

Audiences 2023+

The top trends shaping Australian audiences in 2023 and beyond.

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Introduction

This report shares insights from over 8,800 arts and cultural audience members about their attendance in 2023 and beyond

Launched in May 2020, the Audience Outlook Monitor was established to track audience sentiment in relation to the COVID-19 pandemic. In 2023, it continues to provide insight into the top trends shaping audiences today, including the cost-of-living crisis, global uncertainty and the collective mood.

The main source of data featured in this report is the Audience Outlook Monitor, a cross-sector, collaborative survey involving around 100 arts and culture organisations, including museums, galleries, performing arts organisations and festivals.

For more information about the survey process, and sample sizes, visit the Appendices.

This report compares the latest data with past Audience Outlook Monitor reports, to examine how things are changing over time – and identify opportunities for programming, marketing and strategy in the current conditions.

For questions, contact: info@thepatternmakers.com.au.

1.

Attendance trajectories



1. Attendance Trajectories

Attendance rates across the country continue their slow recovery since the pandemic, and with a challenging year ahead, it's wise to set sights on the right targets.

Key points:

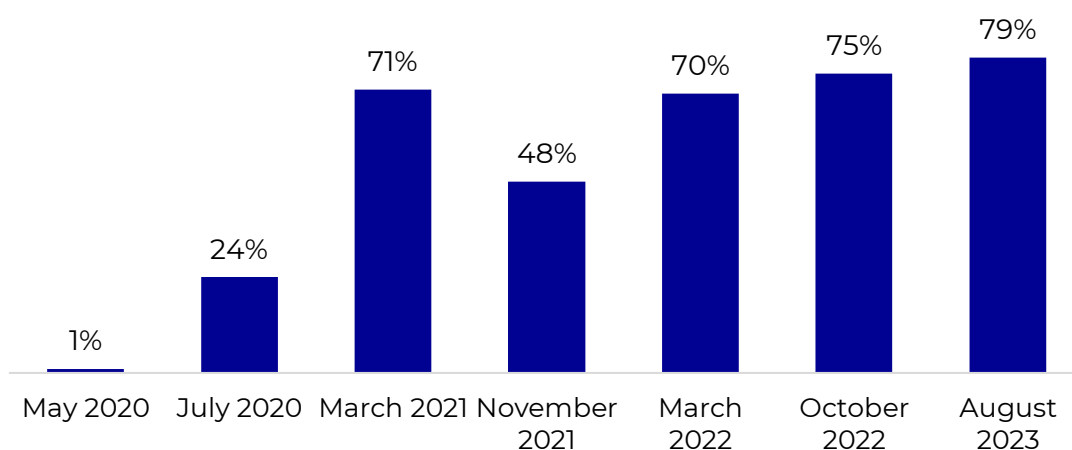
- In 2023, attendance is reaching its highest point since 2020, and the frequency of attendance is increasing, but the recovery process continues.
- Strategic investment and programming shifts have helped many organisations sustain or increase their capacity in 2022 and 2023, but charting recovery is complex, with mixed attendance results across the market.
- Big jumps in attendance appear unlikely in the next 12 months, with 2 in 3 audience members expecting their attendance levels will stay the same amid a challenging economic outlook.
- Making space to review measures of success and share learnings – internally and externally – may help organisations focus on the right challenges over the coming year.

In 2023, attendance is reaching its highest point since 2020, but there's more to the story

As Australia continues its recovery from the pandemic, the proportion of audiences attending cultural events in person has grown over time.

8 in 10 audience members say they attended at least one kind of cultural event in the fortnight prior to data collection (79%), up from 7 in 10 (70%) in March 2022.

Figure 1: Proportion of respondents answering yes to 'In the past fortnight, did you do a cultural activity in-person (not online)?' May 2020 to August 2023 (n=8,816)



However, this overall participation rate only tells part of the story, with spending levels not growing alongside participation. There are also key differences in how various groups are attending and spending. For simplicity, we discuss three key segments in this report:

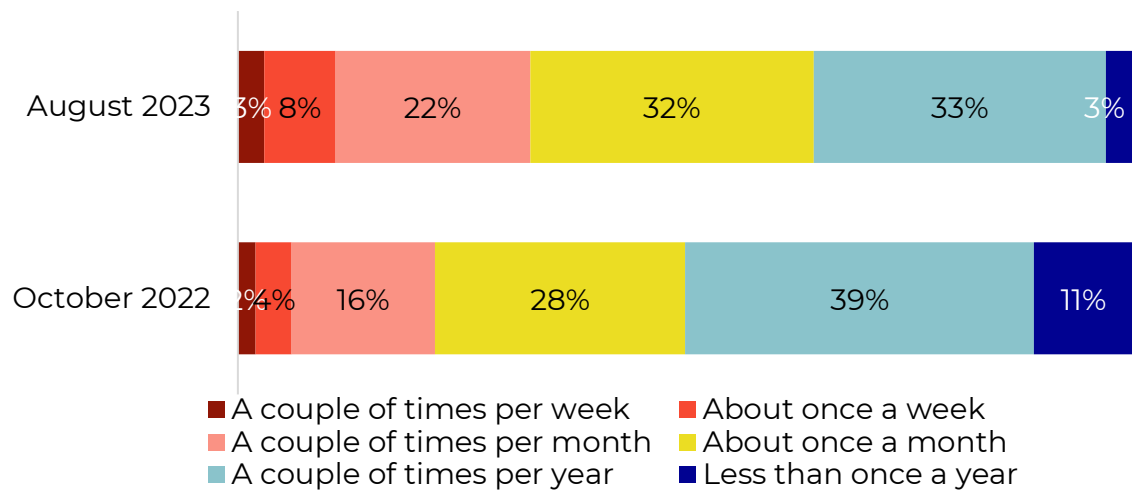
- ▶ **Young and restless:** Audiences under 35 are attending frequently, but spending the least, with concerns about their economic outlook.
- ▶ **Family frugality:** Audiences aged 35-54 with children living at home were less likely to have attended a cultural activity in the last fortnight (72%) and are managing pressures on family budgets.
- ▶ **Older and bolder:** Audiences over 55 are spending the most on cultural events right now, and their spending is growing.

Although there will always be exceptions, understanding the major differences between these three groups is a helpful starting point, with a dedicated chapter on these segments later in this report.

Frequency of attendance is growing at performing arts venues and at museums and galleries

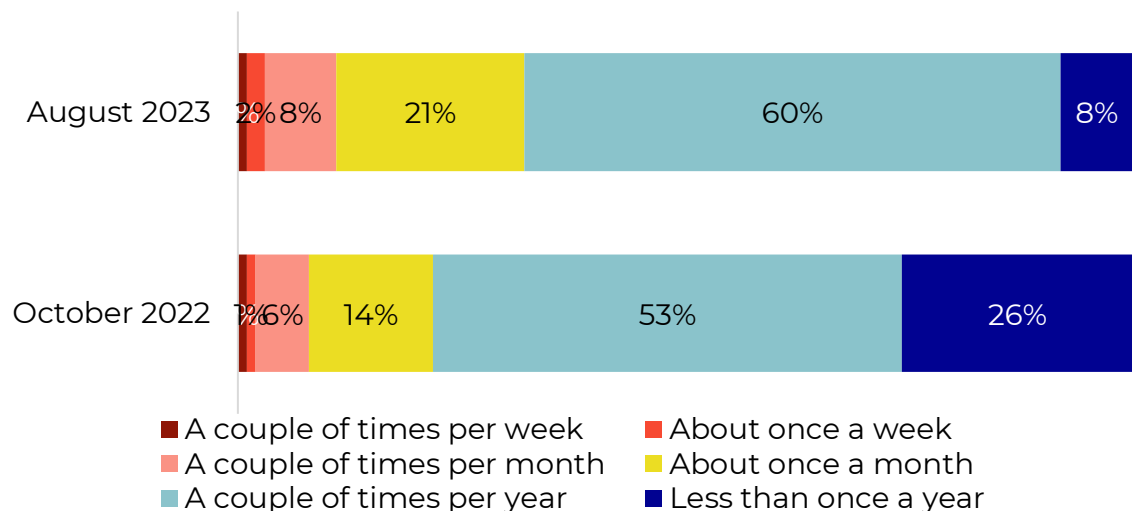
Those who are attending performing arts events in 2023 are, on average, attending more frequently than they were in October 2022, with 65% attending at least once a month in August 2023, compared to 50% in October 2022.

Figure 2: Attendance frequency at performing arts events, August 2023 (n=8,351) and October 2022 (n=5,333)



Likewise, frequency of attendance at museums and galleries has increased, with 32% attending at least once a month, up from 22% in October 2022. This is a positive trend, but there are some complexities.

Figure 3: Attendance frequency at museums and galleries, August 2023 (n=6,688) and October 2022 (n=4,713)



There is no one story for how organisations are recovering their audiences after the pandemic, but there are similar challenges

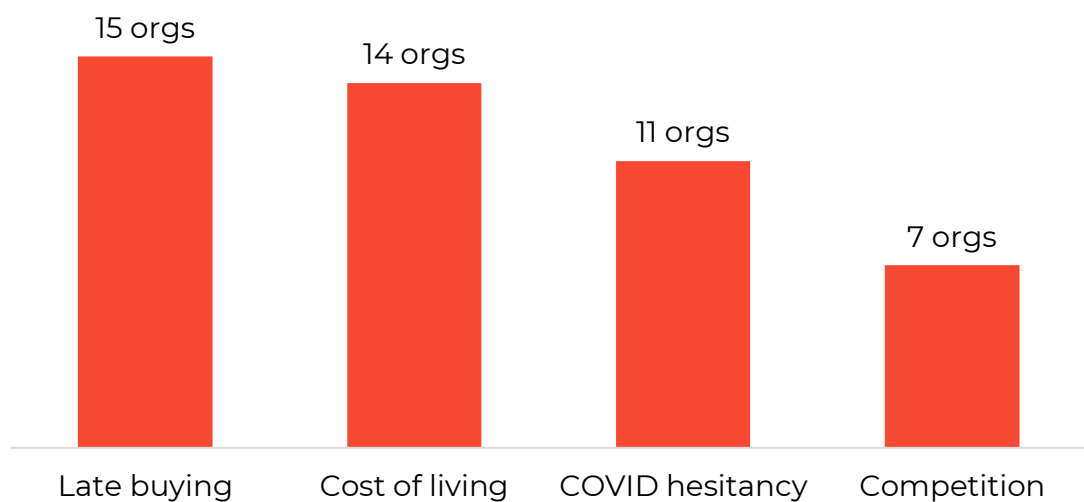
Although the participation rate and frequency are trending in a positive direction, behaviour has not returned to pre-pandemic levels.

Arts organisations participating in the Audience Outlook Monitor were asked to provide attendance figures for 2019 and 2022, to compare how audiences have changed and to what extent the industry has rebuilt its audiences following the pandemic. They were also asked what their biggest challenges and successes have been.

52 organisations responded to the benchmarking survey, and their responses confirm the past few years have been challenging, with a range of factors impacting differently across the market. Some organisations have been affected by natural disasters, while others are unscathed. 11 of the organisations were feeling the impact of COVID as their top challenge, while others were feeling different pressures.

While each reported unique circumstances, some shared similar challenges like last-minute ticket buying, cost of living concerns, COVID hesitancy and competition in the market.

Figure 4: Themes mentioned by organisations in response to ‘What’s been the biggest challenge, in terms of bringing audiences back?’ August 2023 (n=39)



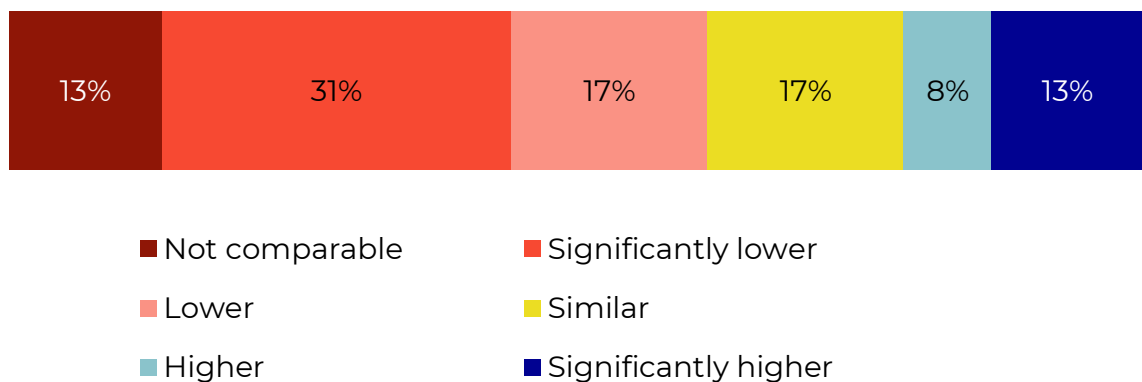
Organisations are adapting to the new landscape in different ways, and around 4 in 10 have rebuilt their audience to 2019 levels

Amongst the 52 organisations who provided responses about their attendance levels and events for 2019 and 2022, the picture is complex.

Comparisons are not always straightforward, but based on analysis of available data, it appears that around half of all organisations had lower (17%), or significantly lower (31%) audience numbers compared to 2019.

By 2022, some organisations had recovered their audience to similar levels to 2019 (17%) or grown them further (21%), but there is important context for what’s behind these numbers.

Figure 5: Quantitative audience recovery in organisations, August 2023 (n=52)



Some organisations are expanding their capacity or adapting their programming to reach new audiences, while others are stabilising or monitoring

Attendance numbers are influenced by changes in programming, capacity, funding and strategic shifts, so it’s not always a fair comparison. Digging deeper into both quantitative and qualitative data from organisations, different stories emerged about how they adapted during the pandemic.

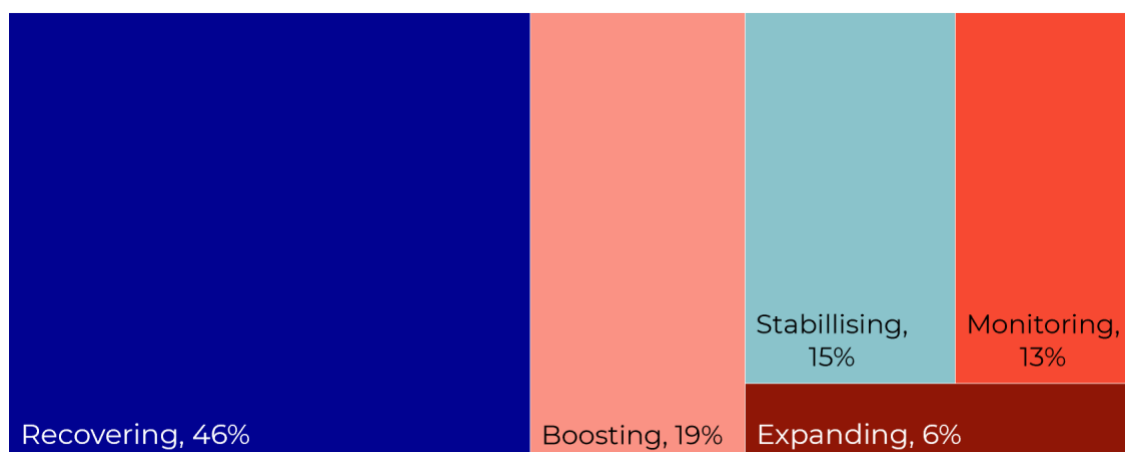
Organisations were placed into these categories by evaluating against the following four elements:

Audience recovery	Events and capacity	Programming	Organisational changes
Is total paid and free attendance higher or lower compared to 2019?	Has the number of events and tickets available changed?	Were there changes in approach to the types or genres of events?	Were there changes in funding or big strategic shifts?

Five different groups of organisations are apparent:

- **Expanding** organisations (6% of the total) are seeing the most positive trends, and were fortunate to have operations that involved outdoor locations, free/cheap events or confident audience segments during the upheavals
- **Boosting** organisations (19%) have invested in new ways of working since the pandemic, increasing their capacity and attracting new audiences in the process
- **Stabilising** organisations (15%) show signs of returning to pre-pandemic levels, without dramatic changes in what they do
- **Recovering** organisations (46%) had not regained their pre-pandemic audiences by 2022, and the next few years will be important, with strategic work involved
- **Monitoring** organisations had non-comparable data, either due to inconsistent record-keeping or changes in personnel or ticketing systems and will be monitoring progress differently.

Figure 6: Categories of recovery in organisations, August 2023 (n=52)



***Expanding* organisations reached much larger audiences, sometimes due to being ‘in the right place at the right time’**

Audience recovery	Events and capacity	Programming	Organisational changes
Increased beyond 2019 levels by more than 30%	Similar events and capacity	Benefitted from having outdoor venues, free/cheap events or confident audience segments	Leaning into their core business, and/or undertaking some adaptive work, showing signs of sustainability

6% of organisations were classified as ‘expanding’, demonstrating significantly larger audiences in 2022 relative to 2019 without drastic changes to programming.

One expanding organisation noted that their core business had benefited from the behavioural changes of audiences in the pandemic, noting that since it ‘lends itself to people having freedom to move around freely in the open air, we have had record crowds since 2020.’ (Festival, regional NSW).

***Boosting* organisations gained new audiences by increasing their programming, event capacity or touring**

Audience recovery	Events and capacity	Programming	Organisational changes
Increased beyond 2019 levels	More events with more tickets available	‘Blockbuster’ style programming, and leveraging international acts	Putting the hard work into attracting new audiences

19% of organisations were classified as ‘boosting’, reporting that activities such as programming blockbuster events, international acts, or (for some key producing organisations) ramping up their own touring have led to strong attendance recovery trajectories.

6 in 10 boosting organisations were performing arts venues, suggesting that some venues may have more ability to leverage audience-building programming opportunities, compared to some other organisation types.

Supply was also a common theme, with all boosting organisations reporting that they've increased the number of paid and/or free events since 2019.

'We've experienced a huge lift in the inventory/number of shows going on sale providing lots of choice for the customer' (Theatre, Regional NSW)

All boosting organisations noted changes in programming. Popular events like international acts, or light-hearted content were cited as factors in attendance recovery:

'Having international acts come through... built on confidence and lifted profile. Once all the restrictions were lifted, we found audiences were hungry for performances.' (Venue, Regional NSW)

'Anything that is not light-hearted and easy to digest is harder to attract an audience.' (Venue, location redacted)

However, not all touring product is reaching an audience, with one regional VIC producer saying, 'Touring shows have been very difficult to sell post-COVID'.

One manifestation of the increased supply generated by boosting organisations is **more competition, which some organisations mentioned** as a challenge facing them at the moment:

'There was also a lot of in-industry competition with so many events back in full force.' (Multi-artform venue, regional VIC)

'[We're] competing for our audience's attention.' (Theatre venue, regional NSW)

While celebrating a successful recovery, boosting organisations are also having conversations around sustainability, and how to retain the new audiences they have attracted.

***Stabilising* organisations showed signs of returning to pre-pandemic levels, without dramatic changes in what they do**

Audience recovery	Events and capacity	Programming	Organisational changes
Varied – within +/-15% of 2019 levels	Similar to 2019	Similar to 2019	Similar to 2019

15% of organisations were classified as ‘stabilising’, and based on their numbers and stories, they appear to be serving audiences in similar ways compared to 2019, and at a similar volume.

These organisations have not dramatically increased their capacity or changed their programs, and yet have seen the rebuilding of audiences back up to the levels seen pre-pandemic. 3 in 4 stabilising organisations were **producers**.

Organisations that were less affected by lockdowns and reduced capacity during the pandemic may be in a better position to stabilise than others. One stabilising organisation said:

‘Being in WA we were largely able to continue performing, albeit with some small snap lockdowns and reduced capacity, but we really only had to cancel two productions in totality.’

***Recovering* organisations had not regained their pre-pandemic audiences by 2022, and the next few years will be important**

Audience recovery	Events and capacity	Programming	Organisational changes
Attendances in 2022 were significantly lower than 2019 levels	Varied – may be less events, or similar events but with less audiences	Similar to 2019	Similar to 2019

46% of organisations were classified as ‘recovering’, due to having lower or significantly lower audiences in 2022 relative to 2019.

The ‘recovering’ classification was more common in medium to large organisations, with 70% large organisations (200+ staff) and 46% of medium (20-199 staff) in this category. 3 of the 4 galleries and museums that responded were ‘recovering’, whilst one was ‘stabilising’.

30% of recovering organisations mentioned **cost of living** and 39% mentioned **late-buying ticket cycles** as a barrier to recovery. Some noted the impact of more intense competition, with one saying:

‘Audiences are now spoiled for choice when it comes to attending live events, and also again having the option to see international touring artists and travel overseas.’ (Producer, WA)

A number of the recovering organisations say that so far, 2023 is looking more positive, and in a year’s time this benchmarking exercise could see them join the ‘stabilising’ group.

However, as uncertainty in the market continues, the next few years will be critical in determining the trajectory of attendances and whether there is need for strategic changes.

Many audiences appreciate the higher volume of events available, post-pandemic – though perception of choice is mixed

When reflecting on their recent attendance experiences, audiences often mentioned enjoying being able to attend the wide range of events now available to them. One said,

‘Having a variety of options is great and this seems to have increased over the past 12 months.’ (Age unknown, WA)

Several respondents appreciated the opportunity to make up for lost time during the pandemic, as one said,

‘We have looked forward to getting back out and enjoying the arts and cultural events we missed during Covid. We have tried and enjoyed new experiences.’ (55-64, VIC)

Others are conscious that they're feeling there may be too much choice, with the back log of events now being cleared, post-pandemic and many feeling time poor. One said,

'The main problem is that since COVID there is almost too much competition as artists return in droves to Perth.' (55-64, WA)

Meanwhile, others feel that, although things have resumed, they continue to miss out on opportunities in their local area. One said,

'I used to like going to see big city theatre companies on tour – since COVID they've stopped touring in my area.' (65-74, VIC)

Big increases in attendance appear unlikely in the next 12 months, with 2 in 3 audiences expecting their attendance will stay the same

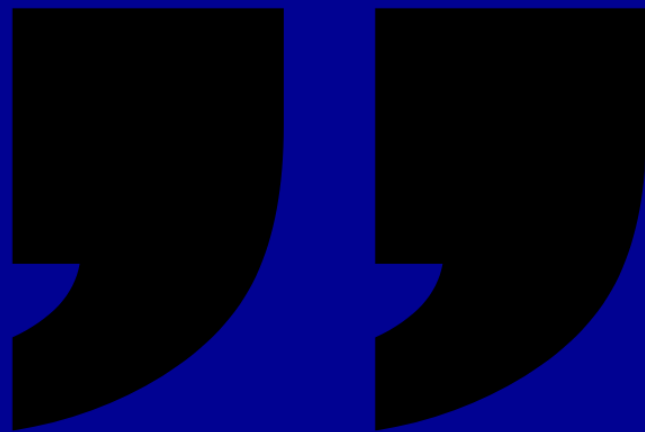
In October 2022, half of respondents to the Audience Outlook Monitor (51%) said their current level of attendance would 'definitely' or 'likely' increase over the following year. In August 2023, that proportion dropped to one quarter of respondents (27%), while 2 in 3 respondents expected that their current level of attendance at cultural events will stay 'about the same'.

Inflationary pressures are impacting household budgets – with major changes unlikely for at least 12-18 months (the RBA predicts inflation to return to the target range by late 2025) – a topic covered in depth in the next chapter.



"Having a variety of options is great and this seems to have increased over the past 12 months."

Audience member
WA



Things to think about when charting attendance trajectories:

Attendances are moving in a positive direction, but the situation is complex, and growth in attendance volume could be limited in the next 12 months.

Here are some things to consider:

- ❑ Manage stakeholder expectations around attendance recovery, emphasising that there are many stories of recovery out there and no 'one size fits all' approach
- ❑ Consider investing ways to improve the accuracy and consistency of how attendance is measured and tracked over time, so it can inform your decisions
- ❑ Make space for internal reflection and interpretation of actual attendance data, including what may be behind changes, to build organisational knowledge
- ❑ There is a case to review attendance and engagement targets for the next 12 to 18 months – bearing in mind that economic conditions are limiting growth in attendance and that habits take time to change
- ❑ Ensure that attendance isn't your only measure of success, and consider ways to track engagement and impact
- ❑ Find opportunities to share knowledge with your peers about what's working, what's a struggle and how you're evolving your work around audience needs
- ❑ Consider joining (or forming) cross-organisational working groups and networks around key topics, where there is opportunity to share learnings and push the industry forward

2.

Inflationary pressures and pricing



Image Credit: Chloe Elizabeth, courtesy of Adelaide Fringe.

2. Inflationary pressures and pricing

Economic conditions are limiting what Australian audiences can spend on events, and some segments need targeted thinking to ensure access to arts and culture.

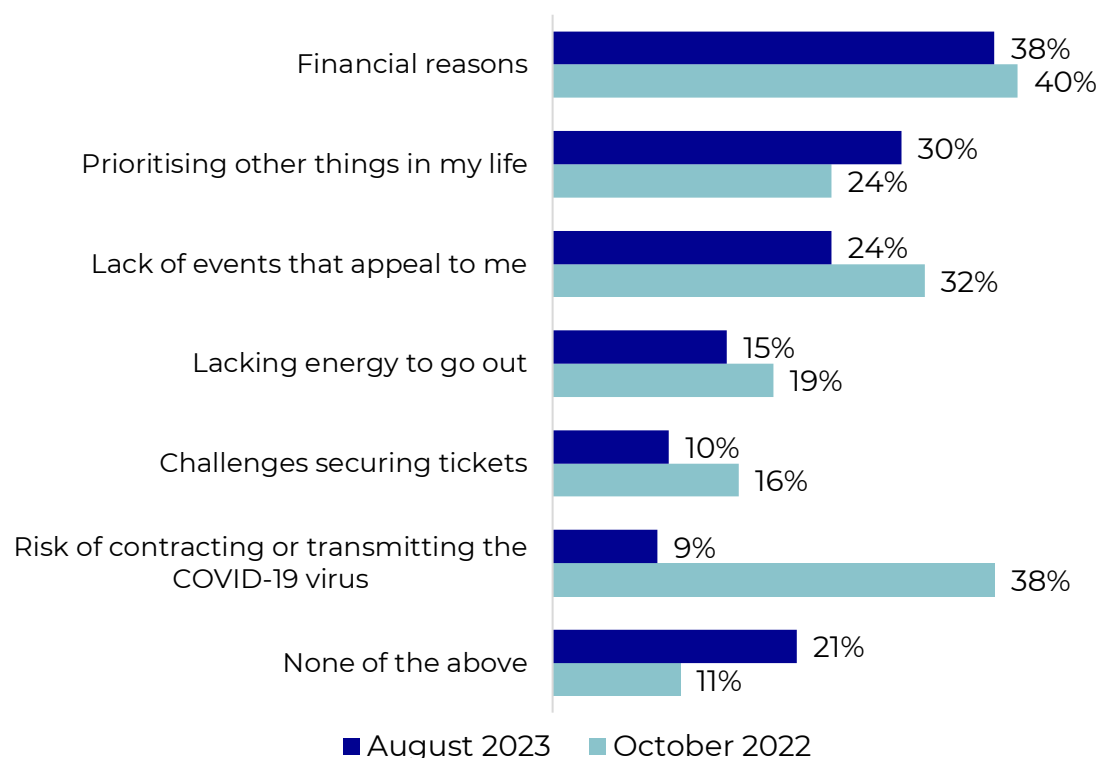
Key points:

- Financial reasons are the top barrier to attendance, and inflationary pressures are expected to continue in 2023 and 2024.
- Spending levels at arts and culture events are not growing, as audiences weigh up value for money and take longer to make decisions.
- Younger audiences and families continue to be the most impacted.
- A key opportunity is developing sustainable strategies for targeting disadvantaged segments.

Financial reasons continue to be the top barrier to attendance, affecting 4 in 10 audience members

Consistent with previous research in April 2023 and October 2022, the August 2023 results show that financial reasons are the most common barrier to attendance (38%). This is followed by audiences 'prioritising other things' in their lives (30%) and a perceived lack of appealing events (24%).

Figure 7: 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). August 2023 (n=8,741) and October 2022 (n=5,415).



Spending levels at arts and culture events are not growing, with consumer confidence remaining low in August 2023

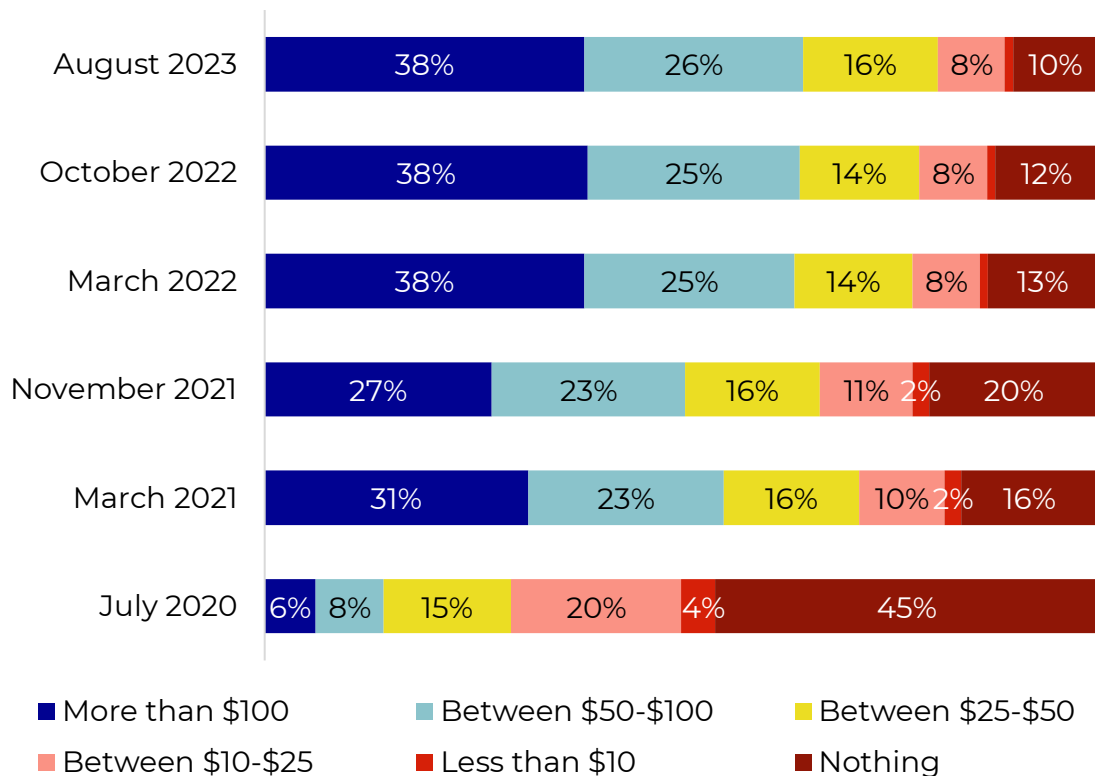
While attendance has increased over time, audiences overall are not necessarily spending more money, with amounts spent on tickets to in-person live events and cultural activities staying roughly the same as October 2022 levels.

On average, spending levels remain consistent with previous rounds of data collection. In August 2023, two-thirds (64%) of respondents spent over \$50 on tickets to in-person live events and cultural events in the past fortnight – slightly higher than April 2023 (59%), but consistent with October 2022 (63%).

The latest [ANZ-Roy Morgan Australian Consumer Confidence](#) survey reported on 8 August 2023 shows that ‘confidence has been in very weak territory for 23 consecutive weeks, the longest weak streak on record.’

Spending levels vary slightly between age groups (see [Segmented approaches](#) for further information).

Figure 8: In the past fortnight, how much did you spend on tickets to in person live events and cultural activities? Full phases from July 2020 to August 2023 (August 2023, n=6,796)



More than half of audiences under 55 say they're financially worse off than they were a year ago

In August 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?'

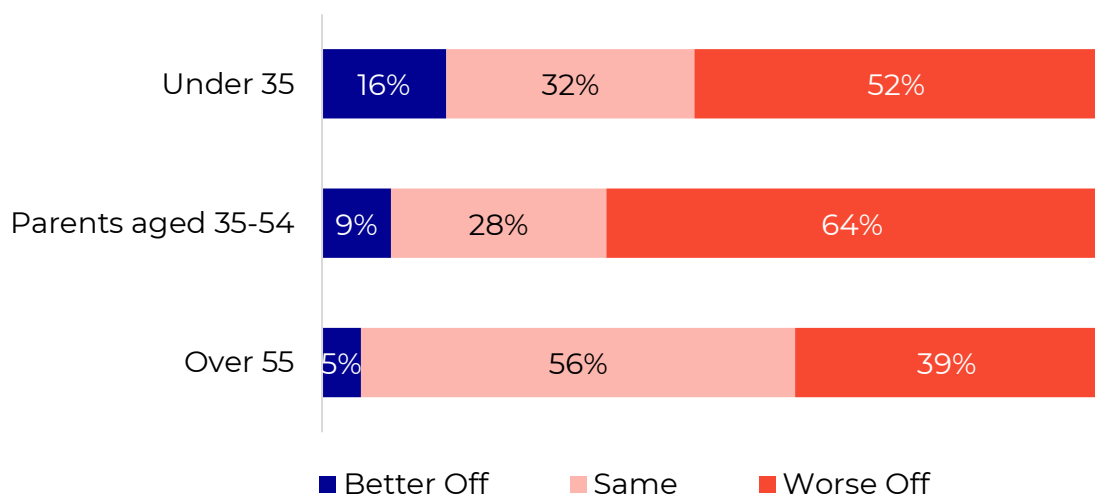
Overall, audiences were most likely to say they are the 'same' (48%), or 'worse off' (45%) at the moment. Only 7% overall said they are 'better off'.

Those aged 35-54 were mostly likely of any age group to report they are financially 'worse off' (62%). This rate is slightly higher among **parents in this age group** (64%) compared to non-parents (60%).

Audiences **under 35** were the second-most likely age group to say they are 'worse off' (52%). Although it is a small proportion, 16% of under 35s said they are 'better off' – the highest proportion of any age group. However, this result may be linked to many under 35s breaking into the workforce and commencing full-time work and/or their perceptions of financial stability differing from that of older Australians.

Over 55s were most likely to say they are in the 'same' financial position compared to a year ago (56%).

Figure 9: Would you say that you (and any family living with you) are better off or worse off financially than you were a year ago? By key segment, August 2023 (n=6,580)



Audiences are thinking carefully about how to experience events and whether they can justify ‘splurging’

Qualitative data shows that many audience members are still attending cultural activities while finding options to spend less, or are prioritising things that really grab their attention. One said,

‘From our perspective it's mainly the cost of an event/performance that affects our decision. If it's something we're passionately interested in, we will attempt to stretch the budget.’ (75+, WA)

Another said,

‘I have been spending a lot on entertainment recently as there have been lots of big-name performers doing shows in Australia, but I am feeling the pinch so will need to cut down on spending on arts from this point onwards.’ (Under 35, NSW)

Another described the tension of valuing the arts and having a desire to support artists’ work – while balancing cost of living pressures.

‘While arts are an important part of life, the cost of many events continues to be a barrier particularly when factored against the increased cost of living. I want artists to earn what they are worth and to be able to practice their craft, and to earn a living from what they love, it's just such a balancing act.’ (Age unknown, ACT)

For others, despite their love for arts and culture, they have needed to re-evaluate priorities and seek most cost-effective solutions at the moment. One attendee shared,

‘Incomes are not going as far as they used to. It is a difficult equation. Art and culture are very important, but people need to be able to live in a home and put food on the table before they will consider paying for cultural events. Community events for those on low incomes will assist with people seeing more events when they are financially secure.’ (65-74, VIC)



"From our perspective it's mainly the cost of an event/performance that affects our decision.

If it's something we're passionately interested in, we will attempt to stretch the budget."

Audience member
75+, WA



Audiences are feeling slightly more pessimistic than optimistic about their future financial circumstances

Audiences were also asked: 'Now looking ahead – 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 the same as now?'

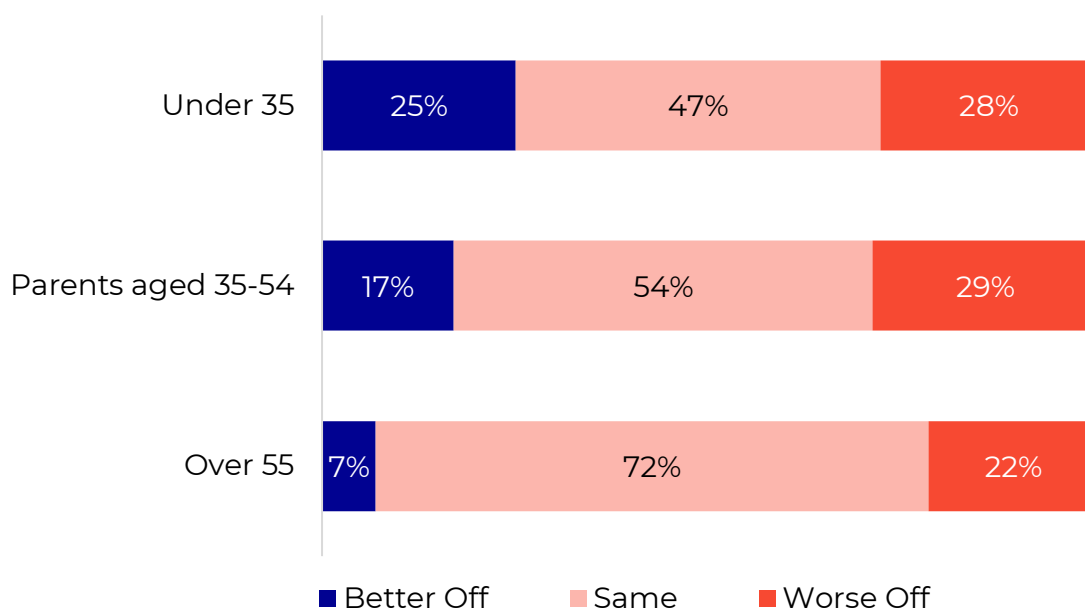
Two-thirds (66%) of audiences say they expect to be in the 'same' financial position a year from now, while one-quarter (24%) expect to be 'worse off.' One in 10 (10%) expect to be 'better off.'

Parents aged 35-54 are less optimistic about their financial circumstances in the coming year, with 3 in 10 (29%) expecting to be 'worse off.'

Under 35s were the most polarised group: they are second-most likely to say they expect to be 'worse off' (28%), but they are also the most likely group to say they expect to be 'better off' (Figure 10), perhaps related to their prospects of career progression.

Over 55s were most likely to say they expect to be in the 'same' position (72%) suggesting a degree of stability in their outlook, which is not shared to the same extent in other segments.

Figure 10: Now looking ahead – 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 the same as now? By key segment, August 2023 (n=6,225)



Half of audiences are looking for cheap things to do, taking longer to make decisions and staying closer to home

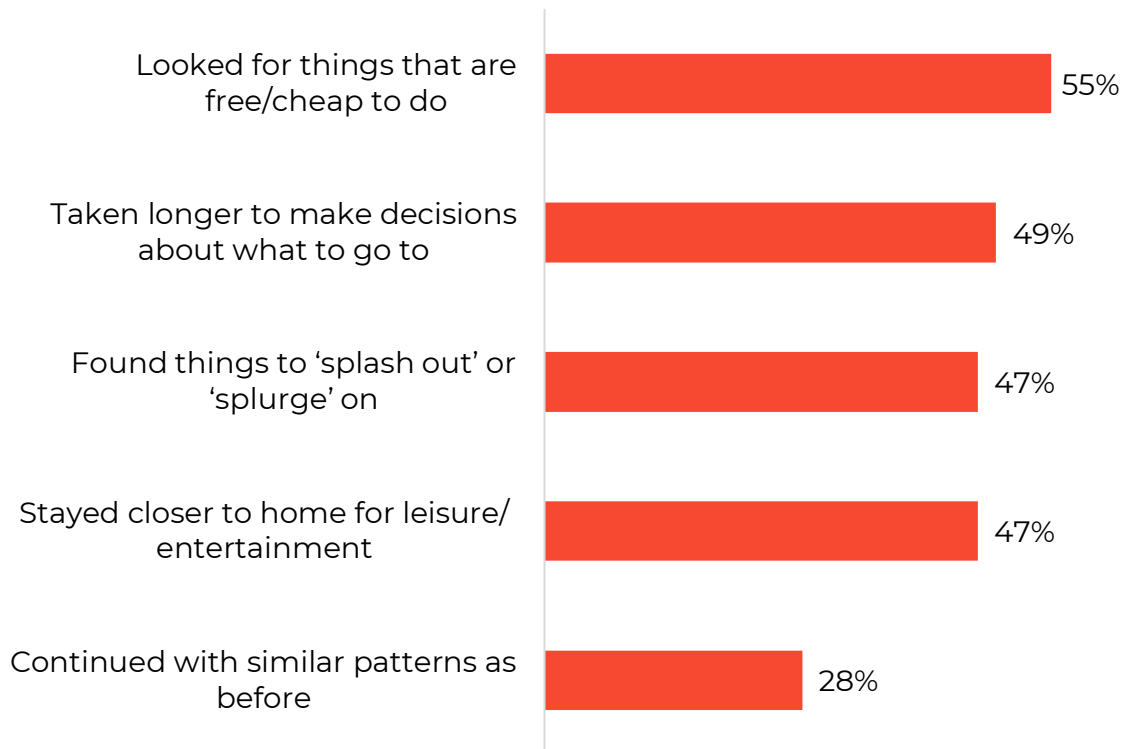
Audiences were asked about the ways in which their attendance behaviour has been affected by their financial situation at the moment. Respondents were most likely to say they have been ‘looking for things that are free/cheap to do’ (55% agree or strongly agree).

Around half are also deliberating longer on their decisions to attend (49%) and staying closer to home (47%) to attend events. Audiences are least likely to have continued with similar patterns as before (28%), suggesting that many are finding themselves adapting to the changing conditions.

While the majority are looking for cheap options, a significant number (47%) also say they have found things to ‘splash out’ or ‘splurge’ on. As audiences become more selective, some may have a stronger desire to commit to the things they love – while saving in other areas. One respondent shared,

‘Coincidentally, a number of overseas bands I like have announced tours. So, I've "splashed out" on tickets more recently. But I needed to convince myself I could afford it.’ (35-54, VIC)

Figure 11: Given my financial situation, in the past 6 months, I have... (strongly agree and agree) August 2023 (n=8,707)



The cost of tickets is only part of the equation, with regional audiences also factoring in travel costs, parking and food

Financial barriers associated with attending are compounded by travel costs for many. Qualitative data reflects that many audiences are weighing up the additional costs of attending, such as travel, accommodation, food, as well as the ticket price. One said,

‘It is cheaper and easier to stay home. If these organisations want more people to attend their events, they need to provide more incentives and better accessibility – especially to those in regional towns who can't even afford the travel costs of getting to the city.’ (Under 35, VIC)

This is particularly the case for those living in regional and rural areas, with many respondents making suggestions for incentivising attendance among these audiences. One said,

‘Those living in regional areas are feeling the cost of living and housing crisis too, which makes it hard to justify the cost of travelling to the city and perhaps accommodation. It would be great to have more regional performances or visits to regional studios to assist up and coming artists.’ (Age unknown, NSW)

Another mentioned subsidising tickets for rural attendees travelling into the cities,

‘I always have to travel for anything appealing, which is a major deterrent. My suggestion is (upon proof) a discount for people living in areas that don't have the privilege of being close to major events to entice and encourage attendance. For example, a membership to receive a discount on tickets for [people] living in a rural area to help with the overall cost of attending?’ (Under 35, VIC)

Due to the cost of travel, some respondents mentioned they are attending more local productions to keep costs down, for example:

‘We are starting to look at local productions at our local Council Entertainment Centre as they are more affordable. For me to take my grandchildren to see a musical, it is definitely a once a year only event with the cost being hundreds of dollars.’ (65-74, NSW)

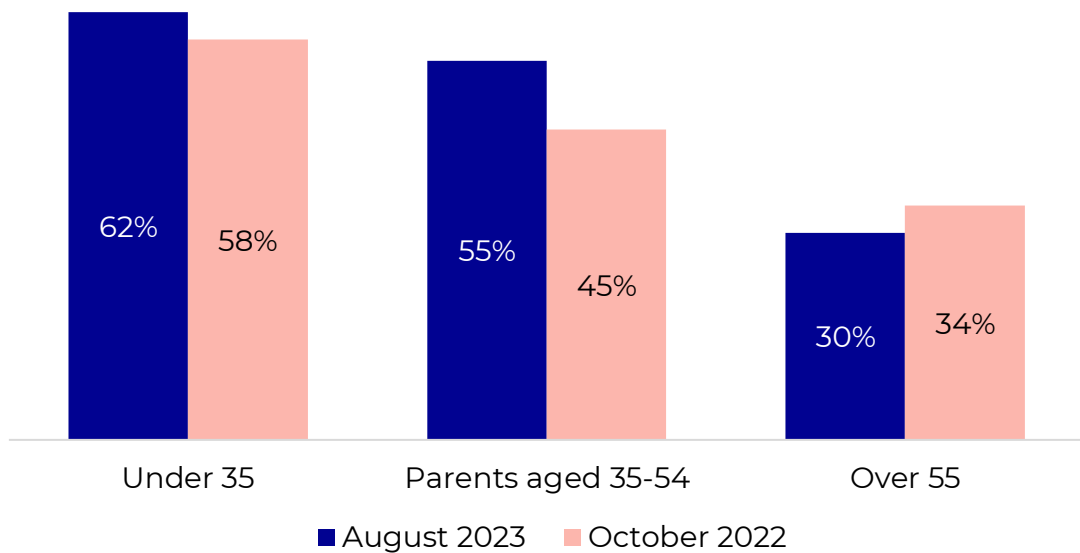
Younger audiences and families continue to be the most impacted by financial barriers

Financial barriers are affecting audiences across all age groups; however, they are most pronounced amongst **under 35s**, with 62% experiencing financial barriers to attending (up from 58% in October 2022), while only 30% of **audiences over 55** are affected (down from 34%).

The proportion is even lower looking at those aged 75+, with 24% in this group saying financial barriers have prevented them from attending as

they did in the past (down from 30% in October). Meanwhile, 55% of **parents aged 35-54** are affected (up from 45%)

Figure 12: Proportion of audiences experiencing financial barriers, August 2023. By key segment, August 2023 (n=6,603) and October 2022 (n=3,956)



Qualitative data shows that younger audiences are eager to attend cultural events but are feeling the pinch in the cost-of-living crisis, inhibiting their ability to engage with some types of cultural experiences. One said,

‘In my experience, younger audiences are eager to engage more in culture, however, high ticket prices can present a barrier (for events such as the opera, ballet, or classical music performances).’ (Under 35, VIC)

Meanwhile, responses from **parents aged 35-54** suggest that many are eager to attend family events – but are finding costs associated with attendance prohibitive due to the cost of living. One shared,

‘Finances are tight at the moment and ticket prices are becoming out of reach, especially for those with young families and mortgages. For what is essentially a discretionary spend, it becomes harder to justify paying the ticket prices for the small gigs that I enjoy attending...

...We want to continue to support artists but current financial constraints and increasing cost of tickets are pricing us out of the



market. As a result, I am having to be far more selective about what gigs I am prepared to spend on, whereas a year ago, I had a calendar full of gigs and tickets all lined up.' (55-64, VIC)

Another shared,

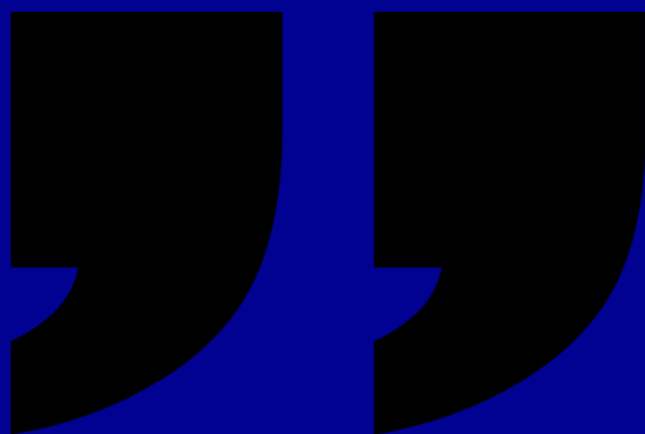
'I would like my teenage children to attend, but many don't offer student or children tickets which means we don't go as a family of four: to attend a concert can be \$400 or more. I am an arts and music supporter and performer and want to see more concerts, but with tickets in reach of all age groups.' (Age unknown, ACT)



"Finances are tight at the moment and ticket prices are becoming out of reach, especially for those with young families and mortgages...

...We want to continue to support artists but current financial constraints and increasing cost of tickets are pricing us out of the market."

Audience member
55-64, VIC



Things to think about when addressing financial barriers to attendance

Audiences in all age groups are feeling the pinch when weighing up the costs of attending cultural events – though some are more disadvantaged than others.

Here are some things to consider:

- ❑ Prioritise discussions around meaningfully building future audiences, and consider whether you have the right strategies in place to meet this generational challenge
- ❑ Consider new ways to cross-subsidise events in programs and/or seek funding and partnerships to enable greater discounts and opportunities for financially disadvantaged segments
- ❑ Draw on data about how different segments are affected when assessing the case for funding in grant, partnership and sponsorship applications
- ❑ Review the level of discounts offered for younger people and concession pricing in relation to the level of disadvantage they experience
- ❑ Try to avoid last-minute ticket discounts and think ahead about strategic offers that can realistically be maintained longer-term, to build consistency, clarity and trust with audiences
- ❑ Consider packaging of tickets with food/drink and travel options, and/or partnerships with local vendors and businesses, where nearby options and offers could be cross promoted to audiences.

3.

The desire to inspire



3. The desire to inspire

In the wake of the pandemic, audiences are in the mood for uplifting experiences – requiring event organisers to think creatively about effecting meaning and building trust in difficult times.

Key points:

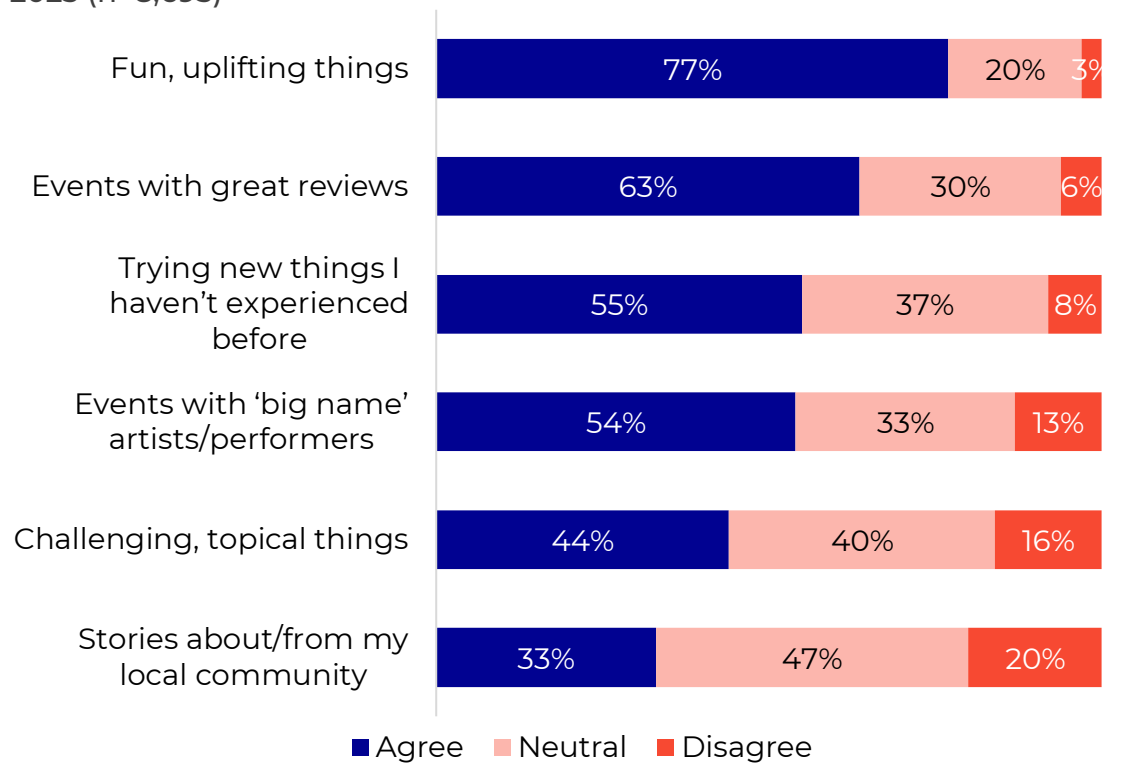
- Australian audiences are showing significant appetite for a wide range of content, though budget pressures are leading some audiences towards ‘safer’ bets or ‘guaranteed fun’.
- Social, uplifting experiences and events with great reviews will continue to reach the widest audience in the coming year.
- Many audiences are hungry for meaning, but care and tact may be needed to when approaching challenging topics.
- Organisations that understand the mood can please crowds today while building trust for tomorrow.

There is significant appetite for a wide range of content, though budget pressures are leading some audiences towards 'safer' bets

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

The results show significant audience appetite for all themes tested, including fun, uplifting things (77%), events with 'big name' performers (54%), and challenging, topical things (44%).

Figure 13: In the coming year, I'll be most attracted to... August 2023 (n=8,695)



Qualitative data indicates that audiences' decision-making is influenced by this time of economic uncertainty. An audience member shared,

'Given the uncertainty of what the future holds and the impact that the current cost of living has on the majority of households, I believe people are looking for uplifting events and experiences that the whole family can enjoy without costing large sums of money and may even be provided free by local councils etc.' (35-54, VIC)



"The arts are so important to keeping my spirits up and my mental health well.

It's really challenging when you can't afford to go to an event every now and again that you know will keep you well."

Audience member



Fun, uplifting events (77%) and events with great reviews (63%) will continue to reach the widest audiences in the coming year

In August 2023, audiences were most likely to agree that they'll be attracted to fun, uplifting things (77%). This rate is even higher among under 35s (85%) and parents aged 35-54 (88%).

Audiences whose wellbeing has been most affected by the cost-of-living crisis and other challenges in the wake of the pandemic appear to be more likely to seek this reprieve. One shared,

'We're all depressed. All of us under 35s are completely depressed. Stop dedicating so much of programming to serious/sad/challenging content and just give us something joyous and fun. Barbie is trouncing Oppenheimer at the box office - case in point.' (Under 35, NSW)

Another agreed, commenting,

'Audiences need to be uplifted and shown that there is much to be optimistic for - the success of the Barbie movie, & Juliet the musical, Pierre Bonnard Exhibition at the NGV, are all providing escapism and giving people a boost during these difficult times.' (Age unknown, VIC)

Meanwhile, two-thirds (63%) of respondents agreed that they will be attracted to events with great reviews in the coming year.

For audiences who are affected by the cost-of-living crisis, reviews may be playing an instrumental role in helping them decide which arts and cultural events they should prioritise – and where they should spend their money. One audience member observed,

'People with limited resources will pick and choose what to attend based on popularity and reviews. Not everyone will take a risk on something they are not sure of.' (55-64, VIC)

Audiences appreciate the important role the arts play in providing solace and enhancing wellbeing

In the August 2023 survey, audiences were asked, 'What else do you think arts and cultural organisations should be aware of about Australian audiences at this time?'

Many respondents lamented having to miss out on cultural experiences due to cost-of-living pressures. One said,

'I just don't want to ever not experience events because cost is way out of my budget. I do believe attending these events help me with my overall mental health, it gives me a sense of wanderlust and inspiration which helps making the cost of living bearable.' (35-54, QLD)

Another said,

'The Arts are so important to keeping my spirits up and my mental health well. It's really challenging when you can't afford to go to an event every now and again that you know will keep you well.'

Several expressed how the arts play an integral role in supporting wellbeing in difficult times. One said,

'Post COVID, so many people are struggling financially. Spirits are low, uplifting events are required for wellbeing and community connection and belongingness.' (65-74, NSW)

There is support for promoting the benefits of participation in the arts more widely, as one commented,

'I think it's really important that governments understand how important the arts are to the community, and how they contribute to wellbeing and the economy... It is harder for audiences to support arts organisations at present but that doesn't mean they are any less valued or critical to our society.' (55-65, SA)

Under 35s are also drawn to new experiences (68%) – and the appeal for challenging, topical things is strong among over 55s (46%)

Despite being more selective about what they attend, there is still a large proportion (55%) who say they will be drawn to trying new things – and 44% say they will be drawn to challenging and topical programming.

Audiences under 35 are currently the most likely to agree they will be attracted to new experiences, with 68% agreeing – suggesting that although this group are favouring fun and assured quality, they're still open to a certain level of risk-taking. This group is less likely to agree they'll be attracted to challenging, topical things (45%) than they were in October 2022 when they were the most likely age group to be attracted to this type of programming (52%).

Audiences over 55 are slightly more likely than average to say they will be attracted to challenging and topical programming – with 46% agreeing. Audiences aged 65-74 were the most likely to agree, at 48%. There's a strong appetite for new things among this group (51% agree), but this is less than the average response.

Parents aged 35-54 were less likely to be attracted to challenging and topical events (36%), but 57% say they'll be attracted to new things, slightly higher than average (55%).

Qualitative data indicates that many audience members are attracted to new works for their potential to engage social issues and enhance audiences' understandings in innovative, challenging and thought-provoking ways. One said,

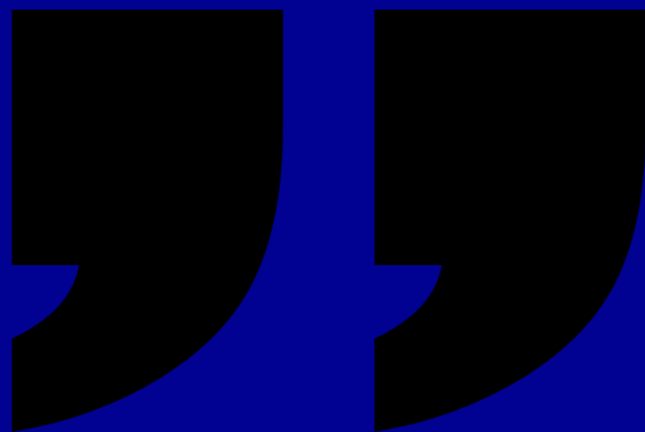
'Australian arts audiences are intelligent and open to be challenged. Arts organisations need to commission new work and exhibit new work. This is essential for the future health and development of arts in this country.' (65-74, VIC)



**"Australian arts audiences are
intelligent and open to be
challenged..**

**..This is essential for the future
health and development of arts in
this country."**

Audience member
65-74, VIC



Many are conscious of a shift towards less risky content, and want to ensure that bold works reach them

Some audiences view the arts as important in shedding light on critical issues, such as climate change and the Voice to Parliament, and enhancing audience's awareness of them. One said,

'Love variety of choice. Stimulating contemporary ideas, things that entertain and which are uplifting. Content which enhances our understanding of important issues – refugees, First Nations People/ The Voice, our multinational community, world politics. Appreciation of the natural environment and how to protect it.' (65-74, VIC)

Others are eager to be excited by new works and to experience a diverse cultural landscape. One respondent shared,

'With inflated prices and difficulties in the economy, I don't want to see the same things each year (particularly the classical companies), I want to see new works and see Australian works and see First Nations works. I don't know how I can continue to subscribe to companies where 90%+ of the works are repeats or foreign stories. It isn't worth it to see something again in this economy.' (Under 35, VIC)

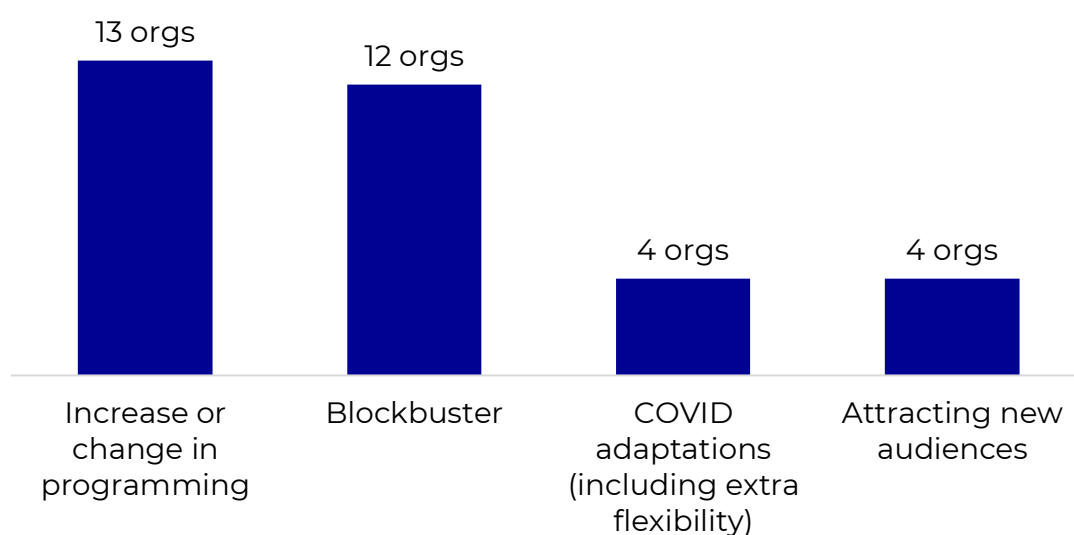
While ranked lower in the list of options in **Error! Reference source not found.**, many are still interested in local content that explore topics that represent Australians in diverse ways. One said,

'We want to see stories that properly reflect us. Stories about Australian experiences – it feels like we've gone back into a 'cultural cringe' period. Let's explore what it is to be here, in Australia, now. That means diverse work, new work, challenging work. Enough of playing it safe.' (35-54, SA)

Organisations are adapting their programming to suit the challenges of the new era

Organisations are finding success in bringing audiences back using a range of measures. An increase or change in programming from 2019 was cited as one of the biggest successes, and blockbuster programming, COVID-specific adaptations and developing new audiences were also notable mentions.

Figure 14: Organisations mentioning theme in response to 'What's been the biggest success, in terms of bringing audiences back?' August 2023 (n=32)



An organisation stated,

'We have been able to attract new audiences with compelling content.' (Museum, ACT)

Another shared,

'New programming, diversity of programming and content, as well as low ticket pricing, has increased first time visitors to our venue.' (Music venue, metropolitan NSW)

Things to think about when making creative and programming decisions

While audiences are becoming more selective about what they choose to attend, there is strong desire for a wide range of content.

Here are some things to consider:

- ❑ Events can be ‘fun and uplifting’ while still pushing boundaries – so look for ways to present new, topical and challenging ideas in different ways for audiences
- ❑ With many audiences reliant on ‘reviews’, consider complementary ways to build trust such as reposting audience shares and enabling functionality for audiences to leave reviews or ratings on websites or social media (also a great audience development exercise!)
- ❑ Consider what is working more broadly for Australian audiences in terms of content at the moment, e.g., under 35s are getting behind the uplift and nostalgia of *Barbie*, and the Matilda’s journey in the FIFA Women’s World Cup is engaging record-breaking audiences
- ❑ Discuss the right level of investment in strategies for reaching new audiences, and retaining them long-term
- ❑ Sometimes, resources are better spent with targeting a specific group of interest with an event. One audience member said, ‘I think it’s important to consider appealing to specific audiences rather than casting a wide net that ends up appealing to nobody.’

4.

Three segments to know



4. Three segments to know



















Younger audiences, families and older audiences are thinking and behaving very differently in 2023, and organisations must build capacity for new ways of working.

Key points:

- Social and economic pressures impact different generations in different ways, and this is reflected in three key audience segments.
- Young people, families and older audiences show stark differences in mood, entertainment priorities, spending patterns and media consumption.
- Organisations must consider how to create and execute strategies for different segments and build in flexibility to adapt as conditions evolve.

Summary of key segments

Inflationary pressures are experienced differently across the population. Three key audience segments are presented below.

	Young and restless	Family frugality	Older and bolder
	Arts audiences under 35	Arts audiences aged 35-54 with children living at home	Arts audiences aged 55+
Attending cultural events	 84%	 72%	 79%
Feeling pessimistic about the future	 28%	 29%	 22%
Spending \$50+ on in-person events	 48%	 50%	 67%
Attracted to fun, uplifting content	 85%	 88%	 72%
Attracted to challenging, topical things	 45%	 36%	 46%
Seeing a role for digital in their lives	 58%	 47%	 66%
Top awareness channel	Word-of-mouth (54%)	Websites & word-of-mouth (39%)	Email from an arts org (50%)
Top motivator for subscriptions and memberships	Accessing discounted tickets (42%)	Accessing discounted tickets (45%)	Locking in plans early (28%)

Different segments are behaving differently right now, with stark differences in spending patterns

In October last year, at least 30% of audiences in each age cohort spent more than \$100 on tickets to a recent live cultural event. However, in August 2023, higher spending levels are skewed towards older age groups.

Under 35s were least likely to be spending over \$100 on tickets in the fortnight prior to data collection – with 2 in 10 spending over \$100 (22%), down from 31% in October 2022. Meanwhile, ticket buying in the \$25 – \$50 range has increased for this segment – currently at 26% in August 2023, up from 19% in October 2022.

Alongside these decreased spending levels, 8 in 10 (78% strongly agree and agree) under 35s have been looking for free/cheap things to do in the past 6 months.

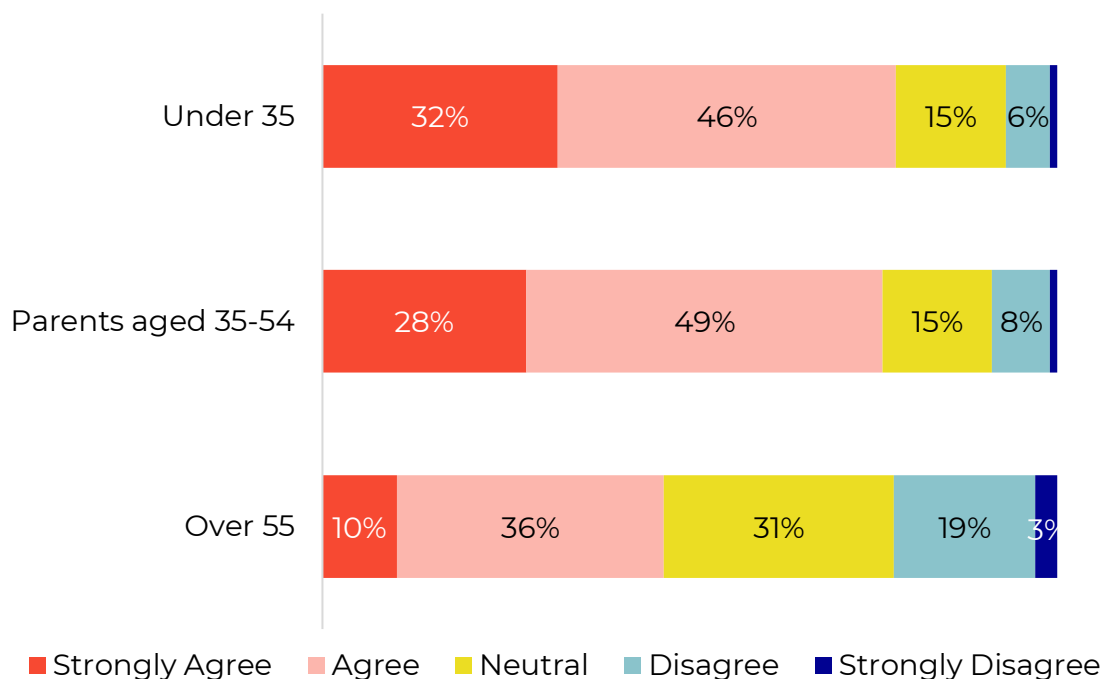
There is a case to ensure ticket and membership discounts for younger audiences include under 35s, or in some cases under 40s. One respondent said,

‘Move age caps from under 30s to under 35s (we got robbed of 2 years in COVID and cost of living is still hard).’

In the 35-54 age group, the proportion spending over \$100 is 31%, a slight decrease compared to October 2022 (36%). Similarly, the proportion of audiences aged 35-54 spending in the \$25-\$50 range in August has increased to 22%, up from 15% in October 2022. **Parents and caregivers aged 35-54** are more likely to be looking for free/cheap things to do (77%), compared to non-parents in this age group (63%).

Meanwhile, **audiences aged over 55** are least likely to be looking for free/cheap things (46% strongly agree or agree) (Figure 15). Spending by audiences aged 75+ is on the increase, with 43% spending more than \$100 on tickets in the fortnight prior to data collection, up from 35% in October 2022.

Figure 15: Given my financial situation, in the past 6 months, I have looked for things that are free/cheap to do. By key segment. August 2023 (n=7,064)



Qualitative data illuminates prohibitive ticket pricing as a barrier for families

The nuclear family ticketing structure of 2 adults and 2 children does not support other family audiences, with respondents noting that special children’s ticket pricing should be more widely adopted. One respondent explained:

‘Choosing to go to a venue is a massive financial decision if I want to involve my partner and kids. It’s so amazing that children under 16 can go to plays etc. for free or just \$10 – means that they can experience live performances with us. Otherwise, it would just be me going alone because I certainly can’t afford \$200+ for tickets to a show for us all.’

Another said:

‘I pay for tickets for my grandchildren to attend shows. The costs for families to encourage children to participate in the arts are too high. Ticket prices are generally the same for children. This is unfair. Family tickets help a bit. Creating audiences starts with childhood experience. That should be reflected in ticket prices.’

Another said:

‘Prices for children are very expensive so I do not take my granddaughter’.

Many parents and caregivers are committed to finding affordable, family-friendly cultural experiences

Eager to have their children experience arts and culture and foster a lifetime appreciation, others highlighted that they select what to see based on affordability:

‘Many of us take children with us to galleries, music, dance, museums, zoos etc - our choices are often on what is family-friendly and affordable. NGV and Museums Victoria have wonderful programmes for kids.’ (65-74, VIC)

Another mentioned a lack of affordable options for families at the present time,

‘Parents and young (pre-school aged) kids are always looking for things to fill in the day, especially on weekdays when one parent may be home and the other at work. Family-friendly, affordable arts and cultural events on weekdays could be really popular, but I haven't seen too many options.’ (Under 35, QLD)

60% of under 35s found arts and cultural activities to ‘splash out’ and ‘splurge’ on – a significant increase from 32% in April 2023

Arts attendance is complicated for younger audiences, who are attending events more frequently and spending less – but the most likely to be splurging and seek fun/uplifting activities.

In August 2023, 6 in 10 **under 35s** found arts and cultural activities to ‘splash out’ and ‘splurge’ on; up from 32% in April 2023.

With lower income and higher financial pressures, ‘splashing out’ might look a little different among this group, compared to older audiences with different ideas of luxury.

Younger audiences are growing conscious of missed opportunities to see and experience a variety of art

Financial barriers may be preventing untapped audiences from trying new things, as one said:

'The younger audience (up to mid 30s) are likely very stressed with work and family commitments and the increased cost of living. Personally, I take longer deciding which performances to attend, and 'value for money' is a bigger consideration than it used to be - so I'm less likely to try something if I'm unsure whether I will enjoy it.' (Under 35, WA)

Some respondents pointed to the missed opportunities that may be impacting young people whose early arts attendance has been limited by COVID-19 and now the cost-of-living crisis. One attendee shared,

'As a grandparent who cares for young children, every week I try to take them regularly to museums libraries and art galleries. I'd also like to take them to theatre, but the cost is prohibitive. When my children were young there were a lot more low-cost or free performing experiences to attend – circus, puppet shows, plays and short performances, street theatre, writing, film. As a result, my older son took up drama and ultimately film making. Grandparents can be an asset in growing up next generation of young people to engage in cultural life.' (65-74, NSW)

3 in 10 say they're prioritising other things in their life – like work, families and resuming travel

A growing proportion of audiences (30%) say they're prioritising other things in their lives – up from 24% in October 2022.

Qualitative data suggests that individuals' priorities vary – from work and family commitments to the resumption of travel and exploring other interests.

Parents commonly noted that their priorities have shifted due to reduced spare time, as one said:

'New addition to our family and consequent reduced income from that, as well as increasing cost of living, time to commit to events, energy etc. has impacted our event attendance. [I'm] hoping our ability to access cheaper weekday events might increase.' (Under 35, VIC)

Some are resuming travel plans disrupted by the pandemic and have less time for attending arts and cultural events. One said,

'All of our friends who are aged 65+ are busy catching up on travel as we feel COVID has robbed us of 2-3 years of active life.' (65-74, NSW)

Others are becoming more hesitant to commit to attending, with increased ticket prices impacting their perception of value for money. One shared,

'Inflation has not changed my approach so much [...] but some increases in prices have made me reconsider whether they are value for money... is the price of a ticket better than chatting over dinner?' (35-54, NSW)

Others mentioned that, as life gets busier, plans and priorities continue to shift, as one said,

'Life changes quickly and plans have to change just as quickly. There are plenty of things that I think I'd like to go to, but in the end... life/work/travel/circumstance gets in the way.' (Age unknown, QLD)



"Inflation has not changed my approach so much...but some increases in prices have made me reconsider whether they are value for money..."

...Is the price of a ticket better than chatting over dinner?"

Audience member
35-54, NSW



Things to think about in serving different segments

The pandemic created social issues that affected different people in different ways. Right now, inflationary pressures are also being experienced differently across different audience segments.

Here are some things to consider:

- ❑ Consider whether your organisation is across the different trends taking place and has insights to inform tailored approaches
- ❑ Review organisational capacity for targeted approaches since different segments require very different thinking. Consider things like organisational structures, skills needed internally, workflows, data and software needed for successful targeting
- ❑ For those marketing events, reflect on whether the pressures of reaching short-term attendance/sales targets is inhibiting strategic work required for long-term audience development
- ❑ Consider all elements of audience experience in marketing strategy, and look at ways to build trust, loyalty and engagement in the short, medium and long-term
- ❑ Take time to clean, update and tag your database to maximise the potential for targeted campaigns and optimise open rates

5.

Online trends



5. Online trends

Audiences continue engaging online in large numbers, and in 2023, online content is helping audiences find out about events, discover new artists and participate in digital experiences.

Key points:

- Digital channels are paramount to audience engagement – with 75% of recent attendees finding out about arts and culture events online.
- Preferred platforms look very different across age groups: email marketing is the priority for 55+, while word-of-mouth and socials are key for under 35s.
- 4 in 10 audiences continue to engage in online arts and culture, and half say digital cultural activities still play a role in their lives, despite spending less.
- It might be time to review online offerings, scrapping what's not working and freeing up resources for more targeted approaches.

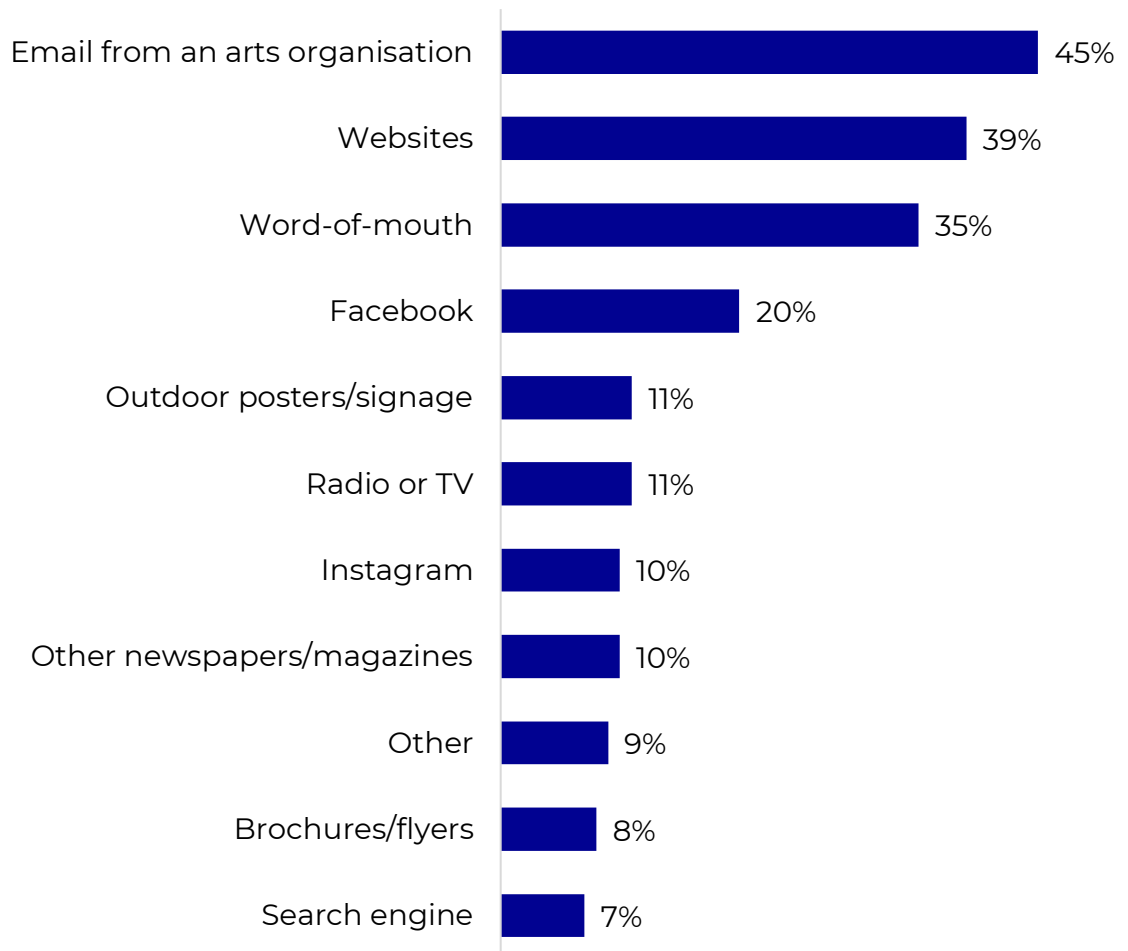
Most attendees find out about events through digital channels like email marketing, websites and socials

When asked how they heard about the most recent event or cultural activity they attended, overall, audiences were likely to cite online channels (75%). This includes direct emails from arts organisations (45%) and websites (39%).

Word-of-mouth from friends, family or colleagues (35%) is the third-most common channel.

Reliance on social media, such as Facebook (20%) and Instagram (10%) is also significant, and could be higher than the figures quoted, assuming a proportion of word-of-mouth occurs online.

Figure 16: How did you hear about the most recent event or cultural activity you attended? (Select all that apply). August 2023 (n=6,931)



Audiences of all age groups are using on online channels – and word-of-mouth is key for younger audiences

Emails from arts organisations are the dominant awareness channel for audiences over 55. Word-of-mouth is most prevalent amongst under 35s and audiences aged 35-54 – and these age segments are also finding out about cultural events via social media channels (Figure 17).

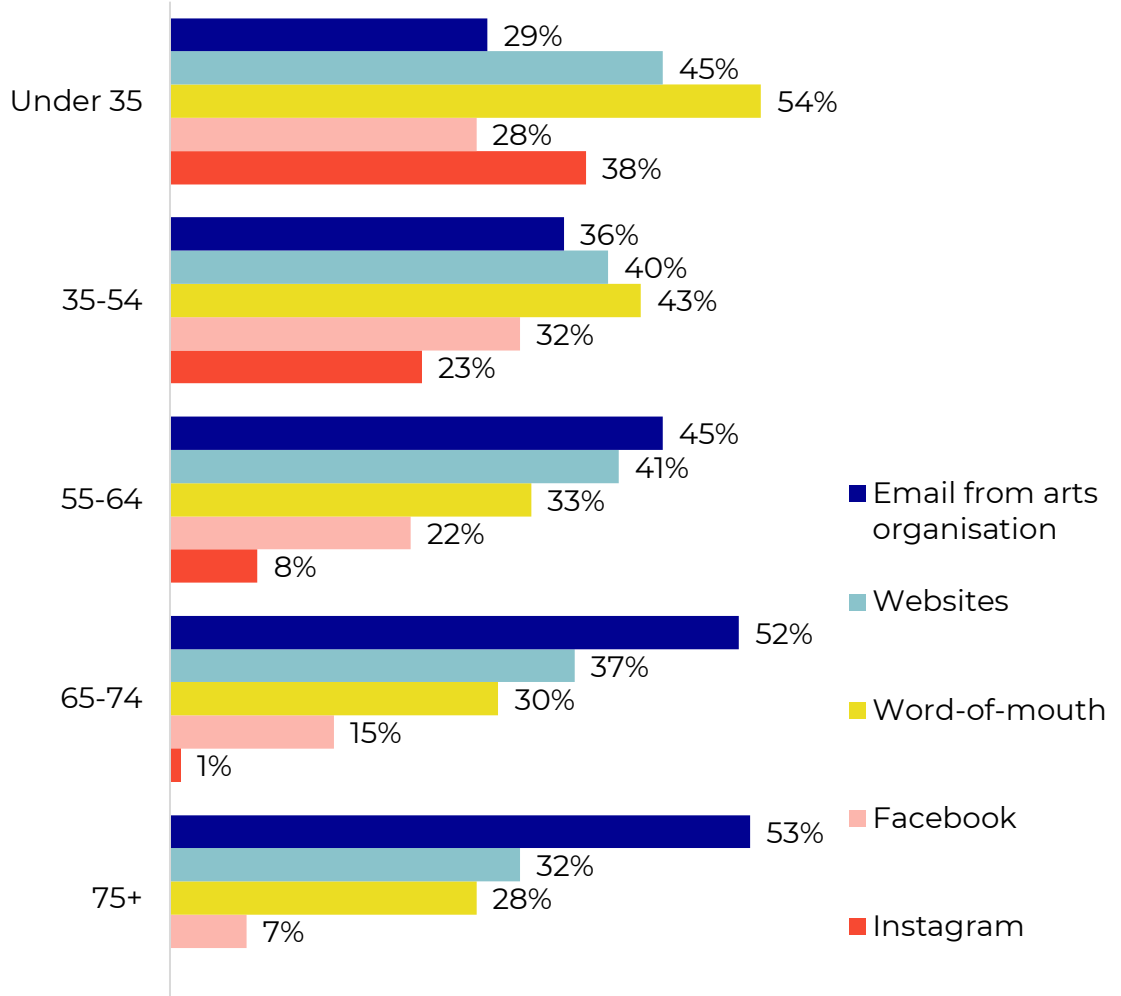
Word-of-mouth from family, friends and colleagues enables possible future attendees to hear reviews around the value and quality of cultural offerings, as one attendee said,

‘We are possibly more discerning than ever [about] where we spend our dollar, and audience, rather than critic, reviews impact decisions to attend.’ (55-64, VIC)

While audiences are hearing about cultural activities and events via emails, some mentioned ‘email fatigue’ and often missing emails – suggesting organisations should employ multiple channels to drive awareness. One said,

‘I believe audiences are challenged by financial stress and the challenges of time commitments, and technology overload in terms of emails - although this is the best method from my perspective of gaining real attention. Whilst social media is helpful - all too often, it is simply something that scrolls past too quickly.’ (55-64, VIC)

Figure 17: How did you hear about the most recent event or cultural activity you attended? (Select all that apply). By age group, August 2023 (n=5,716)

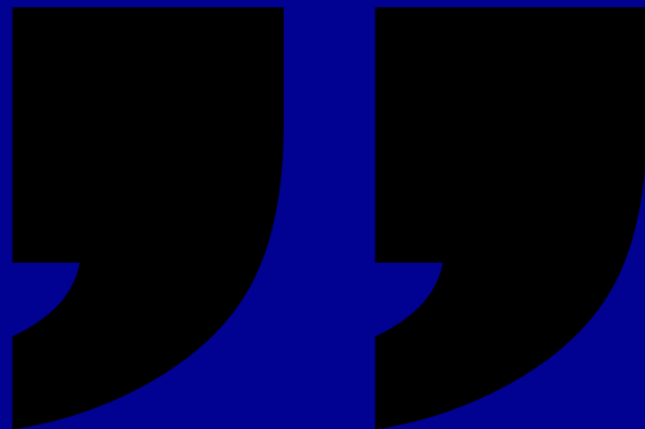




"I believe audiences are challenged by financial stress and the challenges of time commitments, and technology overload in terms of emails...

..Whilst social media is helpful — all too often, it is simply something that scrolls past too quickly."

Audience member
55-64, VIC



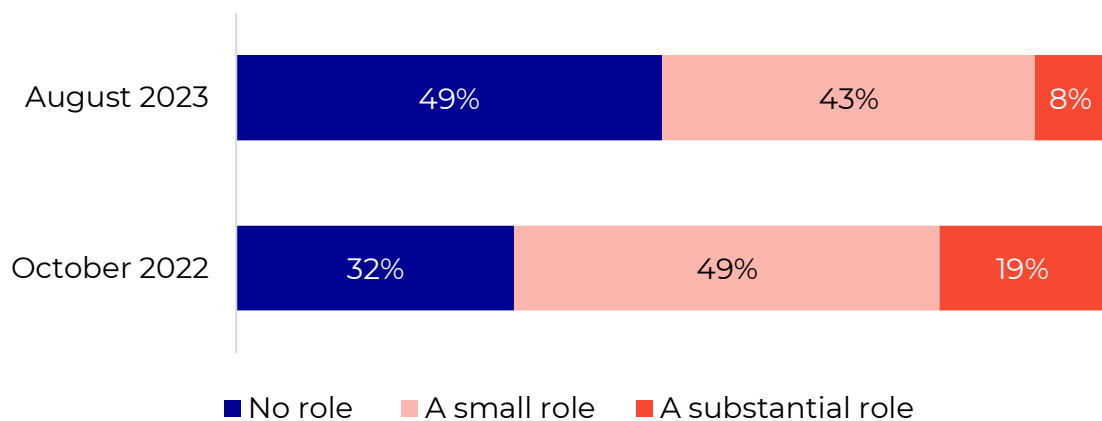
4 in 10 audiences continue to engage in online arts and culture, and half say digital cultural activities still play a role in their lives

Four in ten audiences are currently participating in online or digital arts and culture experiences (39%), consistent with October 2022 (41%).

Online audiences continue to participate in a range of different activities. In the past fortnight, 21% watched a pre-recorded video of a performance or event (stable with 21% in October and 20% in March 2022) and 14% watched a live streamed performance (stable with 14% in October and 16% in March 2022).

The largest drop has occurred in online classes, courses and tutorials: 15% participated in this activity in August 2023, down from 18% in October and 20% in March 2022.

Figure 18: As venues are open and it's possible to attend in-person cultural experiences, what role do online arts events/experiences play in your life? August 2023 (n=8,722) and October 2022 (n=5,429)

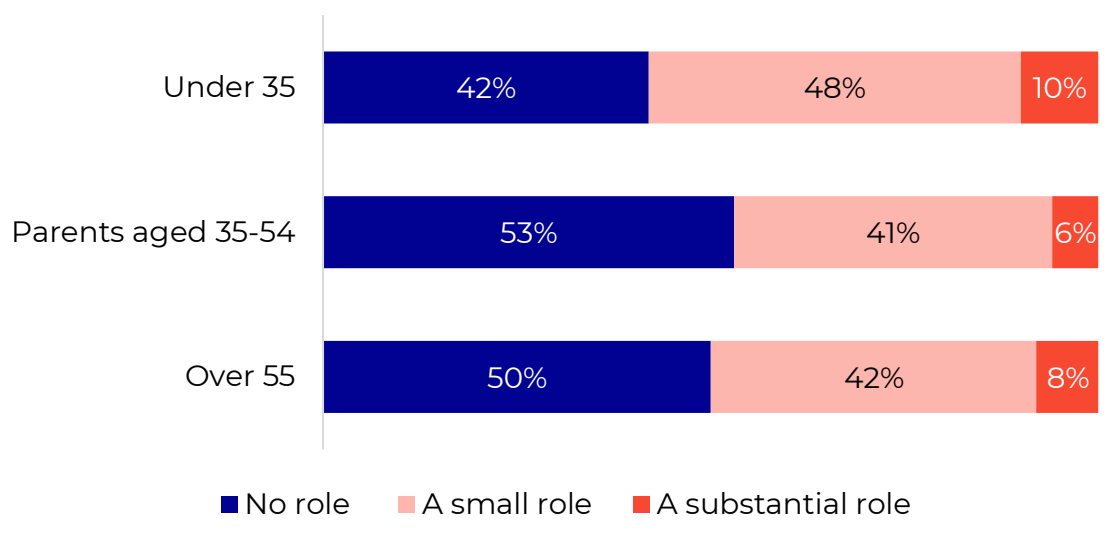


Respondents were asked what role online arts events/experiences play in their life now that venues are open for in-person attendance. Around 4 in 10 (43%) say they play a small role (down from 49% in October 2022), and only 8% say they play a substantial role (down from 19% in October 2022).

Among the three key segments, at 58%, audiences **under 35** were the most likely to say that digital experiences will play some role in their life – either a small role (48%) or a substantial role (10%). Meanwhile, the proportion seeing a role for digital experiences in their lives is smaller

for parents aged 35-54 (47% say substantial or small role) and over 55s (50% say substantial or small role).

Figure 19: Role of online arts experiences, by key segment. By key segment, August 2023 (n=8,722)



Looking at ages in more detail, both under 35s (58%) and audiences aged 75+ (55%) were the most likely age groups to say that online arts experiences played some role, though qualitative data suggests their motivations differ.

Many younger respondents cited the convenience of online events in terms of travel or inability to go in person. One said,

‘I prefer live performances. Sound experience is way better if you see the performance in person. However, physical distances or geographical location as well as travel and tickets costs can be barriers to seeing the arts.’ (Under 35, QLD)

Older respondents referenced more medical or mobility reasons, one said:

‘Due to decreasing mobility, I am increasing my use of online performances of ballet and classical music.’ (75+, NSW)

Another said:

‘[I] remain partially locked down [with] health vulnerability, so online, streamed concerts are wonderful and also support artists.’ (65-74, ACT)

Online spending is declining, with 3 in 10 digital audiences paying for arts experiences

In line with lower spending among audiences overall, the proportion of online audiences paying for digital arts experiences has continued to decline steadily over the past 18 months.

Three in 10 (29%) said they paid for an experience in the past fortnight, down slightly from 32% in October and 33% in March 2022, and 37% in November 2021.

Paying audiences are engaging in a range of different payment models. The largest proportion said they purchased a 'single experience (e.g., pay-per-view for an online performance)' (12%), consistent with previous rounds of data collection.

Fewer subscribed to a platform to access content on-demand (9%), made a donation for something they experienced online (9%) or subscribed to a program/season that included the online experience (4%).

Some audiences are eager to engage online – though issues with internet connectivity are key barriers

While several audience members showed interest in participating in online arts experiences, some cited trouble with internet access as a barrier. One said,

'Internet access while I'm travelling for work can be a real obstacle with online experiences. So many Australian locations (including cities) have terrible Wi-Fi connections.' (35-54, SA)

This is particularly true for those living outside of metropolitan areas. One said,

'Living in the country means that connectivity can be an issue.' (65-74, VIC)

Some are limited by connection issues at their home – and rely on public access. One said,

‘Difficulty with internet connection at home... depend on public access connection via local library.’ (55-64, WA)

Others mentioned a lack of awareness about what's on offer – or feel overwhelmed with choice. One said,

‘I'm not very computer savvy and I sometimes feel a bit overwhelmed attending events on the online platform.’ (65-74, WA)

Other respondents mentioned having a desire to participate online, though the timing of available events presents issues – particularly when viewing international work. One said,

‘I try to engage when I can, but nothing live ever lines up with my schedule. But I do try to watch and research theatre online that I wouldn't find in my local area.’ (Under 35, WA)

Many audiences are endeavouring to limit their screen time – and some simply aren't interested

A significant number of respondents mentioned that the prospect of in-person events was more appealing than online events, particularly for those working on screens. One said,

‘Because I spend all day in front of a computer at work and feel incredibly disinclined to use one in my spare time. I am also one of the minority of people on the planet who don't have any social media accounts so am not digitally connected. I am a deadset luddite.’ (55-64, WA)

Another said,

‘I prefer the connections and energy that come from face to face and try to minimise screen time outside work...’ (Under 35, VIC)

Another shared a similar sentiment, commenting,

‘Not at all, it's a personal preference. I spend all day on the computer for work so the last thing I would choose to do when relaxing at home is watching it there too!’ (Age unknown, WA)

Many respondents explained that they are simply not interested, and when given the choice, would prefer to attend a live event in person. One said,

‘Online arts do not resonate with my understanding of arts events and experiences. I consider experience as being in the physical and visceral presence of the performance, artwork or film (cinema). Sitting in my office encountering an artwork via a generic screen does not represent for me, value for money or a cultural experience.’ (Age unknown, WA)

Some see the greatest value in online arts experiences that facilitate learning and skills development

Several audience members suggested that online experiences are the most engaging when they include an element of education or learning. One said,

‘While I am happy to attend professional development online, I much prefer to attend live performances and cultural events as I enjoy being amongst others who are attending and feel it is more stimulating to be in a different environment or venue and engaging with community.’ (65-74, WA)

Another said,

‘In comparison with live performances, I am not a fan of online experiences. I prefer not to watch it. I adore live performances. Fortunately, if I want to learn about something I will put up with digital performances as a last resort and turn the volume down on advertising.’ (65-74, WA)

Things to think about when connecting with audiences online

The online space is key when engaging audiences – though the lines get blurry on how different types of content and different platforms connect with audiences.

Here are some things to consider:

- ❑ Compare these insights with your own analytics to reflect on what is right for your audience – and where there could be gaps or opportunities to improve
- ❑ Look at what is not working and what resources could be freed up to focus on your priority opportunities
- ❑ Ensure that realistic targets are set for digital experiences in the current climate (when audiences are looking for moments of connection and fun) and ensure digital distribution strategies have a long-term horizon
- ❑ Leverage the prominence of word-of-mouth as an awareness channel online, especially among audiences under 35, with strategies that promote the social aspects of events, or encourage sharing
- ❑ Look at your ability to create segmented email campaigns with targeted offers and messaging for different groups (e.g., some might use email strategically and sparingly with under 35s and focus email campaigns on audiences aged 55+)

6.

Late decision-making



6. Late decision-making

In 2023, last-minute decision-making persists, with audiences having more choices and busier lives as commuting, travel and social events pick up. Organisations need to prepare for new phases in campaigns, to reach people at the right time.

Key points:

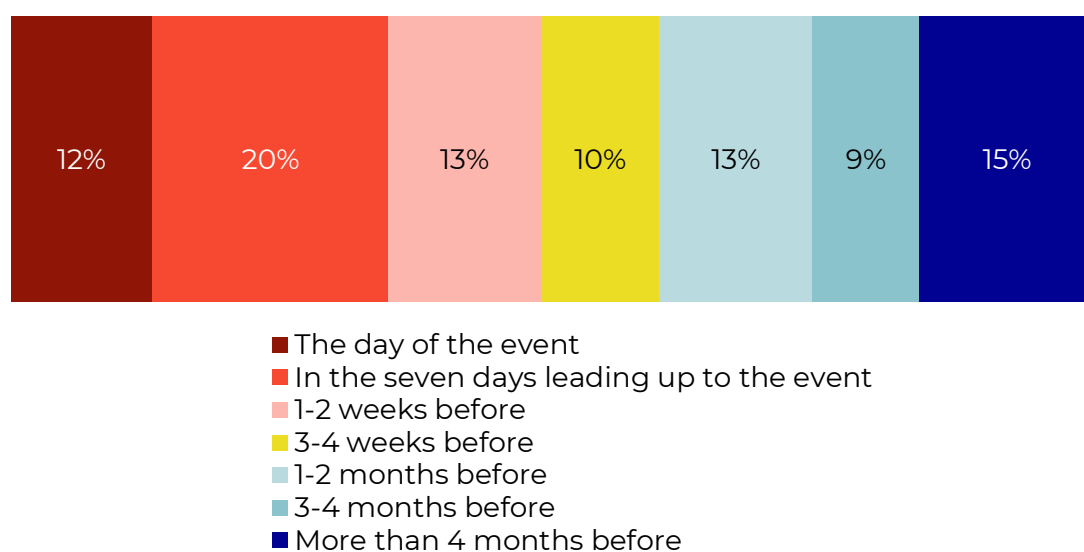
- Half are booking less than two weeks out, with 12% on the day of the event
- Analysis of 'early bookers', 'mid-term bookers' and 'last-minute bookers' shows that last-minute ticket buying is most common among younger audiences and lower spenders. Those booking later are also more likely to rely on word-of-mouth.
- Ticketing initiatives to support more price sensitive audiences are important, but last-minute discounting may not be the answer.

Arts audiences were asked about how far in advance they booked or committed to the most recent event they attended

For the purposes of this report, we have summarised early bookers as those that lock in their tickets more than a month in advance, mid-term bookers as those who commit 1 – 4 weeks in advance, and last-minute bookers who book either the week of the event or on the day.

Overall, the last-minute ticket buying trend prevails – with 12% of audiences reporting they booked the last event they attended on the day of the event and 20% in the week leading up to it.

Figure 20: Can you tell us how far in advance you booked or committed to go...? August 2023 (n=6,926)



Big names and limited seats were key motivators for early bookings. 58% of early bookers agreed that they were attracted to events with 'big name' artists/performers, as opposed to 51% of last-minute bookers.

There was a strong sentiment around the fear of missing out for early bookers, who wanted to secure seats well in advance, and many respondents listed their reason for booking early as, 'wanting great seats', or getting their 'favourite seats'.

Last-minute ticket buying is most common among younger audiences and lower spenders

Half of all audiences are committing or booking less than two weeks out, with 12% on the day of the event. Nearly two-thirds (65%) of audiences aged 35-54 reported taking longer to decide, followed by 55-64s (47%), and audiences aged 65-74 (42%).

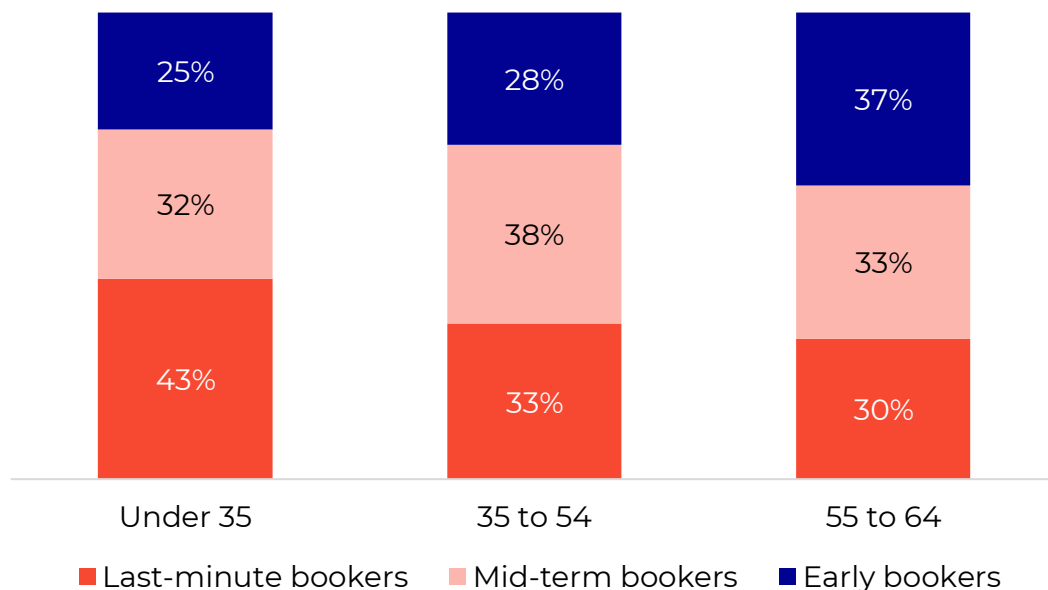
Under 35s also comprise a large proportion of last-minute ticket buyers, with 43% booking last-minute – consistent with trends around increased financial barriers for this group.

The 75+ group were the most decisive (46% early bookers) and less likely to have taken longer in decision making (37%).

Many early bookers reported feeling ‘better off’ or the ‘same’ financially as they were a year ago (60%), whereas last-minute and mid-term bookers were slightly less likely to do so (54%).

Over half (55%) of early bookers reported spending more than \$100 in the past fortnight on in-person live events and cultural activities, compared to 36% of mid-term bookers, and 21% of those booking last-minute.

Figure 21: Can you tell us how far in advance you booked or committed to go...? By selected age cohorts, August 2023 (n=2,828)



Last-minute bookers typically hear about events via word-of-mouth (45%)

Almost half (46%) of mid-term bookers reported email as a means of hearing about the event they attended recently.

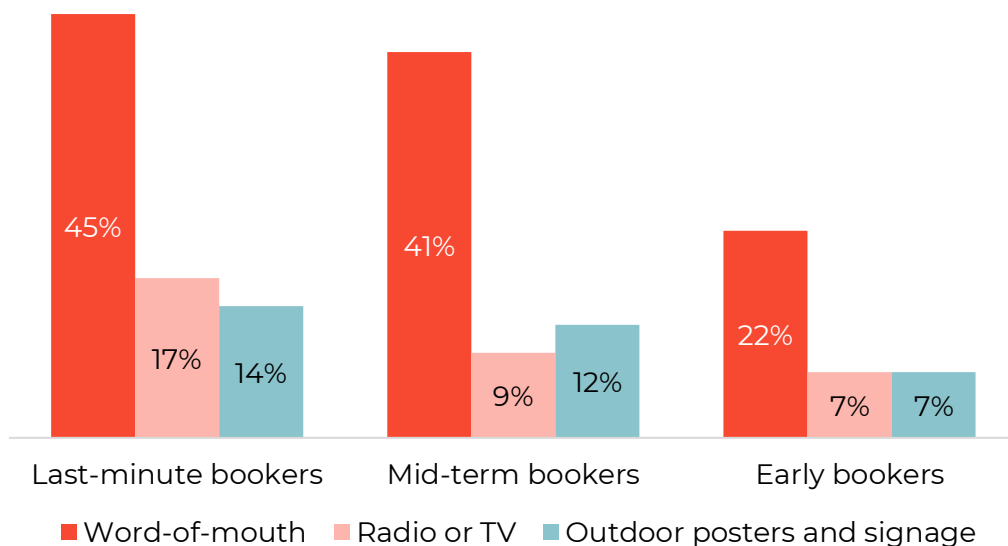
Email is less important for last-minute bookers, with only 27% noting this as their awareness channel for their latest event.

Last-minute ticket buyers weren't necessarily committing based on things they saw online, but due to word-of-mouth recommendations (45%) and traditional media channels like radio and TV (17%), or outdoor poster/signage (14%).

Social media and online media did not appear to reach a higher proportion of last-minute ticket buyers, which seemed to have similar cut-through across all types of ticket purchasing time frames.

Audiences living outside of major cities often had to book further in advance to account for travel planning and logistics.

Figure 22: How did you hear about the most recent event or cultural activity you attended? (Select all that apply). By booking purchase timeframe, August 2023 (n=6,918)



Things to think about when catering to different types of ticket-buyers

Audiences have different motivations for when they purchase tickets. A significant proportion of last-minute bookers suggest the trend is here to stay, so planning ahead can help to avoid last minute 'panic' discounting.

Here are some things to consider:

- ❑ Define the different phases of a campaign and review how tactics can change to suit different phases. For instance, what motivates early bookers is unlikely to work for mid-term and late bookers
- ❑ Consider ways of tracking intended attendance other than buying tickets, such as opportunities to register interest. One under 35 respondent said 'We're gonna take longer to lock in tickets, but we will, don't panic!'
- ❑ 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
- ❑ Review ticket prices for young audiences, and if youth discounts are already in place, review 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
- ❑ 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 are keen to support the arts and artists.

7.

Subscriptions and memberships



7. Subscriptions and memberships

Subscribers and members are vital for many arts organisations, but their needs vary dramatically across age groups, and organisations are adjusting their packages to suit new needs.

Key points:

- 4 in 10 audiences are members or subscribers – with performing arts subscriptions more common than other types.
- Subscriptions uptake and motivations are very different across audiences in different stages of life.
- Older audiences want to lock their plans in early and show financial support, while younger audiences are more likely to want access to discounted tickets.
- There is a case to test different offers and models, using messaging to target the unique needs of different audience segments.

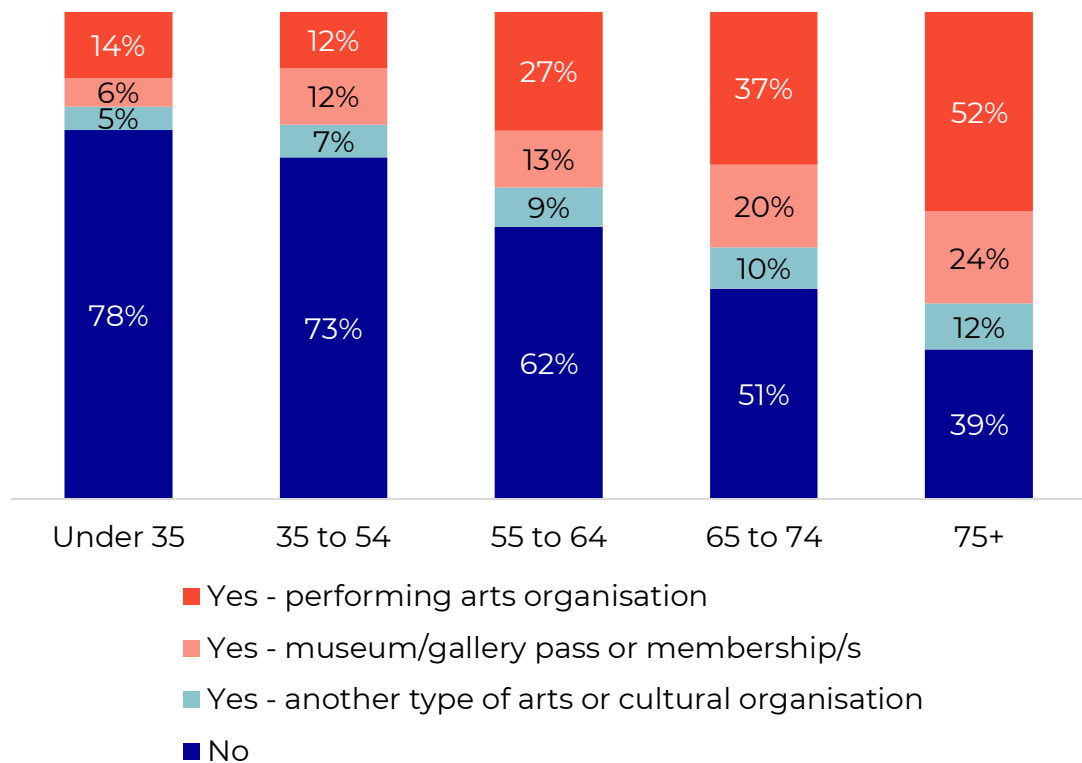
4 in 10 audiences are members or subscribers in 2023 – but this picture looks very different across different life stages

Four in 10 (41%) respondents reported having subscribed or purchased season tickets or a membership to an organisation this year.

Performing arts subscriptions were slightly more common in this sample, held by 29% of respondents, followed by museum/gallery memberships (held by 15%). A small number (9%) held another kind of membership, for example, to literary festivals.

Performing arts subscriptions were much more common among older generations (e.g., 52% of those over 75), which is almost 3 times the rate of under 35s at 14%. Museum/gallery memberships were also more common among older age groups.

Figure 23: Did you purchase a season ticket, subscription or membership? By age group, August 2023 (n=7,236)

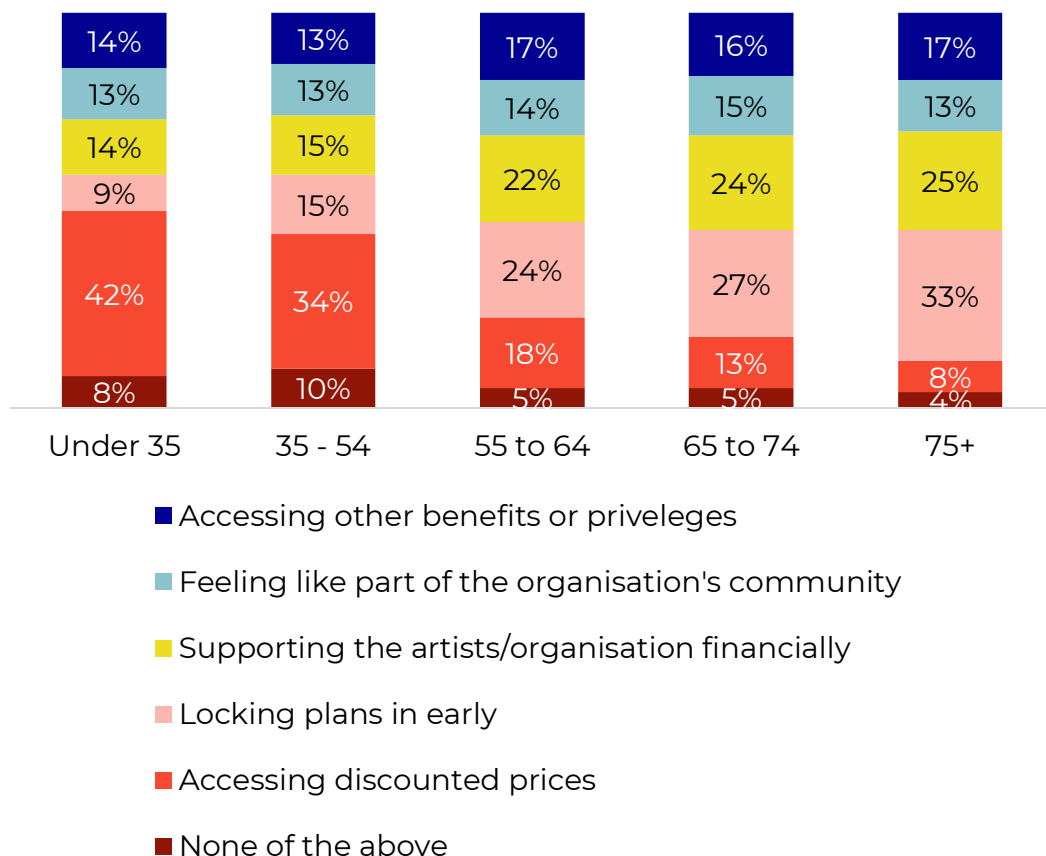


Older audiences want to lock their plans in early, and want to support organisations financially

Audiences were asked to select their top reason for subscribing from a list of options. The motivations for buying ticket packages are drastically different between younger and older audiences (Figure 24).

Among audiences over 55, the most common reason was locking plans in early (28%), followed by supporting the artists/organisations financially (24%). A smaller proportion identified their main motivation as accessing other benefits (16%) or discounts (13%).

Figure 24: From the following list, what was the top reason for your decision to subscribe or purchase a season ticket or membership? By age group, August 2023 (n=3,150)



Over 55s are more likely to select 'locking plans in early' as a motivation for subscribing – but is not a key driver for younger audiences.

These differing motivators indicate that distinct approaches are required to market packaged ticketing products and memberships between age groups.

4 in 10 under 35s currently holding a membership/subscription see ‘accessing discount tickets’ as their main motivation

Altruistic drivers were more prominent in older audiences, but are not necessarily top motivators for younger audiences. 42% of **under 35-year-old subscribers** said discounted tickets were their main motivator, compared to 13% of over 55s.

Under 35s are looking for clear cost benefits in their memberships or subscriptions, and suggest memberships and subscriptions could be enhanced by concession pricing and more flexibility around payment plans, booking dates and cancellation policies. Many under 35s pointed to the prohibitive financial toll of lump sums as a primary barrier to purchasing subscriptions. One said:

‘As a younger person, the primary reason for me to subscribe is the somewhat cheaper pricing and ability to be flexible with our bookings without fees. Given the prices of tickets are going up and flexibility more important, I would prefer a multipack/spend and save model over a traditional sub.’

Another said,

‘I can’t afford a one-off big annual fee! I’d maybe consider monthly memberships if I knew it’d be cheaper in the long run’.

Another said:

‘Low-income subscriptions. You’d see me at the venue every week!’

Others noted a lack of awareness about programs and discounts available to them. One said:

‘To be honest, there probably are a bunch of membership programs out there that would suit me well, but I haven’t really heard about them.’



"As a younger person, the primary reason for me to subscribe is the somewhat cheaper pricing and ability to be flexible with our bookings without fees...

...I would prefer a multipack/spend and save model over a traditional sub."

Audience member



Things to think about when reviewing subscription and membership offers

Here are some things to consider:

- ❑ Subscription behaviours differ dramatically across audience groups – and it's important to consider whether a single subscription offering can appeal across age groups
- ❑ There may be a case to test new and different packages, and target them at different age groups
- ❑ Messaging of subscription campaigns will work best when tailored to a target age group – for instance, campaigns targeting young people could emphasise discounts and flexibility, whereas campaigns targeted at older audiences might emphasise the benefits of locking plans in early, and showing your support
- ❑ Flexibility could be an untapped benefit of performing arts subscriptions in the current climate, whereby people can organise changes of dates with no extra charge
- ❑ Payment plans and/or monthly fees could have their place in memberships for younger people – it's a space worth watching.

About the survey

On 2 August 2023, participating organisations simultaneously sent the Phase 9 survey to a random sample of their audience – defined as those who had attended an arts or cultural event in person since January 2018.

Over 8,800 audience members responded (8,816), from all over Australia: New South Wales (NSW; n=2,560), Victoria (VIC; n= 3,046), Queensland (QLD; n= 1,005), South Australia (SA; n=833), Western Australia (WA; n=988), and the Australian Capital Territory (ACT; n=324). A small number of responses were collected from audiences in Tasmania (TAS; n=26) and the Northern Territory (NT; n=34). These are included in national averages but not reported separately.

What's next

To read about the story so far, visit the study's Australian homepage at: www.thepatternmakers.com.au/outlook.

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.

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Patternmakers acknowledges Aboriginal and Torres Strait Islander peoples as the traditional custodians of our land – Australia. We acknowledge the Gadigal people of the Eora Nation as the traditional



custodians of the place where Patternmakers is based, and we pay our respects to Elders past, present, and emerging.



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