



Audience Outlook Monitor

# Snapshot Report: How rising inflation is impacting audiences

Australia – April 2023

# Contents

<b>Infographic</b>	<b>3</b>
<b>Key findings</b>	<b>4</b>
Summary of segments	7
Opportunities	8
<b>Introduction</b>	<b>11</b>
<b>Consumer confidence</b>	<b>12</b>
<b>Attendance outlook</b>	<b>14</b>
<b>Looking ahead</b>	<b>25</b>
<b>Detailed segments</b>	<b>30</b>
Older and bolder	30
Family frugality	31
Young and restless	33
<b>Acknowledgements</b>	<b>35</b>

Cover Image Credit: Audience at Future History Runway. Melbourne Fringe Festival 2022. Photo by Duncan Jacob, courtesy of Melbourne Fringe.

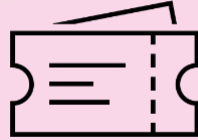
# Audiences on the economic outlook

Some continue to spend, others make careful choices, as data collected in April 2023 from 1,318 past attendees shows inflationary pressures impact audiences in different ways.



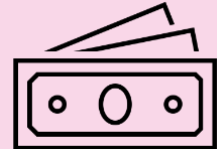
## 4 in 10

42% of audiences say they are **worse off** than they were a year ago, and 51% say they are in the **same position**, with a mixed picture across the market.



## 59%

The proportion spending over **\$50 on tickets to in-person cultural events** has **fallen** from 63% in August and October 2022 to 59% in April 2023, with the outlook uncertain.



## #1

Financial reasons are the **top barrier to attending**, and many are looking for free/cheap things to do (54%), staying close to home (45%) and taking longer to make decisions (50%).

## Key segments



With concerns about the virus fading, audiences **over 55** are now attending and spending more: 40% spent more than \$100 in the past fortnight, compared to 37% in August 2022.



**Families** are facing higher housing costs, and now factor in ticket prices to a greater degree. Parents are the most likely to prefer a different day, time or location to previously.



Despite being early returners to cultural events, **under 35s** feel most negative about their financial prospects, and are actively looking for low-cost attendance opportunities.

## Key findings: April 2023

# Rising inflation has put pressure on household budgets, with audiences attending slightly fewer events and spending less

- ▶ Increasing interest rates and cost-of-living pressures are impacting consumer confidence around the country. This 'Pulse Check' explores how Australian arts audiences are responding to changing economic conditions, based on data from 1,318 past attendees.
- ▶ Around 4 in 10 (42%) audience members surveyed say they are 'worse off' financially compared to one year ago. 1 in 10 (7%) are 'better off' and 5 in 10 (51%) are 'the same'.
- ▶ Arts attendees appear to be faring slightly better than the general population, on average, but are more cautious about the country's economic outlook, based on comparison of the results with the [ANZ-Roy Morgan' Consumer Confidence index](#).
- ▶ Trends vary across segments, confirming the need to tailor strategies for different audiences and events. Older audiences are the most likely to say their situation is the same (58%), while parents are the most likely to say they are 'worse off' (57%). Young audiences under 35 are most negative about the economic outlook.
- ▶ While three-quarters of past attendees (76%) attended a cultural event in the fortnight before data collection (19-23 April), consistent with October (75%) and August 2022 (76%), the profile of those attending, and their attendance preferences are changing.
- ▶ Average spending levels are decreasing, with 6 in 10 (59%) of those attending in the past fortnight spending over \$50 or more, down slightly from August (63%) and October 2022 (63%). However, averages should be interpreted with caution, as some segments are actually spending more, and others less.

# With financial limitations top of mind, many audiences are deliberating longer on factors such as price, location and overall value

- ▶ As COVID-related concerns continue to fade, **financial reasons are the top barrier to attendance**, affecting 4 in 10 audience members.
- ▶ A lack of money is not the only consideration – the data also suggests a perceived **lack of time** and a **lack of energy**, as lifestyles continue to evolve after the pandemic. Many report feeling busier with the return of office working, commuting, travel and social events – and 24% say they are inhibited by ‘prioritising other things’.
- ▶ When asked about their cultural spending over the past 6 months, sizeable numbers say **the price they are willing to pay** to attend (35%) and/or their **frequency of attendance** (48%) have **decreased**.
- ▶ When reflecting on the most recent event they attended, 4 in 10 audiences said that **price influenced them ‘more than usual’** (39%).
- ▶ Around half are looking for **free and cheap** things to attend (54%) and qualitative data shows that discounts and pricing offers are factoring into a high number of decisions, particularly among families and young people.
- ▶ **People from different socio-economic backgrounds are ‘splurging’ and ‘saving’ to different degrees** – and some are doing both, opting to splash out on events that are important to them, while making savings elsewhere by looking for free or low-cost alternatives.
- ▶ **Audiences say they have decreased spending** on events (50%), donations (36%) and subscriptions/memberships (31%) – though many who engage in these forms of support say they plan to continue, acknowledging tough conditions for artists and a desire to show their support in tough times.

# The uncertain economic outlook requires tailored strategies for different segments and scenarios

- ▶ Many are taking longer to make decisions (50%), and last-minute ticket-buying appears here to stay for the time being.
- ▶ The location of events is also impacting 33% of audiences more than usual and 45% say they are staying closer to home. Qualitative data suggests that proximity to events plays an important role – with costs of parking, fuel, air tickets and hospitality all increasing.
- ▶ Some segments are more disadvantaged by travel costs than others, and logistical considerations in scheduling events will be important for catering to a range of audiences.
- ▶ When asked about the next 12 months, audience responses confirm enduring appetites for new (53%), uplifting (68%) and challenging arts experiences (42%). Balanced programs are as important as ever.
- ▶ When asked to share what they've attended recently, and why they prioritised those things, some common themes include a **desire to support artists** and organisations they value and wanting to return to the **works they know and love**. Some appear to want a 'safe bet' that they will have an enjoyable experience with friends/family.
- ▶ Economic conditions are complex, and affect every household differently. However, looking at the trends in three key segments can assist with understanding some of the differences and identifying practical implications (overleaf).
- ▶ With an uncertain outlook, and the possibility of a recession, it's wise to stay flexible and consider how **strategies and tactics can be adjusted as conditions change**.

## Summary of segments

Inflationary pressures are experienced differently across the population. Three key audience segments are presented below. A detailed breakdown is available in the [Detailed segments](#) section of this report.

<b>Older and bolder</b>	<b>Family frugality</b>	<b>Young and restless</b>
Arts audiences aged 55+	Arts audiences aged 35-55 with children living at home	Arts audiences under 35
<ul style="list-style-type: none"> <li>▶ After several years shaped by virus concerns and mask-wearing, older audiences are now enjoying higher attendance levels and spending.</li> <li>▶ As the most likely audiences to experience no barriers to attending right now, this group is open to a range of experiences and are the most likely to seek out challenging, topical works in the next 12 months.</li> <li>▶ Email is the top way they find out about events, so consider ways to continually improve your databases and eDMs.</li> </ul>	<ul style="list-style-type: none"> <li>▶ Rising housing costs are affecting families more than households without children, and audiences with kids at home have reduced their arts spending more than others.</li> <li>▶ High numbers are staying closer to home, looking for free/cheap things to do and taking longer to commit, as they weigh up costs for 3 or more people.</li> <li>▶ Families see the arts as important for their children – and many are prioritising it within their budget.</li> <li>▶ For Kids and Family shows, consider a pricing and promotion strategy tailored to this group (they're the most likely group to find out about events on Facebook!).</li> </ul>	<ul style="list-style-type: none"> <li>▶ Despite being eager to get out and about, young people are attending at slightly lower levels than they did 12 months ago and are spending less too.</li> <li>▶ They're facing financial barriers at twice the rate of their parents' generations – and feel more down about their economic future.</li> <li>▶ They're eager to connect socially, attend fun/uplifting events and try new things they haven't experienced before, but may need support to attend.</li> <li>▶ Some are looking with keen eyes for student or youth discounts – and ways to cover the costs of travel and eating out.</li> </ul>

## Opportunities

As conditions continue to change, opportunities exist in terms of programming, marketing and ticketing. However, the right solutions will look different for every organisation. The ideas outlined below are put forward to get you thinking, and any action should be considered in terms of what's right for you and your audience.

### **Programs featuring diverse topics and different price points are likely to reach the broadest audiences**

- ❑ Keep in mind audiences' desire for fun, uplifting events in the post-pandemic era, but don't forget there are sizeable numbers wanting new, topical and/or challenging things – some audiences have expressed wariness of commercialisation or softening of the cultural activities they love at the expense of creative innovation
- ❑ Review the price points of your offerings and consider how audiences in different segments will assess value for money
- ❑ Research the demographic shifts affecting your area and explore as a team how behaviours like working from home, commuting and travel are changing
- ❑ Keep on top of transport options to your area, such as public transport schedules and initiatives, and consider these when scheduling events
- ❑ Consider programming earlier event options/matinees to encourage attendance among cost-conscious parents or outer metro/regional audiences who might catch public transport or drive but want to avoid travel rush or late-night travel
- ❑ Looking ahead, consider the right frequency and volume of events for the economic conditions. It might be helpful to plan for different scenarios such as a fast rebound or prolonged recession.



## Clear and helpful marketing campaigns can help get indecisive audiences over the line

- ❑ Look at ways to take pressure off audiences by spelling out instructions on how to get to and from events, on your websites, newsletters or pre-event emails
- ❑ Consider researching and promoting any money saving transport or parking initiatives, to encourage regional or outer metro attendance at inner city events, or metropolitan attendance at regional or outer metro events
- ❑ Consider creating and promoting itineraries for a 'night out' based on different budgets e.g., suggested transport, pre-show drink destination and post-show dinner destination
- ❑ Take time to get digital marketing right and wherever possible tailor the words, imagery and channel, based on things like prior attendance, post code, age, family status or income (sometimes reaching a smaller group with the right campaign will deliver better engagement than a broad campaign to a bigger group)
- ❑ Where one event ticks various boxes, consider A/B marketing tactics to communicate the same event to different segments in different ways – for example, highlight the 'challenging, topical' content of a show in an email to over 55s, while featuring any 'big name artists' in an email to under 55s.

## Ticketing initiatives to support more price sensitive audiences are important, but last-minute discounting may not be the answer

- ❑ Look at ways of rewarding early bookers with earlybird discounts or newsletter subscriber pre-sales, rather than resorting to last minute 'panic' discounting
- ❑ Consider offering cheaper ticket prices for young audiences and if already in place, reviewing age limits – i.e., under 35 may be more appropriate than under 30 or under 25 given current conditions, and some artforms may have a case to extend this to under 40

- ❑ Consider offering group discounts or family ticket offers (e.g., 2 adults, 2 kids or 1 adult, 3 kids) to relieve cost pressures from price sensitive parents and caregivers, and encourage group bookings
- ❑ Review the approach to booking fees and consider a per ticket fee or a scaled offer e.g., percentage of total purchase instead of a set per transaction fee, which has a higher impact on single ticket purchasers
- ❑ Clearly communicate where booking fee money is going, and consider investigating a payments solution like [ArtsPay](#), as some audiences are put off by high booking fees but many are keen to support the arts and artists.

## **With some arts audiences doing well financially and others struggling, it might be time to introduce alternative payment models**

- ❑ Investigate ways to facilitate 'pay it forward' tickets, where people in more comfortable financial positions can purchase or subsidise tickets for people more affected by cost of living pressures
- ❑ If feasible, options to pay in instalments could take the pressure off audiences splashing out big purchases, and encourage more to book in advance
- ❑ For lower cost events, consider a 'pay what you want' model with a small pre-purchase deposit to encourage more risk taking from audiences to see something new, topical or challenging, but avoiding risks around no-shows.

## Introduction

# This April 2023 ‘pulse check’ asked 1,300 past attendees of cultural events about their response to cost-of-living pressures

Launched in May 2020, the Audience Outlook Monitor is tracking audience sentiment in relation to the COVID-19 pandemic. It involves a cross-sector collaborative survey process involving around 100 arts and culture organisations, including museums, galleries, performing arts organisations and festivals.

The ‘pulse check’ survey is a short, targeted questionnaire developed between the October 2022, Phase 8, and the upcoming August 2023, Phase 9, of the Audience Outlook Monitor. It is designed to ‘take the temperature’ of audiences in response to heightened cost of living pressures.

After three years of the pandemic, the [Australian Bureau of Statistics \(ABS\)](#) reports that over the twelve months to the March 2023 quarter, the consumer price index (CPI) rose 7%. Interest rate rises are impacting households and consumer confidence around the country.

On 19 April 2023, Patternmakers sent the ‘pulse check’ survey to 8,000 past respondents from previous phases of the study, who opted-in to be contacted about future research on this topic. The survey closed on 23 April 2023.

Over 1,300 audience members responded (1,315), from all over Australia: New South Wales (NSW; n=376), Victoria (VIC; n= 374), Queensland (QLD; n= 202), South Australia (SA; n=153), Western Australia (WA; n=123) and the Australian Capital Territory (ACT; n= 80). A small number of responses were collected from audiences in Tasmania (TAS; n=9) and the Northern Territory (NT; n=1). These are included in national averages but not reported separately.

This report compares the new results on the national level, with national data collected previously in March 2022 (Phase 7), August 2022 (‘Pulse Check’) and October 2022, to examine how things are changing over time – and identify opportunities for programming, marketing and strategy in the current conditions.

## Consumer confidence

### 4 in 10 audiences feel they are 'worse off' than they were a year ago, but parts of the market may have a level of economic resilience

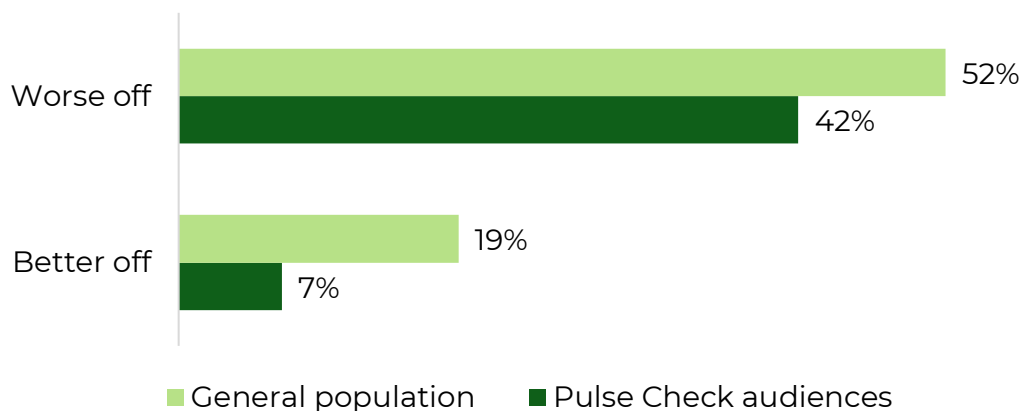
The April Pulse Check survey aimed to measure aspects of consumer confidence among Australian attendees of arts and cultural events.

In April 2023, audiences were asked 'Would you say that you (and any family living with you) are better off or worse off financially than you were a year ago?'. On average, 2 in 5 said they are 'worse off' (42%), compared to 52% of the general population, and 7% say they are 'better off' (compared to 19% in the general population).

Compared to the [ANZ-Roy Morgan Consumer Confidence](#) in the general population, one interpretation is that arts audiences participating in the study are perceived to have higher financial stability than others.

Small differences in the methodology mean that comparisons should be made with caution.

Figure 1: Proportion of audiences who say they are financially worse off, the same, and better off, compared to one year ago. National average (n=1,315).



## Families are the most likely to say they are ‘worse off’ than one year ago, while audiences over 64 appear more stable

Economic conditions are complex and affect every household differently. When breaking the Pulse Check results down by demographic characteristics, some groups are more likely than others to say they are worse off, including:

- ▶ Audiences aged 35-64 with children living at home (65%)
- ▶ Audiences under 35 (47%)
- ▶ Audiences aged 55-64 (47%)

Meanwhile, some groups are less likely to say they are worse off, including:

- ▶ Audiences aged 65-74 (34%)
- ▶ Audiences aged 75+ (28%).

A range of factors affect household finances, and peoples’ perception of them. Household income plays an important role: High-income earners, such as those earning \$3,000+ (AUD) per week are the most likely to say they are ‘better off’ than one year ago (15%), compared to low-income earners, such as those earning \$400-\$649 per week (3%). Household spending is also key, with inflation occurring at different rates in different spending categories.

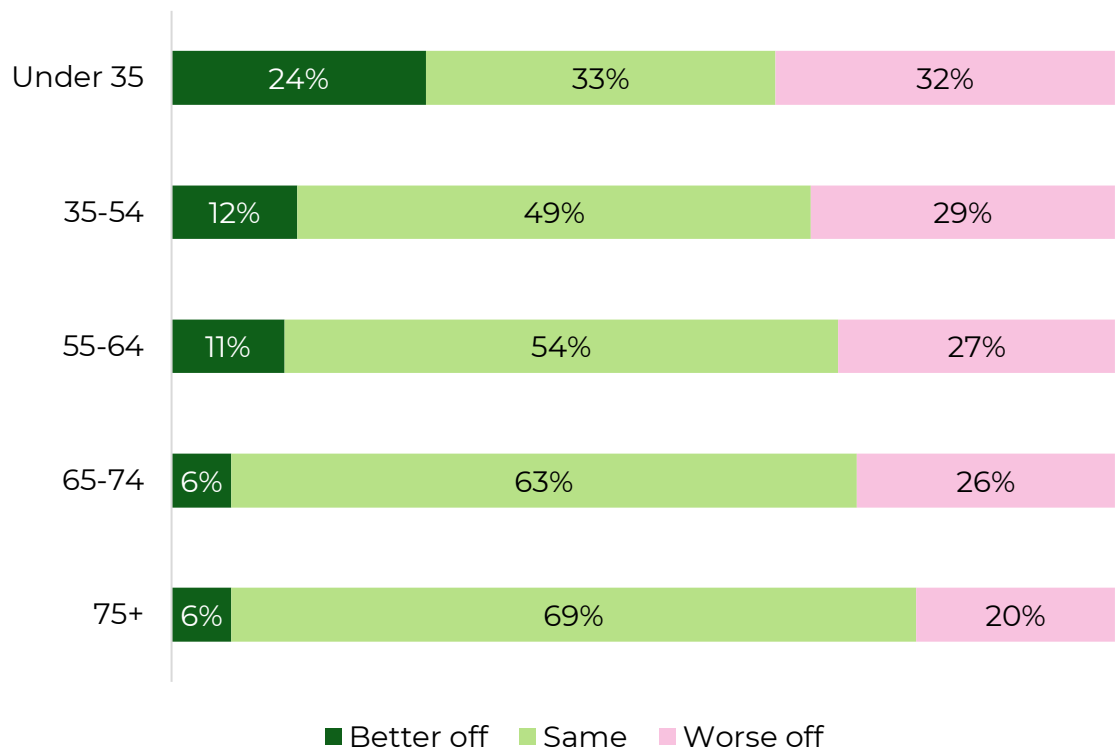
## While many are optimistic the economy will stabilise, 6 in 10 younger audiences feel that there will be ‘bad times’ ahead

When asked, ‘Do you think that a year from now you (and any family living with you) will be better off financially, or worse off, or just about the same as now?’, the majority expect they will be in the same position (57%) while one quarter (26%) expect to be worse off. One in 10 (10%) expect they’ll be ‘better off’ and 7% ‘don’t know’.

The outlook varies across audience segments, with the differences between three key segments explored in detail in the [Summary of segments](#). For instance, ‘Older and Bolder’ audience members are the

most likely to say they'll be in the same position, and 'Young and Restless' audiences are the least likely to.

Figure 2: Proportion of audiences who say that in a year from now, they expect to be financially worse off, the same, and better off, compared to one year ago, by age group (n=1,307).



When it comes to economic/business conditions in the country as a whole, half of audiences said they thought the outlook was uncertain (51%), while 2 in 5 (40%) said the country will have 'bad times'. Only 5% expect the country will have 'good times'. These results are fairly consistent with the general population.

Young people appear to have more pessimistic attitudes about this – with 6 in 10 (58%) feeling there will be 'bad times' ahead for the economy, and 3 in 10 (31%) believing they personally will be worse off.

## Attendance outlook

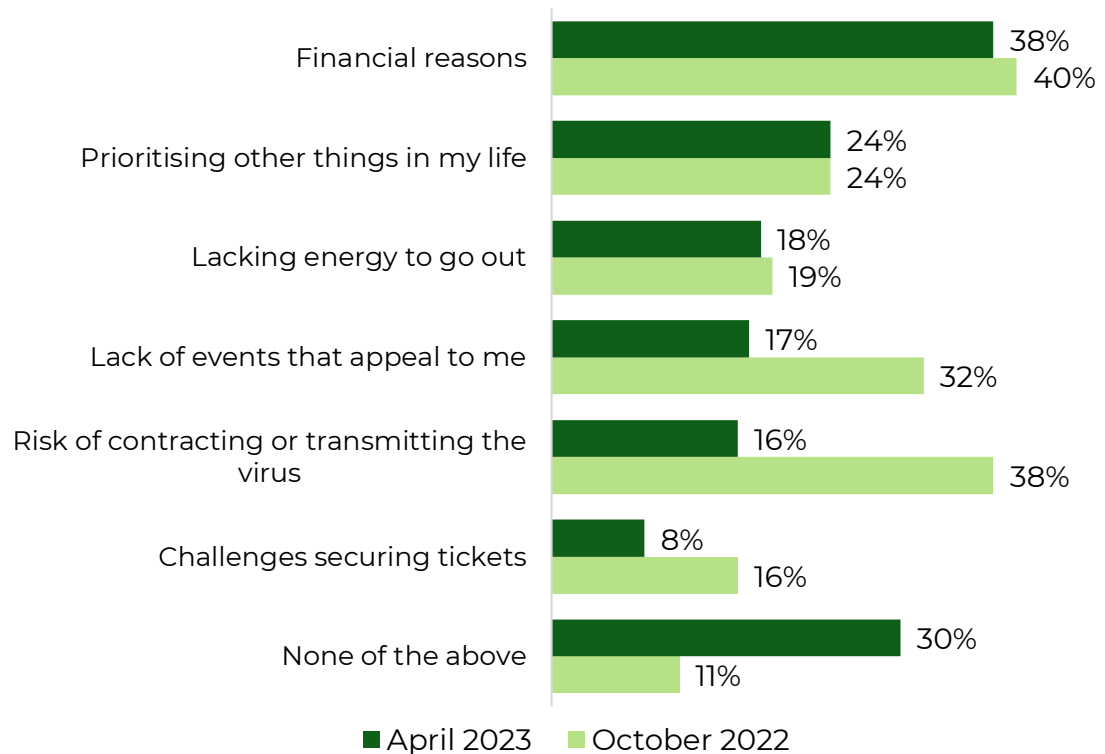
### Financial reasons are the top barrier to attendance, affecting 4 in 10 audience members

Consistent with results in October 2022 (40%), the April 2023 results show that financial reasons are the most prevalent barrier to attendance (38%) – higher than August (24%) and March 2022 (17%).

Audiences in all age groups are citing financial barriers, though it is most pronounced among audiences aged 35-54 (61%), which includes many families with mortgages (such as those in the [Family Frugality](#) segment) – and least pronounced among audiences aged 65-74 (27%).

Lower income earners are also more likely to be citing financial barriers, such as those earning \$650-999 per week (50%). Audiences earning \$3,000+ per week are the most likely to say they are facing no barriers (37%).

Figure 3: Can you tell us if anything is preventing you from attending in-person arts and culture events as you used to in the past? (select up to three) (n=1,318)



## Most audiences continue to attend events amid cost-of living pressures, but their behaviour and spending have changed

Three-quarters of past attendees (76%) say they attended a cultural activity in the two weeks prior to data collection, which is consistent with October 2022 (75%) and August 2022 (76%).

For example, [Older and Bolder](#) audiences (those aged 55+) are the most likely to be attending right now (78% of respondents aged 55-64 and 79% of audiences aged 65-74).

Meanwhile, [Young and Restless](#) audiences (those under 35) are least likely to have attended a cultural activity recently (67%) – a notable decline since October 2022 (77%) when they were the most likely to be attending.

Audiences had attended a wide variety of activities two weeks prior to data collection, including live performances (49%), cinemas (31%), museums or galleries (30%), fairs or festivals (14%), and lectures, artist talks or workshops (13%).

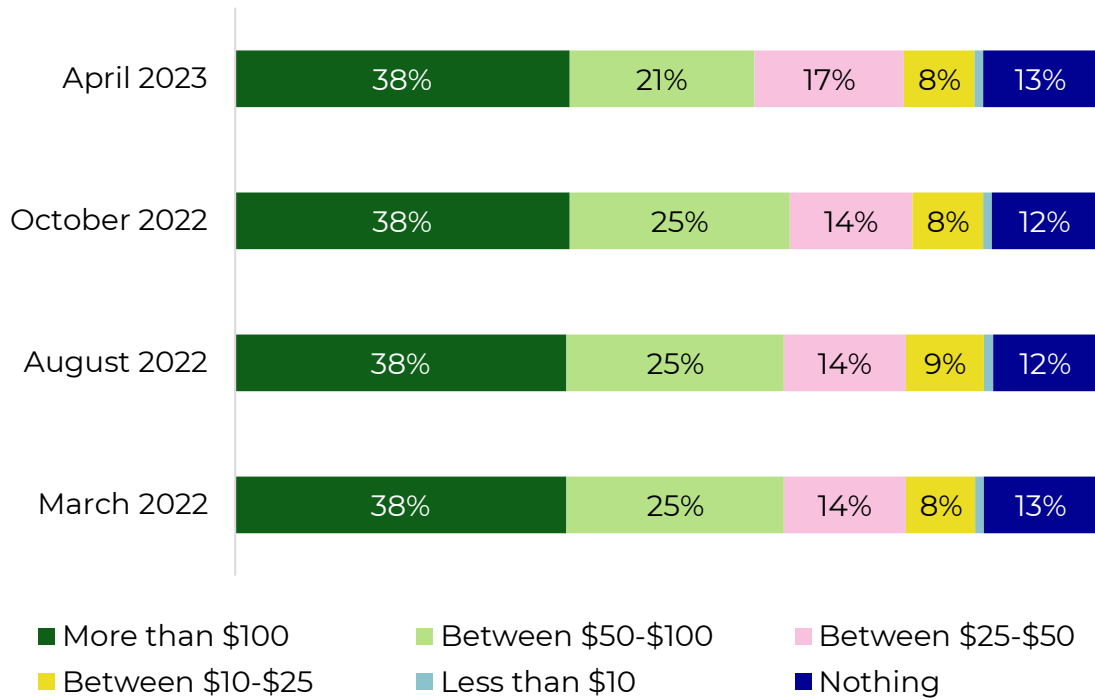
Some audiences expressed that they were motivated to reconnect with the work they love, prioritising it over other expenses. One said,

‘Attended the Australian Ballet in Sydney which included ticket, transport and accommodation; attending the ballet is very important to me, and I would forgo other discretionary expenditure rather than miss the Australian Ballet at the Opera House.’

However, on average, spending levels are not increasing. In April 2023, the proportion spending over \$50 on tickets to in-person live events and cultural events is 59%, slightly lower than August and October 2022 (63%).



Figure 4: In the past fortnight, how much did you spend on tickets to in person live events and cultural activities? March 2022 to April 2023 (n=1,007)



Qualitative data shows that many audience members are still opting to attend cultural activities, while finding options to spend less. One said,

‘My husband and I are pensioners living in a rural area. We are finding both our age and financial circumstances mean we do not travel to Melbourne as frequently as we did for plays and concerts partly owing to the cost of tickets. Yesterday I spent the day at the NGV galleries with a young friend. A lovely inexpensive day.’

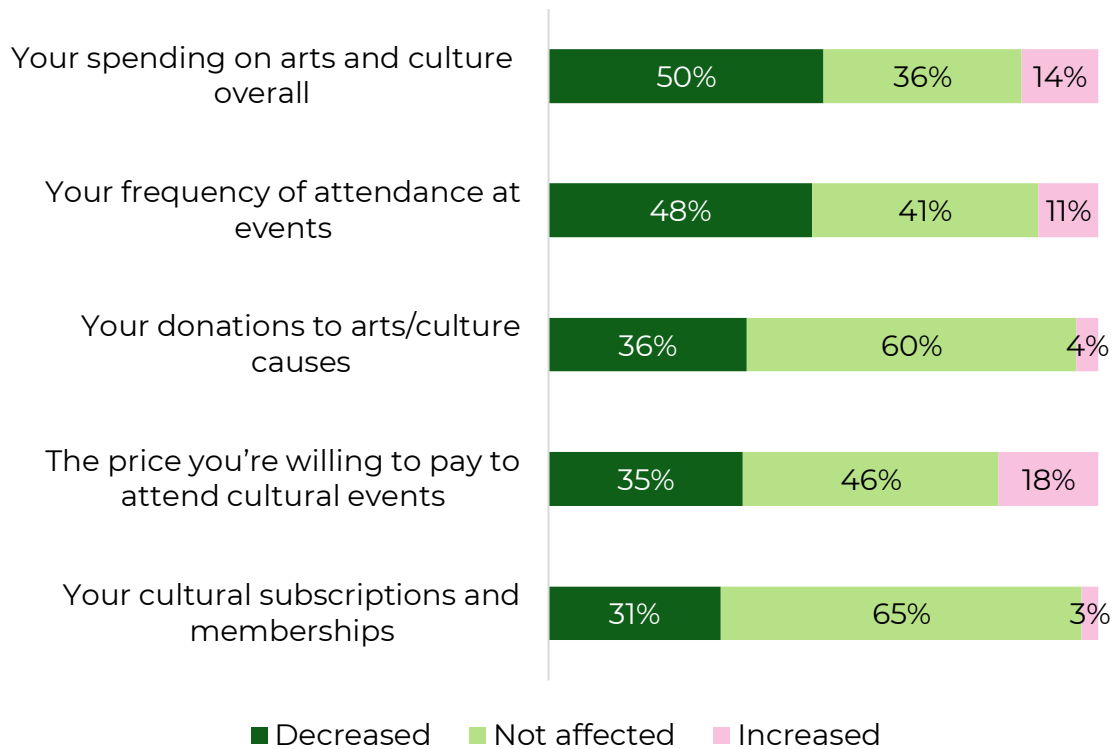
## Half say their overall spending (50%) and frequency of attendance (48%) at arts events has decreased in the past 6 months

Respondents were asked to indicate the extent to which their arts and cultural spending has been affected by economic conditions, and in what ways. A list of activities was presented with options for increased, decreased or not been affected in the past 6 months.

Audiences are most likely to say their overall spending (50%) and frequency of attendance at events (48%) as decreased.

Among behaviours that have remained steady, donations to arts and cultural causes (60%) and subscriptions and memberships (65%) are the most likely to have not been affected.

Figure 5: In the past 6 months, have the following things increased, decreased, or not been affected? (n=1,315)



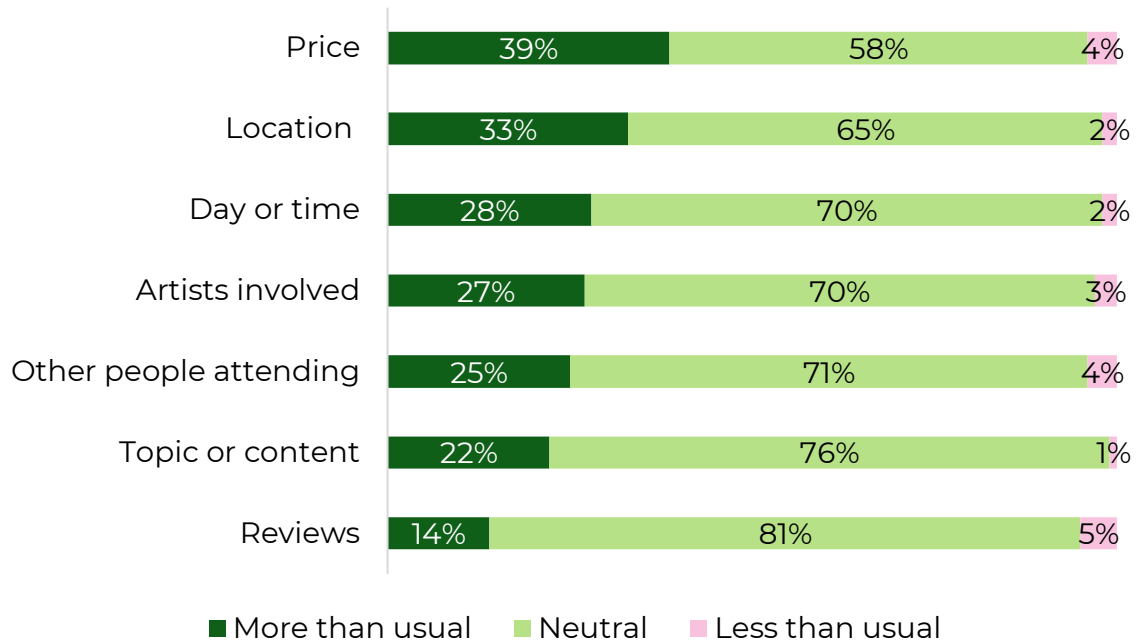
## 4 in 10 (39%) audiences say they are affected by the price of arts events more than usual at the moment

Respondents were asked the extent to which their attendance decisions have been influenced by a range of factors, compared to pre-pandemic times.

From a list of options, price was the most influential factor in attendance decisions, with 39% of audiences saying this affected them 'more than usual', relative to pre-pandemic. This was followed by the location of cultural events (33%), other people attending (25%) and the topic or content (22%).

Reviews were the least likely factor to influence audience attendance decisions (14% said more than usual).

Figure 6: Compared to how you approached attending prior to the pandemic, to what extent were you more or less influenced by...(n=1,000)



Some respondents reflected on their need to balance priorities at the present time. One said,

'Sadly, if your rent for a one-room unit has gone up \$100 a week with no notice of consideration from \$500 to \$600 a week and your job (in this case, as a scientist) has been pulled because you're only a contractor, there's no room to pay for anything extra. I think renters would make a high proportion of people who, in more secure times, would have been happy to "go out and spend" but simply cannot do so.'

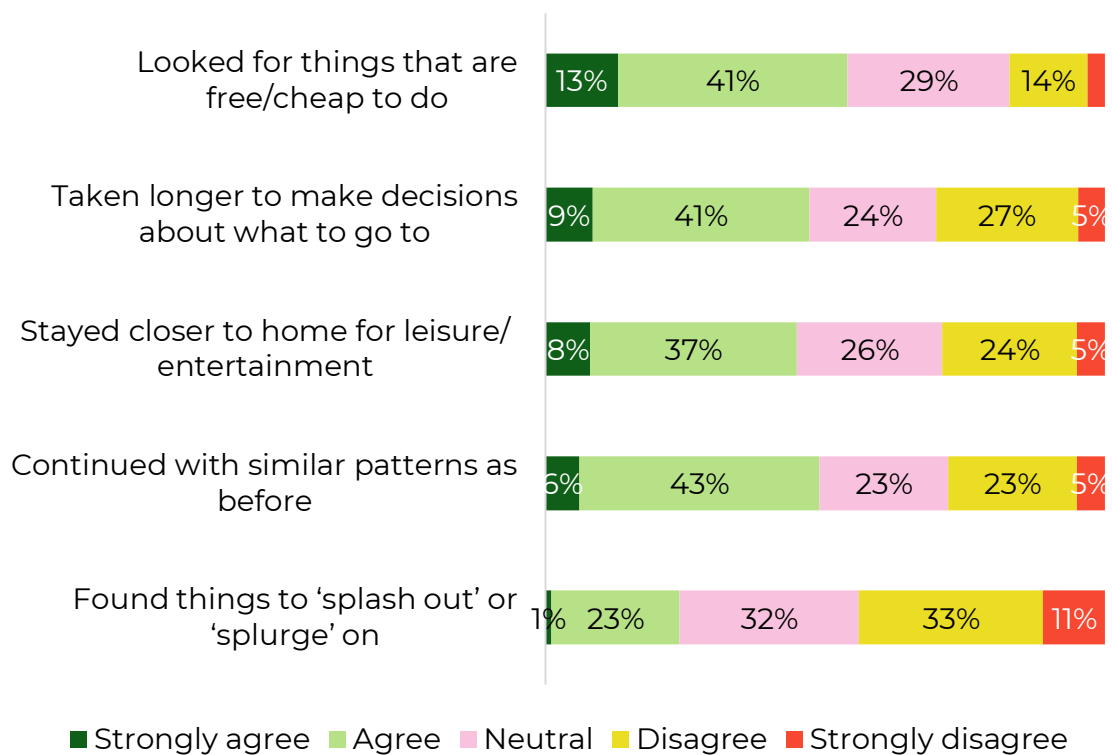
## Half of audiences are looking for cheap things (54%), or taking longer to make decisions about what to attend (50%)

Audiences were asked about the behaviour they've engaged in over the past 6 months, in light of their financial situation. At the moment, audiences are most likely to be 'looking for things that are free/cheap to do' (54% agree or strongly agree) and least likely to be finding things to 'splash out' or 'splurge on' (24% agree or strongly agree).

Audiences are also taking longer to make decisions about attending (50%) – consistent with trends observed in previous rounds, around last-minute ticket buying.

Many are opting to stay closer to home (45%) to attend events. Some segments, such as those in Family Frugality (Arts audiences aged 35-55 with children living at home) are among the most likely to be opting to stay home at the moment – as multiple family members attending can stretch budgets significantly.

Figure 7: Given my financial situation, in the past 6 months, I have...(n=1,315)



## Audiences from different backgrounds are 'saving' and 'splurging' on cultural activities at varying levels

When looking at demographic breakdowns, behaviour such as 'splurging' is not confined to higher-income earners, with people in all categories saying that this aspect has decreased to some degree.

A significant portion of audiences earning \$650-\$999 per week (27%), as well as those earning \$3,000+ (30%), agree that they have found things to 'splurge' on in the past 6 months, given their financial situation.

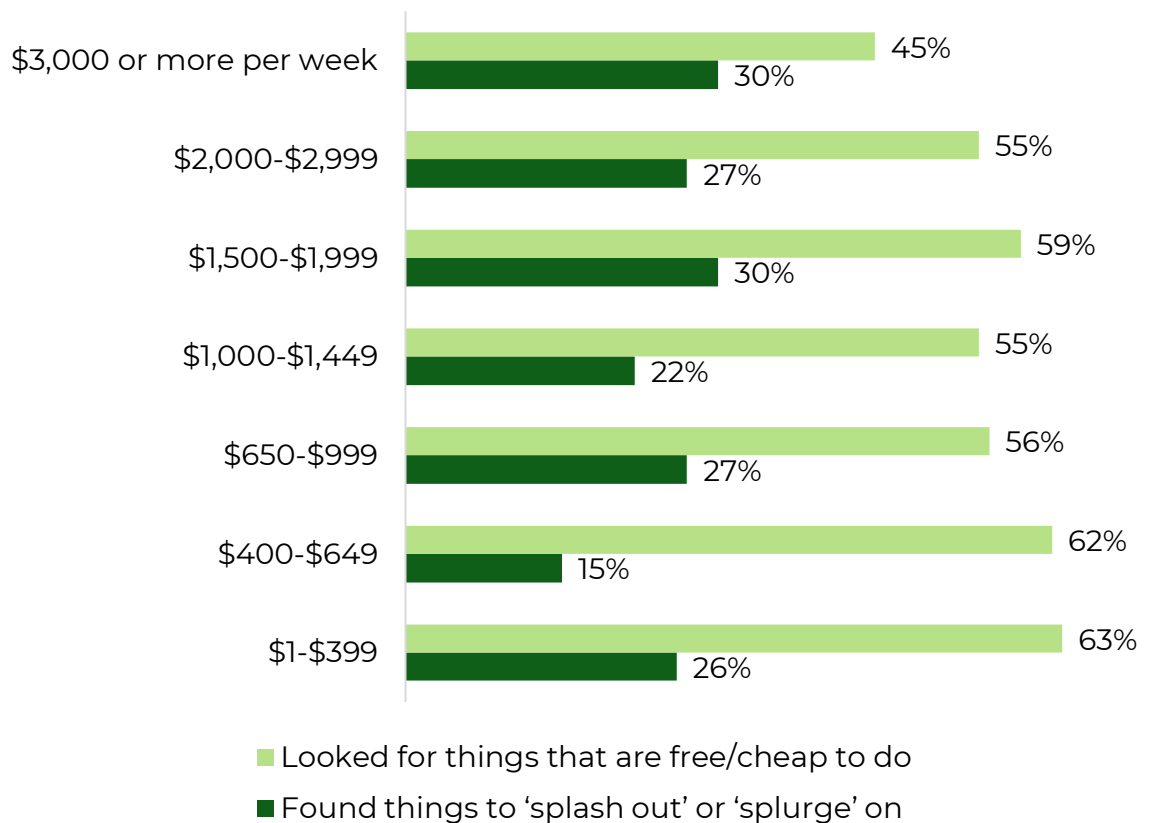
Similarly, audiences in all categories are looking for ‘free/cheap things to do’ – a sign that there is universal demand for affordable arts experiences.

A sizeable portion of audiences earning \$650-\$999 per week (56%), as well as those earning \$3,000+ (45%), agree that they have looked for ‘free/cheap things to do’ in the past 6 months. This number is even higher for the [Young and Restless](#) audience segment (those under 35), among whom 69% are looking for free/cheap things to do.

Some audience members are balancing the choice to splurge on cultural activities that are important to them, whilst seeking free activities. One said,

‘Went to the NGV and the Victoria State Library (both free). And to a Counting Crows concert at Hamer Hall (a splurge); Both the NGV and the state library are free, and I actually went looking for volunteer opportunities. Counting Crows is my favourite band so I splurged because they may not come around again for a while.’

Figure 8: Given my financial situation, in the past 6 months, I have... (agree or strongly agree), by weekly household income (n=1,315)



Some shared suggestions for improvement, as one said,

'I think given the cost of living is increasing and people, including myself will likely be tightening their spending on arts or cultural events, these organisations need to address the challenging task of how to make an event both cost effective and worthwhile that people will consider it when thinking about spending their dwindling and potentially soon to be extinct, "spending money".'

Others were unsure of how to respond to the current economic climate. One said,

'Sadly, I can't think of any solutions to financial pressures. I have to live within my means – and I'm not!'

## **Audiences remain eager to attend – and are simply more selective about what they can fit within their budget**

Other audience members shared that despite costs increasing, prioritising the cultural events they can attend, within their budget, is important. One said,

'Yes, cost of living has gone up, food, petrol, all bills. I'm willing to spend money on the cultural events I want to attend and will find budget for it.'

One said,

'Even though I am trying to be considerate with spending money going out, the ability and wanting to now go out and see a concert has outweighed the thought that I shouldn't be spending my money on it.'

One mentioned that for the time being, they are being more selective about what they choose to attend – and potentially missing out on things they would usually see, to see a 'bigger' act:

'The reason we're not going out as much is to save money. We're much more selective on what we pay to see. In the past I would pick shows that would pique my interest. Now I only book shows that I really want to see and can afford. For example, we went to one day at Womad this year as my husband wanted to see

Florence and the Machine. That meant we couldn't go to any other shows at the Adelaide Festival when we usually pick 3 or 4.'

Some audiences mention that attending with family members is becoming increasingly prohibitive,

'Prices of events, especially theatre etc. have certainly increased in line with other economic costs these cultural organisations are facing. Whilst this has only affected my attendance slightly it does impact on my decision to take other people to shows. I like to take my young teen nieces to productions, but the number has decreased as costs for 3 tix can be more than \$500 in some cases.'

Another said that they always seek affordable options,

'I always look for free things to do, e.g., I live near Canberra's Floriade and always attend, and I go to the Multicultural Festival. This is normal for me, as is attendance at the movies, theatre etc. I spent the past fortnight in Japan and prepaid many of the cultural events I went to.'

Another mentioned that the accessibility of living in a metropolitan area, is integral to having more affordable opportunities,

'If a show is too expensive, I just won't go, unless it is a name brand, once-in-a-lifetime experience. The beauty of Melbourne is there is loads of free stuff like Melbourne Now.'

## **The rising cost of travel – particularly for those outside of metro areas – disadvantages some segments**

One-third (33%) of audiences say the 'location' of events is affecting their decision making more than usual. Qualitative data suggests that proximity to cultural events can exacerbate financial pressures – particularly for those living outside metropolitan areas. One respondent said,

'When I lived in Melbourne attending live events, theatre, concerts etc., was an easy thing to do. Now that I live in a region it is almost financially impossible. The cost has been relieved somewhat by the recent State Government decision to make regional ticketing (train)

the same as in the city. The next step would be for regional trains to run at a time when I could attend an event and still get home the same day/night. That is not possible now.'

Metropolitan-based arts companies noticing a decline in outer metro or regional visitors may wish to increase promotion of any money saving transport or parking initiatives or take some of the pressure of attendees by spelling out instructions on how to arrive on their websites, newsletters or pre-event emails.

## **Other lifestyle changes continue to impact attendance for one-quarter (24%) of audiences**

Other factors, such as behavioural and habitual changes are a reason for not attending and may continue to impact the sector's recovery.

A quarter (24%) of respondents say they are prioritising other things in their life right now, consistent with findings in October 2022 (24%).

Qualitative data highlights a diverse range of circumstances which have contributing to arts and culture not being as much of a priority in their lives anymore, from work to family commitments, travel and health.

Scheduling events around work and life commitments is difficult for many, with some saying,

'Depends how difficult it is to get to the venue, how far away the venue is, if I can get a good seat at a reasonable price, if I can work attending around my work hours.'

Others are resuming their travel options and may have less time or resources to allocate attending cultural activities. One said,

'Travel options have opened up and time and energy are being redirected to "catching up" on missed travel plans.'

For some, their own health or the health of people close to them may be a barrier, causing them to re-evaluate how they prioritise arts and culture in their lives. One said,



‘Health and aging mean I am cutting down on my previous levels of arts activity.’

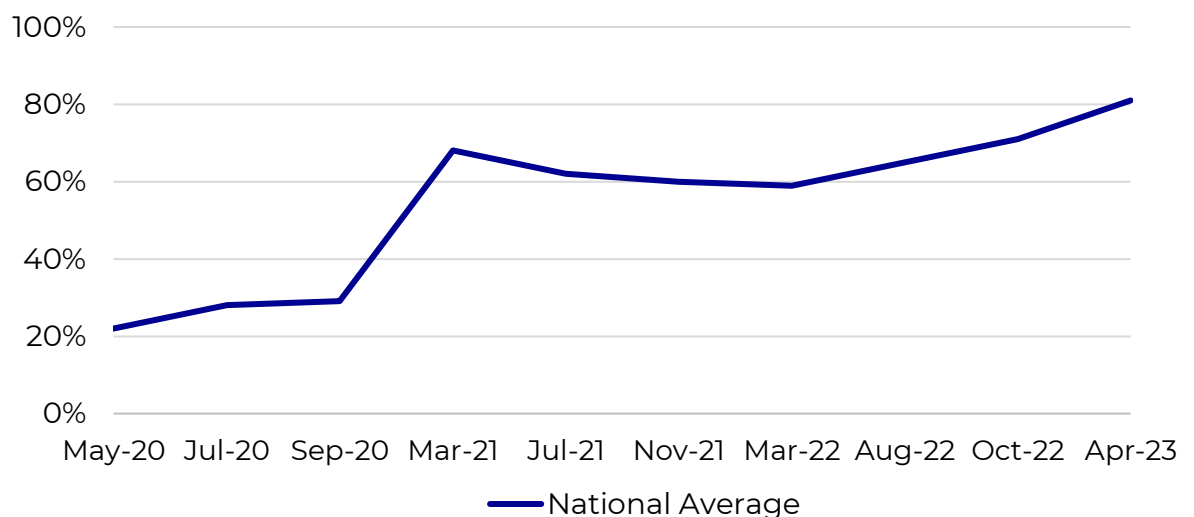
Qualitative data also highlights the behavioural changes of friends and close ones is also a barrier to attendance for some, with several respondents saying ‘a lack of companions to go with’ may prevent them from attending.

## Though COVID-related barriers have declined, 2 in 10 cite a lack of energy to attend cultural events

As we learn to live with COVID-19 in the community, fears surrounding contracting and transmitting the virus continue to decline. In April 2023, 16% selected the risk of contracting or transmitting the virus as a barrier to attendance, down from 38% in October 2022.

8 in 10 (78%) audience members said they are ready to attend ‘now or whenever permitted,’ up from 7 in 10 (71%) in October 2022. One in 5 have some level of caution (22%, down from 28%) and just 1% aren’t willing to attend right now (stable).

Figure 9: Proportion of audiences who are ‘ready to attend now or whenever permitted’, May 2020 to April 2023. n=1,311



However, the long-term effects of the pandemic continue to impact some audiences’ stamina for attending. Around 2 in 10 (18%) say they lack energy to go out, consistent with October 2022 (19%). One respondent said,

'It's time and energy I have to conserve more than money. I often find that I'm unable to get to events I've booked for because of double booking not having the stamina to do it all.'

Another mentioned the residual lethargy combined with cost of living making for difficulty in going out:

'My behaviour has not returned to pre-pandemic levels. And the reason for this is a combination of the residue of the pandemic effect (almost like PTSD) and the inflation we're currently experiencing. I used to go to the cinema once a week pre COVID. I've only gone once since the cinemas reopened. As for theatre, yes, I've bought tickets this 2023 season, but to fewer performances than I used to (because of the cost to discretionary expenditure).'

Despite the numerous complex barriers to attendance cited by many, a quickly growing proportion say they are not currently facing any barriers to attending – 3 in 10 (30%) in April, up from 11% in October 2022. One respondent said,

'Nothing will prevent me if I can find attractive events.'

## Looking ahead

### Qualitative data suggests last-minute ticket buying remains a trend for 2023

Previous rounds of the study revealed a trend of last-minute ticket buying. In August 2022, 26% of audience members were most likely to have been booking for events within the next seven days and the next 2-3 weeks (43%), and qualitative data in October 2022 highlighted the ongoing prevalence of the trend.

Likewise, qualitative data suggests the trend has continued into April 2023, and it could be here to stay a while yet.

Financial pressures may cause some audiences to hesitate before making bookings in advance, with some wanting to be convinced into attending before they can justify the purchase.

'Due to financial situations (more saving money because not being able to attend stuff during COVID) I find I take longer and more convincing to buy tickets for events.'

Some audiences may be feeling overwhelmed at the prospect of booking far in advance, unsure of their future plans, especially if they are limited in their ability to obtain a refund or give away their ticket. One said,

‘So many events are now being planned so far in the future, sometimes 8-12 months. Too much to deal with to plan so far out.’

Another said,

‘Purchasing early enough to get good seats can make attendance uncertain and it's difficult to on sell tickets due to terms and conditions.’

Wanting to hear reviews on events may cause some to book tickets last-minute, as one said,

‘I intended to book early but was unsure so booked late once I was aware of the reviews.’

Others said they were motivated to attend when an opportunity arose, and they had no plans on a particular day. One respondent said,

‘Free afternoon, checked what was on, booked and went.’

## **Audiences are attending a range of cultural events and have various motivations for supporting work they love**

In April 2023, audiences were asked to describe the most recent cultural activity they attended, and their motivation for prioritising it.

Audiences mentioned a range of cultural experiences, including familiar and unfamiliar experiences, from local and free events to large blockbuster performances and digital arts experiences.

Audiences continue to show support for artists and organisations who have been impacted by the pandemic. One said,

‘Went to a couple of show at the Melbourne comedy festival - Atheneum Theatre and Melbourne Town Hall; such an awesome event, like to get out and see a few shows, especially knowing the impact COVID had on artists.’

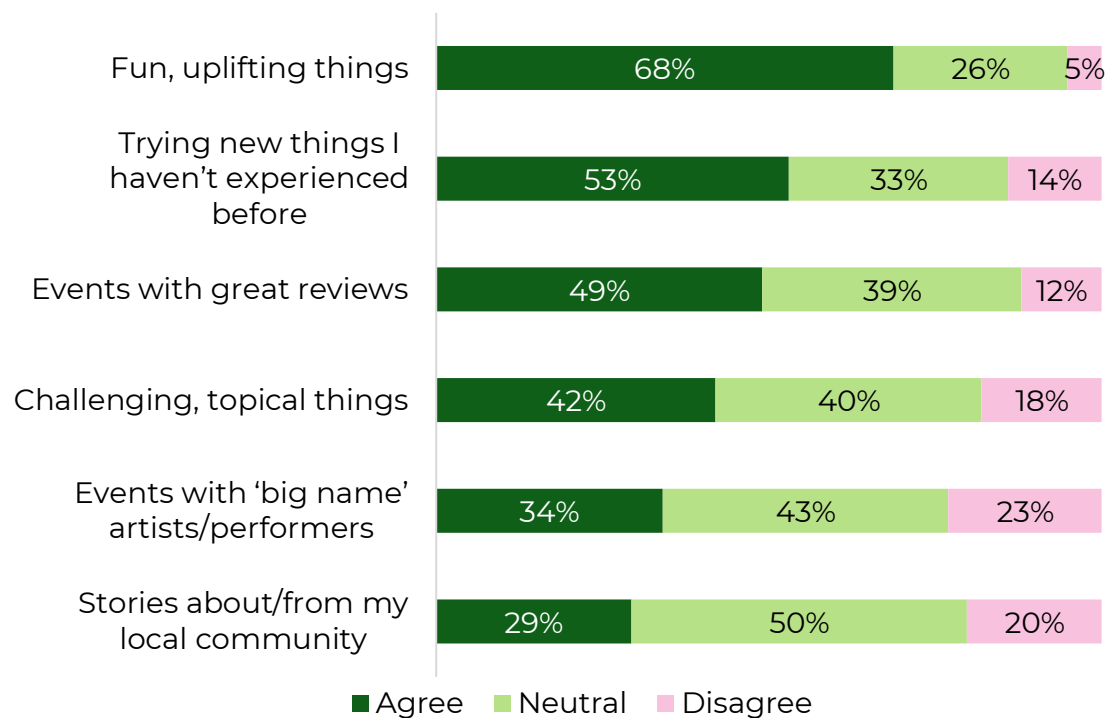
## 7 in 10 audiences say they will be attracted to fun, uplifting things in the coming year – and 53% want to try new things they haven’t experienced before

Audiences were queried about the types of cultural activities they’ll be most attracted to over the next 12 months.

Audiences are most likely to agree that they’ll be attracted to fun, uplifting things (68%), and more than half (53%) will be seeking new things they haven’t experienced before.

However, there is also a strong appetite for challenging, topical things (42% agree) – suggesting that diverse programming remains key to attracting different types of audience members.

Figure 10: In the coming year, I’ll be most attracted to ... (n=1,303)



As mentioned, audiences continue to seek out uplifting, positive and light-hearted experiences – offering reprieve from instability and challenging news cycles. One said,

'[I attended] the cinema as a Seniors Club member and Concession cheaper seats at Musica Viva concerts. Palace cinema

(both in Brisbane) and the Conservatorium Theatre in the side balconies; price and entertainment value. Not being made or required to think. I'm over that, just want to be entertained, not lectured to.'

Another said they attended,

'Mary Poppins with my partner. Highly recommended by work colleague. I had been to more serious events (plays) with family members that do not interest my partner. This [show] being fun, and uplifting fitted the bill; It was strongly recommended by a friend, and I wanted something that suited my partner too. So "lighter" than a few other recent shows.'

## **Respondents suggested ideas for alleviating financial pressures on audiences – though acknowledge that artists and organisations also face constraints**

In April 2023, audiences were asked, 'Do you have any suggestions for how artists or cultural organisations could address your needs and interests best, moving forward?'

Audiences acknowledged that financial limitations are impacting artists and arts organisations as well as audiences – and offered messages of support. One said,

'Just to say I appreciate how it must be difficult for artists and art organisations too. Since retiring I am living on a fixed income which has been eaten into over the last couple of years by the rising prices of food and fuel, so I just have to choose carefully what I can support.'

Some supported advocating for increased funding to the arts in times of crisis. One said,

'Arts and culture need to be affordable and accessible in Australia, so more funding opportunities need to be made available and ensuring fair pay and conditions for all artists.'

Others encouraged the use of alternative ticketing models,

'I think it's always hard for arts groups in periods of low consumer confidence and COVID definitely made it worse. The "pay in four" system put in place for some arts organisations via AfterPay or pay pal has enabled us to see shows or concerts. We have started going to smaller new work in our area rather than "big shows".'

Another said,

'Continue offering events at a variety of times and price points, and continue or expand the opportunity to buy season's subscriptions on instalment. Avoid external agencies with ridiculously high handling charges.'

## **Audiences are supportive of innovative and creative programming models, in light of challenging conditions**

Some respondents are conscious of creativity being compromised in an effort to reduce costs - and support offerings that are creative, diverse and innovative. One said,

'Strike a balance between the money-making blockbusters and the innovative/risky. The danger with these times is that the focus may move to making money, at the expense of creative and innovative work.'

Another said,

'Continued investment in new local works, buoyed by international well received works. We need some new weird stuff from overseas to inject new ideas into Australian theatre.'

One audience member shared their admiration for how the sector has adapted in recent years,

'I love what is provided by the arts and culture. I believe in the benefits they have for the entire community. I also admire the creative ways in which artists and cultural organisations have responded to the constraints of COVID. That flexible mindset that challenges us to think beyond the here and now and create beauty as well as insight is what we need. My personal circumstances have unfortunately affected how social I feel. But I will be moving forward.'

## Detailed segments

### Older and bolder

After several years shaped by the virus and mask-wearing, older audiences are now enjoying higher attendance levels and spending.

- ▶ Audiences over 55 are the most likely age group to experience no barriers to attending right now.
- ▶ Historically they have had lower comfort levels at cultural venues and high rates of mask-wearing – but on average this group is feeling more confident and active right now: 16% say the risk of contracting or transmitting the virus is inhibiting their attendance, compared to 47% in August 2023.
- ▶ They are spending at higher levels than they were 6 months ago. 40% spent more than \$100, compared to 37% in August 2022.
- ▶ Eight in 10 (78%) attended a cultural event in the past fortnight, the highest rate seen in the study since it began in March 2020. When asked to reflect on their recent attendance, one said, 'Musicals - Mary Poppins, & Juliet and an art exhibition as well as an open-air rock concert; after COVID lockdown I think I'm more inclined to not miss out on anything.'
- ▶ When asked about their household's financial situation, they commonly say it's the same as it was a year ago, particularly those over 75 (68%). Although most see the country's economic outlook as uncertain, they also generally believe their financial situation will be stable in the year ahead.
- ▶ Most say they have continued with similar spending patterns as before (53%). Around one quarter of those over 65 say they are willing to pay higher prices compared to 6-12 months ago (25%), although few identify with 'splurge' behaviour.
- ▶ While fewer of this group have personally been affected, some say they are conscious of how others are impacted, 'I am fortunate that my financial situation is secure enough that I am able to afford to attend events without worrying too much about the cost to myself. However, I do try to be mindful of the budgets

of any companions, so that probably impacts my decisions more than my own financial situation.'

- ▶ In the next 12 months – this is most the likely group to be drawn to challenging topical things (44% vs 39% of those under 35), and least attracted to big names (32% vs 46%) – though these still figure in some of their decisions.
- ▶ This group is relying heavily on email (63% say they found out about the event they most recently attended this way, compared to 42% of under 35s) – so continuing to grow and maintain CRMs and e-news databases, and optimising EDMs, are worthy of continued investment.
- ▶ They are almost three times as likely to hear about events in newspapers and printed material, though this is a small and possibly declining habit (16% compared to 6% of under 35s).

## Family frugality

Arts audiences aged 35-54 who have children living at home tend to be more budget conscious right now.

- ▶ Recent attendance rates among parents are slightly lower than other adults (72% vs 77%), particularly at live performances (39% vs 51%), which are associated with higher costs of attendance.
- ▶ When asked if anything is inhibiting their attendance, compared to pre-pandemic, parents are more likely to say financial reasons (56% vs 35%) and/or prioritising other things in their life (36% vs 22%). There has historically been a gap between parents and non-parents in this regard – but it is wider now than in past phases of this study.
- ▶ Parents are more likely to say they are worse off financially, than they were a year ago, compared to other adults (59% vs 38%).
- ▶ According to the Australian Institute of Studies [Families Then and Now: Housing](#) report, families with children (including couples and single-parent households) have higher weekly housing costs than couple-only and lone person households. Their housing costs have also risen faster over time.



- ▶ Pressure from housing costs on household budgets are mentioned by arts audiences as a key factor limiting their cultural spending. One person said, 'The monies I used to spend on dining out, live theatre, cinema and arts events has been eaten up in mortgage repayments.' Another said, 'We are now spending more on food and mortgage and are sacrificing going out unless it is low cost.'
- ▶ Most parents say their cultural spending has decreased in the past 6 months (54% vs 47% of other adults), and they also identify with budgeting behaviours at higher rates, e.g.:
  - Taking longer to make decisions about what to go to (67% vs 47%)
  - Looking for things that are free/cheap to do (76% vs 51%)
  - Staying closer to home for leisure/entertainment (59% vs 43%).
- ▶ One parent shared their situation:
  - 'Over the last year we've been to a number of big concerts and shows but I'd seriously reconsider spending more than about \$75 a ticket for anything at this point. We just saw Into the Woods at Belvoir St and adult tickets were \$82 but they had a student rate of \$47 which made it doable as a family.'
- ▶ Along with factoring in price to a greater degree than they did pre-pandemic, parents are the most likely to have changed their preferred attendance day/time or location. These changes vary from avoiding late nights, to staying closer to home, and it's worth working out what that means for your events.
- ▶ In the next 12 months, they're more likely than other adults to be drawn to fun/uplifting things (79% vs 67%) and trying new things they haven't experienced before (56% vs 53%). In October, when asked about travelling for cultural events, they were less likely to have travelled recently, consistent with the finding above regarding staying closer to home.
- ▶ Parents are more likely than other groups to use Facebook (33% vs 21%) - though this platform should always be part of a multi-channel strategy. Email, web and word of mouth are even more

important for this age group – and marketers may choose to prioritise accordingly.

## Young and restless

Young people tend to have lower incomes, and are among the most affected by financial barriers right now

- ▶ Young audiences (under 35) are attending at slightly lower rates than other adults right now (68% vs 78%), despite being early returners and high attenders earlier in the pandemic (76% were attending in March 2022).
- ▶ Those who are attending are spending at lower levels than they did previously, and they are spending less than other adults: 25% spent over \$100, compared to 40% of older adults.
- ▶ The proportion experiencing financial barriers to attending has increased from 45% in August 2022 to 58% in April 2023. They say other barriers are also inhibiting their attendance – such as ‘lacking energy to go out’ (36%) and ‘prioritising other things in my life’ 31%.
- ▶ While other ages most commonly think their financial situation will stabilise in the next 12 months, young people are more divided in their opinion, with some (23%) believing they will be better off, and others (31%) feeling they will be worse off. In fact, they are the most likely age group to believe they will be worse off, which is consistent with a recent international [multigenerational study by UNICEF](#), showing that 59% of 15-24 year olds in high-income countries believe they will be worse off than their parents.
- ▶ Right now, many are looking for free/cheap things to do (68%) and say the price they are willing to pay for cultural events has decreased (54%). When asked about the last event they attended, and why they prioritised it, many mentioned the cost and/or the availability of free or cheap attendance, for example, ‘I have been to several Melbourne International Comedy Festival acts in the last month as well as the cinema a few times. That was prioritised due to the availability of discount codes and cheaper tickets for

certain nights, plus the fact that many variety shows are available where multiple acts can be seen.'

- ▶ Several respondents specifically mentioned student prices and under 30 discounts or other offers. One suggested, 'Modifying 'youth' subsidies – there is a lot of inconsistency across various organisations – some are still at around 25 years of age... I think the ones that go up to 35 are much more reflective of the current demographics ... particularly in a time when other financial priorities like housing affordability are becoming increasingly harder...'
- ▶ When reflecting on their recent attendance experiences, several young people also mentioned being grateful to have been gifted tickets by parents, family members or friends in the industry – underlining the power of older generations in building younger audiences.
- ▶ Young people also identify with the behaviour of taking longer to make decisions about what to go to – and are factoring in things like the time commitment and scheduling, as well as costs. One said, 'I need to align events, for example I might be able to afford the show, but not dinner out, so I need to be able to time attendance around this.' Some also mentioned time constraints due to work and study.
- ▶ When targeting young people, it's important to bear in mind they commonly find out about events via Word of Mouth (57%), more so than other age groups. They also find out about events on websites (59%), on Instagram (34%) and Facebook (32%). They are the most likely group to find out about events through Instagram, and some
- ▶ They are twice as likely as older age groups to see outdoor advertisements for the events they attend, though this is a relatively small channel (17%, compared to digital channels which total 85%).

## What's next

To read about the story so far, visit the study's Australian homepage at: [www.thepatternmakers.com.au/covid19](http://www.thepatternmakers.com.au/covid19).

There, you can also access a dynamic dashboard to help you explore the results by location, artform and other variables. Instructions and tips for using the dashboard are available in a short video.

To receive future Snapshot Reports, Fact Sheets and resources in your inbox, as soon as they are available, you can opt in to receive Audience Outlook Monitor news at the link above.

If you have a question, or an idea to put forward, relating to this study, you can contact [info@thepatternmakers.com.au](mailto:info@thepatternmakers.com.au).

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# AUDIENCE OUTLOOK MONITOR

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