study also has Morris Hargreaves McIntyre's proprietary segmentation system, Culture Segments – rapidly becoming the international industry standard for cultural audience segmentation – built in, which gives even greater insight into audiences' relationship with arts and culture, their values, propensity to give time and money, spend on cultural activities and even media habits. Most importantly it gives us greater insight into how to reach them, and what to tell them when we do.



Welcome to Audience Atlas Jordan

- Foreword 5
- How to use this report 7
- Jordan: culturally rich with challenges 10
- A homegrown sector with ambition 11
- Summary of market features 12
- A market with potential 13
- Introducing Culture Segments 15
- Artforms 22
- Culture Segments 58

The **potential** for arts and cultural entities and venues in Jordan is huge, and this study will provide answers to some **fundamental questions** we must ask when **developing our audiences**. How big is the market? How much of it do we have? How much potential is there? How do we reach that potential? What should we say to them when we do?

The information in this report is the foundation for a **new way of thinking** about your audiences and we at Morris Hargreaves McIntyre are excited about the opportunities it creates for new and old **arts entities in Jordan**.

Foreword

The British Council was founded to create a **‘friendly knowledge and understanding’** between the people of the UK and the wider world.

We use the **cultural resources of the UK** such as art, sport, education, science, culture, language, innovation and creativity to make a **positive contribution** to the people, institutions and governments of the countries we work with.

This **creates opportunities**, builds connections and engenders trust, so that we make a **lasting difference** to the security, prosperity and influence of the UK.

For the British Council, Culture is an enabler and driver of sustainable development, a way of engaging communities in shaping our shared future and supporting open, inclusive and stable societies. Artistic and cultural approaches empower diverse groups to participate in cross-cultural dialogue, creative and collective problem-solving, and capacity building. Culture also provides tools and spaces for creative expression and gives voice for individuals to raise awareness, build solidarity and encourage change. Culture treads a different path. Instead of solving social, economic and environmental problems through government or development agency interventions, arts and culture create the space for people to express opinions, explore issues and imagine alternative futures.

Our programmes employ the arts and culture to explore contentious ideas and contested truths and to safely connect with the past to explore alternative futures and to generate new opportunities. They encourage engagement and a strong sense of cultural identity.

Our Global Arts Strategy includes five central pillars:

- 1) Sharing UK Arts with the World
- 2) Policy and Research
- 3) Arts for Social Change
- 4) Capacity Building and
- 5) Fostering Collaboration and Networks.

These pillars further reinforce the British Council's Jordan strive to bring culture and audiences together and contribute to the richness of Jordan's cultural map.

Culture and development has been championed by many stakeholders in Jordan. This “Audience Atlas Jordan” comes as a collaboration between the British Council Jordan and European Union National Institutes for Culture (EUNIC) Cluster Jordan, and co funded by the European Union.

This is an action oriented commitment of all of us to advance the cultural agenda in Jordan.

The Audience Atlas Jordan provides unprecedented insights that can help all stakeholders in Jordan to increase participation in culture, especially among those who are currently excluded from the opportunities that culture has to offer.

We believe that Culture and Arts have the potential to transform communities. With the first ever most detailed cultural audience market profile of Jordanian culture audience – we aim to provide the sector with a common language for understanding audiences, equip organisations with the means to target their audiences more accurately, engage with them more meaningfully and develop lasting relationships with them.

We encourage all to make use of this ground-breaking report which examines the attitudes, motivations and behaviours of arts audiences to support evidence-based practice by Culture and Arts stakeholders, decision makers, funders, and practitioners, and take arts and culture closer and closer to society in Jordan.



Steve McNulty (Director of British Council Jordan)

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 Jordanian culture market** as a whole.

Section 1

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

See pages 10 to 21

Section 2

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

See pages 22 to 57

Section 3

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

Here you'll get to 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 58 to 89

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 simply going to see a film or popular music concert.

Culture market - the proportion of the population who has attended at least one of the artforms tested in the past three years.

Current market – people who have attended an artform in the past three years. Note: this includes people who have attended in last 12 months.

Lapsed market – people who have attended an artform at some point in their lives, but not in the past three years.

Potential market – people who have never attended an artform, but have expressed an interest in doing so, or people who haven't been recently. Note: this includes the lapsed market.

Not in the market - those who say they are not interested in attending in future.

Technical interpretation

This in-depth look at the Jordanian culture market was completed using a mobile phone survey, distributed by an external telecommunications company. This data was then used to analyse the overall profile of the culture market for Jordan, as well as breaking this down by artform.

Artform definitions

We asked about attendance and potential future attendance at a wide range of artforms. The artform section of this report is grouped as follows:

- **Film:** Watched a film at a cinema, another venue or shown as part of a film festival
- **Literature:** Events connected with books, writing, literature or poetry or been to a library
- **Visual art:** Galleries, visual art (including digital or video art or craft exhibitions)
- **Museums:** Any museums
- **Theatre/drama:** Plays and theatre performances (includes musicals and puppetry)

- **Dance:** Any dance (including Latin, ballroom and other dance events and excluding contemporary or ballet)
- **Comedy:** Any comedy performance
- **Traditional music:** Music indigenous to Jordan
- **Street performance:** Any kind of street performance including circus and music
- **Classical music:** Classical music and new classical music concerts
- **Popular music:** Rock and pop, hip hop, jazz and blues, metal or heavy metal. No distinction is made here between, for example, Arabic or Western music
- **Contemporary dance:** Any contemporary dance performance
- **Opera:** Any opera or operetta
- **Ballet or classical dance**

A note on methodology

According to the 2015 Jordan census, there were around 6.6m Jordanians living in the country. This research sampled 1,750 adults (aged 16 or over) representative of the Jordanian population, with quotas by age, gender, Governorate and educational attainment. This research demonstrated that 34% of the population were in the market for arts and culture, equating to around 2.2m Jordanians. Of those in the market, we asked about their cultural preferences and experiences for a variety of artforms, scaling up our findings to create real number estimates for the whole Jordanian population.

The 95% confidence interval for the total sample of 1,750 is +/- 2.34 percentage points. This means that we can be 95% confident that the true population value lies within +/- 2.34 percentage points of the reported value.

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

More information on research parameters can be found on page 88 of this report.

Culture Segments in practice

The purpose of segmentation should be to help us focus our efforts in the places that will give us the best return: where we can both be efficient and effective at attracting audiences and support for our work. Therefore no one should have eight segment strategies. The benefit is in being able to select one or two segments to treat as priorities at any one point in time.

The data in the following chapters can be used to identify segment(s) to target and prioritise for different kinds of arts and culture, and the segment by segment insight will help you understand how to effectively reach and engage people within those segments.

The segments that appear in greater proportions in the current market (have attended an artform in the past three years) are likely to be most open to attending that artform. These will be the easiest segments to target. The potential market contains those who have not attended an artform in the past three years if at all, so while they have indicated they are open to attending in future, more may need to be done to convince them to give it a try or to return to it after this time.

Those who are not in the market have said that this is an artform they have never attended and are not interested in attending in future. Given there is such a large number of people in the current and potential markets, it would not make sense to dedicate resources to targeting this group.

The Expression segment is the most dominant in the culture market in Jordan and highly active in culture. Their enthusiasm varies between different artforms. Further to Expression, the second largest segment for each artform varies, which has implications for targeted marketing strategies depending on artform.

Where choosing to target audiences that are new to an artform, there are several segments that would support a market development strategy – for example increasing the market for the visual arts by targeting Expression, Essence and Affirmation.

Each of the segments has different motivations, attitudes and priorities when it comes to attendance. Because they are looking to get something different out of the experience, once you have selected a segment to target, you can set about crafting publicity and messages that will convince them that you will satisfy these personal expectations. The segment chapters of this report describe what people in the segment are likely to be like and how and where you can most effectively target them. By understanding what they would like to get out of the experience you can also consider ways of enhancing their visit – such as designing the front of house experience, customer service, talks or added activities – to make their trip most personally rewarding. This in turn will increase the likelihood of their returning in future.

Jordan: culturally rich with challenges

Jordan is cosmopolitan and rich in traditional culture, and has a **young, tech-savvy and educated** population. Despite this, there are challenges for the **cultural economy** with a time, and often money-poor population, huge numbers of **refugees** and **fewer foreign tourists** than previously.

A population in flux

Jordan's total population stands at 9.5m, of which 6.6m are Jordanian. The remaining 2.9m residents (which includes a large transient refugee population) were not surveyed for this report.

Fewer tourists than in previous years

Jordan's economy has been impacted by instability around the Middle East. The uprisings over the last couple of years have also had a substantial impact on tourism in Jordan: with Petra receiving half the number of visitors in 2016 compared with 2010.

One third are unemployed

The Jordanian government has been taking steps towards reforms both in term of welfare and creating the right conditions for private investment. Despite this, unofficial unemployment is 30% and 14.2% live below the poverty line.

Unequal access to culture

While Jordan is considered one of the Arab world's most cosmopolitan countries, it is still a deeply traditional society. Amman in particular is viewed as one of the most 'modern' cities in the region and contains much of the cultural provision when compared to the other Governorates.

Highly educated, but not in culture

Jordan is a well educated country, with an adult literacy rate of 96%. Education in Jordan is viewed as a priority and there is an emphasis on school grades over any cultural education, despite overall government support for traditional culture and archaeological and historical heritage.

A tech savvy population

More than 3.5 million Jordanians use computer technology and social media. Internet penetration in 2016 stood at 46%. Smartphone penetration is at around 60% of the population. 2014 research showed that 15-24 year olds accounted for 51% of smartphone users in Jordan.

With limited time and resource for the arts

Leisure time in Jordan is likely to be limited for a number of reasons. There are long working hours and average wages are low. The population is also very young, meaning that family pressures could impact on spare time. The high unemployment rate will also impact on the level of disposable income available for cultural consumption.

A homegrown sector with ambition

Despite a **rise in Jordanian culture**, and an increase in private support, audience development still faces a number of **challenges**. **An enhanced understanding** of the current, and perhaps more importantly the potential market, its **profile, location, behaviour, attitudes** and **needs** will help engage a wider range of people in arts and culture.

Reported growth in homegrown culture

According to the 2013 EU report 'Developing Creative Industries in Jordan: A Call to Action', there had been a rise in homegrown cinema and music activity in traditionally import-reliant Jordan. More independent performing arts events were starting to happen in Amman, and, since 2000, there was a significant growth in the private gallery network, art collectors and people interested in art. However the last four years have seen political and social flux and this reported cultural boom appears to be at odds with more recent anecdotal evidence.

With heavy Western influence

While many of the cultural offerings in Jordan are heavily rooted in traditional artforms, pop culture is increasingly affected by European and American influences. Amman is consistently stated to be one of the most westernised cities in the region and events such as the biennial Al Balad Music Festival are symptomatic of a new generation of young alternative musicians.

Private support is on the increase

Total spending on cultural activities in Jordan is less than 1% of the government budget. Fields such as filmmaking, television, video production, animation, music production and video games have all seen a rise in private sector involvement, making them less dependent on state-subsidies or international support.

A lack of current resource

While there is an appetite for strategy, framework and tools, marketing is currently unstrategic and audience development is ad hoc. This is largely as a result of the absence of dedicated marketing resource and reliance on part time, often freelance support.

Absence of booking data

Infrastructure for selling tickets is sporadic. Occasionally tickets can be purchased directly online but largely they are sold through cafes, libraries and theatres. Therefore audiences aren't tracked so there is no knowledge of which audience members are new and which are repeating visitors.

Social media and word of mouth have potential

Marketing activity focuses largely around flyers (which can be ineffectively distributed) and social media. Social media is a real area of leverage that can be proven to work. Word of mouth is important and time needs to be spent identifying ambassadors and influential people within peer groups and communities.

Summary of market features

The **Jordanian culture market** accounts for **34%** of the population, is mainly **based in Amman**, young, **digitally-active** and has huge **potential for growth**.

A young and vibrant market

Over 60% of the market is aged 18 to 34 years old and 37% is aged 18 to 24.

An urban market

Four million people, or 42% of the overall population, live in Amman, with Irbid (1.77m) and Al_Zarqa (1.36m) being the next most populous governorates. Three quarters of the total population of Jordan reside within these areas.

Social media savvy

Over half of the culture market in Jordan use entities' online platforms, such as social media sites, websites or blogs. This equates to over a million people regularly accessing information directly from the cultural sector. Three quarters of the market use Facebook for cultural information.

Huge potential for audience development

Potential attenders constitute an average of 45% for each artform. This means that from film to contemporary dance there is huge interest from people who don't already attend, and consequently room for growth.

6.6 million

Jordanians live in Jordan.

34%

of the Jordanian population is interested in culture. This equates to

2.2 million

in the market for culture in Jordan.

47%

of this market is based in Amman

37%

of the market is aged 18-24.

Country	Population in culture market (%)	Number in culture market (millions)
New Zealand	98%	3.3m
New York City	90%	13m
UK	85%	42.7m
South Korea	87%	37.3m
Australia	87%	13.7m
Germany	84%	57.6m
China	60%	363.3m
Jordan	34%	2.2m
India	24%	67m
Turkey	20%	10.9m
Brazil	16%	23m
Indonesia	11%	9.5m

A market with potential

The **Jordanian culture market offers opportunities for growth.** Current attenders make up less than two thirds of the market for most artforms and most of those not currently attending **are interested in doing so.** This means there is little to do in convincing the market of the merit of culture, but has **implications for both programme and marketing.**

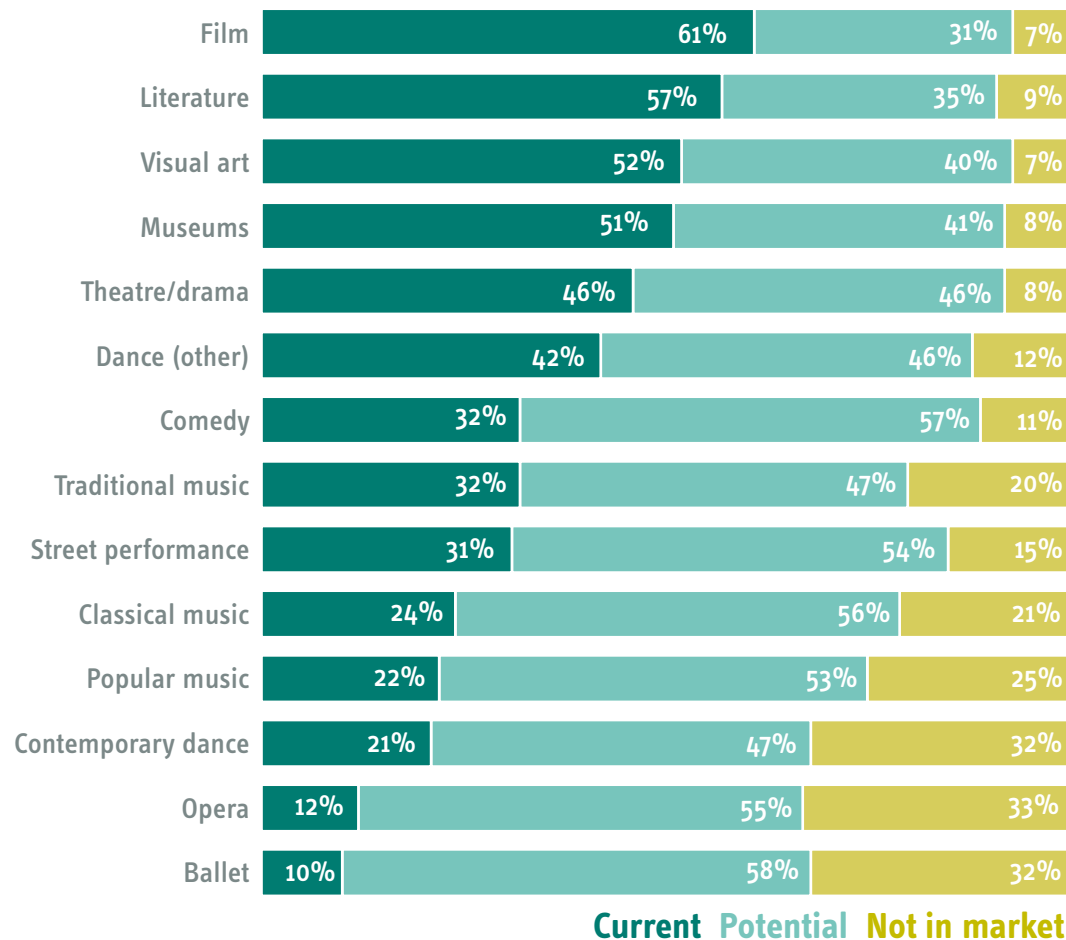
Room to grow for every artform

Potential attenders constitute between around 30-60% of the market for each artform, meaning that even for artforms with relatively high attendance, there is room to expand into new audiences.

Attendance can be encouraged

The interest exists for all artforms: meaning that providing the right opportunities for engagement, alongside the right messaging should stimulate growth in all areas of the market.

Current, potential and not in market



Film has broadest appeal, with 61% current attenders

Film has the highest proportion of those who have attended over the last three years. This isn't specific to Jordan and is a trend seen across all Audience Atlas territories.

Large current literature market due to widespread use of libraries

A widespread use of libraries across Jordan gives literature an unusually large current market (57%) and large provision provides ample opportunity for increased engagement.

Visual art and museums currently attended by over half of Jordanian market

Visual art enjoys attendance from 52% of the market and museums are visited by 51% of the market. Interestingly, in all other countries in which Audience Atlases have been carried out, museums are the second most attended artform behind film, making museums less well attended in Jordan than elsewhere.

Live music and dance split opinion but have huge potential

The proportion of those not in the market for contemporary dance (32%), opera (33%) and ballet (32%) is about a third each, with these being the most rejected artforms with the smallest current markets.

Having said this, many performance artforms provide unique opportunities for vast audience development, with potential markets that significantly outweigh current attenders.

Introducing Culture Segments

Culture Segments is MHM's universal psychographic **cultural segmentation system**. It draws upon over a decade's experience to truly **understand** and **meet the needs of audiences** for arts and heritage. Culture Segments is a **powerful tool** to understand and engage audiences by targeting them more accurately, **engaging them more deeply** and building **mutually beneficial relationships**.



A sophisticated segmentation

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

Meet the segments

Below is a summary of the eight Culture Segments that comprise the market. There are full pen portraits for each of the segments from page 55.

Essence (8% of Jordan's culture market)



Discerning, Independent, Sophisticated

Tend to be well-educated professionals who are leaders rather than followers, independent minded and confident in their own tastes. They consider high quality culture as essential to life but will be dismissive of things they consider to be too popular or unsophisticated.

Expression (29%)



Receptive, Community, Expressive

The Expression segment are active, fun-loving, self aware people who accommodate a wide range of interests, from creativity and learning to community and nature. They want to share experiences with others and highly value inclusivity so want to make sure that everyone will feel welcome at the events they attend.




Affirmation (13%)
Aspirational, Quality time, Improvement

See the arts as one of many leisure choices. They recognise the benefits of self-improvement at the same time as enjoying quality time with others. Keen to do the right things, they like to build memories of their special experiences.



Enrichment (10%)
Traditional, Heritage, Nostalgia

The Enrichment segment have established tastes and enjoy culture that links into their interests in heritage and more traditional artforms. They are not driven to discover new things and tend to like spending their leisure time close to the home.




Stimulation (11%)
Active, Discovery, Variety, Social

The Stimulation segment is an active group who live life to the full, looking for new experiences and novelty. They are open to a wide range of experiences, from culture to sports and music, but like to be ahead of the curve in everything they do.




Release (12%)
Busy, Ambitious, Prioritising

The Release segment is looking for escapism and relaxation. Leisure time is not for intellectual pursuit or cultural challenge and they tend not to prioritise arts and culture as a use for their time or money.



Perspective (10%)
Settled, Self-sufficient, Focused

The Perspective segment is settled, fulfilled and self-sufficient. They are independent minded and focus their time on personal passions, however their underlying spontaneous nature and desire to learn provides a focus for engaging with arts and culture.



Entertainment (7%)
Consumers, Popularist, Mainstream

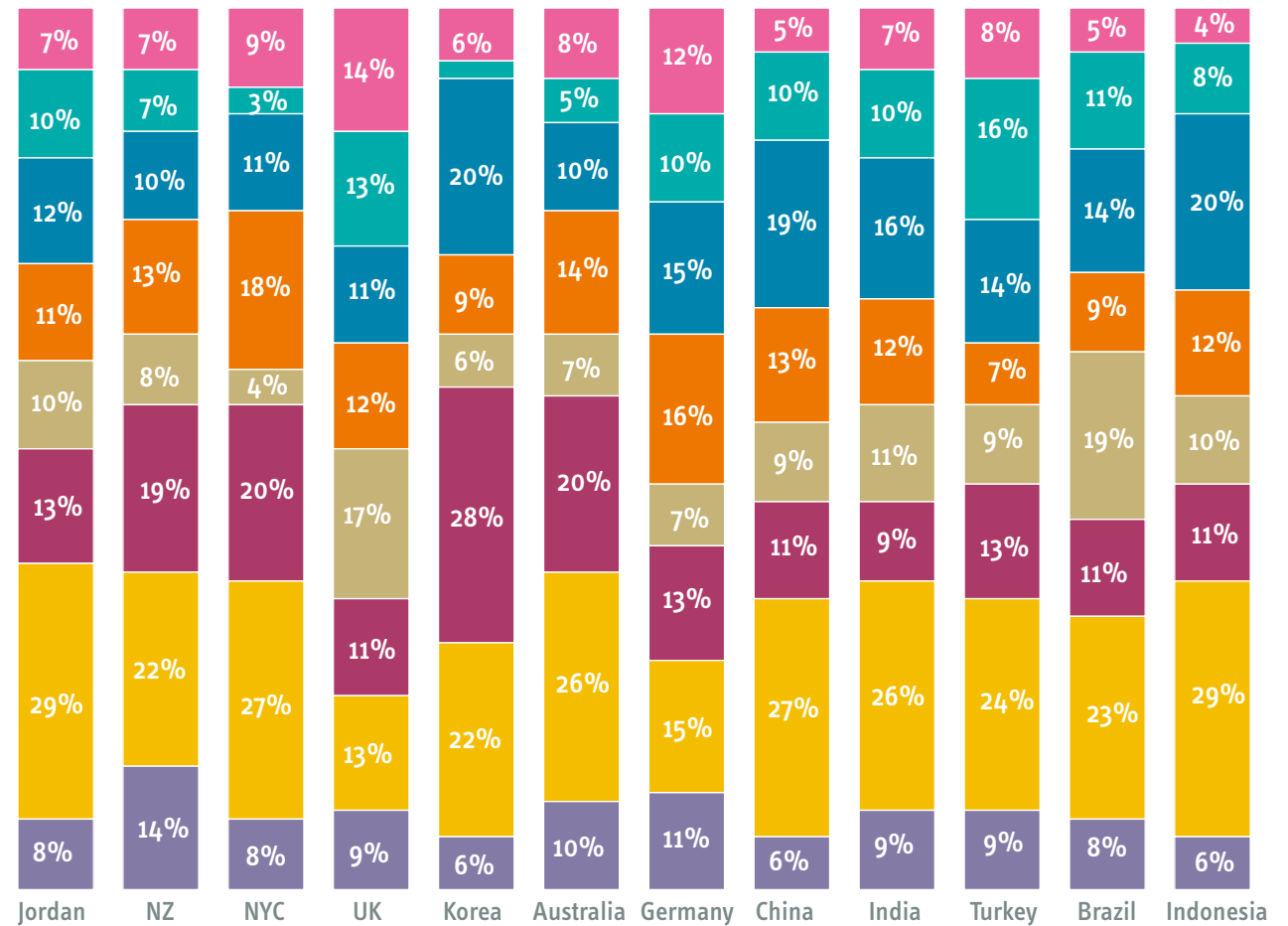
The Entertainment segment tend to be conventional in their tastes. The arts are on the periphery of their lives and they don't wish to stand out from their peers. Their occasional forays into culture are usually for spectacular, entertaining or blockbuster events that everyone else is going to or talking about.

Resonant across boundaries

MHM has undertaken Audience Atlases and applied Culture Segments in 12 different geographical areas. Each of the Culture Segments can be found in each of the different territories we have researched but in slightly different proportions.

Being values-based, Culture Segments transcends national contexts and is proven to be resonant across country boundaries.

Entertainment
Perspective
Release
Stimulation
Enrichment
Affirmation
Expression
Essence



Jordan is a market dominated by Expression

Expression are found in large numbers in many countries. Markets with less available access to formal arts culture tend to flourish in indigenous and community-based culture, something that Expression relish. They are also the majority of active cultural audiences in China, India, Turkey, Brazil and Indonesia.

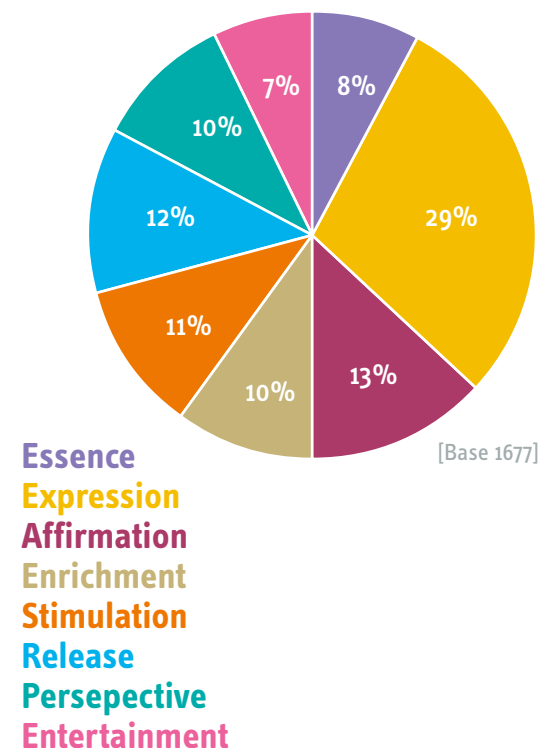
An even spread across other segments

Unlike some other markets, there is no immediately obvious second segment, meaning that the second largest segment easily changes between artforms.

Affirmation show willing in Jordan

Affirmation make up 13% of the market in Jordan and are engaged in a variety of culture in the country. They make considered choices in their cultural consumption and are a great target for carefully crafted marketing. Marketing that is lacking in detail will leave Affirmation unsure of whether to attend and they will look to reviews and endorsements to help them decide.

Culture Segment profile of the Jordanian Culture Market



Essence's tastes are not always catered for

Essence have a deep appreciation for 'high quality' art and are very involved in culture in Jordan but will be selective in what they engage with. They are seeking profound transcendental experiences from art so will steer away from more exuberant, communal, popular culture.

Stimulation a great focus for specific artforms

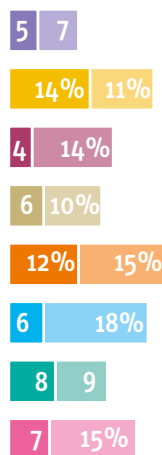
Thrill-seeking Stimulation make up just over a tenth of the Jordanian culture market. While they aren't as engaged as some other segments they look for out-of-the-ordinary experiences and make a great focus for cutting edge arts and marketing campaigns.

Culture Segments attitudes to culture are as expected

The tables on the following two pages show some of the key attitudes and perceptions of the different segments towards culture in Jordan.

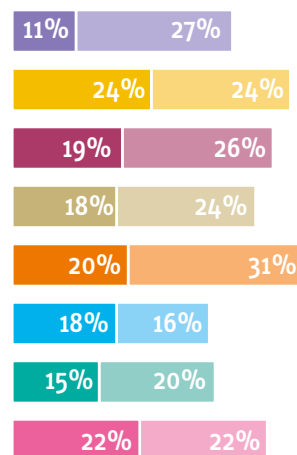
Further information into how this influences the segments and their choices around arts and cultural engagement are found in the pen portraits on pages 58 - 89.

Arts and cultural events are not for the likes of me



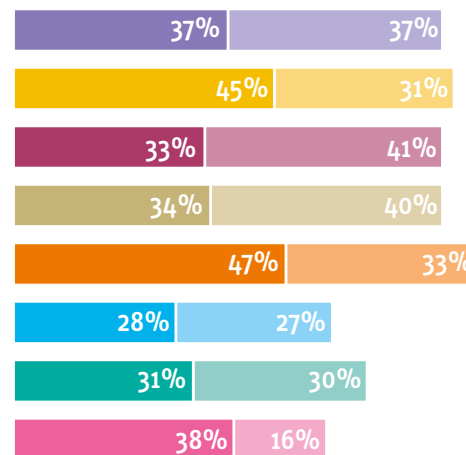
Strongly agree → Tend to agree

Social / cultural convention prevents me from seeing as much as I would like



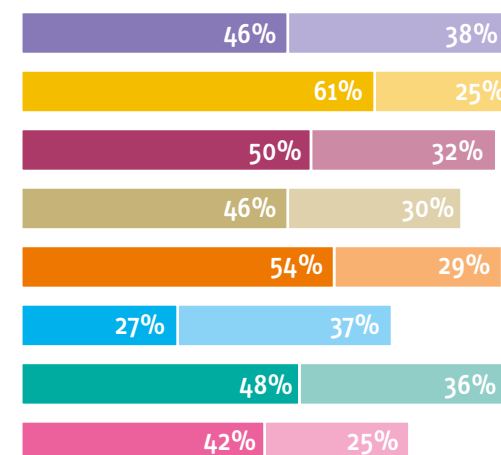
Strongly agree → Tend to agree

Arts and cultural events are too expensive to attend in Jordan



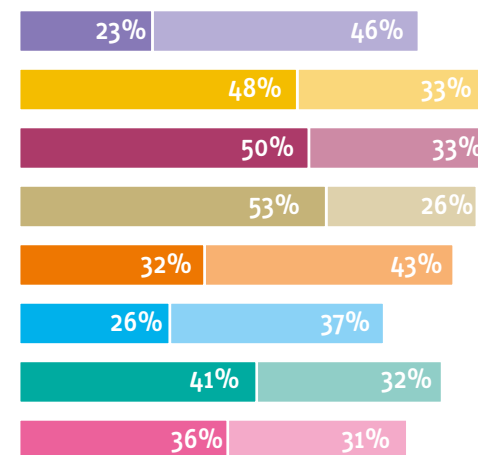
Strongly agree → Tend to agree

Most people are socially excluded from cultural opportunities



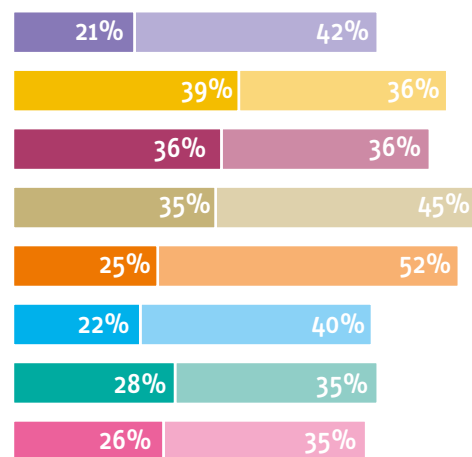
Strongly agree → Tend to agree

Other commitments in my life prevent me from having enough time to go to arts / cultural events



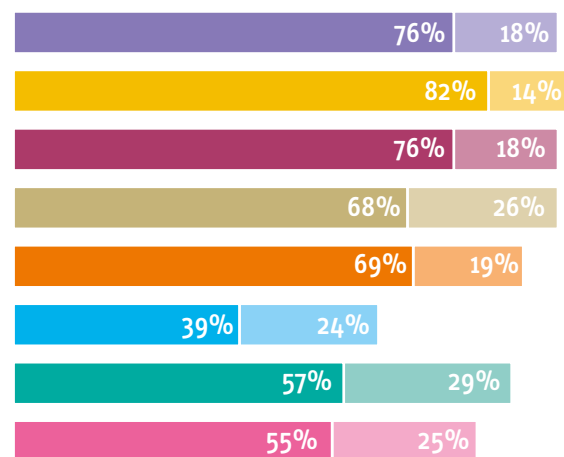
Strongly agree → Tend to agree

It is not convenient for me to travel to arts and cultural venues



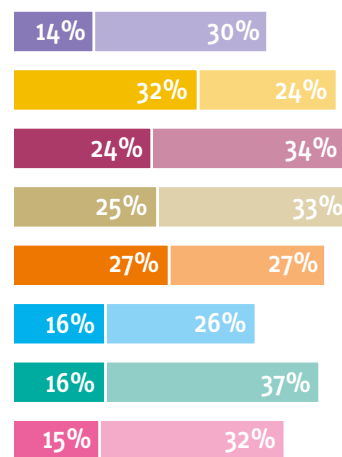
Strongly agree → Tend to agree

Exposure to international culture helps to educate and widen people's horizons



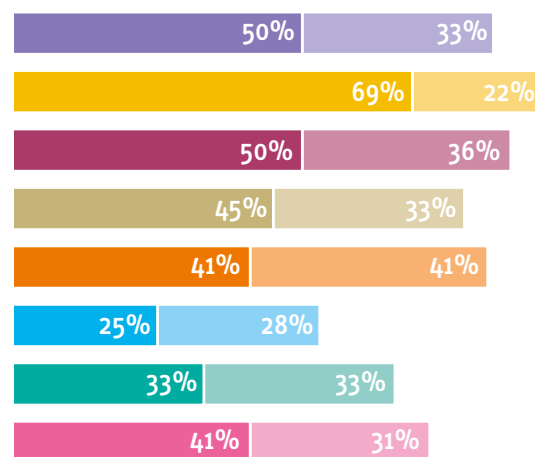
Strongly agree → Tend to agree

I don't have anyone to go to events with, and I don't want to go alone



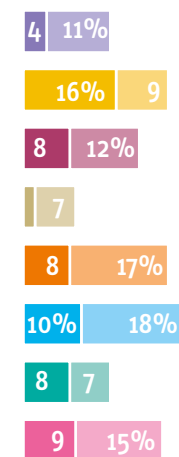
Strongly agree → Tend to agree

Access to arts and culture is important for a well-rounded education



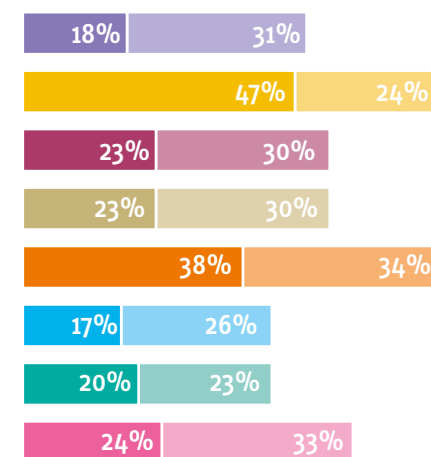
Strongly agree → Tend to agree

I don't think I would understand or appreciate arts and cultural events



Strongly agree → Tend to agree

I prefer art and culture from my local tradition



Strongly agree → Tend to agree

Summarising optimal messages

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

The diagram to the right summarises the core differentiated messages that should be considered when targeting individual segments. The ideas presented here offer a useful preamble ahead of the pen portrait section (pages 58 - 89) which explores each segment in detail.

Key messages for targeting each 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	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	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

2.1 million in the film market

Audience Atlas data from across the world consistently has **film as the most accessed artform**, and Jordan is no different, with almost half the market having attended within the **last three years**.

The largest Culture Segment in the Jordanian culture market, **Expression** show less enthusiasm for film, but still **dominate** the **current and potential** market because of their volume.

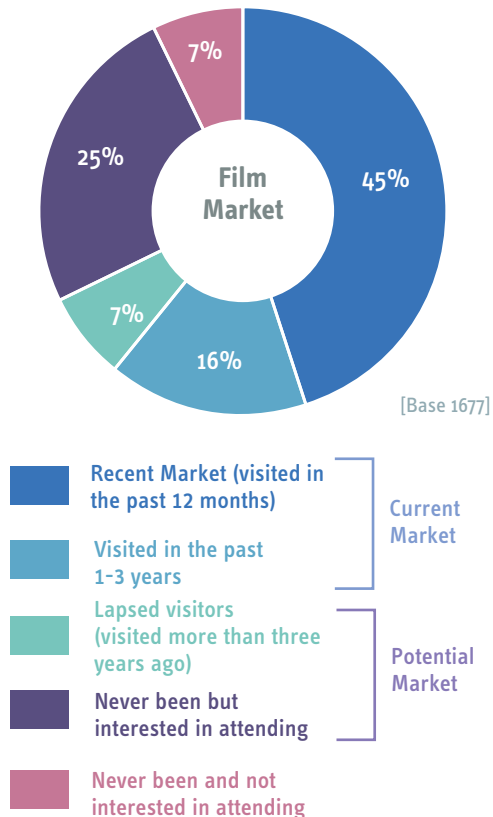
61% have recently been to see a film

Film has the biggest number of current attenders in Jordan, far exceeding the artform average of 36%. This equates to 1.4 million Jordanians.

Second largest culture market for film

The overall market for film in Jordan is the second largest in the country for current and potential markets, conceding only to the visual arts.

Penetration of film into the Jordan culture market



Very few not in the market

Those never interested in attending film make up one of the smallest proportions of that of all artforms (7% against an average of 17%).

Smallest potential market of 700k

Under a third of the market is made up of those who don't currently attend but would be open to trying. Film has the smallest potential market because of the amount of people already attending.

32% have never been to see a film

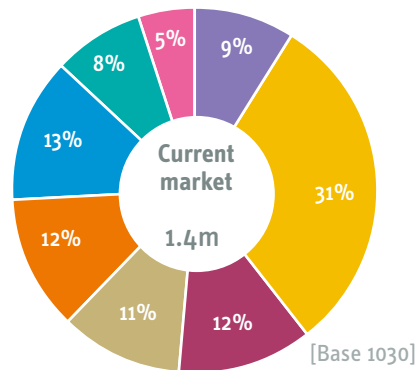
Despite film's prevalence across Jordan, only two thirds of Jordanian's interested in arts and culture have ever attended any film.

Small number of lapsed attenders

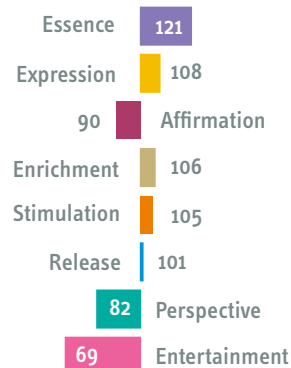
Against an average of 11%, the 7% lapsed market for film, those who have been previously, but not within the last three years, is relatively small.

Current Market by Culture Segment

People who have attended a film in the past three years

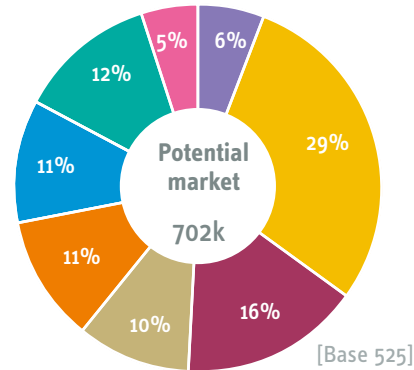


Indexed against the Jordan culture market

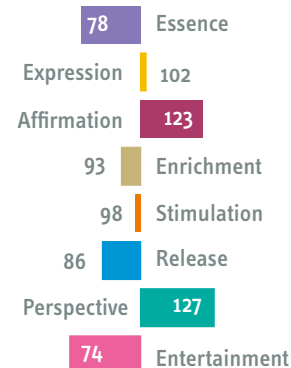


Potential Market by Culture Segment

People who attended a film more than three years ago, or who have never attended a film but are interested in doing so



Indexed against the Jordan culture market



How to read this index

An index is an indication of how likely a segment is to be in a particular artform market, in comparison to the average, i.e. the Jordan culture market as a whole. An index figure of 100 is equivalent to 'the average'. The numerical distance from 100 will give you a percentage score of how more or less likely a segment is to have engaged with an art form.

Example: Essence have an index score of 113. This means that Essence are 13% more likely to be in the current film market than they are to be in the Jordan culture market as a whole - i.e. $(9/8) \times 100$

An index score above 100 means that a segment is over represented in a particular artform market (compared to the Jordan culture market as a whole), an index below 100 means that a segment is under represented in a particular artform market (compared to the Jordan culture market as a whole).

Segment profile broadly reflects market

As can be expected in artforms which attract a large proportion of the market, the Culture Segment profile doesn't differ greatly to the overall profile of the culture market.

Expression dominate, but their interest wanes

Exuberant Expression over index in the current market in every artform, however at 108 film is the artform in which this is least prevalent.

Affirmation have consistent potential

Keen-to-impress Affirmation are frequently more present in potential markets as they feel that it is right to be open to new cultural ideas even if they have not yet tried them. Affirmation show interest here and would make a solid second segment for marketing for film, so long as they are reassured with the right reviews.

Perspective worth the effort for film

There are only three artforms in which Perspective are particularly present in the potential market, these being film, visual art and theatre. Encouraging this segment maybe rewarding but marketing can be a challenge as is explained in the pen portrait on page 79. Placing articles in press may be a better approach than traditional advertisements

Discerning Essence less eager

Although the number of current film attenders in Essence shows an increase on the market profile overall, those who don't already attend aren't worth chasing. Essence are ever present in the culture market and over index in current markets across artforms by an average of 129.

Amman and Irbid have more than their share of current attenders

Amman (66%) and Irbid (64%) have higher than their fair share of those in the current market for film.

Film features more in Amman than other artforms

Film is the only artform for which Amman has a statistically significantly higher number of those in the current market. Meaning that the region has over half of the overall film market for Jordan at 52%.

As a result it is the only artform for which the potential market in Amman is substantially smaller (26% against the 31% average).

Fewer in Al_Balqa

Film is the only artform for which Al_Balqa has a significantly smaller proportion of those in the current market.

2.1 million in the literature market

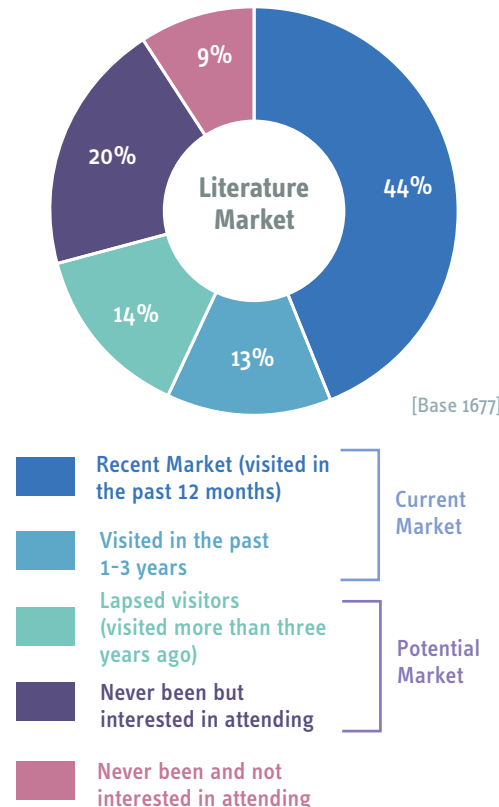
Literature is **comparatively popular** in Jordan, with over 70% of the market having used a **library**. While proportion of current attenders renders the **potential market** relatively small, there remains **room for growth**.

In addition to harnessing **Expression's enthusiasm**, **Affirmation** could be an option for **market growth**.

57% of the market are recent attenders

Over half of those in the market for culture in Jordan have attended a literature event or institution in Jordan in the past three years. This is the second highest for all artforms in Jordan and equates to 1.3 million.

Penetration of literature into the Jordan culture market



Over half of those in the market have used a library in the past three years

Literature's relatively large current market can be attributed to a current market for libraries of 52%. The current market for literature events (such as festivals about books or poetry) is substantially smaller at 25%.

Potential market of 783k

Unsurprisingly, due to it having the second largest current market, literature has the second smallest potential market at 35% (average potential market of 47%). Despite this, having one fifth of the market who have never been but who would be interested in attending still provides opportunity for market growth.

A smaller than average number not interested in literature

Jordanian culture consumers are generally open to literature. Less than one in ten of the culture market aren't interested in literature (9%), this compares to an artform average of 17%.

Culture segments for literature markets broadly follow the average

As is expected in artform markets that subsume much of the overall market, the Culture Segment profile doesn't substantially differ from the overall market profile.

Expression less prominent than in other artforms

Expression tend to over index in current markets, however in literature they only over index by 111. Despite this, the segment also diminishes within the potential market. This represents only a slight dampening of enthusiasm in comparison to other artforms.

Affirmation could be a good bet

In a market that doesn't naturally show a second priority segment, Affirmation could be a reliable proposition. Affirmation, who regularly look to better themselves through their arts engagement, could be a natural fit for literature and show enthusiasm for the artform.

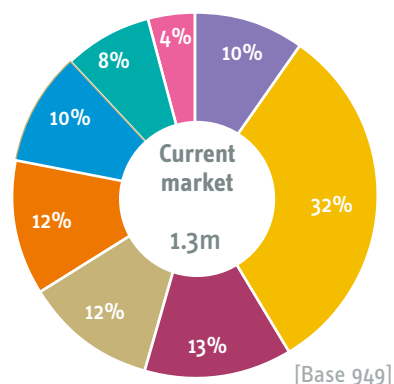
Literature a good fit for Enrichment

Literature is among the most popular artforms for Enrichment, who like to feel like they're taking traditional and safe culture. With a current market over index of 112 there is opportunity here if Enrichment can be persuaded that literature events and institutions, such as libraries, are traditional enough for them.

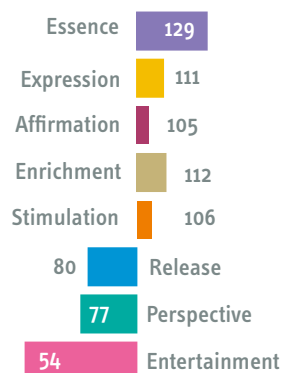
Please see page 23 for information on how to read this index.

Current Market by Culture Segment

People who have attended any library or literature event in the past three years

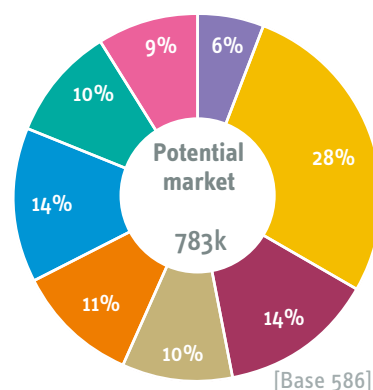


Indexed against the Jordan culture market

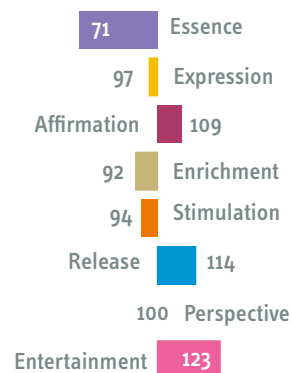


Potential Market by Culture Segment

People who have attended any library or literature event more than three years ago, or who have never attended but are interested in doing so

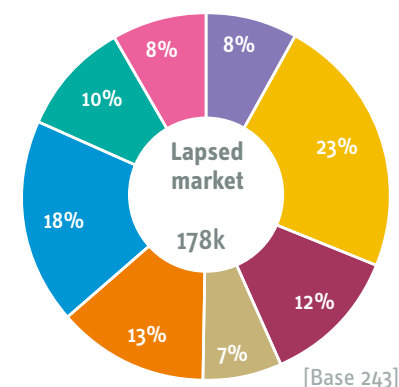


Indexed against the Jordan culture market

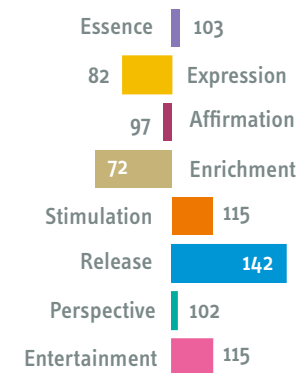


Lapsed Market by Culture Segment

People who have attended any library or literature event more than three years ago



Indexed against the Jordan culture market



2.1 million in the visual arts market

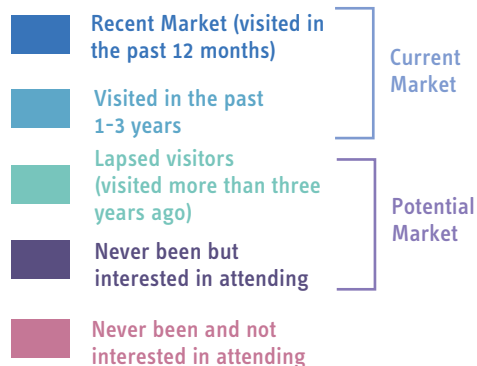
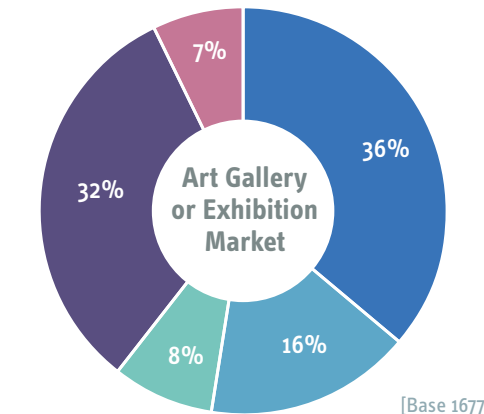
Visual arts has the **biggest overall** market in Jordan, with only 7% rejecting it outright. With a **slightly smaller current market** than film and literature this leaves **four in ten** in the Jordan market open to persuasion for the visual arts.

Expression and **Affirmation** make up over half of the current visual arts market, but **Enrichment** and **Perspective** could also be willing to attend.

The artform with the biggest overall market in Jordan

93% of the Jordan culture market demonstrated an interest in attending art galleries or exhibitions, a large percentage compared to most other artforms. Correspondingly, there is the smallest amount of those not in the market at all, 7% against an average of 17%: equating to 162K rejectors.

Penetration of visual art into the Jordan culture market



Over half have recently attended art galleries or exhibitions

Over half (52%) of those in the market for culture in Jordan are in the current visual arts market, making it the third biggest current market. This equates to 1.2 million people.

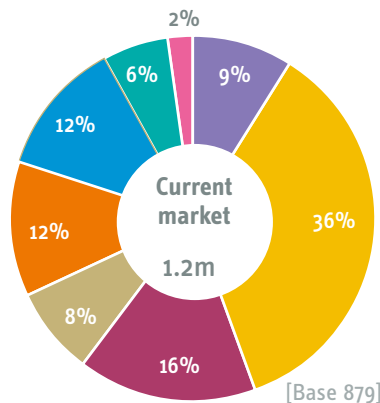
Potential market of 906k

40% of those in the culture market could potentially attend an art gallery. Within this, one third have not been but would be interested, leaving plenty of room for growth into new audiences.

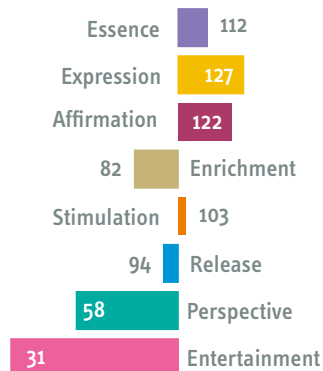
Please see page 23 for information on how to read this index.

Current Market by Culture Segment

People who have attended visual art in the past three years

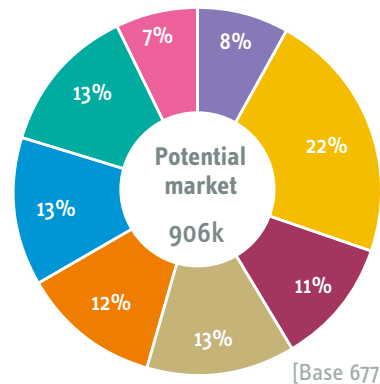


Indexed against the Jordan culture market

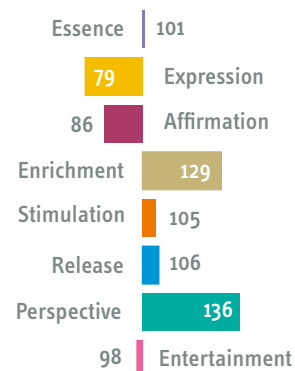


Potential Market by Culture Segment

People who attended visual art more than three years ago, or who have never attended but are interested in doing so



Indexed against the Jordan culture market



Expression remains most prominent

Making up 36% of those who have been in the last three years, this is another artform in which entities can't afford to ignore Expression. They under index in the potential market but this can be attributed to making up only 17% of the lapsed market (against their usual profile of 29%). This suggests that once Expression have attended they are easily tempted back.

Affirmation put their money where their mouth is

Affirmation, who tend to feature more in potential markets than current ones, have demonstrated a willingness to substantiate their interest and are more likely to have recently attended an art gallery or exhibition compared to other artforms. This enthusiasm from a segment, who often claim they are interested but less frequently attend, should be capitalised on.

Potential for Enrichment and Perspective

While Enrichment and Perspective don't tend to attend visual art, they are interested in doing so. Exhibitions with a focus on these segments could prompt visits.

2.1 million in the museums market

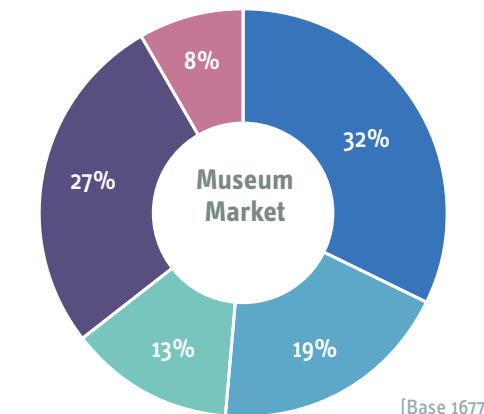
With a **current market** of around half and only 8% rejecting, there is **significant room for potential** in museums. A third are already regular attenders.

A stable market profile with ever-present **Expression** dominating also sees **Affirmation** show willing through their attendance and **heritage-focused Enrichment** show more interest here than in many other artforms.

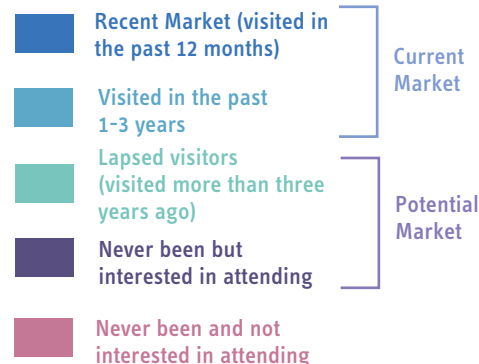
Over half (51%) are in the current museums market

One third of the market have been to a museum in Jordan in the last year and around half have been within the last three, making museums one of the artforms in Jordan with the broadest appeal. The 51% in the current market equates to an estimated 1.1 million.

Penetration of museums into the Jordan culture market



[Base 1677]



912k potential attenders

The potential market for museums accounts for 41%, including a relatively large lapsed market (13% compared to average of 11%), perhaps due to the number of people who may have attended museums as a child but not returned since.

One third have attended in the last 12 months

Compared to an average of one quarter (24%) for other artforms, this shows an eagerness for regular museum attendance among a central core of the market.

Only a small amount are rejecting museums

At only 8%, there are relatively few in the market who have rejected museums outright.

Expression is joined by Affirmation, Stimulation and Enrichment as segments to target

Despite a standard market profile, there are several segments worth pursuing.

Expression account for a third of current attenders

Within the expected pattern, Expression dominate the museums current market and consequently diminish slightly from the potential market.

Affirmation demonstrate their enthusiasm

Affirmation are looking for cultural activities that offer dual benefits of being social with learning outcomes. Museums that can ensure both of these are delivered will be most successful. Recommendations on targeting Affirmation can be found in the pen portrait from page 63.

Museums may pique the interest of Enrichment

While Enrichment only over index in the current market for museums by 107, they aren't usually found in regular attendance for artforms in Jordan. As a result of their presence in the current market, they don't disappear from the potential market as we might expect. This suggest that the heritage and traditional focus of museums is of interest to Enrichment and with the right exhibitions, this segment could be nurtured.

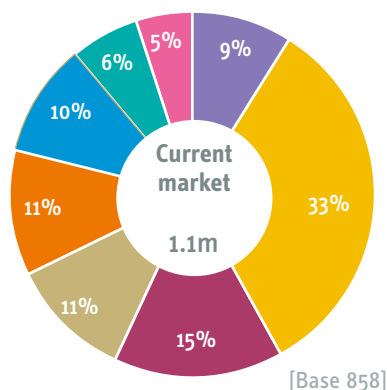
Stimulation are consistent attenders

Stimulation don't wildly over index but could be ones to watch. The segment are keen to try new things and certainly aren't put off by museums. However, in order to retain them as consistent visitors, they need to be drawn in by offers that will both pique their interest and satisfy their curiosity.

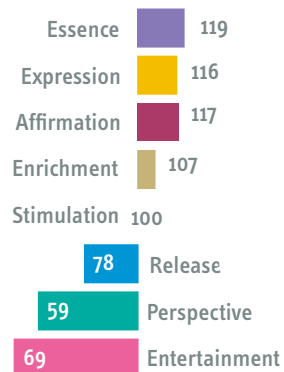
Please see page 23 for information on how to read this index.

Current Market by Culture Segment

People who have attended a museum in the past three years

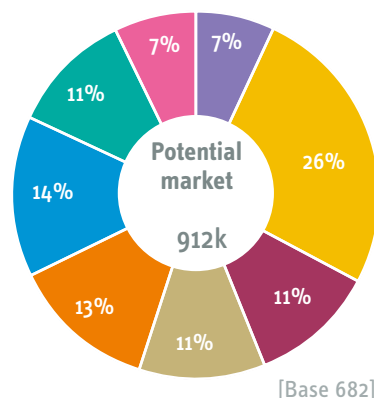


Indexed against the Jordan culture market

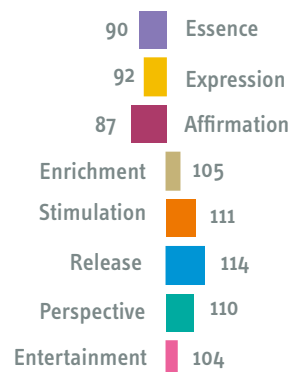


Potential Market by Culture Segment

People who have attended a museum more than three years ago, or who have never attended but are interested in doing so

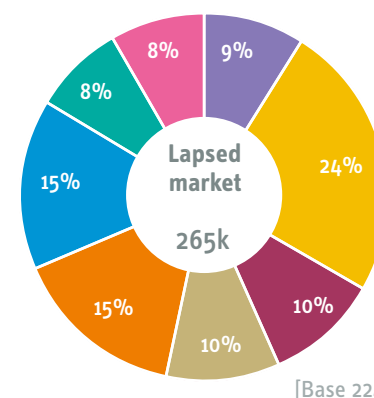


Indexed against the Jordan culture market

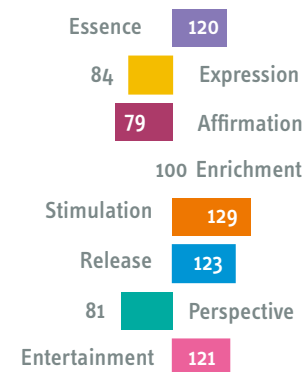


Lapsed Market by Culture Segment

People who have attended a museum more than three years ago



Indexed against the Jordan culture market



2.1 million in the theatre market

The **drama and theatre market** within Jordan demonstrates **equal numbers current and potential** attenders, with each proportion of the market standing at **one million** people.

Expression enjoy **sharing their cultural experiences** with others and this could explain why theatre is an area in which they **dominate** even more than the average for other artforms.

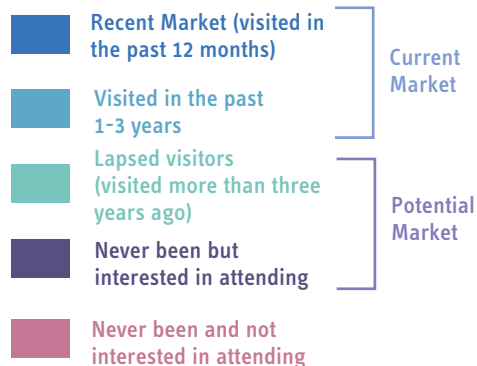
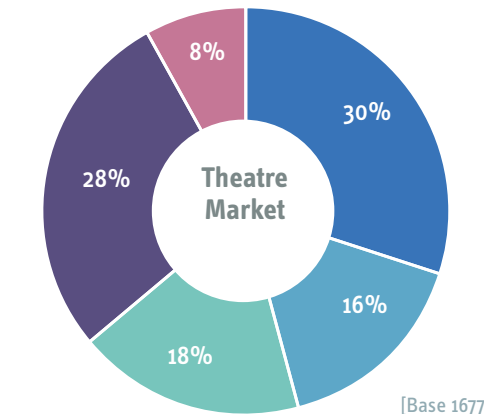
46% have attended a theatre performance in the last three years

One million people (46%) across Jordan have attended a theatre performance recently, over half of these have attended in the last year.

A potential market of 1 million

Theatre is the artform with the most balanced current to potential market, meaning for every

Penetration of drama/theatre into the Jordan culture market



individual who has attended in the last three years, there is another person who could be persuaded.

Theatre has high numbers of past attenders

18% of those in the market for theatre are lapsed attenders, compared to an average of 11% for other artforms. This could be because it is an artform that is more likely than others to tour, so many might only have the opportunity to attend at spaced out intervals.

Small proportion of those not in the market

Less than 10% of those in the market for some form of culture aren't interested in theatre, leaving it an artform with a relatively large market and opportunities for expansion into new audiences.

Expression are regular theatre attenders

Those in the Expression segment feature even more strongly in the current market, accounting for 36% of attenders in the last three years. Expression enjoy arts that they can consume within a community, with other people experiencing the highs and lows at the same time as them, accounting for them over indexing here even more than usual. Theatres and theatre companies should therefore consider ways to increase opportunities for interaction between audiences, opportunities to debate and discuss and spend time in the venue before and after the performance.

Affirmation is also a good segment to target

Affirmation show themselves in the current market without diminishing from the potential market, suggesting they are a segment worthy of focus when considering marketing and programming within theatres.

Stimulation level second with Affirmation

Stimulation also account for 13% of the potential market for theatre, making them worth targeting with the more unusual, quirky, exciting or novel productions - making sure they stand out from the crowd.

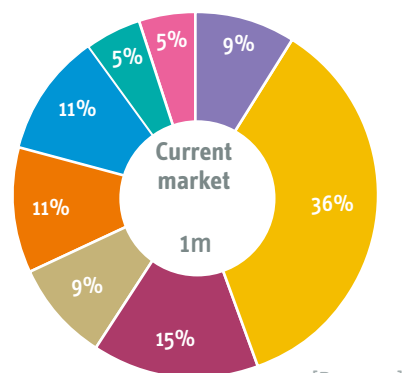
Ajloun and Jarash are in the market for theatre

60% of those in Ajloun and Jarash are in the market for theatre, significantly more than the average of 46%. This could be that theatre has increased provision in the region without the competition with other artforms that exists in Amman. With further investigation, Ajloun and Jarash may prove worthy of inclusion on touring schedules.

Please see page 23 for information on how to read this index.

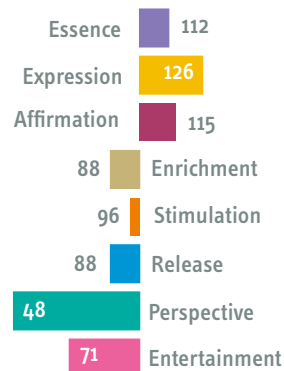
Current Market by Culture Segment

People who have attended any drama or theatre in the past three years



[Base 771]

Indexed against the Jordan culture market



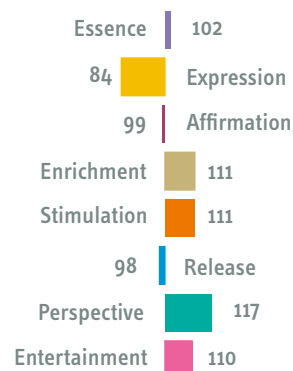
Potential Market by Culture Segment

People who have attended any drama or theatre more than three years ago, or who have never attended but are interested in doing so



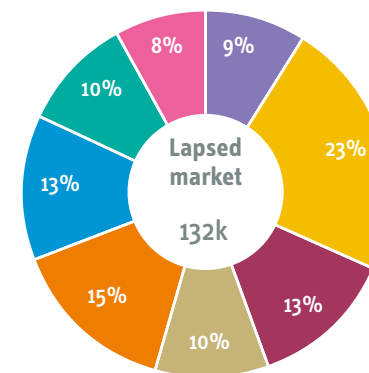
[Base 777]

Indexed against the Jordan culture market



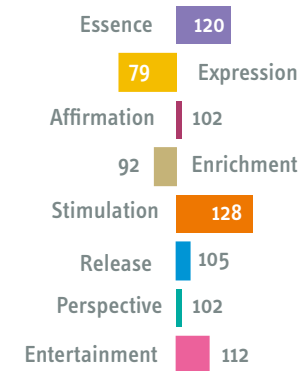
Lapsed Market by Culture Segment

People who have attended any drama or theatre more than three years ago



[Base 306]

Indexed against the Jordan culture market



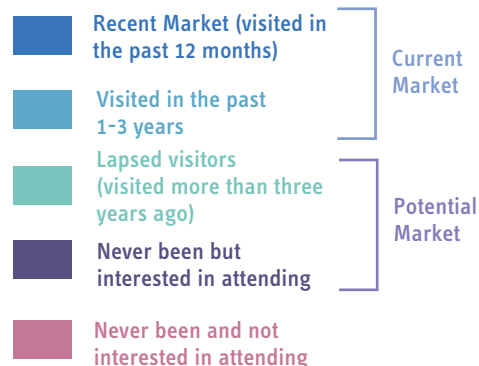
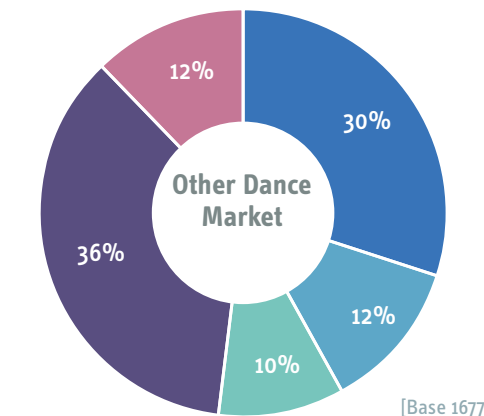
2 million in the dance market

Dance in this section excludes contemporary dance and ballet, which this report considers separately, but instead focuses on an **eclectic mix** of other genres, such as **ballroom, Latin, hip-hop and Circassian dance**.

This is the first artform within this report in which **current attenders (42%)** are **outweighed** by those who don't currently go, but might be interested (46%).

Perhaps because of the eclectic **mix of dance styles** included in this genre, there are a **number of segments** who might be interested in attending dance events of these types.

Penetration of other dance into the Jordan culture market



Around two in every five already go

42% of those in the market for culture in Jordan are in the current dance market, around two in every five people. This means 940k recent attenders.

A potential market of a million people

One million people in Jordan are interested in going to see dance performances, over a third of the whole culture market.

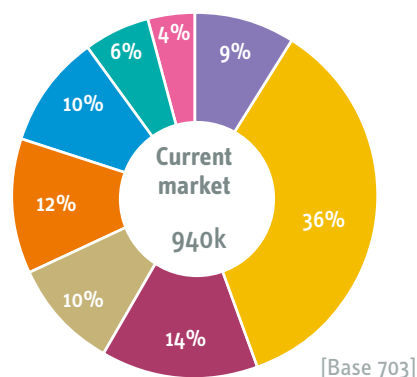
Jordanian are more open to these dance forms than ballet or contemporary

Only 12% are not interested in ever attending these types of dance events, a small figure especially when compared to 32% for both ballet and contemporary dance, which are much more divisive.

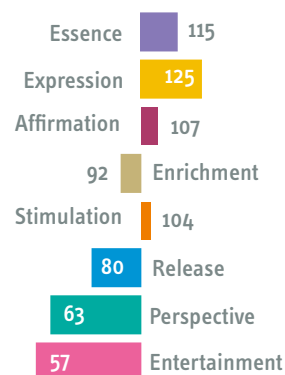
Please see page 23 for information on how to read this index.

Current Market by Culture Segment

People who have attended another dance event in the past three years

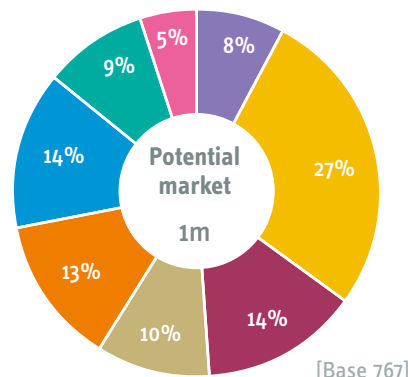


Indexed against the Jordan culture market

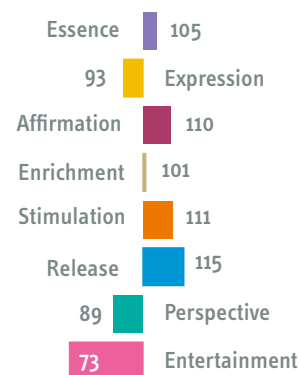


Potential Market by Culture Segment

People who attended another dance event more than three years ago, or who have never attended but are interested in doing so



Indexed against the Jordan culture market



Four segments showing an interest in dance events

Essence keen on most performance arts including dance

In addition to exuberant Expression, and steady Affirmation, Essence, a segment whose interest in performance art in Jordan is well documented in this report, are also interested in attending these and other types of dance events. Essence will attend if they can be effectively convinced of the quality.

Stimulation might attend if events were different enough

While Stimulation don't go wild for dance, they do demonstrate an interest. Assuming the events were unique enough for this active segment they could certainly be persuaded to make an appearance.

Residents of Ajloun and Jarash are keen to attend

61% of those in Ajloun and Jarash are in the market for dance, significantly more than the Jordanian average of 42%.

2 million in the comedy market

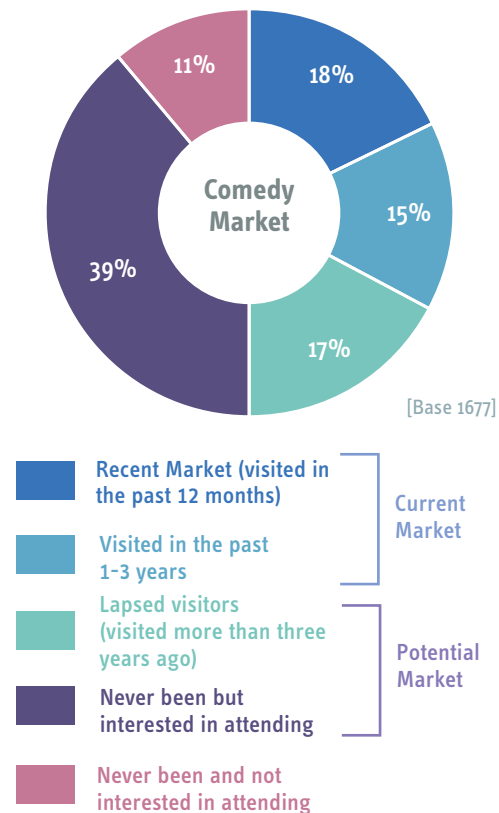
Comedy enjoys a steady **current market** and the second largest **potential market**, at 57%, including a high proportion (17%) of people who have attended before but not returned within the last three years.

The **social experience** that tends to accompany comedy makes it **rich territory for Expression**, and this is supported by the data showing that it is one of the **top three attended artforms for the segment**.

A third in the current market for comedy

32% of those in the market for culture in Jordan are in the current comedy market. This is 725k people across Jordan.

Penetration of comedy into the Jordan culture market



Huge potential for comedy

57% of the market are not current attenders but potentially interested in attending (1.3 million people). This is relatively large when compared to other artforms with a similar sized current market, second only to ballet. This is especially impressive considering that the current market for comedy is around the average when compared to other artforms.

One of the largest lapsed markets (joint with street performance and below theatre)

17% of those in the market for culture in Jordan have attended comedy but not been back in the last three years. It is likely that, as with both theatre and street performance that provision is an issue here.

Shared experiences attract Expression

Expression are particularly prevalent in the comedy market, over indexing by 135, likely for the same reason that they enjoy theatre, because performance art provides ample opportunity for shared and communal experiences that are open, inclusive and accessible to all.

Affirmation and Release need careful consideration

While Affirmation and Release are on equal footing in second place in the potential market, Affirmation are the segment who have also realised their potential interest and attended recently. This makes them more worthy of focus than Release.

Comedy could be something different for Stimulation

Stimulation, who are often on the look out for something different, could be a segment worthy of investment here. They over index in the current market without disappearing from the potential market. They will need assurance that a show is going to be contemporary and cool enough as they like to consider themselves ahead of the curve. Stimulation could be a good target for new up-and-coming comics keen to make a name.

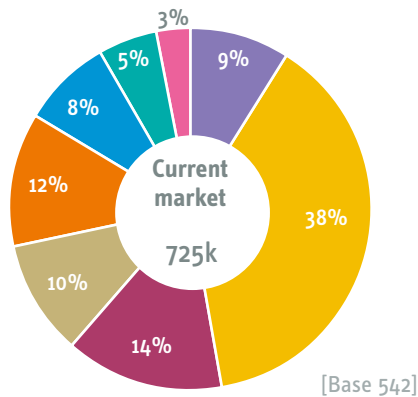
Ajloun and Jarash continue their interest in performance art

Half of those in Ajloun and Jarash are in the current market for comedy, compared to the average figure of 32%.

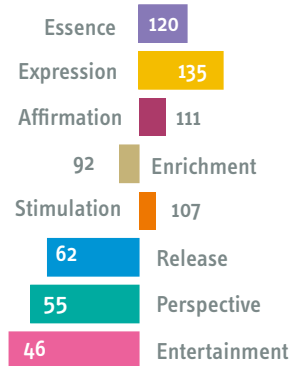
Please see page 23 for information on how to read this index.

Current Market by Culture Segment

People who have attended any comedy in the past three years

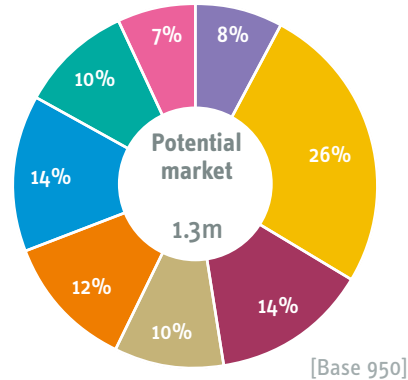


Indexed against the Jordan culture market



Potential Market by Culture Segment

People who have attended any comedy more than three years ago, or who have never attended but are interested in doing so

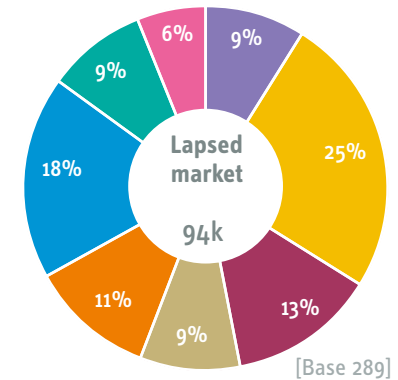


Indexed against the Jordan culture market

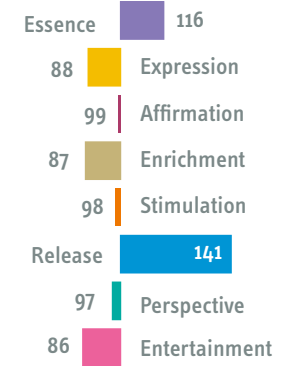


Lapsed Market by Culture Segment

People who have attended any comedy more than three years ago



Indexed against the Jordan culture market



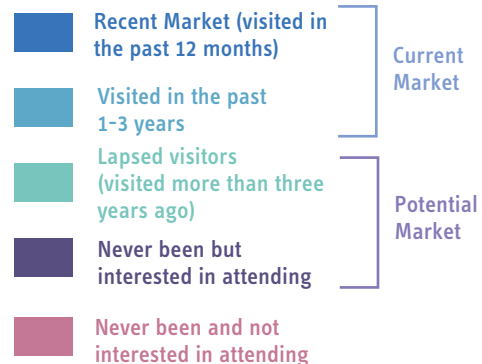
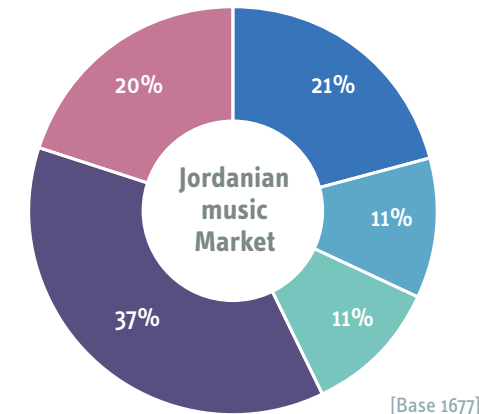
1.8 million in the traditional music market

A third of the Jordanian market attend **traditional music**. An even bigger proportion (37%) don't but might do given the right incentives. There is the same proportion (**one fifth**) of those who have gone in the **last year** as those who **aren't interested** in attending traditional music events at all.

Community-focused Expression show a real interest in traditional music and **Stimulation**, who look for **unique experiences** also feature here.

Perhaps unsurprisingly, those in the **18-24 age bracket** are **less likely** to have ever attended a traditional music event or be interested in doing so.

Penetration of Jordanian music into the Jordan culture market



One third attend traditional Jordanian music

32% of the Jordanian market attend traditional music, including 21% who have been within the last year. This equates to 724k people.

Potential market of 1.1 million

47% of those in the market for culture are interested in, but not already regular attenders of, traditional Jordanian music.

Relatively high proportion not interested in traditional music

A fifth of the market is uninterested in traditional music (20%). This is relatively high when compared to other artforms.

One fifth of the market have attended a traditional music event in the last 12 months.

A fifth of people in the market have attended a traditional music event in Jordan in the last year (21%).

A segment profile dominated by exuberant Expression

Expression are prevalent in the traditional music market

Outgoing Expression are known for their interest in all things communal and local, and traditional Jordanian music cuts right to the heart of this.

Affirmation show potential

Affirmation like to be seen to be doing the right thing, and account for 14% of a sizeable potential market, making them a segment who could be persuaded into attending events that make them feel involved in their community.

Amman less keen, while north-west Jordan shows an interest

Amman residents show less interest in traditional music than other artforms

The only artform where the proportion of those in the current market is significantly lower in Amman than the average (28% compared to 32%). Possibly due to the prevalence of other available artforms in the region.

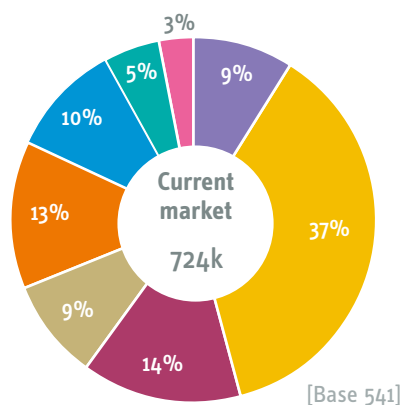
North-west Jordan shows a particular interest in the indigenous genre

Of the culture market in Ajloun and Jarash, half have attended traditional Jordanian dance within the last three years (50%): 18 percentage points above the average. 39% of Irbid are also in the current market for Jordanian dance.

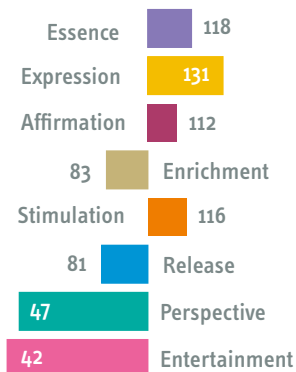
Please see page 23 for information on how to read this index.

Current Market by Culture Segment

People who have attended any traditional music in the past three years

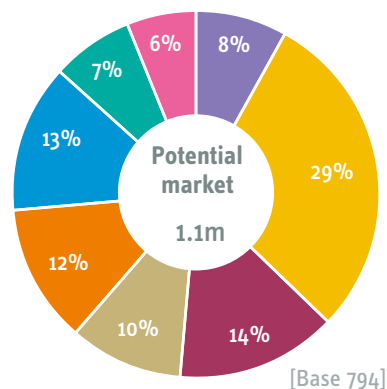


Indexed against the Jordan culture market

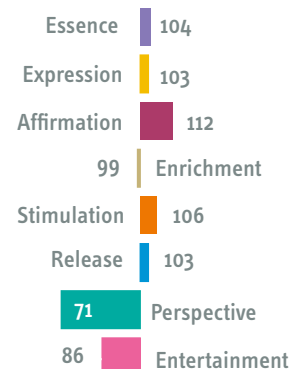


Potential Market by Culture Segment

People who have attended any traditional music more than three years ago, or who have never attended but are interested in doing so

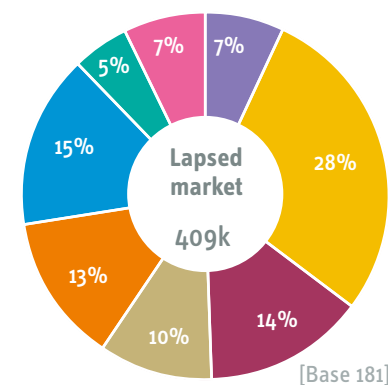


Indexed against the Jordan culture market

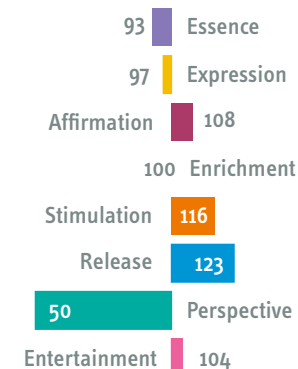


Lapsed Market by Culture Segment

People who have attended any traditional music more than three years ago



Indexed against the Jordan culture market



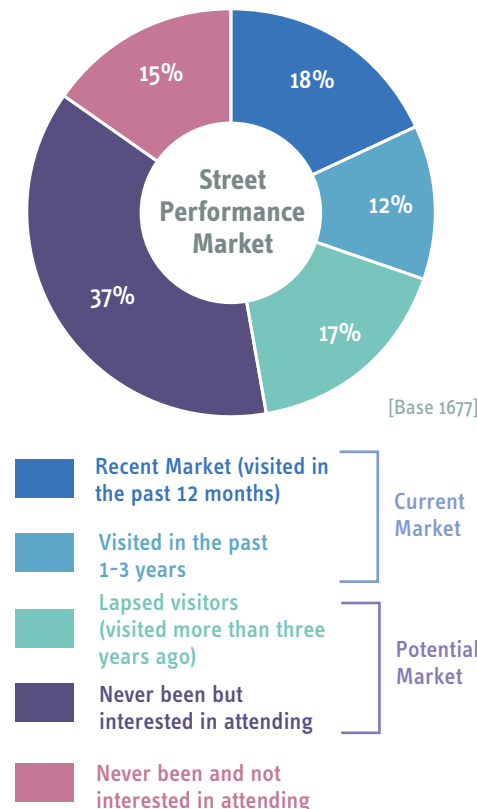
1.9 million in street performance market

A **third of the culture market** in Jordan have been to see **street performance** recently, however 54% haven't but could do in the future.

With an artform such as this with **no fixed base** it is usual to see such a large proportion of audiences who have been before but haven't been back. This can often be attributed to the **irregular access to** the artform rather than the interest that individuals are or are not showing.

Affirmation join Expression here as a core segment.

Penetration of street performance into the Jordan culture market



A third are regular attenders of street performance

31% of those in the current market for culture in Jordan are in the current street performance market, meaning they have attended within the last three years (690k people).

1.2 million in the potential market

There is a potential market of 54%, large compared to the average of 47% for all artforms. Included within this is the 37% who have never been but would consider going.

Many have been but not recently returned

The average proportion of people who have attended an artform, but not in the last three years, is 11%. This figure rises to 17% for street performance, which makes it (after theatre) the joint second biggest lapsed market (alongside comedy). Theatre, street performance and comedy are all artforms that are more likely than others to tour, meaning that many Jordanians might not get the opportunities to attend that they might hope for.

Affirmation join Expression as core segment

Affirmation account for a sizeable proportion of the current and potential markets for street performance, and with the right reassurance could be a great segment to target for this artform.

Stimulation hold steady in street performance market

Street performance, with its potential for unique locations, makes an ideal partner for Stimulation, a segment that the data shows certainly isn't scared off by the artform. Highlighting the one-off and unique nature of events could be really effective in engaging this segment.

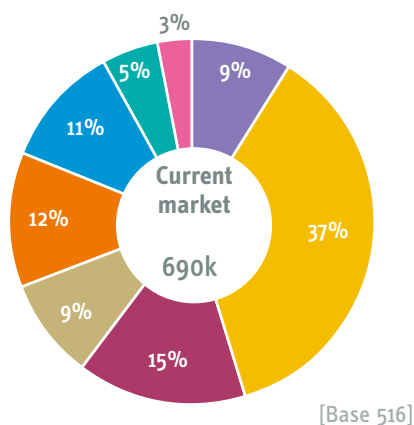
Essence have been before

A large proportion of Essence have been to see street performance before but not been back. While they over index for the artform overall, it might be that having tried it once they decided it wasn't for them. This makes them a segment to avoid placing too much focus on.

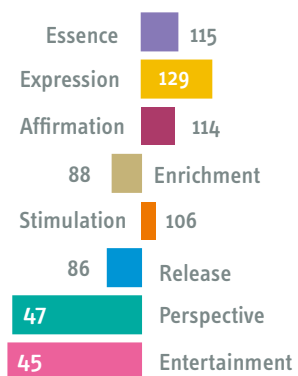
Please see page 23 for information on how to read this index.

Current Market by Culture Segment

People who have attended any street performance in the past three years

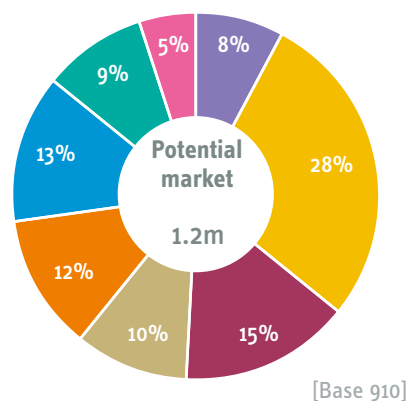


Indexed against the Jordan culture market

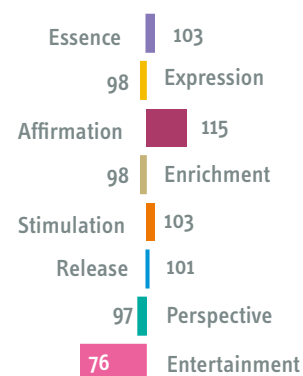


Potential Market by Culture Segment

People who have attended any street performance more than three years ago, or who have never attended but are interested in doing so

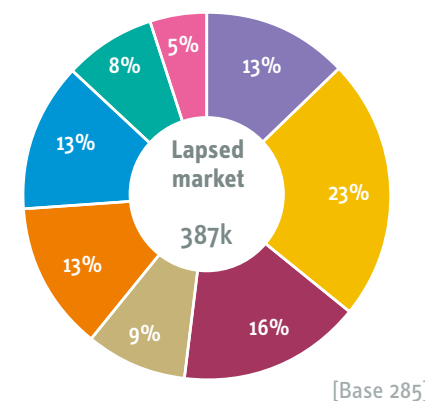


Indexed against the Jordan culture market

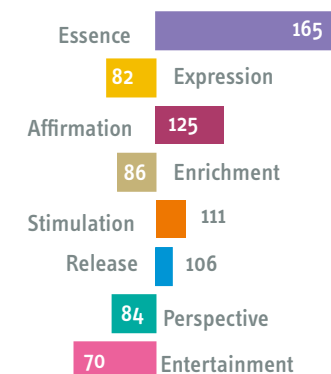


Lapsed Market by Culture Segment

People who have attended any street performance more than three years ago



Indexed against the Jordan culture market



1.8 million in the classical music market

500k people across Jordan have attended classical music in the past three years, around a quarter of the market. This figure doesn't, however, reflect the potential of the artform, with **1.3 million people across the country showing an interest**.

In addition to other core segments, **Essence are key** to this artform and are more likely to regularly attend.

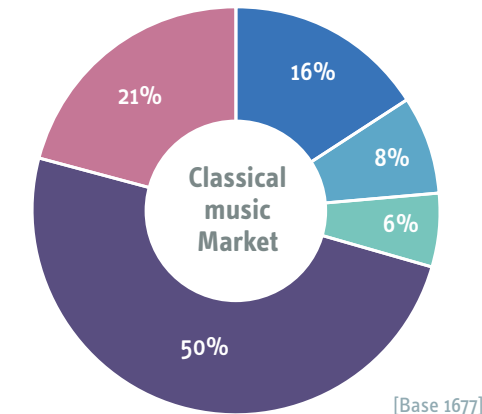
One in four have recently attended classical music

One of the smaller current markets: a quarter (24%) of those in the market for culture in Jordan are in the current market for classical music, this equates to 527k people across Jordan.

Classical music has serious potential

1.3 million people, 56% of the overall Jordanian culture market is in the potential classical music market.

Penetration of classical music into the Jordan culture market



Half have never been but would like to go

In similar proportions to other performance arts, ballet and opera, 50% of the market has never attended classical music but are interested in doing so in future. This is more than twice the number of people who have already tried this artform. So while 1 in 5 are not interested (21%), classical music has considerable untapped market potential.

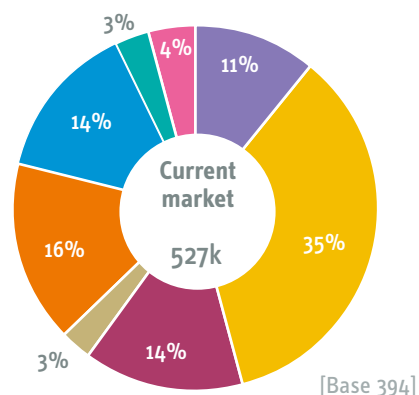
Only 6% are lapsed attenders

In Jordan, music and dance performance arts tend to have lower numbers of those who attended previously but are now lapsed. In this vein, Jordanians are either current attenders of classical music or they have not yet been. This has huge ramifications for marketing strategies for classical music in Jordan.

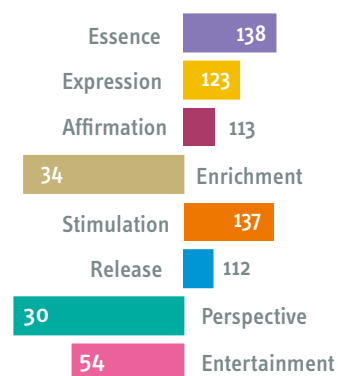
Please see page 23 for information on how to read this index.

Current Market by Culture Segment

People who have attended classical music in the past three years

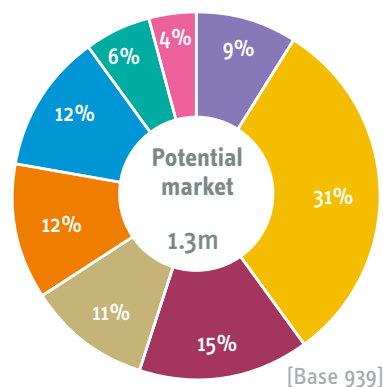


Indexed against the Jordan culture market

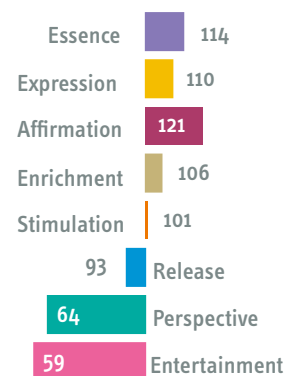


Potential Market by Culture Segment

People who attended classical music more than three years ago, or who have never attended but are interested in doing so



Indexed against the Jordan culture market



A split segment profile

The division that classical music inspires can also be seen reflected in its segment profile. In addition to Expression and Essence, edgy Stimulation are regular attenders but more traditional and risk-averse Enrichment disappear from the current market.

Essence are leaders not followers

Essence enjoy culture regardless of what others think, and can thrive on feeling they're in the know. Classical music can deliver the deep personal benefits they are seeking regardless of whether others share their passion.

Stimulation second largest attending segment

Stimulation tend to veer towards the contemporary so it may be a surprise to see them so present in the classical music market. This perhaps reflects their constant search for adventure and willingness to try the new and the unfamiliar.

Affirmation would like be involved

Eager Affirmation do attend, but not as much as they would like to. Being seen to do the 'in thing' is important to this segment too but they can be more behind the curve than others.

1.7 million in the popular music market

Popular music includes all kinds of **pop, rock, jazz, blues, hip-hop, metal** and **heavy metal**. Despite few attenders, **popular music has huge potential in Jordan**, with half of the market having never been but being interested in doing so.

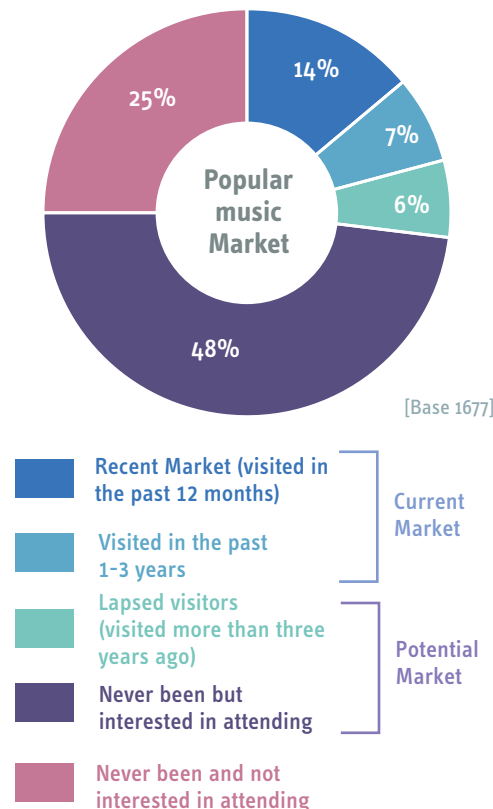
The **quarter of the market** who aren't interested still leave a large amount of audience growth potential for popular music.

Popular music shows a slightly unusual audience profile, with **Release** featuring as a segment to target.

Only 28% have ever been to hear popular music live

Popular music is one of the most unexplored areas for Jordanians in the culture market, with less than a third having ever been.

Penetration of popular music into the Jordan culture market



A fifth have been more recently

Around a fifth (22%) of those in the market for culture in Jordan are in the current market for popular music. This means 488k people have been in the last three years.

A large potential market of 1.2 million

The potential market accounts for 53% of the overall culture market. With a relatively small lapsed market of 6%, this is mainly comprised of those who have never been before but who are interested in attending.

Relatively high number of people not in the market for popular music

A quarter of people have ruled out ever attending a popular music concert, against an average of 17% for other artforms.

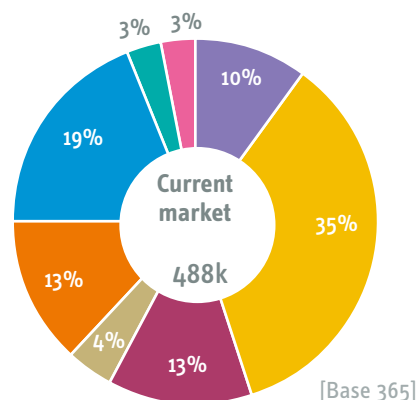
Potential across all ages

While those in the 18-24 age group are significantly more likely to have recently attended, younger people do not make up any larger proportion of the potential than other ages. The potential market for this artform therefore should not be considered as a demographically defined one.

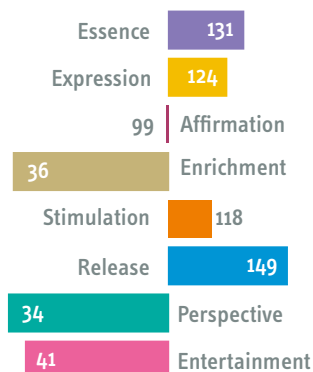
Please see page 23 for information on how to read this index.

Current Market by Culture Segment

People who have attended popular music in the past three years

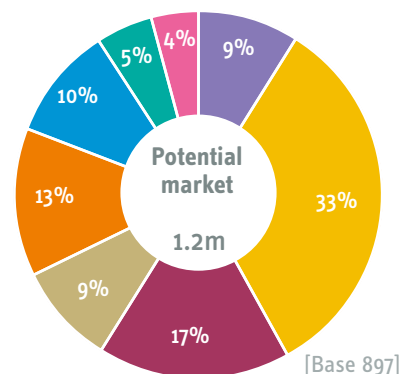


Indexed against the Jordan culture market

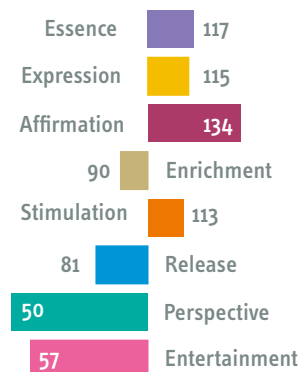


Potential Market by Culture Segment

People who attended popular music more than three years ago, or who have never attended but are interested in doing so



Indexed against the Jordan culture market



Unusual segment profile for popular music

While Expression continue to dominate, and Essence show a strong interest, there is a slightly different segment profile compared to other artforms, with Release showing far more potential here than in other artforms.

Release show an unexpected interest in popular music

While Release show relative reluctance in most artforms, they are over represented in the current popular music market. This segment would prefer to relax with others rather than see leisure time as for self improvement, find it easier to recognise benefits they would enjoy in concerts and gigs than many more formal types of culture.

The popular music scene piques the interest of Stimulation

Stimulation will seek out the interesting and unusual and it is likely there is plenty to retain their interest in popular music. They will look out for emerging artists and enjoy being the first to discover new names.

Affirmation would like to be seen at popular music concerts

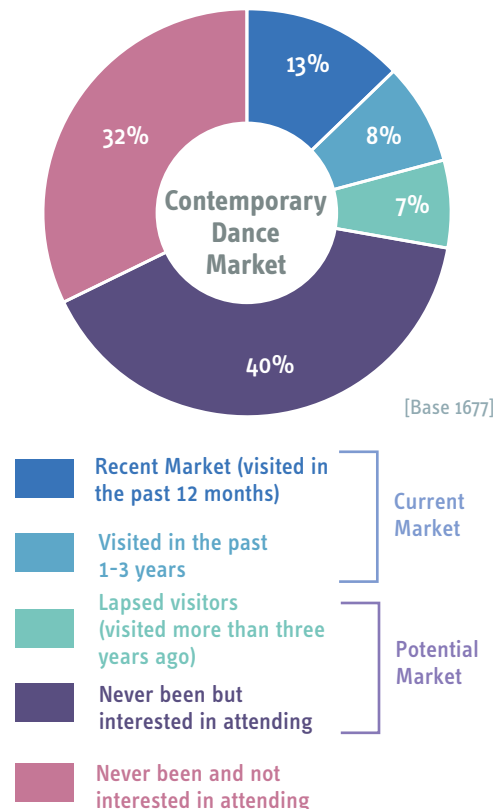
Affirmation feature regularly in potential markets feeling that they ought to show an interest. Here they express that they are open but this does not regularly translate to attendance.

1.5 million in contemporary dance market

Contemporary dance is relatively **uncharted territory** for most audiences in Jordan, with the majority never having been to a performance. While many also don't intend to, the **potential market** is **over double the size** of the **current market**. Like other performance artforms, there is therefore huge **latent potential** for contemporary dance.

Contemporary dance enjoys a similar segment profile to classical music, with **Essence** showing **potential for growth**. **Stimulation** are a **good fit** for contemporary dance and make an excellent additional segment to target.

Penetration of contemporary dance into the Jordan culture market



Less than three in ten of those in the culture market have attended

Contemporary dance shares third place with modern music for most unexplored artform in Jordan, with only 28% of the culture market having ever attended a performance. One fifth of those in the market for culture in Jordan (21%) have attended contemporary dance in the last three years. However, this still equates to 472k people.

A potential market over double that of the current market

The relatively small number who have been to see contemporary dance in the last three years leaves room for growth into potential audiences, with a market of 1.1 million people, or 47% who could be persuaded into returning, or going for the first time.

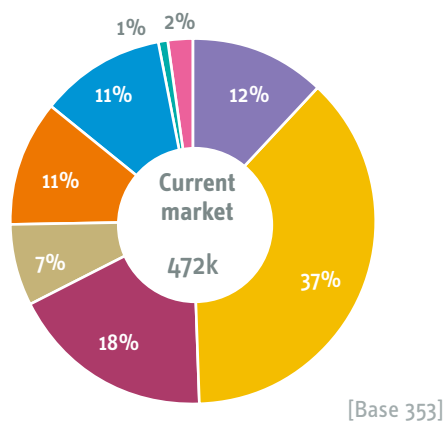
Contemporary dance polarises opinion

Despite this level of potential, one third of those in the culture market in general (32%) have never been to, and wouldn't be interested in contemporary dance. This is one of the highest levels of rejectors across all the artforms.

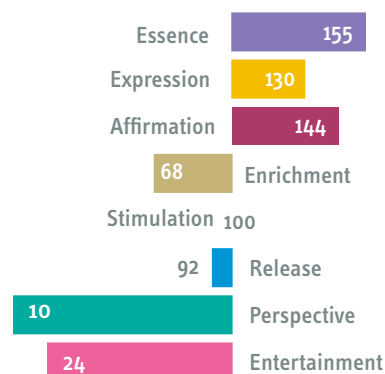
Please see page 23 for information on how to read this index.

Current Market by Culture Segment

People who have attended contemporary dance in the past three years

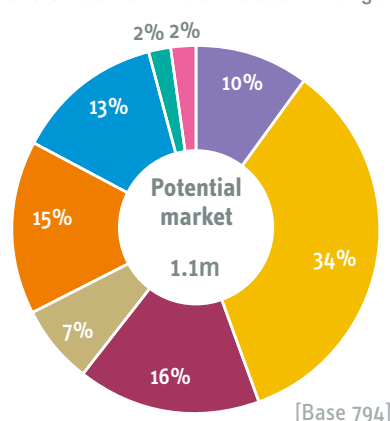


Indexed against the Jordan culture market

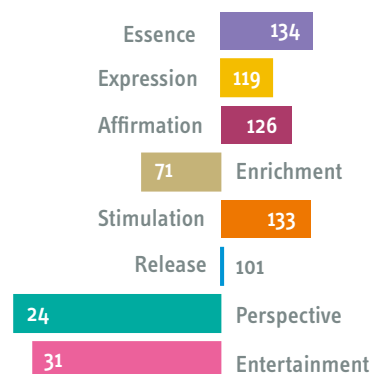


Potential Market by Culture Segment

People who attended contemporary dance more than three years ago, or who have never attended but are interested in doing so



Indexed against the Jordan culture market



An edgy segment profile

The division that contemporary dance inspires can also be seen reflected in its segment profile. With high levels of rejection from the less engaged segments Perspective and Entertainment, and from more traditional Enrichment.

Cultural connoisseurs Essence show up

Essence are the natural choice for contemporary dance and are already going. They over index on attendance more than other artforms apart from ballet.

Affirmation may have found their artform

Affirmation may have found where they fit in with contemporary dance, they over index for attendance more than they do for anything else and still show potential. With the right marketing this segment could fuel the growth of this artform.

Stimulation are interested but cautious

Stimulation account for 15% of a large potential market and while they show signs of being keen, they may still need to be fully convinced that it will meet their needs. Stimulation enjoy the unusual and contemporary but they also enjoy spectacle and need to be assured it will offer enough variety to retain their interest.

1.5 million in the opera market

Opera is the most unknown artform in Jordan, with only **16%** having ever been and one third not interested at all. Despite **large amount of caution towards** opera, there does remain **potential for growth**.

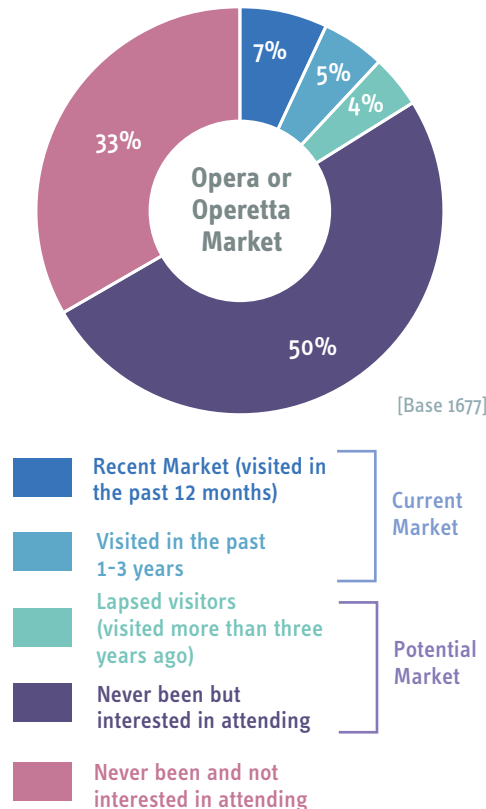
As is often the case for an artform that may **represent a big risk or commitment**, there is little dipping in and out of attendance, demonstrated by a **small number of lapsed attenders**.

Essence and Expression are the two segments to target for opera.

Only 12% currently attend opera

Opera has the smallest proportion of people who have ever attended, at 16%. Only 12% of those in the market for culture in Jordan, or 268k people, are in the current opera market

Penetration of opera into the Jordan culture market



1.2 million in the potential market

This leaves great potential, with 55% of the market not currently attending opera but who could be persuaded into doing so.

A third in the market reject opera - the highest of all the artforms

Similarly to contemporary dance and ballet, there is a high level of rejection of opera among the Jordanian culture market. While this is the highest of all artforms, with an overall market of 1.5 million there is a still plenty of space to grow into.

The smallest lapsed market of all artforms

Only 4% have ever been and not returned in the last three years: the perceived exclusivity of opera may mean that this is an artform that people don't dip in and out of, rather that those who go are regular attenders.

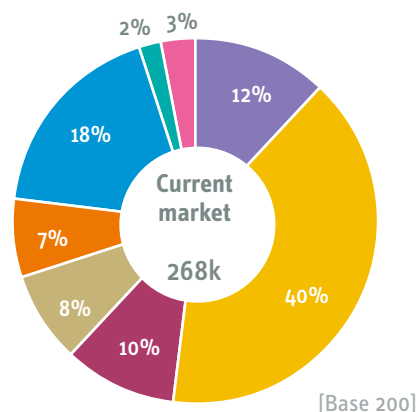
A two segment strategy for opera

Essence and Expression make up the two segments worth pursuing for this particular artform.

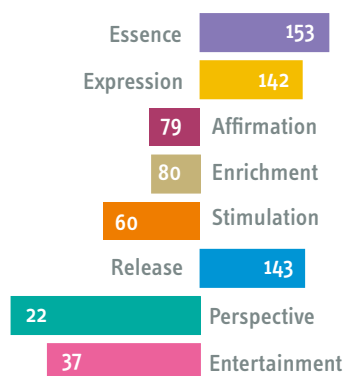
Please see page 23 for information on how to read this index.

Current Market by Culture Segment

People who have attended opera in the past three years

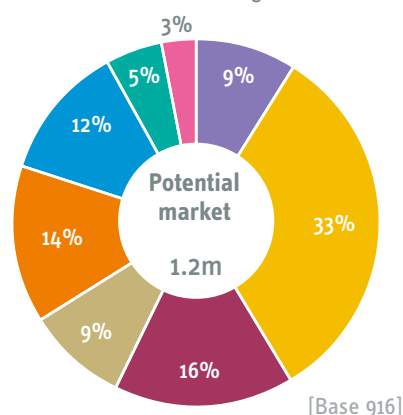


Indexed against the Jordan culture market

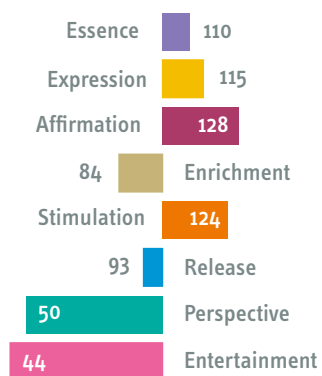


Potential Market by Culture Segment

People who attended opera more than three years ago, or who have never attended but are interested in doing so



Indexed against the Jordan culture market



Essence and Expression are key current and potential attenders

Both segments over index in markets for opera, and in the current markets this can partly be attributed to other segments' disinterest.

Affirmation and Stimulation could be picked up along the way

Both of these segments aren't currently going but haven't ruled it out and make up a significant proportion of the potential market. Through making opera seem both accessible and exciting, but not too mainstream for Essence, Affirmation and Stimulation might be encouraged to go. However, in the short term, far more immediate gains would be enjoyed by targeting Essence and Expression.

1.5 million in the ballet market

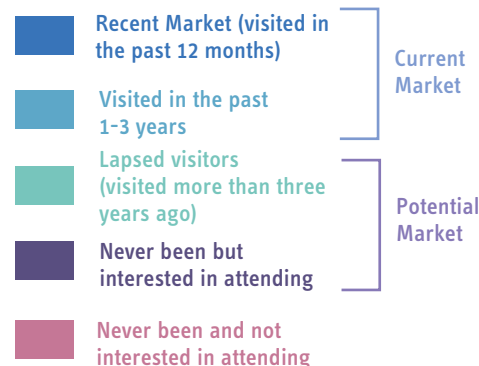
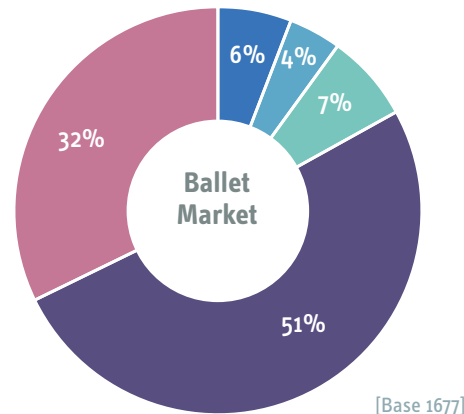
Ballet has a similar profile to contemporary dance but with smaller current market penetration and **greater potential for expanding into the market**. Only one in every ten people in the market currently attends ballet and **a third aren't interested**. These two figures don't make too much of a dent into the potential market which stands at **1.3 million people**.

Essence have the **biggest propensity to attend ballet** and should be the main focus for market growth.

Biggest potential market of all artforms

With a potential market of 58%, ballet has the most potential for growth of all artforms within Jordan. There are 1.3 million people who could be persuaded to go.

Penetration of ballet into the Jordan culture market



Only one in ten currently attends ballet

The smallest of all current markets, ballet only has 229k current attenders, 10% of the overall Jordan culture market.

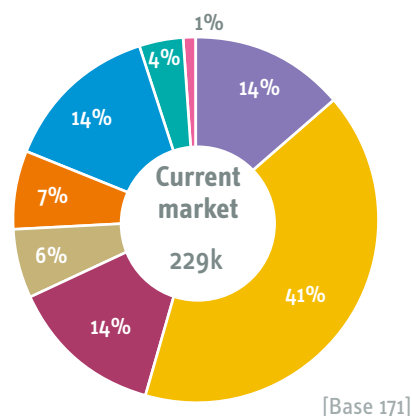
One third not interested

32% of those in the culture market have never been to and are not interested in ballet (717k). This is the second highest of all artforms.

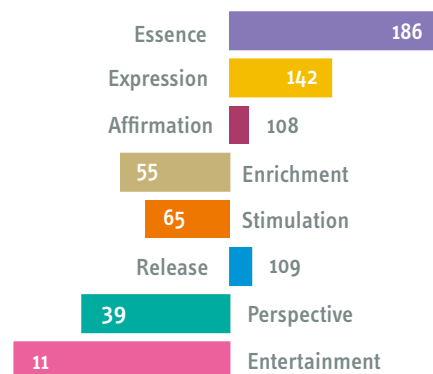
Please see page 23 for information on how to read this index.

Current Market by Culture Segment

People who have attended ballet in the past three years

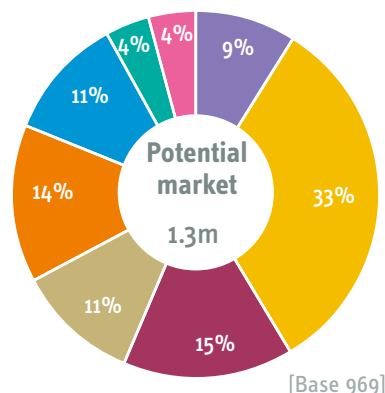


Indexed against the Jordan culture market

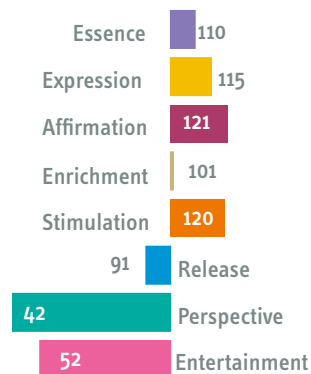


Potential Market by Culture Segment

People who attended ballet more than three years ago, or who have never attended but are interested in doing so



Indexed against the Jordan culture market



Essence and Expression dominate

Essence and Expression dominate here, probably because few from other segments have ventured into the world of ballet. Affirmation, however, both attend and show potential.

Expression make up largest proportion compared to all artforms

Expression dominate the current market for ballet at 41% and over index by a significant proportion. In fact, ballet is the artform in which Expression dominate most.

Essence have a huge propensity to attend

Essence feature most prominently in the current market and are the segment most likely to attend, making them a natural target for ballet.

Seeking affirmation from ballet

Ballet is an artform in which Affirmation may seek assurance about their own cultural tastes, and they account for 15% of a sizeable potential market. This makes them a segment not to be ignored.

Essence



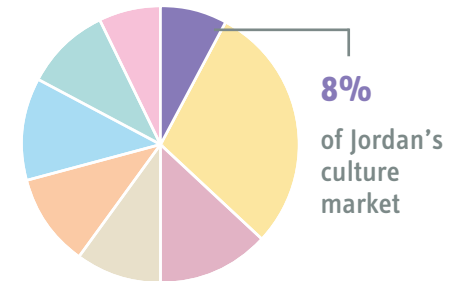
DISCERNING
INDEPENDENT
SOPHISTICATED

Essence consider the arts and culture **essential to their lives** and recognise its broad **benefits** both personal and societal. Culture is something they experience with or without others.

Quality of art is of great importance to them and they may be dismissive of arts experiences they believe to be too **populist or unsophisticated**. **Confident** in their own tastes they will act according to their mood, paying little attention to what others think.

Highly discerning, well-informed and **independent-minded**, they do not perceive popularity as a signifier of quality. They are not driven by innovation but are not afraid of trying new things. If something is worth the effort they will travel to experience it for themselves.

Essence represents...



**More
interested
in...**
Quality,
artistic
integrity.
Opera, ballet
and dance

Popularity and 'must see' events. Entertainment and spectacle over substance

Less interested in...

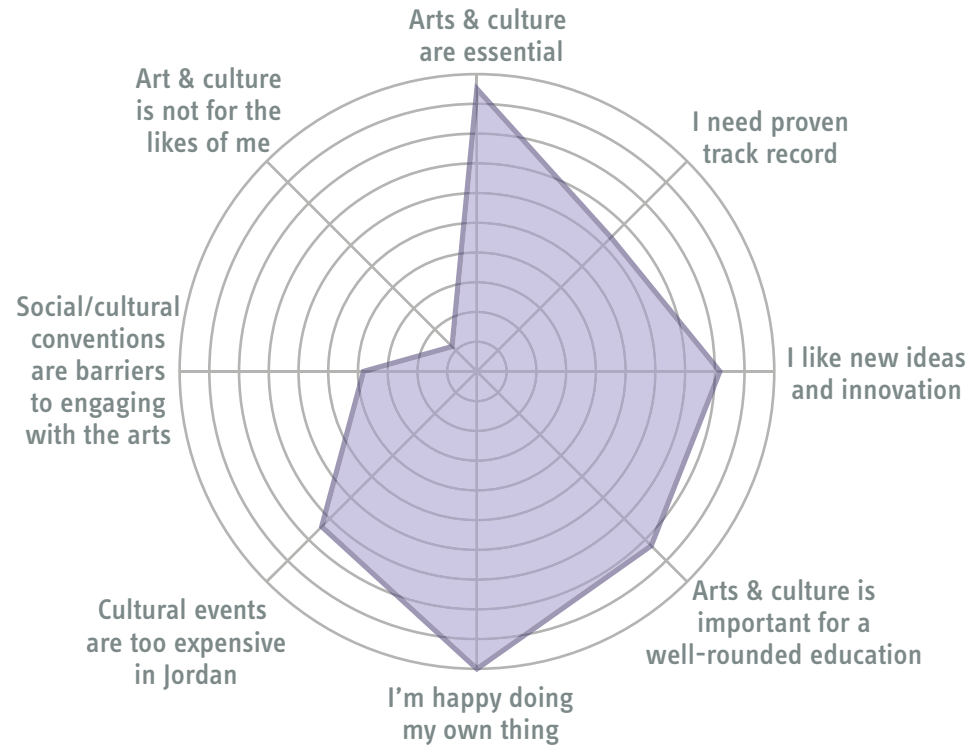
Cultural activities are an essential part of their lives

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

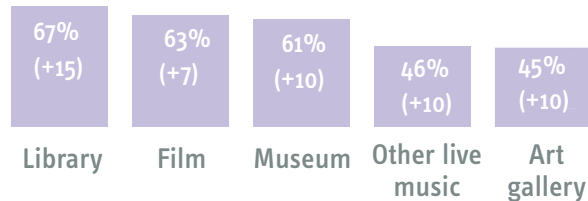
Arts engagement

Those in the Essence segment are most likely to regularly go to arts and cultural events and entities, over represented in current markets for all artforms. This is not surprising considering that Essence don't just attend arts, they live and breathe it. Despite their current attendance, there also remains further numbers in potential markets, meaning that Essence are a mainstay of the Jordanian culture market.

Targeting this segment effectively will be very rewarding - especially for more serious performing arts such as opera, contemporary dance and ballet which will deliver the benefits they seek and hold less appeal to less confident segments.



Top five artform engagement in past 3 years



How to reach this segment

High quality art is of great interest to Essence so they will always be keen to hear about what's on. However they consider themselves discerning and dislike feeling they have been 'sold' to. So avoid 'marketing speak' that they will find patronising, in favour of giving them the full details so they can decide for themselves if it is for them.

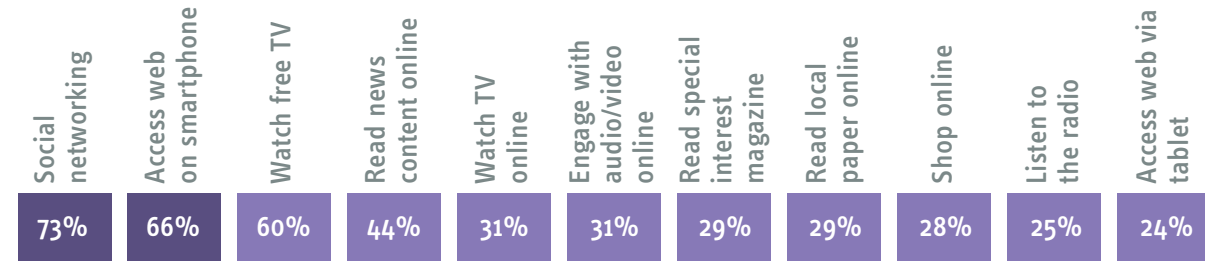
Essence are highly active online, and in wanting to hear as directly from the artists as possible, Essence are the segment most likely to find information about what's on directly from artists' websites, blogs or social media. Like much of the Jordanian population, Facebook is a major source of information.

Essence are more likely than the average to use posters outside of venues, perhaps because they are already so regularly in attendance. Use this to your advantage by emphasising quality and sophistication through these marketing channels.

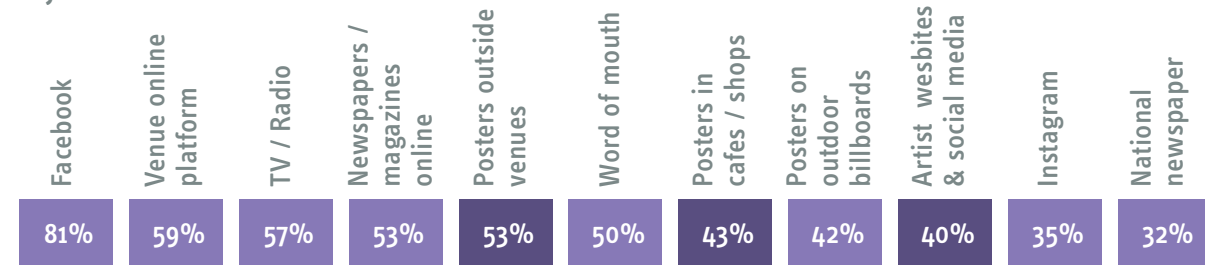
However there also remains further potential by reaching out into the wider Essence market, so don't restrict yourselves to those you already know and use social media and other online channels to reach more of these keen attenders.

How do they consume media?

Media consumption and digital behaviour in a typical week



Key 'what's on' information sources



*Dark shading represents results significantly above average, light shading results significantly below average

Key marketing proposition

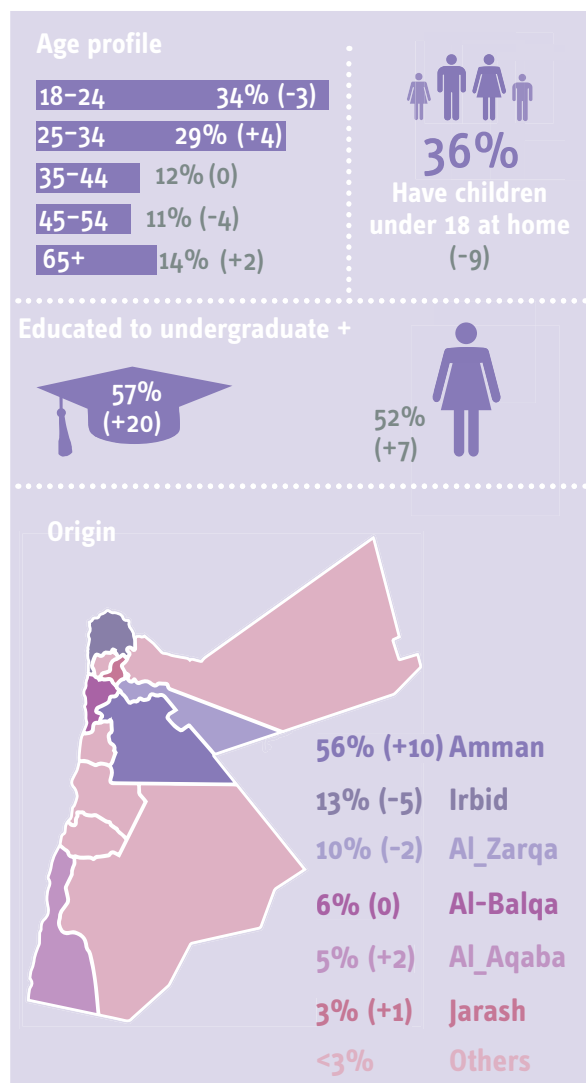
Flatter their independence and sophisticated tastes, providing evidence of quality

Highlight serious quality and sophistication

Acknowledge their discerning knowledge and tastes

Present opportunities for them to make choices, rather than 'selling' to them

Key demographics



Expression

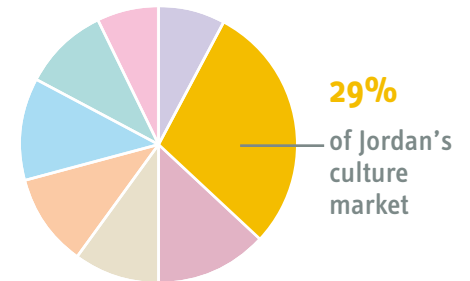


RECEPTIVE
COMMUNITY
EXPRESSIVE

Those in the Expression segment are very in-tune with their **creative** side. They are confident, fun loving, self-aware people with a **wide range of interests** and hobbies, often including food, travel, hiking, wildlife and photography. They have equally **eclectic** and varied tastes when it comes to art and culture and are interested in **exploring new ideas** through art as they see culture as a way of **broadening horizons**.

They enjoy activities that help them connect with and **share experiences** with others and they highly value **inclusion**. They may be concerned that a sense of exclusivity is keeping others at bay with barriers such as **price** and **social convention** preventing more people from enjoying the benefits of art.

Expression represents...



More
interested
in...

Community,
having a go,
most artforms,
wildlife

Individual
pursuits.
Exclusive
events where
they think
others won't
feel included

Less
interested
in...

Arts and culture are a key element of their lifestyle

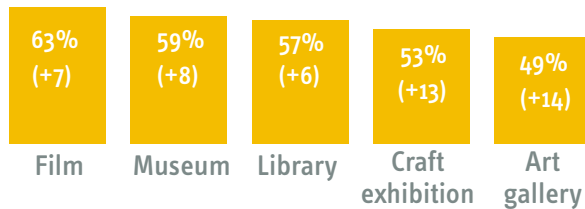
I like being affected by what I see – whether emotionally, humorously, by a spectacle, because it makes me think...

Arts engagement

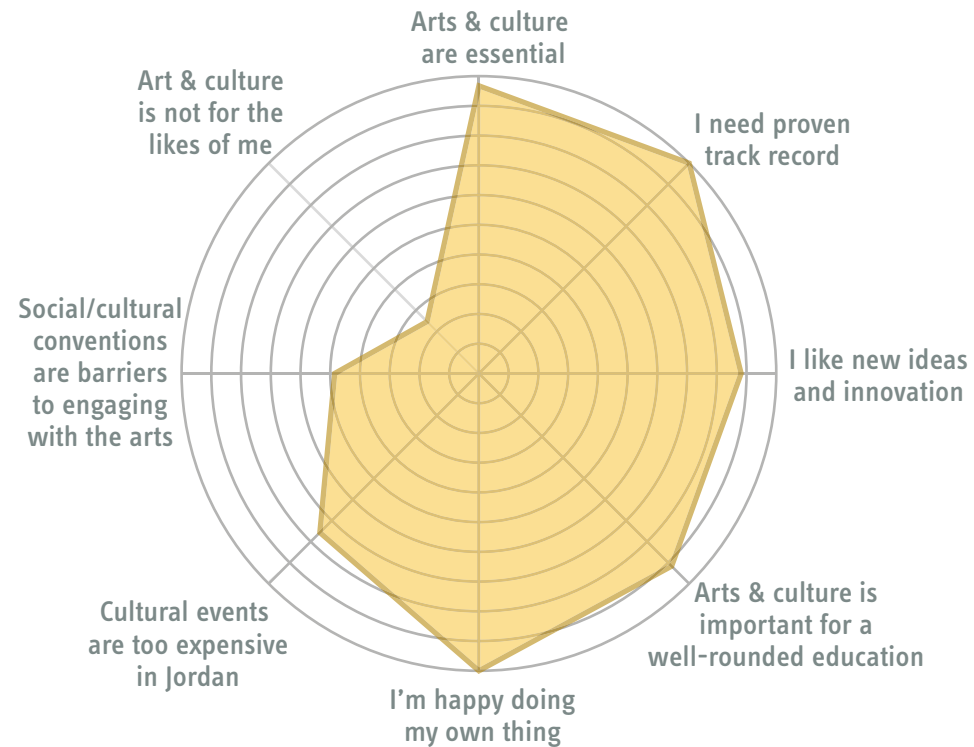
As is often seen in countries with lots of potential for audience growth within arts and culture, Expression dominate the culture market in Jordan. In addition to making up the largest segment in Jordan at 29%, they over index on current markets for every overall artform, accounting for between 31% and 41% of all current attenders.

Prizing inclusivity and shared experience, they are present in the audience for the more popular entertainment, however they are also open to more challenging artforms, where other segments may decrease in numbers, over indexing proportionally for contemporary dance, opera and ballet. Expression should constitute a core part of any artform marketing strategy and will reward artforms with their enthusiasm and loyalty.

Top five artform engagement in past 3 years



[Base 479]



How to reach this segment

Expression use a wide range of different sources – on and offline – to find out what’s on. As the most active (and the most likely segment to volunteer) they like to feel close to arts entities and will also engage with them through social media.

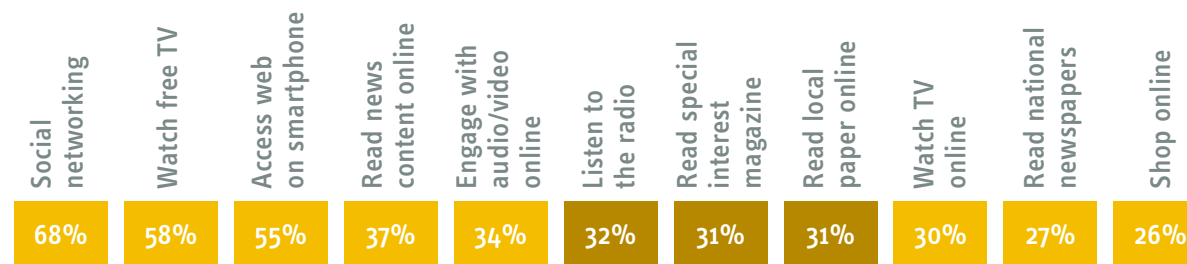
As part of a community, they also like to keep up with what’s going on, so read local print media (often online) and listen to the radio, as well as indulging their interests through magazines.

Expression like to feel that everyone is welcome and included and so look to marketing that makes an effort to be as accessible as possible to those without specialist knowledge or who are not regular attendees. This segment could be a strong contender for ambassador schemes. They enjoy sharing their passion and are typically well networked so consider developing them as ambassadors and bringing them and their networks together.

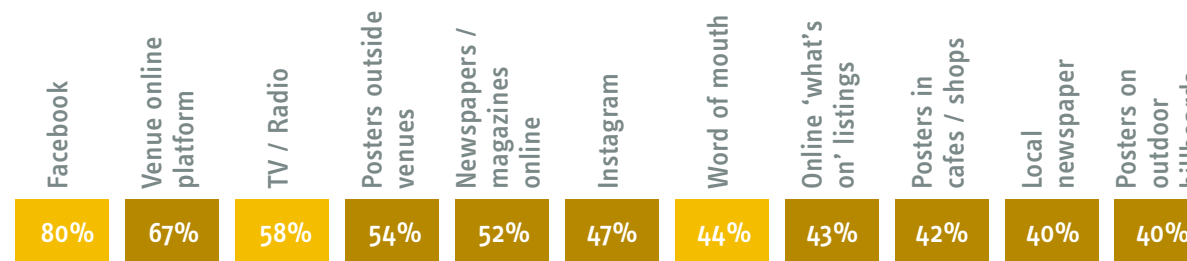
They are often very visually driven and drawn to beautiful, colourful images. Notably they are the segment most likely to engage with arts entities through Instagram.

How do they consume media?

Media consumption and digital behaviour in a typical week



Key ‘what’s on’ information sources



*Dark shading represents results significantly above average, light shading results significantly below average

Key marketing proposition

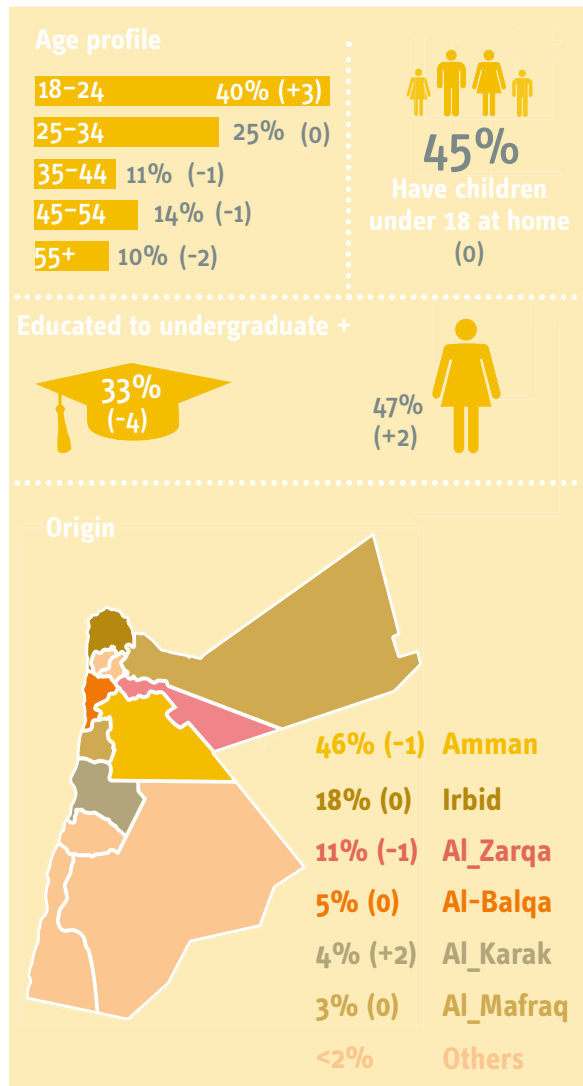
Tap into their desire to be part of something bigger

Everyone is welcome - this will be an inclusive shared experience

Highlight opportunities for creativity and participation

Culture as a way of engaging with community

Key demographics



Affirmation

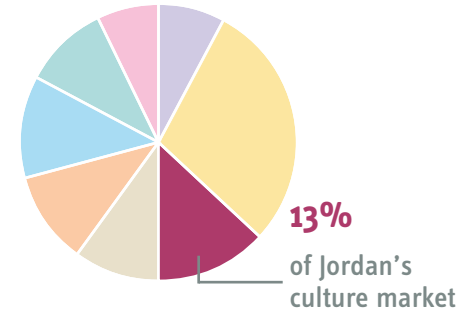


ASPIRATIONAL
QUALITY TIME
IMPROVEMENT

Affirmation tend to see arts and culture as dual purpose – for **enjoyment** and **self-development**. They welcome cultural activity as a worthwhile way to enjoy **quality time** with those close to them.

They are outer-referenced, caring what other people think of them. They feel that culture is a **commendable pastime** and are keen that they do, and are seen to do, the right thing. They will however be aware of **other commitments** that may also demand time, so **don't exclusively spend** their leisure time in arts and cultural activities.

Affirmation represents...



More
interested
in...

Being where they think they should be. They are particularly interested in dance and visual art

Affirmation are renowned for their enthusiasm and claim an interest in every art form

Less
interested
in...

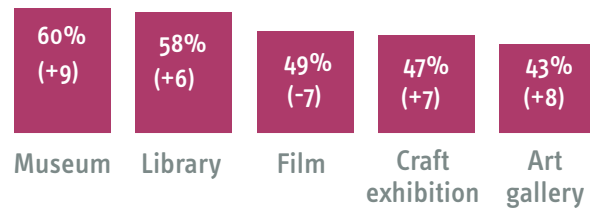
Culture provides opportunities for quality time

Seeing something exciting and thought-provoking with loved ones

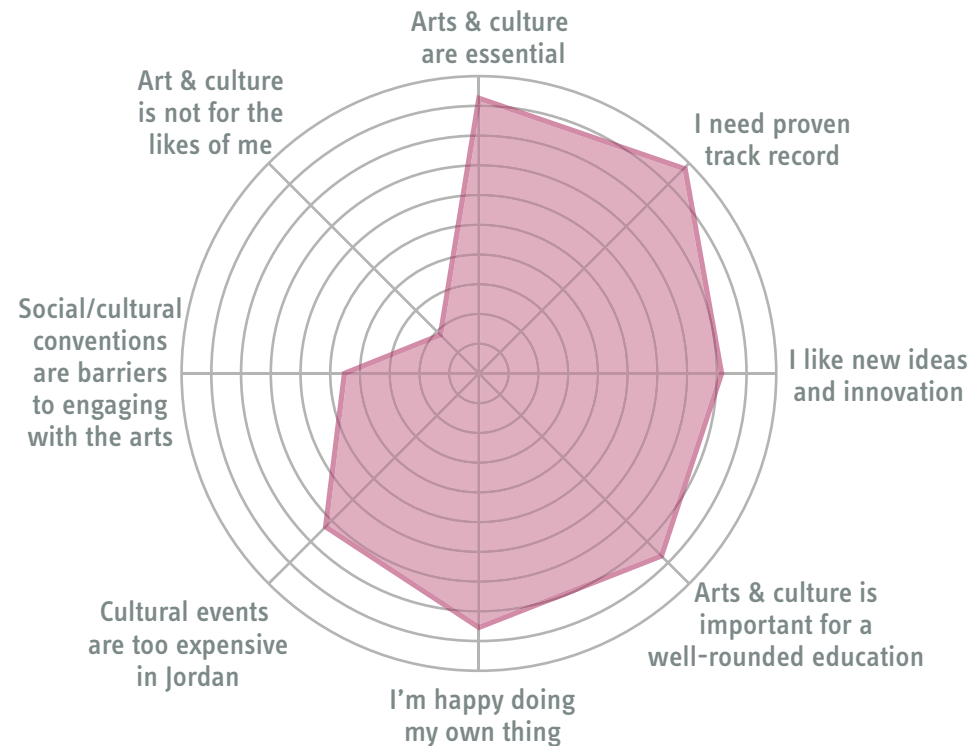
Arts engagement

Affirmation are the second largest segment in the culture market in Jordan and show huge promise for many artforms in Jordan. They are a segment that like to be seen to be interested in 'the right things'. Unlike other segments, grasping Affirmation's real interests can often be best understood through what they already attend, rather than what they say they would like to go to, as there's little they say they're not interested in. Affirmation proportionally show up most in current markets for contemporary dance and visual art and show great potential for popular music, but are a steady choice segment for many artforms across genres and could make reliable and numerous attendees if targeted with the right messages.

Top five artform engagement in past 3 years



[Base 214]



How to reach this segment

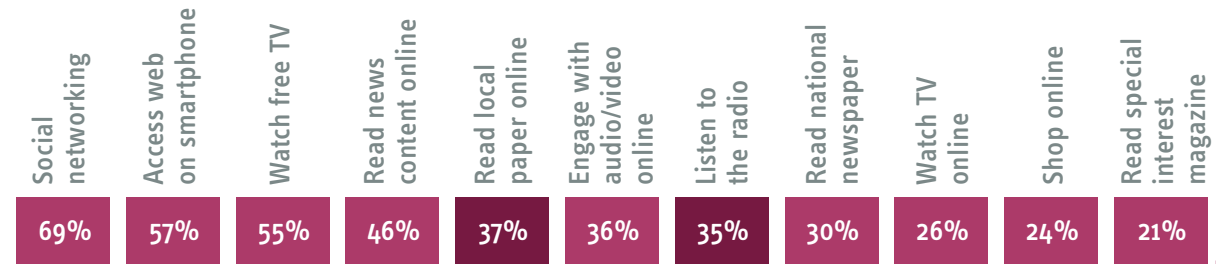
Keen to ensure they make the right choices and see the best things on offer, Affirmation will refer to billboard posters that indicate the events that are most worthwhile going to. Looking for important or prominent events, they are also the segment most likely to refer to national newspapers to find out what's on.

Affirmation don't lack confidence but to aid those careful decisions, Affirmation will also look for endorsement. They may find these on Facebook or respond to other forms of word of mouth. Using reviews and audience responses is a good way to secure their attendance.

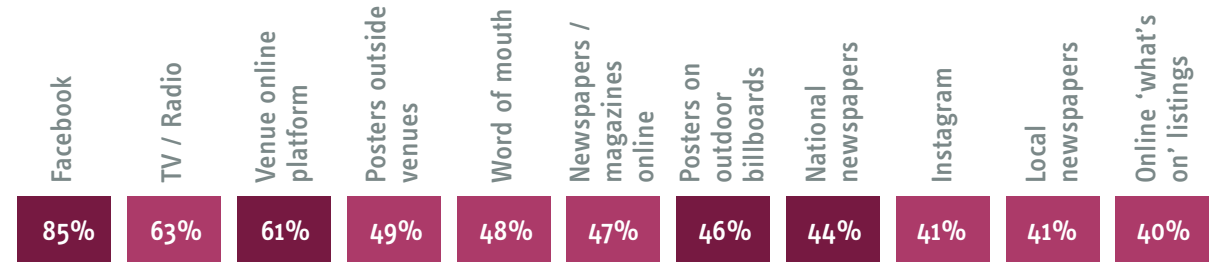
Keen to remember and evidence their arts and cultural engagement, Affirmation also like to preserve memories of their experiences, so a souvenir (such as a programme or CD) to take away will be valued by this segment.

How do they consume media?

Media consumption and digital behaviour in a typical week



Key 'what's on' information sources



*Dark shading represents results significantly above average, light shading results significantly below average

Key marketing proposition

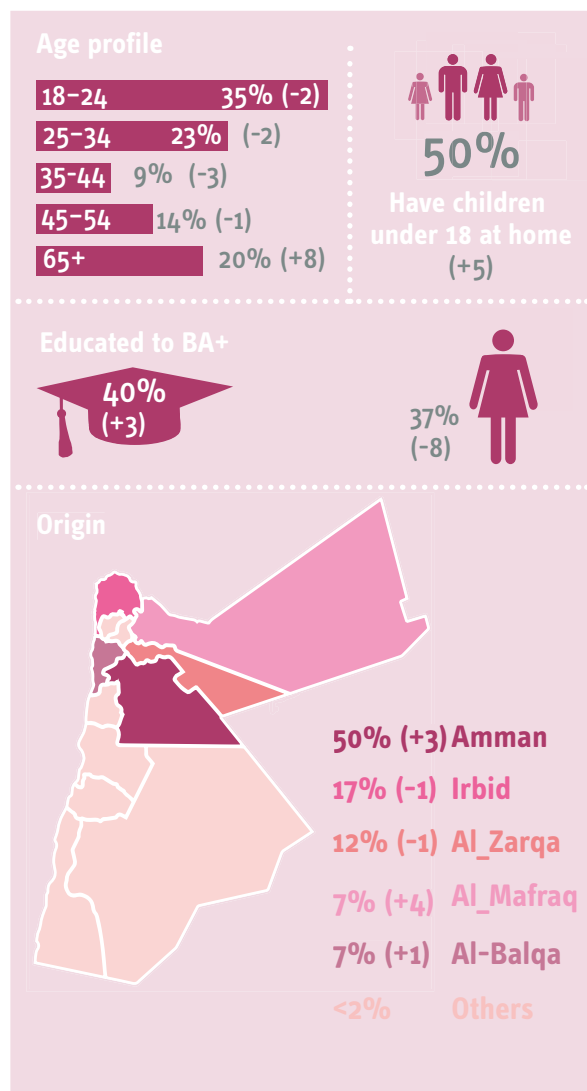
Endorse their view that culture is a more valuable way of spending time with others

Let them feel like they are in the know - inform them early about events

Promote benefits as being both entertaining and educational - and memorable

Present opportunities for them to make choices, rather than 'selling' to them

Key demographics



Enrichment

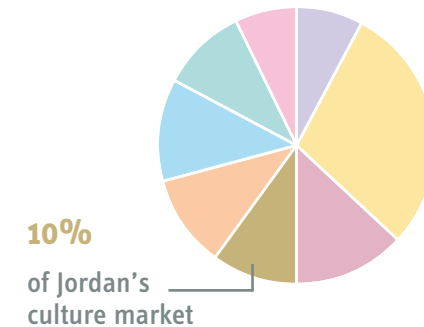


TRADITIONAL
HERITAGE
NOSTALGIA

Enrichment tend to have **established tastes** and habits, knowing what they like and are interested in and **avoiding risk** or wholly unfamiliar things. They prefer to stick to that which is familiar and things they are confident that they will enjoy. They are **conservative** with no interest in what is new or fashionable or what others are doing; instead they veer to the **most traditional and familiar** forms of culture.

Enrichment are **typically planners** and one of the main barriers to their attendance can be the feeling that they haven't the time to commit. This and their **cautious nature** and **aversion to experimenting** may contribute to their not having got round to trying some artforms.

Enrichment represents...



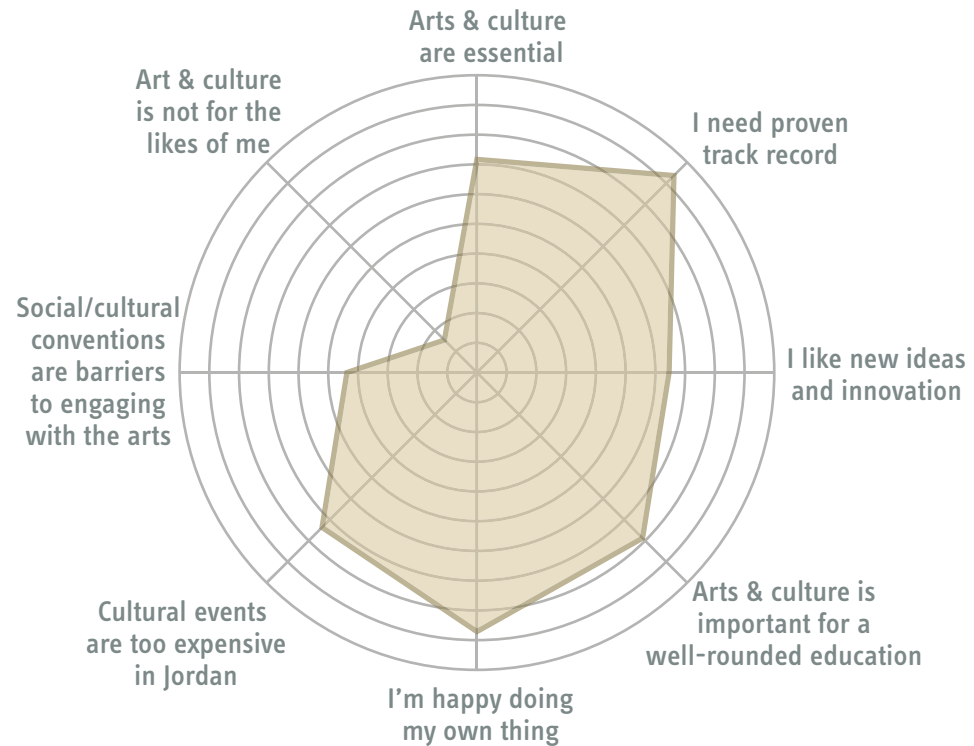
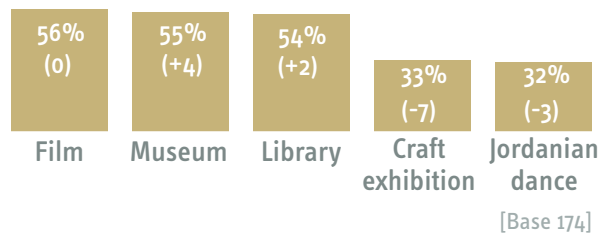
Enrichment are driven by their own interests

Relaxing, reminiscing and having an enjoyably trip out

Arts engagement

Enrichment are one of the smallest segments in the Jordanian market and are only worth focusing effort on in few specific artforms. They show a significant increase in attendance for literature, which makes a good fit for a mature-minded and traditional segment such as this. They show significant potential for visual art and would also make a solid choice for museums, if targeted with the right exhibitions and messages.

Top five artform engagement in past 3 years



How to reach this segment

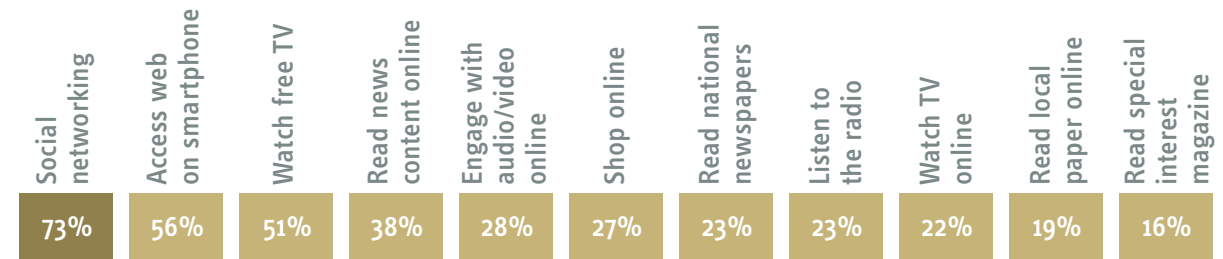
Enrichment are likely to stick within their comfort zone and had no desire to keep up with trends or go on an adventure. If they are unsure whether they are going to like something they may prefer to stay away. Offer them an opportunity to 'try before they buy' by showing them what it is going to look like or hear how it will sound, which would reassure them.

Their information channels are also quite traditional: referring to national newspapers and TV or radio for what's on information, although they do show an interest in functional uses of technology, such as email and social media.

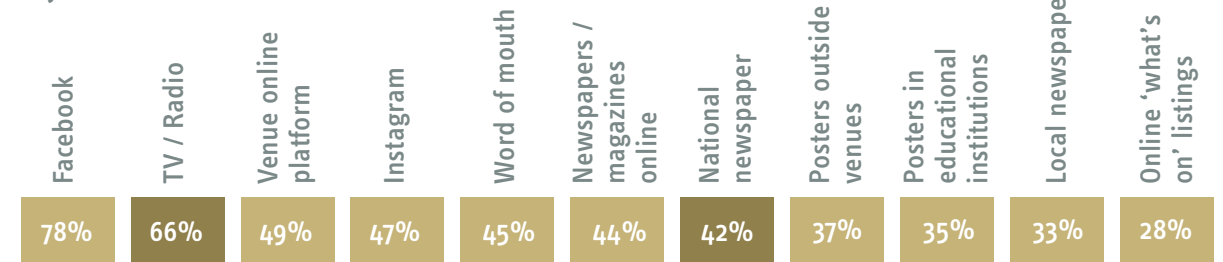
To encourage this segment it is important to highlight the traditional aspect and show credentials for being well established.

How do they consume media?

Media consumption and digital behaviour in a typical week



Key 'what's on' information sources



*Dark shading represents results significantly above average, light shading results significantly below average

Key marketing proposition

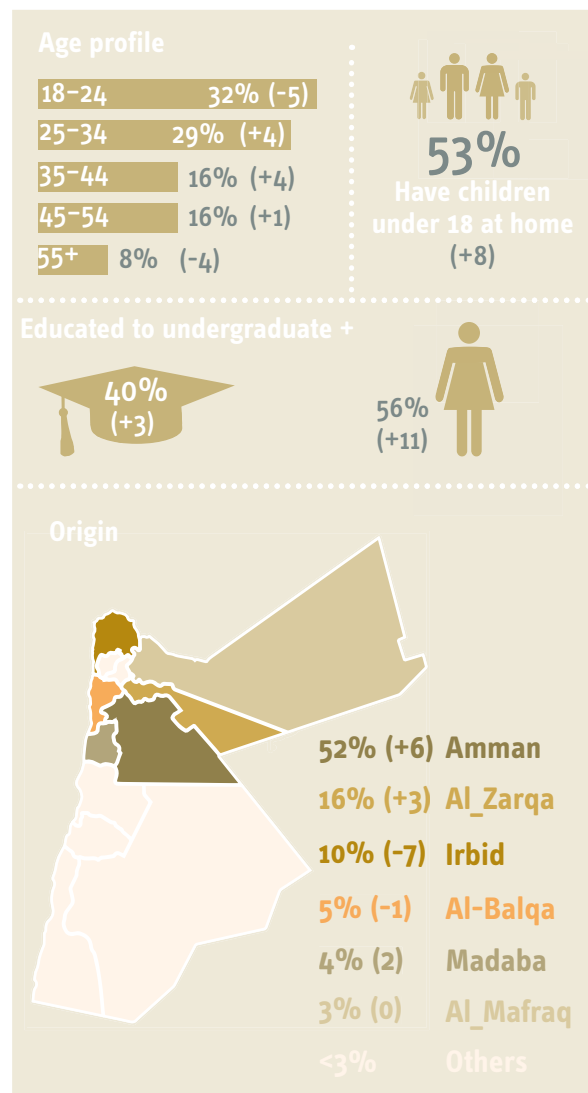
Focus on their established tastes and the warm feeling of awe and wonder

Focus on nostalgia and familiarity

Highlight the traditional and established aspects

Provide chances to 'try before you buy'

Key demographics



Stimulation

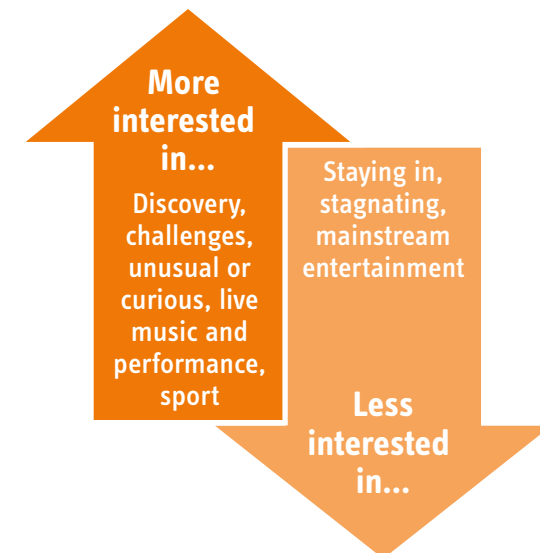
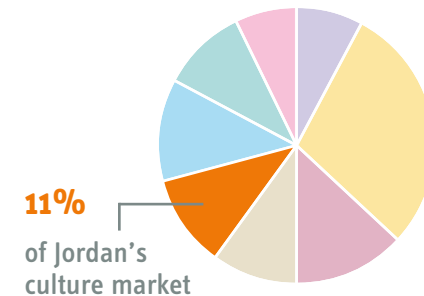


ACTIVE
DISCOVERY
VARIETY
SOCIAL

Stimulation are an **active** group who **live life to the full** and for the moment. They seek out **new experiences** to live a **varied** life, including arts and sports and socialising. Their main reasons for attending the arts tends to be for a **social experience** and to do something interesting or '**out of the ordinary**'.

Stimulation are **independent minded**, but aware of how they are perceived by others. They are excited by new discoveries, not needing things to have a proven track record before they get involved. That is not to say they dislike popular things but **aren't drawn** to the **very mainstream**. While others may cite not having enough time as a reason for not attending, Stimulation make the most of every moment so this is not a barrier.

Stimulation represents...

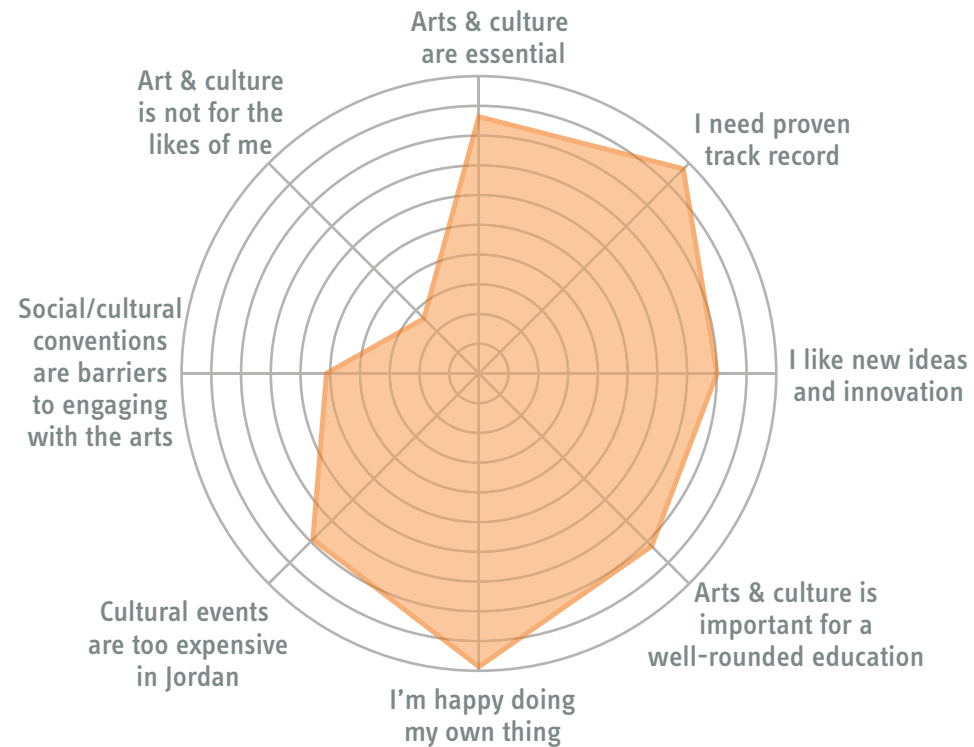


Engagement is driven by a thirst for new experiences

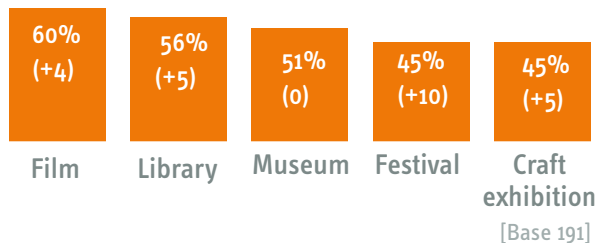
The thrill of something different ...
coming away feeling fulfilled and buzzing

Arts engagement

Thrill-seekers Stimulation show themselves in artforms that are beyond the everyday, ones that can put off more reserved segments. Classical music is the artform in which they make up the biggest current market proportion and they show the biggest potential for contemporary dance. They tend to feature prominently in lapsed markets, because there's little that they haven't been to in the past. This is particularly apparent in both music and dance.



Top five artform engagement in past 3 years



How to reach this segment

The Stimulation segment is likely to look for unusual events through usual information sources, as they like to be in the know and ahead of the curve.

Using well-trodden ground in Jordan, such as Facebook or traditional media, to highlight that an event is quirky or a new take or twist on something will appeal. An unusual setting or a curious context will also whet their appetite. They enjoy being the one who discovered something, so flatter their exploratory nature.

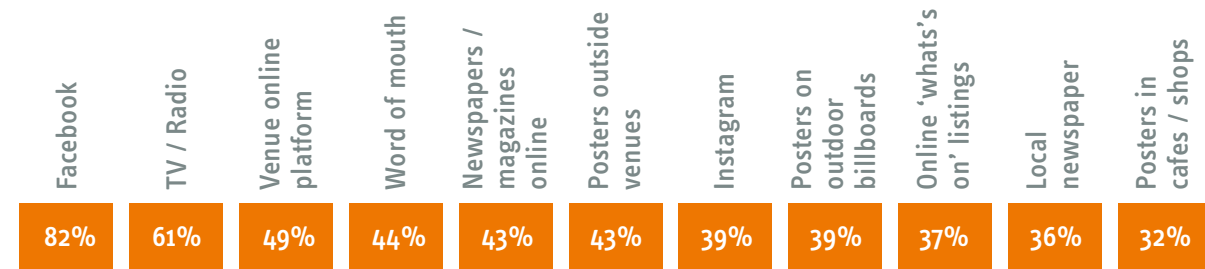
Stimulation appreciate good design and respect clever, cool marketing that catches their eye and intrigues them. They don't, however, want 'spoilers' so provide just enough to entice them and spark their curiosity but leave a certain amount unrevealed for them to discover on the day.

How do they consume media?

Media consumption and digital behaviour in a typical week



Key 'what's on' information sources



*Dark shading represents results significantly above average, light shading results significantly below average

Key marketing proposition

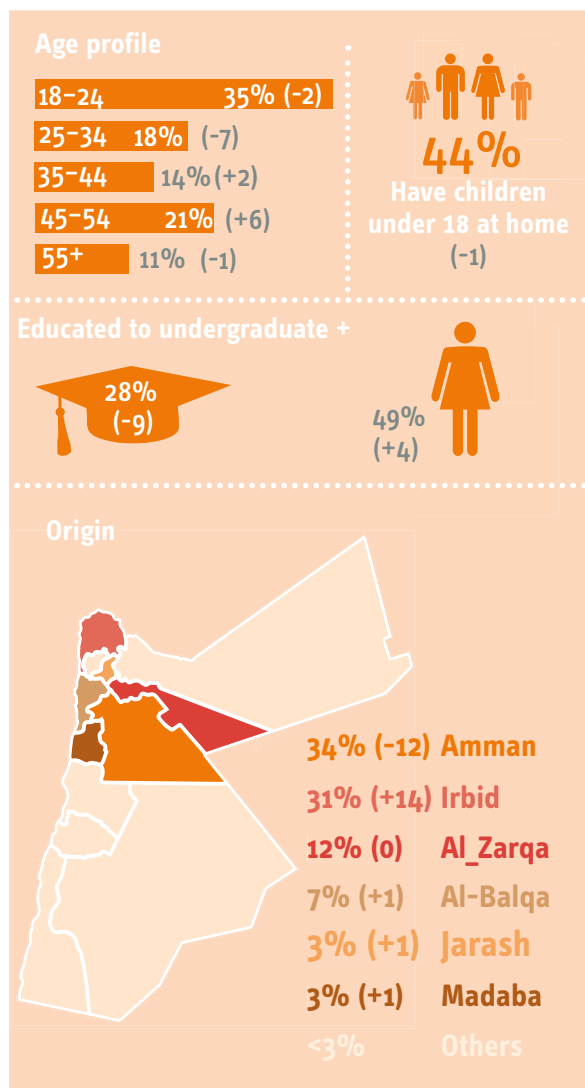
Support their desire to be the first to discover something new and exciting

Offer and promote a sociable element

Highlight the unusual factors - what makes this event stand out from the crowd?

Offer good value for money

Key demographics



Demographics

University town Irbid, with its restaurants, cafés, makes a natural home for thrill-seeking Stimulation, and hosts almost one third of the overall Stimulation population in Jordan.

Release

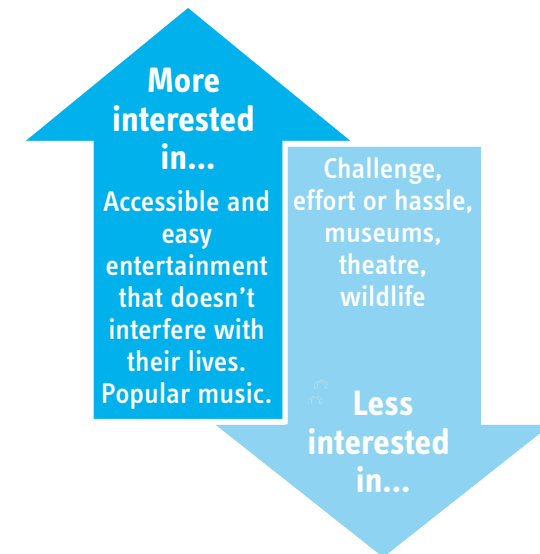
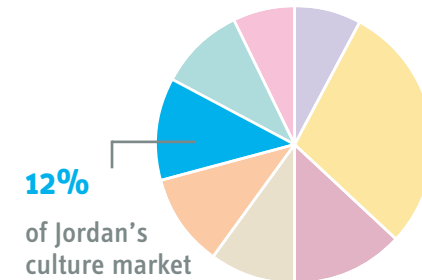


**BUSY
AMBITIOUS
PRIORITISING**

The Release segment seeks opportunities for **relaxation** and **entertainment** in their leisure time. This segment doesn't necessarily feel excluded from culture but may need some **convincing** that the arts are **relevant** or can **add value** to their lives or that people like them go. They **don't recognise personal self-development benefits** of arts and therefore would need **reassurance** that it will be worth the effort to prioritise when there are more **guaranteed routes to relaxation**.

They typically have **low engagement with media** and are **not proactive** in looking for assurances that they'd enjoy arts attendance. Consequently, they have the **lowest awareness** of specific **arts entities** in Jordan.

Release represents...



Culture provides escapism from the hectic everyday

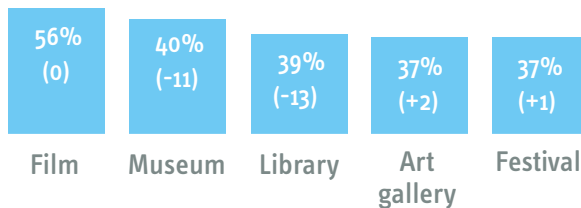
I like to escape and relax

Arts engagement

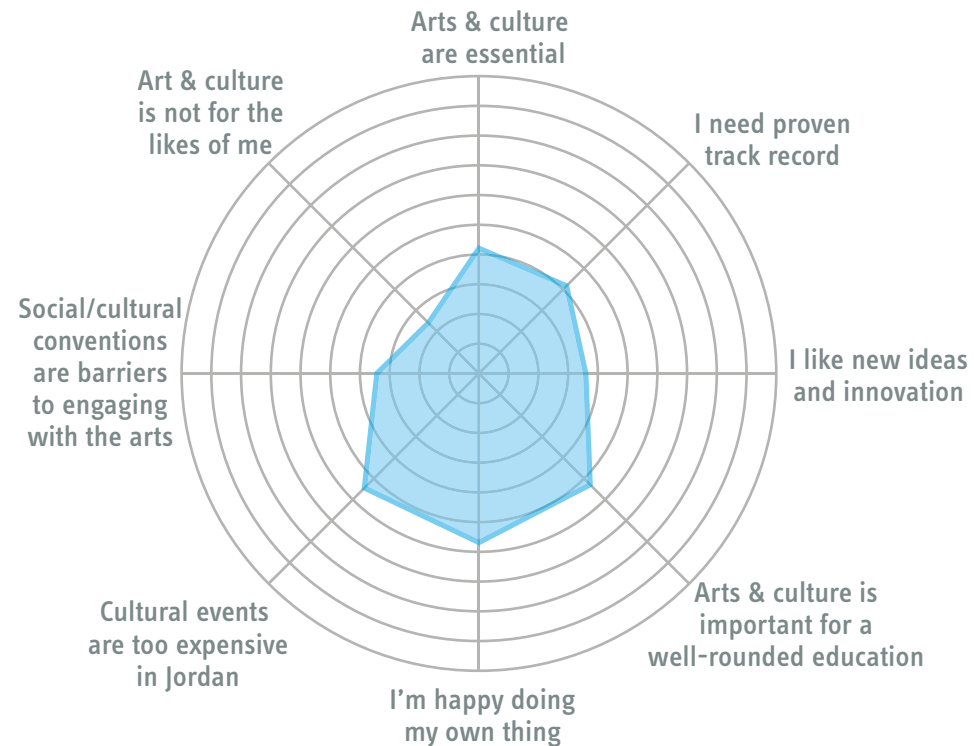
Time poor Release make up 12% of the overall market, are the most lapsed segment, and are frequently under represented in current artform attendance. They significantly diminish in numbers of the overall market for literature, comedy, theatre and museums, and won't reward the effort in targeting them for most artforms.

However they show an interest in popular music, making them an appropriate target for concerts and gigs - positioning them as entertainment and social activities rather than 'culture' and making every aspect of the visit as convenient and hassle free as possible.

Top five artform engagement in past 3 years



[Base 209]



How to reach this segment

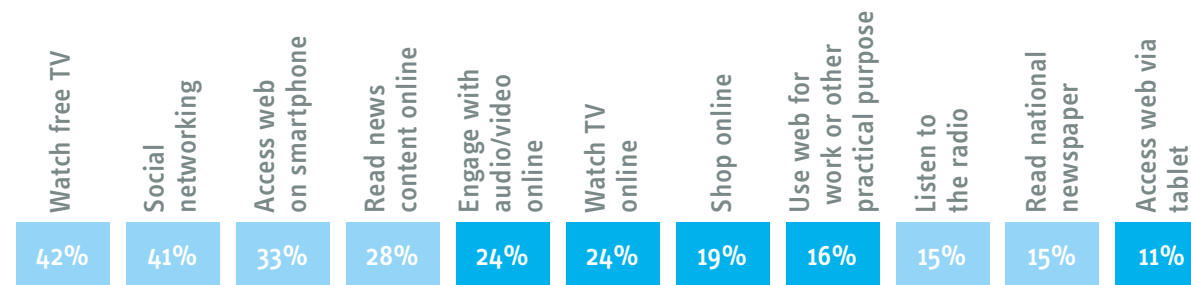
Release are hard to truly engage in arts and culture because it doesn't hold enough weight with them to compete for their available time.

This, combined with them being a less digitally active segment, makes them a challenging prospect for the arts sector in Jordan.

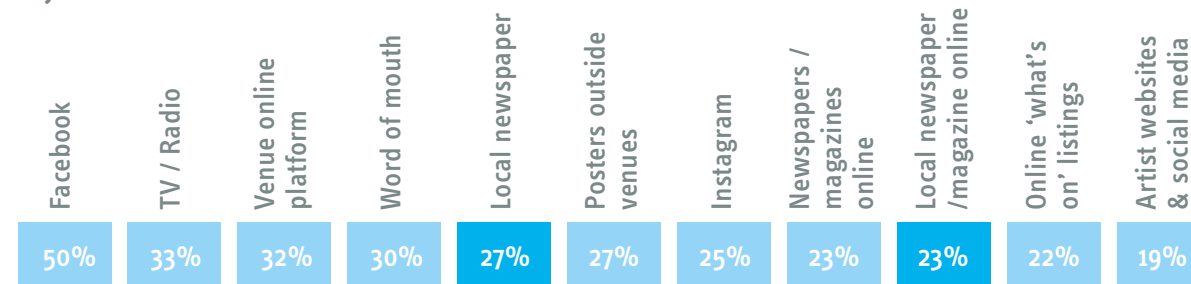
While they might attend something that is sold as local, low hassle and with free tickets, there is little point in specifically targeting this segment to increase their arts engagement and it is unlikely that any long-term relationship will be struck up.

How do they consume media?

Media consumption and digital behaviour in a typical week



Key 'what's on' information sources



*Dark shading represents results significantly above average, light shading results significantly below average

Key marketing proposition

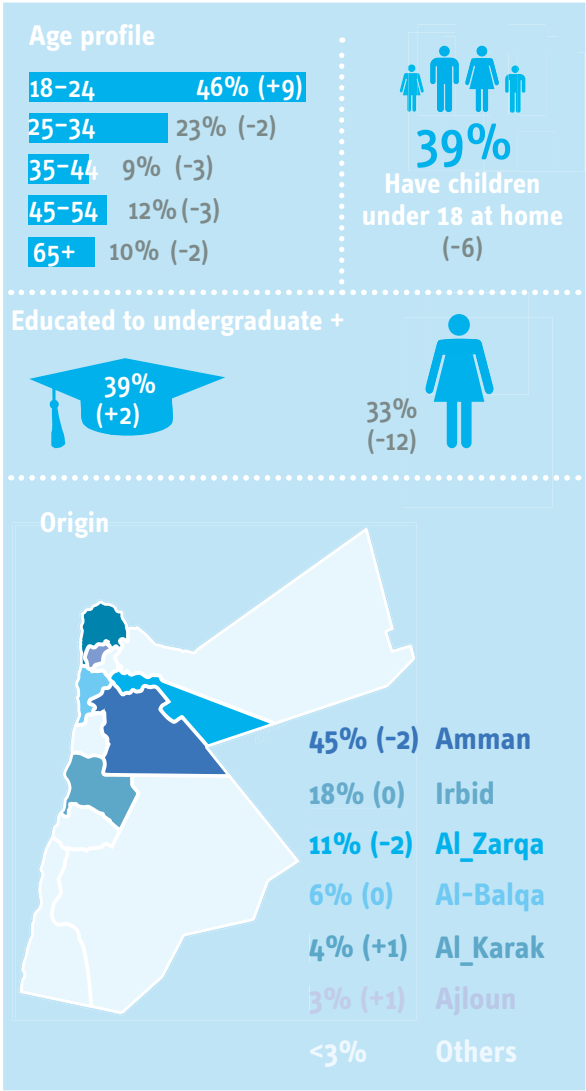
Demonstrate that it will be a relaxing and enjoyable experience

Emphasize the ease of getting there

Make events free and in their locality

Suggest that it ticks all boxes. 'If you only see one thing let it be this'

Key demographics



Perspective

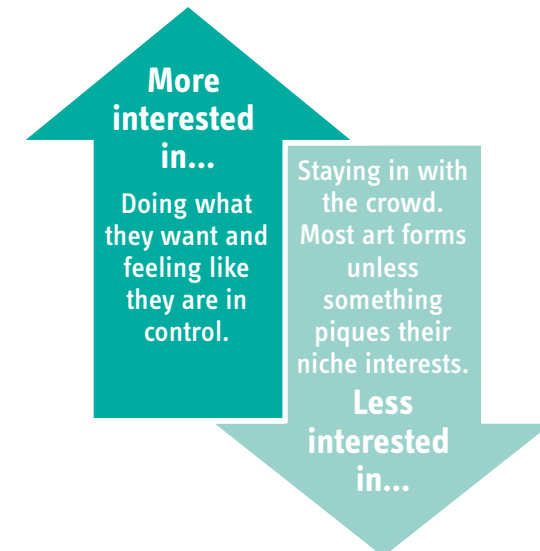
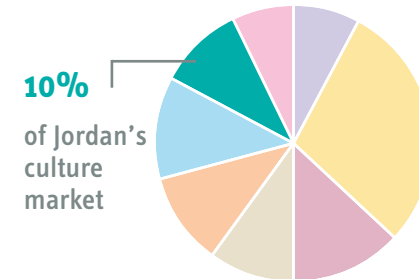


**SETTLED
SELF-SUFFICIENT
FOCUSED**

Perspective are **settled** and **fulfilled**, happy doing their own thing. Arts and culture are **lower among their priorities** and they feel **no need** to be **ahead of the curve**, try new things, or follow what is popular. They are likely to have a **limited number of interests** that they find very satisfying and rewarding and have a **low appetite for expanding** this repertoire. They do not like to rely on others for fulfilment. This segment is **unaffected** by the views of others and tend to **prioritise their own needs** above those of others.

Perspective have a need to **make their own discoveries**, so it will be their **desire to learn** that provides a focus for any cultural engagement. Therefore, they **don't consider external factors** (such as price or social convention) as reasons why they do or don't attend.

Perspective represents...



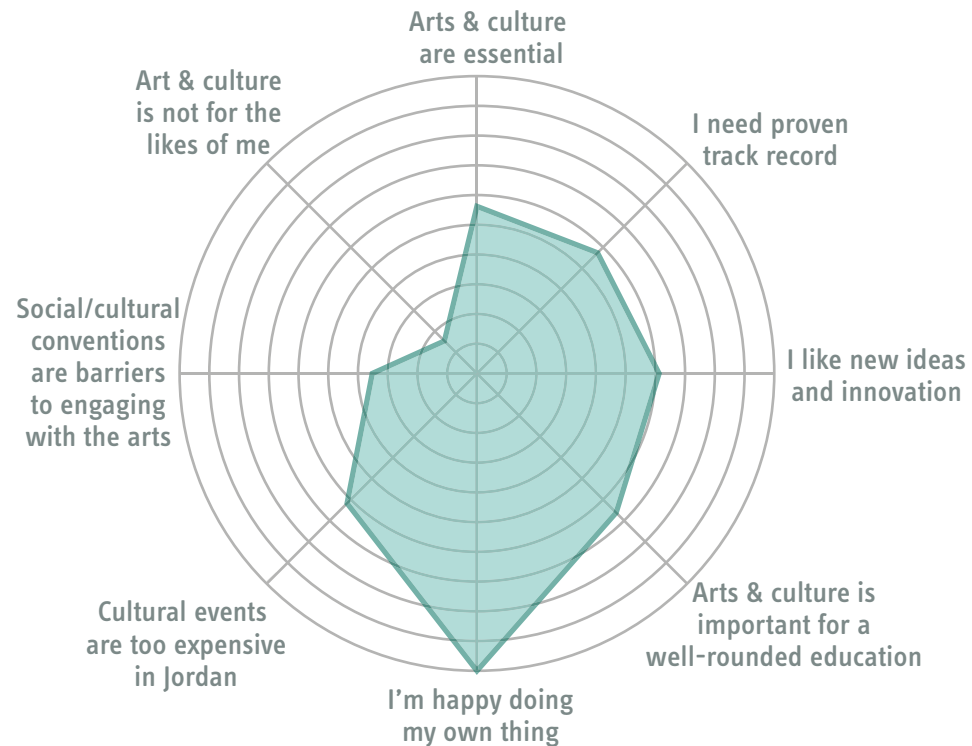
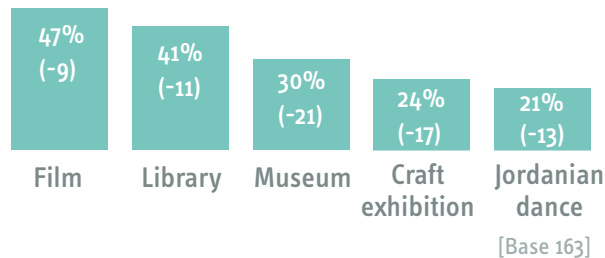
Culture can sometimes help broaden my horizons

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

Arts engagement

Perspective are noticeably absent from current markets, significantly under indexing for attendance for all artforms. This reflects a general ambivalence or lack of perceived personal relevance rather than any strong barriers to attendance. Arts are not essential to their lives, they don't feel excluded, and are simply happier getting on with their own things. Perspective are characterised by their niche interests and independent minds and are a tricky segment to cater for as a whole so are not a segment this report would recommend focusing on for any artform.

Top five artform engagement in past 3 years



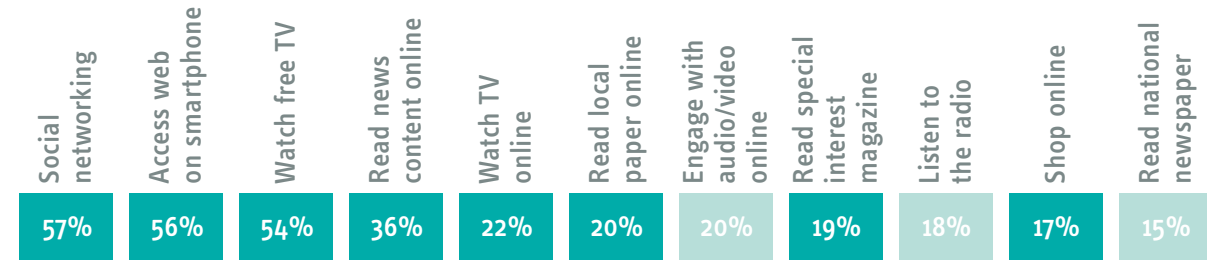
How to reach this segment

Being inner-directed, Perspective are less open to marketing messaging, but at the same time they are not proactive in seeking out what's on.

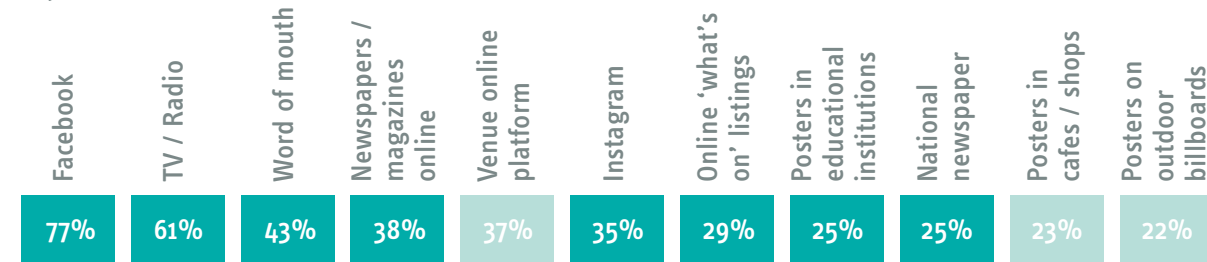
With their low marketing engagement and tendency to rely on personal recommendations, push rather than pull marketing is key to reaching them, with messages carefully framed so that they feel less like explicit marketing and more about them acting on their own terms and making their own discoveries. Strategically placed articles or messages where they might 'stumble across' things that are relevant and interesting to them, will be most effective. Their desire to learn and underlying spontaneous nature may see them attend from time to time but they are unlikely to make a key target for any marketing.

How do they consume media?

Media consumption and digital behaviour in a typical week



Key 'what's on' information sources



*Dark shading represents results significantly above average, light shading results significantly below average

Key marketing proposition

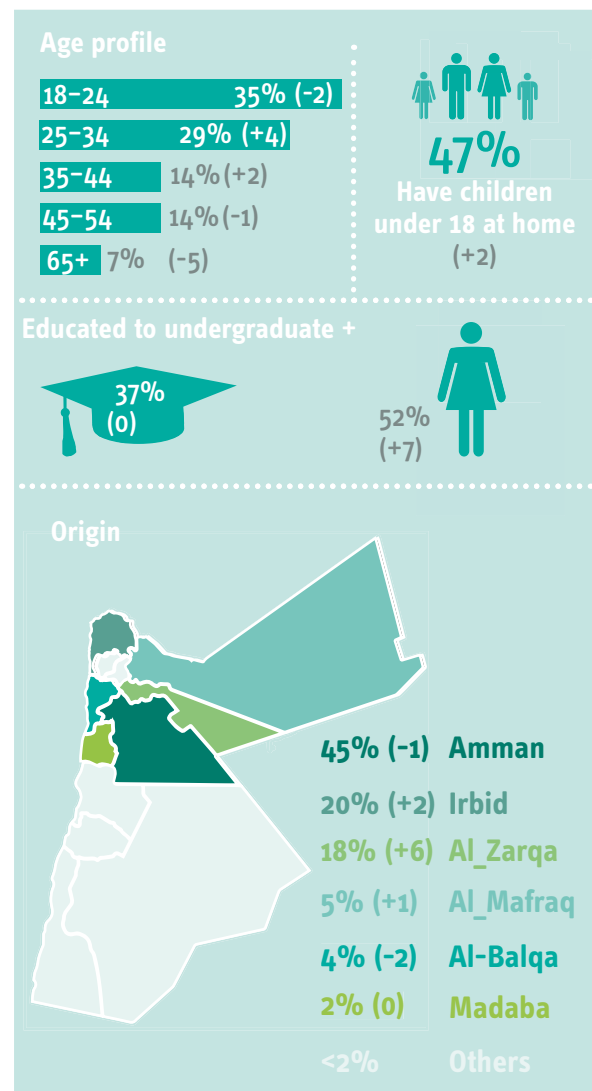
Allow them to feel they are making their own discoveries

Tap into their desire to focus on their own interests

Respect their individuality

Highlight the learning opportunities

Key demographics



Entertainment

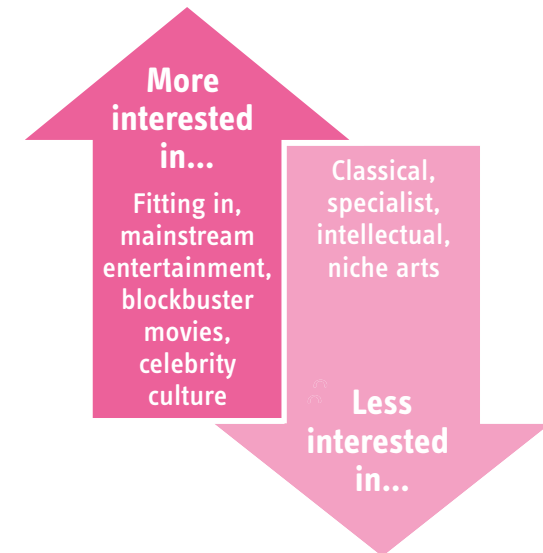
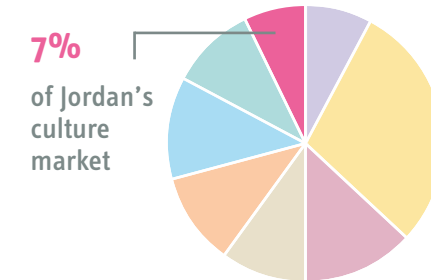


CONSUMERS
POPULARIST
MAINSTREAM

Entertainment tend to see the arts as very much on the **periphery** of their lives. Their **occasional forays** into culture are likely to be for events that are considered **mainstream** – these also compete with a wider range of other more widely adopted pursuits. Leisure time is for fun, and this segment is looking for **entertainment and escapism** – if they do attend it will be socially motivated. For the most part, they cannot envisage meeting these needs through arts and culture and therefore their **engagement** is typically among the **lowest** of all segments.

This segment prefers to stick with the **tried and tested**, and views **popularity** as an **endorsement** of quality. Therefore, they only try things which have established popular currency and have little interest in engaging with what could be considered specialist artforms.

Entertainment represents...



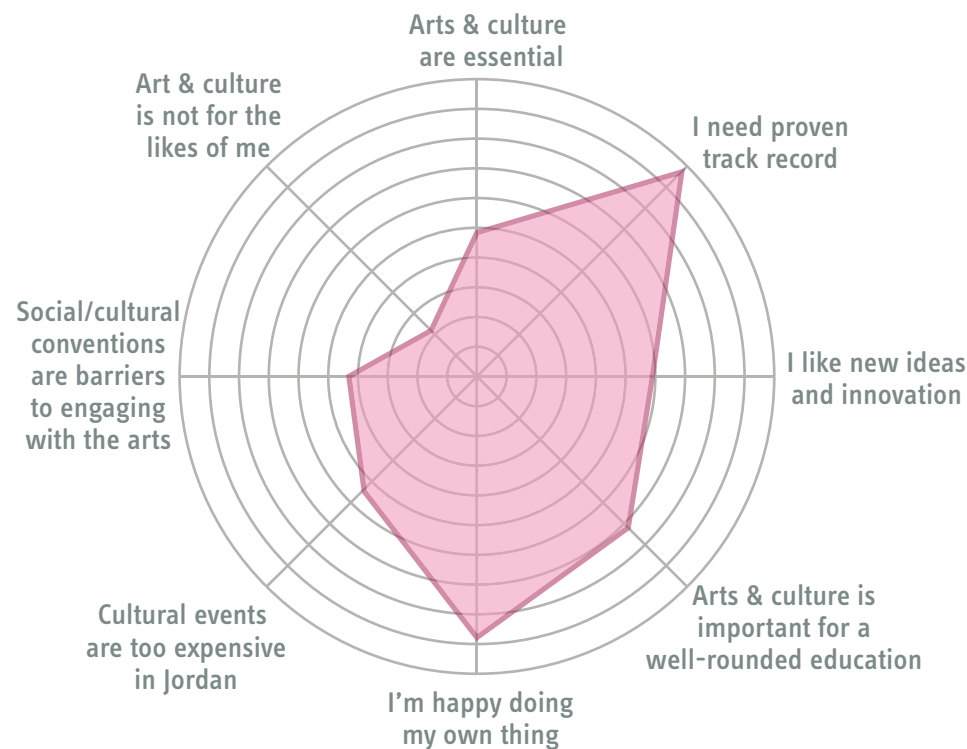
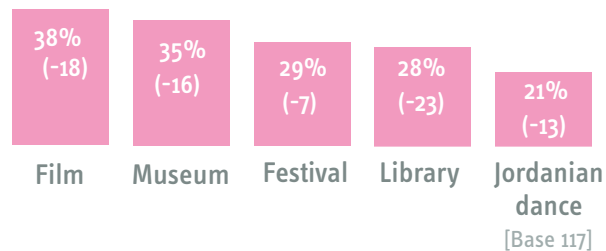
I'll go to 'blockbuster' event if it guarantees to entertain

I'll tend to do what others suggest - I'll fit in with the group

Arts engagement

Entertainment is the smallest segment in the market in Jordan, and within this show the highest level of rejection of the available artforms. They under index in potential and current markets across art forms with the notable exceptions of literature, in which they constitute 9% of the potential market and in theatre, in which they constitute 8%. With small margins such as these Entertainment aren't worth huge investment of time or money but, with small targeted messaging set within other segment strategies, they may be persuaded to attend these artforms on the occasions where big titles and big names are available to entice them.

Top five artform engagement in past 3 years



How to reach this segment

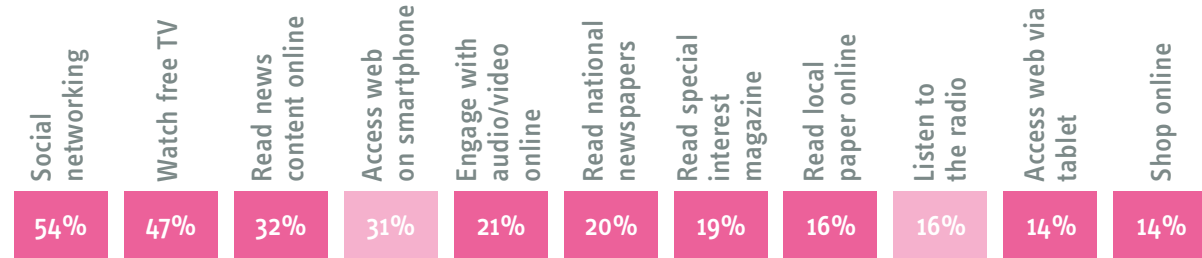
Entertainment like to feel that they are part of the crowd and rarely deviate from the mainstream. As such, Entertainment stick to mainstream media and don't tend to go out of their way to seek out events that their friends aren't already going to.

To target this segment, events and exhibitions need to be sold as 'must see', have celebrity quality and avoid looking too abstract or quirky.

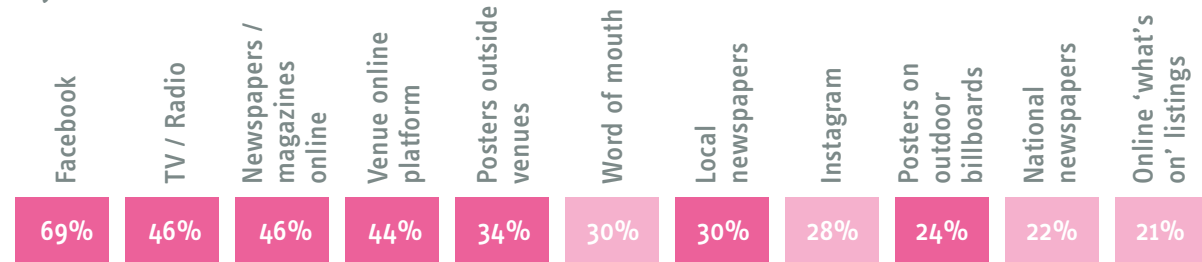
Considering the size of Entertainment and their resistance to arts and culture, it is recommended that only one-off events that might already attract this segment are worth targeting specifically at Entertainment. Too much emphasis on the mainstream in marketing could put off other segments much more likely to attend.

How do they consume media?

Media consumption and digital behaviour in a typical week



Key 'what's on' information sources



*Dark shading represents results significantly above average, light shading results significantly below average

Key marketing proposition

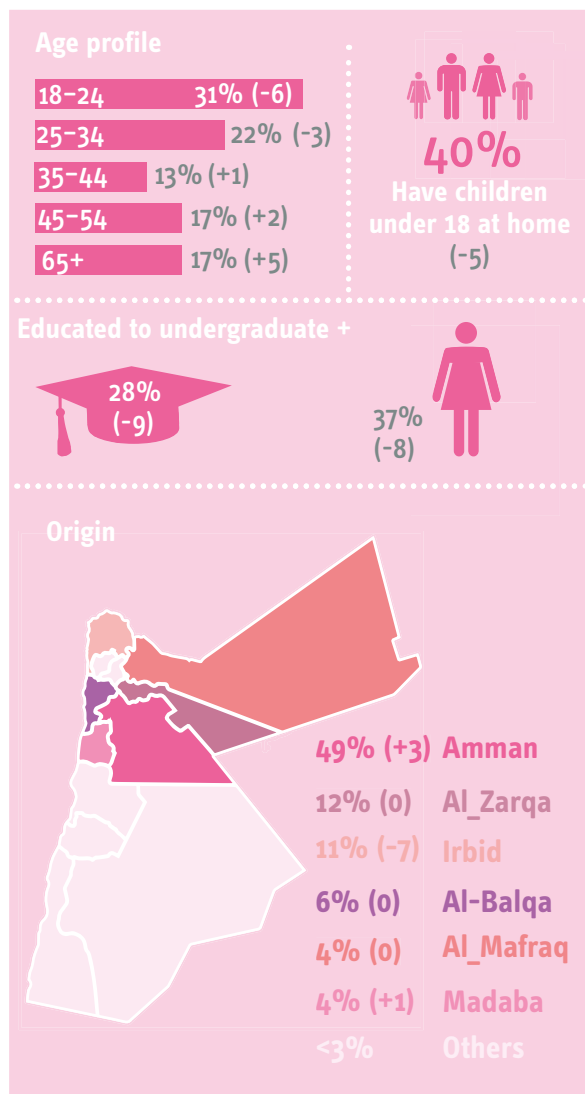
Position as a blockbuster event and highlight its popularity

Link to the mainstream through TV, sports or celebrity

Emphasise the thrilling 'must see' spectacular events

The appearance of big budget, mainstream advertising will assure them this is a major event

Key demographics



Research parameters

This study was carried out for the British Council by Morris Hargreaves McIntyre. It was commissioned February 2016. Fieldwork took place from December 2016 to January 2017.

Target group for the research: Jordanian adults (aged 18 or over) resident in Jordan who have been culturally active in the past 3 years (having made at least one visit to a cultural event or place within that period – this includes seeing a film, live music, museums, galleries, theatre and dance) were included in the study for Audience Atlas. This accounts for 34% of the population aged 18 or over, equating to 2,242,006 individuals when applied to the whole Jordanian population.

Sample size: 1,750.

Sampling method: Quota sampling (quotas were set using census data for governorate, gender, age and educational attainment).

Data collection method: Self-completion mobile phone survey, distributed by a third party telecommunications company.

Questionnaires: Details of questionnaire are available upon request.

Weighting procedures: Data was weighted using census data to be representative of the population in terms of governorate of residence, gender, age and educational attainment.

Reliability of findings: The 95% confidence interval for the total sample of 1,750 is +/- 2.34 percentage points. This means that we can be 95% confident that the true population value lies within +/- 2.34 percentage points of the reported value.



This report was prepared for British Council, Jordan, April 2017

© 2017 Morris Hargreaves McIntyre

Europe (Manchester) office

+44 (0) 161 839 3311

hello@mhminsight.com

Australia (Sydney) office

+61 (0) 400 123 562

sydney@mhminsight.com

New Zealand (Auckland) office

+64 (0) 9 551 7776

auckland@mhminsight.com

mhminsight.com

The Hashemite Kingdom of Jordan

The Deposit Number at The National Library (2017 / 4 / 2065)

يتحمل المؤلف كامل المسؤولية القانونية عن محتوى مصنفه ولا يعبر
هذا المصنف عن رأي دائرة المكتبة الوطنية او اي جهة حكومية اخرى

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.

Front page image: the Baladak project by Al Balad Theatre, 2013. Photo by Raed Asfour.