

City lights to red dirt:

Connecting with audiences across Australia

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Arts audiences in big cities are experiencing the arts at high levels, but with market saturation and the shifting dynamics of Australia's CBDs post-pandemic, new challenges have emerged for organisations to cut through.

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Outer suburbs are the biggest growth areas in Australia right now, and have an expanding arts audience looking for more cultural experiences closer to home — but don't yet have enough venues nearby to accommodate.

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Across Australia's diverse regions, audiences are experiencing access to arts and culture differently. Factoring in extra time and travel costs means heightened barriers in 2023, but with a decentralising trend, more options could be on the cards.

Introduction

Background

- ▶ Across Australia, arts and cultural events draw audiences together. Audiences share a common goal to connect with culture, and one another. However, there are some important differences between the circumstances of audiences in big cities, outer suburbs and the regions, and their behaviours around arts events.
- ▶ The behaviours and sentiments of Australian arts audiences have never been fixed, and in 2023, their needs and interests continue to evolve in response to social, economic and environmental trends. Right now, audiences are particularly affected by inflationary pressures – and inflation levels are expected to stay high in 2024 and 2025.
- ▶ These chapters compare audiences in three main geographic areas and provides insights for connecting people with culture where they live and the places they visit. It includes three parts:
 - Audiences in Big Cities: the 2,812 past attendees of cultural events who say they live in ‘big city’
 - Audiences in Outer Suburbs: the 3,255 past attendees who say they live in the ‘suburbs or outskirts of a big city’
 - Audiences in the Regions: the 2,749 past attendees who say they live in either a town or small city (69%), a country village or rural community (24%) or a farm or place in the country, bush or outback (7%).

About the data

- ▶ This fact sheet draws on data from Patternmakers’ research, including the Audience Outlook Monitor, which has tracked changes in sentiment and attendance since the early stages of the pandemic, and new benchmarking data collected by Patternmakers from 52 Australian arts organisations.
- ▶ Publicly available information such as the Australian Bureau of Statistics (ABS) Census is also used to place the audience research in context with broader social trends.
- ▶ The geographic definitions used in this publication were adopted from Creative Australia’s ‘Widening the Lens: Social inequality and arts participation’, which provides important context in terms of the socio-economic factors that shape people’s engagement with arts and culture.

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- ▶ Read on for our guide to connecting with audiences in different parts of Australia, and then head to the [dashboard](#) to explore the data for yourself (following these tips for using geographic filters).

Fast facts

Attendance at cultural events



	Audiences in Big Cities	Audiences in Outer Suburbs	Audiences in the Regions
Sample size in AOM survey	2,812	3,255	2,749
% who attended a cultural event of some kind in past fortnight	<div><div></div></div> 85%	<div><div></div></div> 78%	<div><div></div></div> 74%
% attending performing arts once a month or more in 2023	<div><div></div></div> 76%	<div><div></div></div> 63%	<div><div></div></div> 52%
% attending museums/galleries once a month or more in 2023	<div><div></div></div> 38%	<div><div></div></div> 26%	<div><div></div></div> 29%

Inflationary pressures



	Audiences in Big Cities	Audiences in Outer Suburbs	Audiences in the Regions
% who say that their household is worse off financially than 1 year ago	<div><div></div></div> 43%	<div><div></div></div> 46%	<div><div></div></div> 47%
% who see their attendance level increasing in the next 12 months	<div><div></div></div> 26%	<div><div></div></div> 26%	<div><div></div></div> 29%
% who left their local area to attend an event	<div><div></div></div> 24%	<div><div></div></div> 47%	<div><div></div></div> 39%
% who say they have stayed closer to home for leisure/entertainment	<div><div></div></div> 42%	<div><div></div></div> 45%	<div><div></div></div> 54%
% who spent over \$50 on tickets recently	<div><div></div></div> 69%	<div><div></div></div> 65%	<div><div></div></div> 57%

Programming preferences



	Audiences in Big Cities	Audiences in Outer Suburbs	Audiences in the Regions
% who say they're most attracted to challenging, topical things	<div><div></div></div> 52%	<div><div></div></div> 41%	<div><div></div></div> 41%
% who say they're most attracted to stories from or about my local community	<div><div></div></div> 32%	<div><div></div></div> 28%	<div><div></div></div> 39%
% who say they're most attracted to events with great reviews	<div><div></div></div> 65%	<div><div></div></div> 64%	<div><div></div></div> 61%

Ticketing and marketing behaviour



	Audiences in Big Cities	Audiences in Outer Suburbs	Audiences in the Regions
Found out about recent events on Facebook	<div><div></div></div> 16%	<div><div></div></div> 20%	<div><div></div></div> 26%
Found out about recent events through websites	<div><div></div></div> 42%	<div><div></div></div> 40%	<div><div></div></div> 34%
Proportion booking in week of event	<div><div></div></div> 22%	<div><div></div></div> 19%	<div><div></div></div> 17%
Proportion who have a subscription or membership to an arts organisation	<div><div></div></div> 51%	<div><div></div></div> 41%	<div><div></div></div> 29%

1.

Audiences in big cities



Audiences in Big Cities

Context

Inner-city dwellers have historically had greater participation rates, but the pandemic has slowed the growth of Australia's biggest cities

- ▶ In big cities, audiences are spoiled for choice. Museums, performing arts centres and artist studios are within easy reach, often helped by reliable public transport. A high concentration of activities means audiences have a diverse range to choose from, and word travels fast to large numbers of people.
- ▶ Attendance rates are traditionally higher: prior to the pandemic, data from the Australian Consortium for Social and Political Research Incorporated's (ACSPRI) 2019 Australian Survey of Social Attitudes (AuSSA) showed that inner-city dwellers were more likely to participate in arts and cultural activities (78%), compared to those living in outer suburbs (70%) or regional areas (54%).
- ▶ But the pandemic disrupted our behaviours, and big cities were hit harder with lockdowns and border closures. According to the ABS, there was population growth in regions at the expense of capital cities.
- ▶ Regional migration has since stabilised, and big cities will continue to grow long-term. However, the pandemic has left its mark, with Australians reassessing where they wanted to live and work.

With more city residents working from home, the composition of CBDs is changing

- ▶ Uptake of remote work has stabilised at 20-25%, which is much higher than the pre-pandemic levels of 2-8%. With shifts towards more working-at-home arrangements, foot traffic in major cities is lower, and for the moment, vacancy rates remain high in some commercial properties.
- ▶ In terms of growth, not all Australian regions are equally affected. Population growth in big cities like Melbourne and Sydney has been driven by international migration, while Brisbane and Adelaide are attracting inter-region moves. Young people between 20-40 are most likely to move for tertiary studies and job opportunities.
- ▶ Attendances at cultural venues and events in big cities has been rebuilding – and in 2023, arts attendance reached its highest point since the pandemic began.
- ▶ However, cities are different places today, and both residents and visitors to cities are feeling the pressure of the housing crisis, changing expectations around commuting, climate risks and rising costs of travel and leisure.

Attendance at arts events in 2023

More people are attending arts events more often in big cities in 2023, but resident arts organisations are competing in a congested market

- ▶ In August 2023, 85% of big city audiences said they attended at least one kind of cultural event in the fortnight before data collection.
- ▶ Three-quarters (77%) of arts audiences living in a big city said they attend performing arts events at least once a month or more. This compares with 63% of audiences in outer suburbs and 52% in the regions.
- ▶ Museum/gallery attendance is also more frequent amongst big city arts audiences: 38% attend a gallery or museum at least once a month, compared to outer suburbs (27%) and regional audiences (29%).
- ▶ When asked about their recent attendance, big city audiences were more likely to say they've attended most artforms, with attendance rates to live performances, museums and galleries, festivals, and lectures and workshops, all higher in big cities than other areas.
- ▶ However, there is also more competition for audiences in big cities. Benchmarking from 52 organisations shows that organisations in big cities have been slower to rebuild their audiences compared to those in other areas. On how they've succeeded, one organisation said, 'Collaborative approach to running events, either through partner events or a united program helped cut through some of the noise that came from the overabundance of events taking place post-COVID.' (Producer, Sydney NSW)

Inflationary pressures

Big city audiences are spending more on the arts, but with more options available, they're more likely to turn to reviews to choose the right event

- ▶ Arts audiences living in big cities are spending more on tickets to in-person live events and cultural activities: 7 in 10 (69%) spent more than \$50 the fortnight before data collection, compared to 65% of outer suburb audiences and 57% of regional audiences.
- ▶ Audiences in big cities are feeling more optimistic about their financial situation right now, with 49% reporting their financial situation is the 'same' and 9% say they are 'better off' compared to a year ago – slightly higher rates than audiences in outer suburbs and regional areas. 43% of audiences in big cities are feeling 'worse off,' slightly lower than those in outer suburbs (46%) and regional areas (47%).

- ▶ Big city audiences are feeling less pessimistic about their future finances, with 22% expecting to be worse off in the coming year, compared to 25% in outer suburbs and 26% in the regions. However, although big city audiences are more stable financially (and less pessimistic about their future finances) than those in outer suburbs and regional areas, many are being selective about what they attend right now.
- ▶ Due to financial reasons, in the past 6 months over half (53%) have looked for free/cheap things to do – and likely would have found ample options. As one big city dweller said, ‘There are many local things you can do that have little cost.’ (Yokine, WA). Another said, ‘When I’m considering attending an arts event but am undecided, I am usually swayed to go if I can get a discount ticket.’ (South Yarra, VIC)
- ▶ Two-thirds (65%) of audiences from big cities say they’ll be attracted to events with great reviews in the coming year, with audiences wanting to choose the ‘right’ event that will give them the best value for money – particularly in the congested market.

Participating online

Digital access is strong in big cities, and audiences are more likely to be paying for online arts and culture experiences

- ▶ In terms of participating in online or digital arts experiences, 40% of big city dwellers reported engaging in online arts offerings in the fortnight prior to data collection. This is comparable to the 40% of regional audiences and 37% of outer suburbs audiences who had participated in an online or digital arts and cultural experience recently.
- ▶ Online arts participation looks different between groups in big cities. One person said, ‘I listen to podcasts from the Sydney Writers’ Festival’ (Marrickville, NSW). Another said, ‘As a visual artist, I am regularly viewing commercial art exhibitions online, particularly those from interstate galleries which I wouldn’t be able to see in person.’ (Potts Point, NSW).
- ▶ Digital fatigue is also a factor for audiences participating in arts and cultural experiences online. One participant said, ‘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!’ (North Perth, WA)
- ▶ Audiences in big cities were more likely to be paying for online arts and culture experiences (35%) compared to those in outer suburbs (26%) or regional areas (24%). Those paying are most likely to be purchasing single online experiences (16%), subscribing to platforms to access content on-demand (11%) and making donations (10%), while fewer are subscribing to programs/seasons which include the online experience (6%).
- ▶ Access issues such as digital proficiency and having the right technology for the desired experience are key barriers to participation. One audience member said they ‘lacked expertise in setting up their devices’ (Balmain, NSW). Another said, ‘I feel like I

would fully benefit from and willing to try experiencing digital art through a quality VR headset product. However, I don't own one at the moment so prefer to experience it in person.' (South Plympton, SA).

- ▶ Among those paying, big city audiences spent more on digital experiences than audiences from other areas, with 26% of online big city audiences spending more than \$100 in the fortnight before data collection. This compares to 16% of outer suburbs audiences and 20% of regional online audiences.
- ▶ More than half of big city audiences say that online arts events and experiences are playing a role in their lives (54%), either a small (44%) or substantial role (10%), while 46% say they play no role.

Cultural tourism and touring

Big cities are drawing people from outer suburban and regional areas for events, but fewer are travelling in the opposite direction

- ▶ When big city audiences were asked where they went to attend recent events, 76% said they stayed in their local area. Most of those who travelled outside their local area went to another big city (65%), followed by outer suburbs (21%), or a town or small city (10%). Smaller proportions travelled to a country village or rural area (3%), or a place in the country, bush or outback (1%).
- ▶ Meanwhile, of the audiences living in outer suburbs and the regions who travelled outside their local areas for their latest live art or cultural activity, 69% reported travelling into the city for the experience.
- ▶ Audiences attending arts and cultural activities in big cities (both locals and visitors) were more likely to attend live performances (70%) than those travelling to other locations, such as outer suburbs (62%), or a town or small city (57%).
- ▶ In comparison, audiences attending arts and cultural activities in the outer suburbs were most likely to attend a cinema (59%), and audiences living in the regions were most likely to attend a live performance (53%), visit a museum or gallery (51%), or attend a fair/festival (40%).

Programming preferences

Big city audiences are in the mood for fun, uplifting events, though there is a stronger market for challenging works in cities relative to other areas

- ▶ When it comes to programming, audiences in big cities continue to put fun and uplifting events at the top of their lists, as an antidote to tough times, with 74% saying they'll be attracted to these events in the coming year. One big city audience member said, 'Cost of living and needing experiences that lift us up from the day to

day more than ever. This could mean fun emotionally uplifting events or thoughtful intellectually uplifting events.’ (Brunswick East, VIC)

- ▶ However, big city audiences are showing a greater appetite for challenging, topical content in the next 12 months (52%), compared to audiences living in outer suburbs and regional areas (both 41%). One said, ‘While "entertainment" as such should always be a key element when seeking to put bums on seats, this should never come at the cost of ignoring the other end of the body, i.e. the brain. Theatre should always challenge its audience, even if it does so while they are laughing.’ (Glebe, NSW)
- ▶ Meanwhile, 58% said they’ll be most attracted to trying new things they haven’t experienced before, slightly higher compared to outer suburbs audiences (54%) and audiences in the regions (53%). One audience member shared, ‘The challenge of new work is exciting and what I personally look for, across all arts and cultural experiences. Recycling a proven formula or an encore performance of a show takes that away from an event and downgrades the experiences. Arts organisations and artists should be supported to be bold.’ (Daglish, WA)

Some city audiences say they prefer earlier performance times than before, and some visitors to the city want to avoid travelling at night, but Friday nights could be making a comeback

- ▶ More CBD workers worked from home during the pandemic compared to the wider community, linked to higher proportions of people employed in professional services working in Australia’s CBDs.
- ▶ Foot traffic in Sydney’s CBD is increasing, with data collected at CBD train stations showing that it has returned to 70% of pre-pandemic levels – and is on a positive trajectory as people resume working in and venturing into the city.
- ▶ The work week looks different today, but commuting patterns are still resettling as employers grapple with policies to motivate staff coming back into offices. One recent survey found that 42% of Australian employers are insisting on workers increasing their number of in-office days each week amidst hybrid working arrangements.
- ▶ The Transport Opinion Survey conducted by the University of Sydney’s Institute of Transport and Logistics Studies found that in VIC, Thursdays and Fridays had become popular to work in the office, for social reasons, while in NSW, Thursday was the most popular day to be in the office.
- ▶ Some audiences say they no longer want to stay out late on weeknights and want more early-evening or weekend matinee options. One audience member said, ‘More daytime events as I can’t park in the city and trains are not safe at night.’ (Hurstville, NSW).

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- ▶ Another respondent said, 'I look for daytime activities that are pram friendly.' (Sydney, NSW). Another said, 'Post-COVID, I have found I am more reluctant to have a late night. I much prefer daytime events or matinees.' (Griffith, ACT).

Ticketing and marketing behaviour

Online channels are playing an important role across Australia to help connect arts and cultural activities to their audiences

- ▶ Three-quarters (76%) of arts audiences living in big cities found out about the most recent cultural activity or event they attended via an online channel. Online activities are similarly important for outer suburbs arts audiences (75%) and regional audiences (75%) as a key awareness channel to find out about what's on.
- ▶ Finding out about events is complex, and channels are fragmented across all geographic areas. However, there are some channels that are more commonly used by big city audiences compared to outer suburbs and regional audiences, including:
 - Emails from arts organisations (47% of big city audiences, relative to 46% of outer suburb and 43% of regional audiences)
 - Websites (42%, relative to 40% and 34% respectively)
 - Word of mouth (37%, relative to 34% and 35% respectively)
 - Instagram (12%, relative to 10% and 8% respectively).
- ▶ Meanwhile, Facebook, radio/TV and brochures/flyers are all in greater use by regional audiences.
- ▶ Big city audiences are much more likely to have purchased a subscription or membership for a cultural organisation this year (51%), compared to those in outer suburbs (41%) and the regions (29%). One person explained that because they visit a museum often, the membership makes it 'Financially beneficial. Gives us opportunities and info about events close to home. Good for an impulse outing or entry late in the day.' (North Fitzroy, VIC)

Understanding the mood

- ▶ Around the world, big cities have changed dramatically since COVID. According to Jones Lang LaSalle, 'A shift to hybrid working, fluctuating visitor numbers, aging real estate and competition from emerging submarkets continue to weigh on the short-term outlook for many Central Business Districts (CBDs).'
- ▶ In Australia, city-dwellers are still recovering from the experience of long lockdowns, and some still feel like they are 'making up for lost time' after the pandemic, particularly in Melbourne and Sydney.
- ▶ Around the country people are drawn to fun and uplifting events – and continue to prioritise things that make them feel good, or help them connect socially, particularly in light of economic difficulties and global events.

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- ▶ Artists and cultural organisations have an important role to play in revitalising cities, however attracting audiences from outer suburbs and regional areas is likely to get harder in the short term, with inflationary pressure continuing to put strain on already higher costs associated with the travel and time it takes to journey into cities.
 - ▶ Work is underway in CBDs across Australia to bring people into cities again – including from regional and outer metro areas. There are exciting initiatives taking place, like Victoria's regional travel cap, and in Sydney changes to the planning system to enable a faster and cheaper process for small bars and pubs to operate outdoor dining.
 - ▶ These changes have CBDs repositioning themselves as 'Central Social Districts', with NSW Minister for Cities Rob Stokes saying, 'While our CBDs won't ever be the same again, they will be better. More inclusive, more dynamic, more walkable, more experiential, and more inventive. Basically, more fun.'

Melbourne, VIC and ACMI



Key examples

Melbourne, VIC and ACMI

- ▶ Melbourne's population growth fell by 1.2 per cent in 2020–21 as overseas migration ground to a halt and thousands of residents moved interstate during lockdowns. But Melbourne is still on track to overtake Sydney as the nation's largest city by 2031–32 (a touch later than previously projected).
- ▶ The latest data set affirms what we know already — Melbourne (Victoria's lockdown-struck capital) was hit harder than any other Australian city during the pandemic. With extended closures and working-from-home arrangements in the CBD, audiences had longer to wait to return to the city and its venues.
- ▶ Audience recovery following lockdowns was then hit by cost-of-living pressures, and so Melbournians, along with many across the country, started facing new barriers to attending arts and cultural events. One audience member said, 'The economic environment is limiting spend. There needs to be more consideration for free or low cost events.' (South Yarra, VIC)
- ▶ ACMI is a museum of screen culture based in the City of Melbourne, VIC. ACMI presents a range of free and paid exhibitions each year. Connecting young and future audiences to ACMI's Melbourne Winter Masterpiece exhibition, Goddess: Power, Glamour, Rebellion when it opened in April 2023 – at the crux of the interest rate hikes and a period of economic recovery and pressures on family budgets – presented a challenge.
- ▶ Through onsite observation and audience data, ACMI was noticing students were facing barriers to entry. Dr Indigo Holcombe-James - Strategic Research Lead at ACMI said, 'We noticed students were coming into ACMI, but they weren't visiting Goddess, they were going to our free exhibitions. It was evident that ticket pricing was prohibitive.'
- ▶ Tickets to the blockbuster exhibition for students were originally priced at \$24. ACMI introduced a \$10 student ticket, providing a meaningful discount to young people who were feeling financial barriers the most, and resulting in a substantial visitation increase. Student ticket sales more than doubled over the exhibition run, resulting in an increase of 136%. Responsive pricing to meet the changing needs of audiences is an important way to look after existing communities as well as open doors to first-timers.

Adelaide, SA and Adelaide Fringe



Adelaide, SA and Adelaide Fringe

- ▶ Adelaide is Australia's fifth largest city, with a resident population of around 1,400,000. Between 2021 and 2041, the population for the City of Adelaide is forecast to increase by 21,052 persons (82.53% growth), at an average annual change of 3.05%.
- ▶ The city has less suburban sprawl than other larger Australian cities, with shorter commute times and idyllic surrounding landscapes making it an appealing destination. According to McCrindle, Adelaide has seen a natural increase, net overseas migration, and net interstate migration since 2021 (the tripple green light for population growth).
- ▶ While its seven-day lockdown was minimal compared to other cities, such as Melbourne and Sydney, the combined effects of the virus spread, restricted travel, border closures and event cancellations had a detrimental impact on the state's arts and culture sector.
- ▶ Adelaide Fringe is the largest arts festival in Australia, and second largest in the world. In 2019, the festival had sold 828,563 tickets and was originally aiming to hit the 1 million mark by 2024. However, due to the challenges posed by the pandemic, progress was hindered, resulting in a decrease to 623,667 ticket sales in 2021. Undeterred by this setback, the Adelaide Fringe team lead by CEO Heather Croall rallied and initiated a 'mission to 1 million campaign', setting an ambitious target of achieving 1 million ticket sales for the 2023 festival.
- ▶ Due to the late-buying ticket trend, which is particularly detrimental for festivals and live performances, Ella Huisman, Executive Director of Adelaide Fringe, described seeing the slow uptake of tickets as 'everyone's worst nightmare.'
- ▶ Rising to the challenge, Adelaide Fringe implemented a strategy involving a sponsored flash sale one month out from the event, granting audiences discounted access to tickets, with the sponsor covering the price difference. This approach rewarded early ticket buyers without diminishing the artists' box office returns. Tickets for the 2023 Adelaide Fringe generally cost around \$35.25 on average, and with plenty of free events to attend, this strategy allowed for more affordable options.
- ▶ Strategic email marketing and database maintenance ensured the right people were getting the right information. Ella said, 'It's great to say you've got 500,000 subscribers, but if they're not actually engaging, it's expensive to have them on your system; your open rates aren't as good, and you're wasting time sending messaging to people that aren't interested.'
- ▶ Additionally, tweaking the web experience for customers was crucial. Ella said, 'We've spent a lot of time and energy to make our platforms really intuitive, focusing on user journey and making the experience of buying a ticket on our website seamless to create a higher box office return for artists.'

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- ▶ On the final night of the festival, at 10 pm, Ella and her team, who had dedicatedly analysed ticketing data and consistently refreshed dashboards throughout the campaign, witnessed the momentous occasion as ticket sales crossed the highly anticipated 1,000,000 mark.

Tips for connecting with audiences in big cities

- ❑ Keep fun, uplifting, connective and escapist events on the agenda for 2024 and 2025, and support challenging content with additional engagement programs.
- ❑ To attract audiences in from outer-suburbs and regional areas, give them plenty of notice. Despite the trend towards last minute commitments, some audiences are considering their options (and logistics) well in advance.
- ❑ Last-minute events and offers can be targeted to 'hyper-local' audiences, people likely to be in the area for another reason, and those with easy public transport connections.
- ❑ Stay abreast of urban regeneration projects that aim to increase foot traffic and spending in your local area and find ways for your organisation to be part of positive change.
- ❑ Use email, web and Instagram to connect with big city audiences – and explore ways to amplify word of mouth and social reviews. Recommendations from trusted sources are powerful right now.

2.

Audiences in outer suburbs



Audiences in Outer Suburbs

Context

With big cities being the hardest hit by the virus and lockdowns, the nation saw a rapid increase in counter-urbanisation, with many Australians moving away from city centres

- ▶ Since 2020-21, the largest growth areas in the country were outer-suburban areas within Sydney and Melbourne, where population growth in these two major cities was driven by net internal migration gains. Riverstone and Marsden Park in Sydney's outer north-west grew by 7,400 people over 2020-21, while Cranbourne East in Melbourne's south-east grew by 5,000.
- ▶ While big cities have a higher concentration of arts experiences, outer suburbs and city outskirts contribute significantly to Australia's diverse cultural landscape, through community-centric programming, access to wider open spaces, diversity in cultures and identities and greater affordability and accessibility. Larger proportions of families with children live in outer suburbs, compared to proportions in capital cities.
- ▶ Australians are increasingly preferring to live in middle and outer suburbs – or even well-connected regional cities - compared to the inner city, according to a study by the University of South Australia. An existing trend only accelerated by the pandemic, many are motivated by the quality of life offered by suburban neighbourhoods and as the Australian population continues to decentralise, more businesses and services are predicted to follow residents outwards.
- ▶ However, attendance rates in outer suburbs are traditionally lower than inner city populations: prior to the pandemic data from the Australian Consortium for Social and Political Research Incorporated's (ACSPRI) 2019 Australian Survey of Social Attitudes (AuSSA) showed that inner-city dwellers were more likely to participate in arts and cultural activities (78%), compared to those living in outer suburbs (70%) or regional areas (54%).
- ▶ Those living on the city outskirts faced significant financial setbacks during the pandemic, likely to have heightened amidst the current cost-of-living pressures. The National Growth Areas Alliance (NGAA) reported that 1 in 5 Australians in the outer suburbs '[have] been living in "financial survival mode" during the pandemic and [are] more likely to feel stressed, frustrated and anxious than the national average.' More than half reported they struggled to pay at least one major bill, whether it be to meet their energy needs, groceries, rent or personal loans. For those aged 40 and under, the figure jumps to 64%.

Attendance at arts events in 2023

Audiences in outer suburban areas have slightly lower rates of attendance than big city audiences, and are participating less frequently

- ▶ In August 2023, 78% of outer suburbs audiences had attended at least one kind of cultural event in the fortnight prior to data collection, lower than the proportion in big cities (85%) and slightly higher than the proportion in regional areas (74%).
- ▶ Around 6 in 10 (63%) of audience members living in outer suburbs said they attend performing arts at least once a month or more. This is lower than proportions who live in big cities (77%), but higher than regional audiences (52%).
- ▶ Outer suburbs residents are visiting museums and galleries at the lowest rate compared to big city and regional residents, with 27% attending once a month or more, compared to 38% of big city residents and 29% of regional residents.
- ▶ Audiences from outer suburbs are attending a wide range of cultural events and activities, like live performances (52%), and museums or galleries (26%). Smaller proportions are attending lectures, artist talks or workshops (14%) and fairs and festivals (8%).
- ▶ Looking ahead, two-thirds (67%) of outer suburbs residents predict that their current level of attendance will stay the same, while 26% predict it will increase.

Inflationary pressures

Almost half of outer suburban audiences say they are financially worse-off than one year ago, and many are looking for free/cheap things closer to home

- ▶ Audiences in outer suburbs are feeling slightly more pessimistic than optimistic about their financial situation right now. Almost half (46%) say they're worse off than they were a year ago, and 25% expect to be financially worse off in the coming year. Meanwhile, big city audiences are slightly more optimistic: 43% say they are worse off compared to a year ago and 22% expect to be financially worse off in the coming year.
- ▶ Over half (54%) of outer suburbs audiences are looking for things that are free or cheap to do. One parent shared: 'As a family of four, the financial cost of events has become a big factor. So, looking for free/cheap things to do to get the family out is more appealing.' (Ferntree Gully, VIC)
- ▶ Audiences who live in the outer suburbs are spending more than audiences in regions, but less than those audiences living in big cities. Two-thirds (65%) of outer

suburbs audiences spent over \$50 in the fortnight prior to data collection, compared to 69% in big cities and 57% in regions.

- ▶ Half (50%) are taking longer to make decisions about what to go to, given their financial circumstances. One respondent shared: 'I go to whatever I can but am a little more choosy. Sometimes I've already been to similar events so won't repeat and sometimes I'm disappointed at a costly show – so I think carefully what will be the best value for me.' (Hindmarsh, SA)
- ▶ One quarter (27%) are finding things to 'splash out' or 'splurge' on, things they've really got their hearts set on but might be saving elsewhere. One outer suburbs resident shared: 'I take a more considered approach to planning out what events I'd like to attend in the next couple of months. If I'm going to a big stadium concert in the next couple of months, then that will be my only event. Otherwise, I'll do a few cheaper events/performances over a few months. If I suspect an overseas band, I love will announce a big show in Australia then I'll save the money (as I have done with Paramore).' (Sunbury, VIC)
- ▶ Encouraging untapped audiences in the outer suburbs to attend may require some strategic approaches, especially in light of heightened cost-of-living pressures. One respondent shared: 'As known, current financial pressures for people is reducing audience participation. These organisations need to reach out to suburban communities by performing locally, possibly with free taster shows/excerpts and local performances with moderate ticket prices.' (Beverly Hills, NSW)

Participating online

Digital participation rates among outer suburban audiences are lower than in big cities and regional audiences surveyed

- ▶ In terms of online or digital arts experiences, 37% of outer suburbs audiences had participated in an online or digital arts and cultural experience in the fortnight prior to data collection, compared to 40% of big city dwellers and 40% of regional audiences.
- ▶ Outer suburbs audiences have different views about the value of online experiences. One said, 'We enjoy "catching up" and doing things together. Online stuff is usually done solo' (Clarkson, WA). Another said, 'I sit on a computer all day. I'm not interested in being online for my entertainment. I prefer to experience an outing and food with my entertainment' (Collaroy, NSW).
- ▶ Audiences living in outer suburbs and regional areas are less likely to be paying for online arts and cultural experiences, with 26% doing so in outer suburbs and 24% in regional areas, compared to 35% of audiences living in big cities. Outer suburbs audiences who are paying are most likely to be purchasing single online experiences (10%), subscribing to platforms to access content on-demand (9%) and making donations (8%) — while fewer are subscribing to programs/seasons which include the online experience (4%).

- ▶ Access and connectivity issues can prevent some people from engaging. One said they '...don't have a computer nor the internet nor a smart phone... can't afford it and really don't need it. I use the computers at my local library for all such communications and I have a land line so that is the sum of my communication facilities.' (Collaroy, NSW). Another said, 'Sometimes the internet connection can fail.' (Vermont South, VIC).
- ▶ Half of outer suburbs residents say online arts events and experiences are playing a small (43%) or substantial (8%) role in their life, while another 49% say they play no role.

Cultural tourism and touring

Outer suburbs audiences are the most likely group to be travelling outside of their local area to experience arts and culture

- ▶ Almost half (45%) of outer suburbs audience members say that due to financial reasons, they have stayed closer to home for leisure/entertainment in the past 6 months. One said, 'Would love to see more quality performances in the suburbs, as I find travelling into the city a chore nowadays, traffic, parking etc.' (Frankston, VIC)
- ▶ When thinking about the most recent event they attended, 53% of outer suburbs residents said the venue or event was in their local area. Outer suburbs audiences were the most likely group to be travelling outside of their local area to experience arts and culture, compared to big city or regional residents.
- ▶ Among those travelling outside their local area, intrastate travel to attend events was most common in this group (41%). Smaller proportions said the most recent event they went to was in another state or territory (4%) or in another country (1%).
- ▶ Amongst those outer suburbs residents who travelled outside of their local area to attend, the largest proportion (69%) went to a big city. Audiences are eager to have more opportunities closer to home, as one said, 'Distance for me is an issue, and there have been more artists doing satellite shows in my community.' (Kalamunda, WA).
- ▶ Others expressed that they are willing to factor in the costs of transport and accommodation for something they desire: 'The greatest obstacle to attending city-based functions is the need to travel. I live in the Upper Blue Mountains (NSW) with very limited public transport options. Staying overnight in Sydney is very expensive, but for a good performance I'm prepared to do it providing I can plan well in advance...' (Blackheath, NSW)
- ▶ Outer suburbs audiences called for the decentralisation of arts experiences, coupled with more variety of options: 'The outer suburbs need greater diversity in terms of what options are available. Frankston has big shows at the Arts Centre, but I'm sure there would be smaller audiences from all across the Mornington Peninsula who are

looking for a range of different things, particularly things that are more intellectually stimulating as well as just 'entertaining'.' (Frankston, VIC).

Programming preferences

Audiences who live in the outer suburbs are showing interest in a wide range of programming, including new ideas and old favourites

- ▶ Three-quarters (77%) of outer suburbs audiences say they'll be attracted to fun, uplifting things in the coming year – a preference which exists in other areas too. One said, 'I think people need fun, entertaining, uplifting events which can provide relief from everyday worries. They also give me a reason to dress up, feel good about myself, involve friends to go with me, enjoy a single glass of wine or bubbles to make it a special event' (Berwick, VIC).
- ▶ There is also a strong appeal for challenging, topical things (41%), though at a slightly lower rate than in big cities (52%).
- ▶ With some audiences deliberating longer over what to attend and tightening their belts when it comes to spending amidst the cost-of-living crisis, and others saying they're prioritising other things, great reviews are impacting what audiences choose to attend. Two-thirds (64%) of outer suburbs audiences say they'll be attracted to events with great reviews in the coming year.
- ▶ Over half (54%) have an appetite for trying new things they haven't experienced before, with qualitative data suggesting audiences are looking for a balance of more familiar works they love, and new things to fall in love with. One outer suburbs audience member shared: 'Striking a balance between introducing new ideas and content and old favourites. It is especially good to see something 'old' with a new interpretation.' (Nedlands, WA).
- ▶ Significant proportions in the outer suburbs are also attracted to events with 'big name' artists/performers (54%) and stories that are about or from their local community (28%), demonstrating the need for a wide variety of programming to continue stimulating and exciting diverse audiences.
- ▶ The work week looks different today, with more workers in the city on mid-weekdays Tuesday, Wednesday and Thursday, and fewer on Mondays and Fridays. Some audiences say they no longer want to stay out late on weeknights and want more early-evening or weekend matinee options.

Ticketing and marketing behaviour

With budgets under pressure, outer suburban audiences are reviewing the value for money of memberships

- ▶ Significant proportions across Australia are committing to attending arts and cultural events last-minute. Three in 10 (30%) audiences in outer suburbs are booking tickets within a week before the event, compared to 33% in big cities and 30% in regional areas.
- ▶ Audiences in outer suburbs are less likely to have purchased season tickets or memberships to organisations than those in big cities: 41% in outer suburbs hold subscriptions/memberships, compared to 51% in big cities. The proportion holding subscriptions/memberships is even lower in the regions (29%).
- ▶ The most common subscriptions for outer suburbs audiences are to performing arts organisations (31%). Meanwhile, 14% have museum or gallery passes or memberships and 8% subscribe or are members to another type of arts or cultural organisation.
- ▶ Reasons for subscribing or being a member to arts organisations included locking in plans early (26%), supporting the artists or organisation financially (22%), accessing discounted prices (17%), accessing other benefits or privileges (17%) and feeling like part of the organisation's community (13%).
- ▶ Many outer suburbs residents who are subscribers and members referenced wanting to support local arts and culture as a reason for supporting organisations in this way. One said, 'Membership gives ongoing support, helps keep events local and accessible, gives me member benefits such as presale tickets and is usually good value for money' (Mount Barker, SA). Another said, 'I like to keep in touch with the local arts scene' (Kingston, ACT).
- ▶ While a significant proportion said they were likely (16%) or very likely (20%) to purchase subscriptions or memberships next year, it was more common for outer suburbs audiences to say they wouldn't. Half (48%) said they would be unlikely (24%) or very unlikely (24%) to purchase subscriptions or memberships next year.

Online channels like email and websites are playing an important role in outer suburbs to help connect arts and cultural activities to their audiences

- ▶ Three-quarters of big city (76%), outer suburbs (75%), and regional residents (75%) found out about a recent cultural activity or event they attended via a digital channel.
- ▶ Residents in outer suburbs are commonly finding out about events and cultural activities through many channels, including:

- Emails from arts organisations (46% of outer suburbs audiences, relative to 47% of big city audiences and 43% of regional audiences)
- Websites (40%, relative to 42% and 34% respectively)
- Word-of-mouth (34%, relative to 37% and 35% respectively)
- Facebook (20%, relative to 16% and 26% respectively).

Understanding the mood

- ▶ With inflationary pressures continuing to put a strain on already higher costs associated with the travel and time it takes to journey into cities, attracting audiences from outer suburbs is likely to get harder in the short term. In 2023, driving into central Sydney from the Western Suburbs, for instance, 'costs almost twice as much as commuting from east and south of the city', according to [The Guardian](#). Audiences from the outer suburbs may need more incentive to make the effort to travel into the city to attend arts and cultural events.
- ▶ Demand for local arts and cultural experiences will increase as populations and businesses continue to gravitate towards outer suburbs. One outer suburbs audience member said, 'Too many events are in the city or inner suburbs. People out west would attend more events if they didn't have to travel so far.' (Wentworthville, NSW)
- ▶ Around the country, people are drawn to fun and uplifting events – and continue to prioritise things that make them feel good, or help them connect socially, particularly considering economic difficulties and global events.
- ▶ Work is underway to enhance the liveability of urban growth areas around the country, such as via state government-funded revitalisation precincts and transport projects in [NSW](#) and [VIC](#). There is a case for arts and cultural organisations to stay abreast of relevant updates and invest in ways to align recovery efforts with broader revitalisation strategies.

Western Sydney, NSW and Riverside Theatres Parramatta



Key example:

Western Sydney, NSW and Riverside Theatres Parramatta

- ▶ Greater Western Sydney (GWS) is the fastest-growing and most diverse region of New South Wales. It's home to 2.65 million people, and its population is projected to reach 3 million people by 2036: two-thirds of Sydney's population growth.
- ▶ As of 2021, four in ten (41%) GWS residents were born overseas, coming from 170+ countries and speaking over 100 languages. It is home to Australia's largest urban Aboriginal and/or Torres Strait Islander population, with 2% identifying.
- ▶ The NSW Government plan for Western Sydney has committed billions in support of communities and community infrastructure, from the Multicultural Communities Support Package to delivering the new Powerhouse Museum in Parramatta.
- ▶ Audiences and organisations in GWS appreciate opportunities to experience events from further afield in their local area. When describing what they think arts and cultural organisations should be aware of at the moment, one resident suggested 'Performance moving out of the city. The Riverside Theatres hosting Opera Australia and STC [was] brilliant.' (Mount Druitt, NSW).
- ▶ Another mentioned that shows in GWS can be more affordable than the alternative in the CBD: 'I tend to attend smaller venues that are cheaper. *The Mouse Trap* in a city theatre was over \$120, in the Riverside Theatres in Parramatta it was \$60. An excellent comparable performance.' (Lidcombe, NSW).
- ▶ Riverside Theatres hosts around 750 performances annually and attracts over 180,000 attendances to a program of theatre, music, dance, comedy, cabaret, kids and family, cinema and festivals. It is also a venue for hire, hosts educational programs, and is home to Riverside's National Theatres of Parramatta and FORM Dance Projects.
- ▶ Amy Matthews, Senior Producer – Education & Communities at Riverside Theatres in Parramatta explains, 'It's getting more and more expensive to live in Western Sydney, especially if you have to commute to work. Tolls are a massive, an inequitable mechanism that's really hard on Western Sydney families. Plus, houses and rents are meaning people are moving further and further out.'
- ▶ She said when major companies tour works to Western Sydney, 'We [Western Sydney audiences] are so used to having to travel to get to anything. If there were more good quality offerings in Western Sydney, we'd go. We'd save our money and we'll go, for our one outing of the week.'
- ▶ Qualitative data from audiences in GWS suggests they are not only eager for arts and culture to reach their area, but also to see their community reflected in arts and culture. One resident shared: 'We are passionate about our local communities. There is a stigma about how much of the arts are targeting for inner city and a particular

demographic. I would be thrilled to see Greater Western Sydney included in the cultural framework of our state in a prominent way.' (Saint Clair, NSW).

- ▶ In terms of working with different communities, and working with artists from a target community, Amy said, 'It's hard to do unless you work with the right people – there's no point putting it on if it doesn't come from the community. You need to build strong relationships with community leaders and listen to people within the community if you're going to be successful.'
- ▶ When it comes to marketing events, she said clarity of communication around the value of the show is important. 'If you don't have a recognisable title it's about quality of marketing assets, copy, communication, pitching it at the right level. What about that show will make it worthwhile?'

Tips for connecting with audiences in outer suburbs

- ❑ To attract outer suburbs residents into other areas, communicate any travel incentives, cost-saving initiatives, and information about other things happening in the area so the trip feels more worthwhile.
- ❑ To attract audiences in from big cities and regional areas into the outer suburbs, give them plenty of notice. Despite the trend towards last minute commitments, some audiences are considering their options (and logistics) well in advance.
- ❑ Keep fun, uplifting, connective and escapist events on the agenda for 2024 and 2025 and support challenging content with additional engagement and outreach programs.
- ❑ The existence of tolls in some areas means that driving into the city can be expensive. Consider promoting public transport connections and making itinerary suggestions for commuters looking to 'make a day of it.'
- ❑ Explore opportunities to take programs to community hubs in in outer suburbs and develop partnerships with local leaders and organisations who are embedded within community.
- ❑ With fewer audiences from outer suburbs engaging in online arts and culture compared to big cities and regions, it's worth making sure digital offerings and marketing are accessible.
- ❑ Use email, websites and Facebook to connect with outer suburbs audiences – and explore ways to amplify word of mouth and social reviews, with recommendations from trusted sources being especially powerful right now.

3.

Audiences in the regions



Audiences in the regions

Context

Almost 80,000 people moved from big cities to regional areas during the pandemic, with the biggest and longest lasting demographic shifts occurring in coastal towns near big cities

- ▶ With big cities being the hardest hit by the virus and lockdowns, the nation saw a rapid increase in counter-urbanisation, with many Australians moving from big cities to the regions. Data shows that 79,355 people moved out of big cities to regional areas during the period 2020-2021.
- ▶ According to the Regional Australia Institute's 'Big Movers 2023' report on the last intercensal period (2016-21), regional Australia 'saw a significant increase in net migration from capital cities, with a net gain of 166,073 individuals – almost triple the net gain of the previous intercensal period (2011-2016). This shift overlaps with the first year and a half of the COVID pandemic.' The report affirms that millennials and overseas-born residents show a strong preference for regional areas.
- ▶ However, the University of Melbourne's 'The Great Migration' report states that 'ABS internal migration data suggests that more people have been relocating to regional Australia and away from capital cities for at least the last twenty years. The pandemic, it seems, has simply amplified a well-established trend.'

While big cities have a higher concentration of arts experiences, the regions contribute significantly to Australia's diverse cultural landscape

- ▶ Regional Australia has a rich array of local arts and literary festivals, community-based arts projects, the preservation of First Nations cultural heritage, public art spaces and other avenues for nurturing local identity, talent and creativity.
- ▶ However, attendance rates are traditionally lower: prior to the pandemic data from the Australian Consortium for Social and Political Research Incorporated's (ACSPRI) 2019 Australian Survey of Social Attitudes (AuSSA) showed that inner-city dwellers were more likely to participate in arts and cultural activities (78%), compared to those living in outer suburbs (70%) or regional areas (54%).
- ▶ The digital divide continues to impact regional communities, with the Australian Digital Inclusion Index reporting that 'Regional Australia scored 69.8 on the digital inclusion index, below the national average of 73.2, while metro areas scored 74.8. Very remote Australia scored significantly below the national average at 62.6. Regional Australia also scored below the national average on all digital inclusion

markers, including Access, Affordability and Digital Ability, with Digital Ability markedly lower than the rest with a score of 59.7.

- ▶ Meanwhile, housing affordability is not keeping pace with population growth. The Regional Australia Institute's [Inquiry into Housing Affordability](#) details 'Pressures in regional home-rental and regional home-purchase markets are underscored by a weak flow of new housing that has not kept pace with a growing population over the past two decades. As a result, regional housing demand has been accumulating over several years.'
- ▶ While decentralisation is leading to population movement outside of the inner cities, remote communities in particular are faced with a lack of investment and government intervention – presenting a challenge for audience recovery. A [study by the University of South Australia](#) highlighted a crucial question: 'And what about the wide verandas of our small, remote inland cities? Without industry diversification and government intervention, these places are unlikely to benefit from the predicted population and economic growth.'

Attendance at arts events in 2023

Audience participation rates are generally lower than big cities – but the picture varies widely between large towns, small villages and rural properties

- ▶ In August 2023, 74% of regional audiences said they attended at least one kind of cultural event in the fortnight before data collection. This varied across different types of regional areas: 76% of those living in towns or small cities said they attended, compared to 70% in country villages or rural communities and 65% on farms, bush or outback properties.
- ▶ In terms of frequency, 52% of audiences in the regions said they attend performing arts events at least once a month or more. This compares with 63% of audiences in outer suburbs and 77% of big city audiences.
- ▶ Museum and gallery attendance is slightly higher in the regions (29%) relative to outer suburbs (27%), but lower than audiences living in a big city (38%).
- ▶ When asked about their recent attendance, regional audiences were less likely to have attended most artforms, with attendance rates at live performances, museums/galleries and festivals all lower relative to big cities and outer suburbs.
- ▶ Some forms appear better able to reach audiences in regional areas than others. For instance, in the past 12 months, 57% of regional audiences have attended libraries, 56% have attended theatres, 52% have attended cinemas or film festivals and 51% have attended contemporary music.

Inflationary pressures

On average, audiences in the regions who have attended recently say they spent less on tickets

- ▶ More than half (57%) of regional audiences participating spent over \$50 compared to 65% of audiences in outer suburbs and 69% of those in big cities.
- ▶ Regional audiences indicate they feel less stable financially (and more pessimistic about their future finances) than those in outer metro and regional areas, and many are being selective about what they attend right now.
- ▶ Almost half of regional audiences (47%) say they are 'worse off' financially than they were one year ago, compared to 43% in big cities. One person from a rural community said, 'Many are going through a difficult time, both with life, families and financial hardships. Most arts and cultural organisational activities are aimed at people who are financially well off and able to afford to attend. Catering for those not so financially well off would, I am sure, be appreciated for these individuals and families.' (Australind, WA).
- ▶ Audiences living in regional areas are also slightly more pessimistic than big city audiences about their future financial circumstances, with 26% of those in regions expecting to be 'worse off' in the coming year, compared to 22% of big city dwellers.

Regional audiences are eager to have access while higher travel and fuel costs may limit their ability to travel, even to towns close by

- ▶ Due to financial reasons, over half of those living in regional areas (56%) have looked for free/cheap things to do, and 51% are taking longer to make decisions about what to go to – trends that are similar in big cities and outer metropolitan areas.
- ▶ Possibly linked with less volume of content, the data shows that regional audiences are slightly less influenced by reviews: 61% say they'll be most attracted to events with great reviews, compared to 64% in outer suburbs and 65% in big cities.
- ▶ Although regional audiences are more likely to be pessimistic about their future finances, they are also more likely to say they think their attendance frequency will increase, possibly because they anticipate increasing options after the pandemic, and in some places, recovery from natural disasters.
- ▶ When responding to the survey, many regional people call for more access. For example, one person said they wanted cultural organisations 'To do more events in small towns and rural communities in Benalla.' (Benalla, VIC).

Participating online

Online channels are playing an important role across Australia to help connect arts and cultural activities to their audiences – but many regional audiences want to participate face-to-face

- ▶ Three-quarters of big city (76%), outer suburbs (75%), and regional residents (75%) found out about a recent cultural activity or event they attended via a digital channel.
- ▶ In terms of participating in online or digital arts experiences, 40% of audiences in regional areas participated in an online experience in the fortnight before data collection, on par with big city audiences (40%) and slightly higher than 37% of outer suburbs audiences.
- ▶ Audiences in regional areas were the least likely to be paying for online arts and culture experiences (24%), compared to those in outer suburbs (26%) or big cities (35%). Those paying are most likely to be purchasing single online experiences (10%), subscribing to platforms to access content on-demand (8%) and making donations (7%) – while fewer are subscribing to programs/seasons which include the online experience (3%).
- ▶ Regional audiences are spending less on digital experiences, with 20% of those participating online spending more than \$100 in the fortnight before data collection. This is lower than big city audiences (26%) but higher than outer suburbs audiences (16%).
- ▶ Many regional audience members appreciate the chance to access arts experiences from home, given financial and geographical restraints. One said, ‘I would love access to more professional theatre productions that I could watch online. As a regional town/city we get to see very little, and it costs a lot to travel to and stay in Sydney or Melbourne for a show. I would be prepared to pay for shows to watch online.’ (Port Macquarie, NSW).
- ▶ Regional audiences are the least likely to say that online experiences play a role in their life right now (48%), compared to 50% of outer suburbs and 54% of big city audiences. In the regions, audiences say online arts events and experiences are playing a small (41%) or substantial (7%) role in their life, while another 52% say they play no role. One respondent said, ‘Where I live there are low levels of IT literacy as well as poor access to internet services and computers - and it cannot be counted on as being a replacement.’ (Broken Hill, NSW). Another said, ‘Streaming and, in particular casting, can be buggy and frustrating - I have experienced poor quality and syncing problems.’ (Don Valley, VIC)

Cultural tourism and touring

Taking into account both regional residents and domestic tourists, the most common arts experiences audiences have in the regions are fairs/festivals and museums/galleries

- ▶ More than half (54%) of regional audience members say that due to financial reasons, in the past 6 months they have stayed closer to home for leisure/entertainment. This compares to 43% of audiences in urban areas.
- ▶ A large proportion of those living in villages, rural communities, farms or bush/outback properties travelled outside of their local area to attend the event they most recently attended (51%). Among these, it was most common to visit a big city (66%) or a town or small city (21%).
- ▶ One person in a rural community argued, 'How about some touring of big shows (alternative performers can do these too) as to attend 'big' shows, one has to travel huge distances.' (Ballan, VIC).
- ▶ Combining locals and visitors, those attending in big cities were more likely to attend live performances than those travelling to other locations. In comparison, audiences in outer suburbs were most likely to attend a cinema (59%) and audiences in the regions were most likely to attend a fair/festival (40%) or visit a museum or gallery (51%).

Programming preferences

Audiences who live in the regions are showing interest in a wide range of art and sounds that reflect 'our strong, beautiful and unique nation'

- ▶ In 2023, most audiences in regional areas say they'll be most attracted to events that are fun and uplifting (80%) – a preference which exists in other areas too. One person from a rural community said, 'Post-pandemic, I personally would like to see performances that are joyous, uplifting and remind us of importance of connection.' (Ulladulla, NSW).
- ▶ There is also an audience for challenging, topical things (41%), though at a slightly lower level than in big cities (52%). One person in a regional community said, 'Do not underestimate our sophistication and appreciation of art', (Mooroopna, VIC), while another said, 'Be more engaging, less political and judgemental' (Stirling, SA).
- ▶ Four in ten (39%) regional audience members say that in the coming year, they'll be most attracted to stories that are 'about or from my local community', which is higher than the rate in big cities (32%) and outer suburbs (28%). One regional person said, 'Keep telling Australian stories and making Australian art and sounds that reflect our strong, beautiful and unique nation.' (Ballina, NSW).

- ▶ There are signs of decreasing appeal for evening or late events. One person explained, 'Events at night prevent many people going out during the winter months due to poor rural road lighting and the overall conditions of the roads after the floods. If there was better street lighting or some sort of transport option, then I believe more people would venture out. Over a certain age, people prefer not to drive at night.' (Seymour, VIC)
- ▶ Increasing matinee sessions could be worth considering, in order to support audiences' commute. One person said, 'There are not a lot of events of interest enough to us that warrant a 50-minute drive in the dark dodging kangaroos, to get to the nearest theatre. More matinee performances would be great so that we can get home in time to lock up the chooks.' (Heathcote, VIC).

Ticketing and marketing behaviour

Regional audiences are slightly more likely to plan ahead – but many memberships don't represent good value for money for those out of big cities

- ▶ Regional audiences are less likely to have purchased a subscription or membership for a cultural organisation (29%), compared to outer suburbs (41%) and big city audiences (51%) this year. One person explained, 'Subscriptions are often focussed around major arts organisations in the capital cities – in my case, Melbourne. I live in a regional area.' (Castlemaine, VIC)
- ▶ Finding out about events is complex and the key awareness channels vary across all geographic areas. The top information channels used by regional audiences include the following:
 - Emails from arts organisations (43% of regional audiences reported emails as their main source of information for their latest arts activity, relative to 46% of outer suburbs and 47% of big city audiences)
 - Word of mouth was key for 35% of regional audiences (relative to 34% of outer suburb and 37% big city audiences)
 - Websites was a source of awareness for 34% of regional audience (relative to 40% of audiences in the outer suburbs and 42% in the big cities)
 - Facebook was the main information source for 26% of regional audiences (compared to 20% of outer suburbs audiences and 16% in big cities).
- ▶ Facebook, radio/TV and brochures/flyers are all in greater use by regional audiences compared to those in other areas in order to find out about events.

- ▶ Improving awareness channels is on the radar for regional audiences, as one person living in a country village or rural community said, 'It would be good to have an overall directory that lists events. A lot of exhibitions or shows are missed because they are not noticed initially. Or may become obvious when it is too late and already booked out.' (Gisborne, VIC).
- ▶ Another suggested leveraging social media to facilitate community-building and word-of-mouth: 'Everyone is on social media now. Start creating online, short content videos about upcoming plays and concerts. [...] Create a group on Facebook of like-minded people who love the theatre, so they can arrange to go to plays together. I don't have many friends in Port Pirie as I'm quite new to the area [...] so I would love to connect with people around here who love it as much as I do.' (Port Pirie, SA).
- ▶ More advanced marketing is helpful when targeting regional audiences. Regional audiences are slightly less likely to buy tickets at the last minute, so building confidence in planning ahead is key, particularly where events involve travel or family/caring arrangements.
- ▶ Parents and caregivers plan well in advance of school holidays – and will likely be thinking carefully about what to prioritise when travelling into big cities over summer. One person said, 'I am a mother/stepmother with 4 children, so finding free, local events for the kids has been a big priority given how expensive life has become. School holidays in particular can be very costly if trying to find events with a per head price.' (Whittlesea, VIC)

Understanding the mood

- ▶ While other OECD countries are experiencing an inflow into metropolitan cities, Australia has seen the opposite trend for almost 15 years. The pandemic accelerated counter-urbanisation, with inner city dwellers flocking to regional areas in higher numbers.
- ▶ Along with the appeal of open spaces and shorter commute times, the shift to remote working has enhanced the appeal of regional places even further. Professor Pauline McGuirk, the director of the Australian Centre for Culture, Environment, Society and Space research centre at the University of Wollongong says: 'What COVID has done is introduce at scale the opportunity to work from home and consider doing so on a long-term basis.'
- ▶ With inflationary pressures continuing to put strain on already higher costs associated with the travel and time it takes to journey into cities, attracting audiences from outer suburbs and regional areas is likely to get harder in the short term. Artists and cultural organisations have an important role to play in maintaining their connection with regional audiences.
- ▶ Exciting work is underway to improve infrastructure and land use to ensure the regions continue to be vibrant places for residents and visitors. There is a case for arts

and cultural organisations to stay abreast of state government-funded regional plans and projects in NSW and VIC and invest in ways to align recovery efforts with broader investment strategies.

- ▶ The next decade will be a defining period for the regions. Liz Ritchie, CEO at Regional Australia Institute said: 'We are at a tipping point to get this once in a generation transformation of regional Australia right, but we must think big, we must think long term, we must Shift our Gaze from the bright lights of capitals to a nation that is more diverse and dispersed.'

Queenstown, TAS and The Unconformity Festival



Key examples

Queenstown, TAS and The Unconformity Festival

- ▶ Queenstown is located on the remote West Coast region of lutruwita/Tasmania. As the largest town on the West Coast, Queenstown's population has risen and fallen following the 19th century mining boom, and is currently home to 1,808 residents.
- ▶ While the Queenstown population fell by 10% between 2016 and 2021, tourism is increasing in the West Coast region, and the creative community is growing, offering new economic opportunities that contrast with the cyclical nature of mining and other major industries present in the region.
- ▶ Local artists, cultural organisations and creative businesses are attracting national and international recognition, and garnering significant investment in TV productions, festivals and other projects.
- ▶ Consultations on a new Cultural Strategy for the region emphasised the importance of community cohesion and sharing opportunities across the region. One local resident said they want to see 'a balance between preserving the region's rich cultural heritage and embracing new ideas and industries. By taking a collaborative approach and working together with the local community, government and businesses, it is possible to create a vibrant and thriving culture that benefits everyone.'
- ▶ Based in Queenstown, arts organisation The Unconformity produces arts-led cultural development, tourism and education projects in partnership with the community, alongside a biennial contemporary art festival that is driving transformational change for the region.
- ▶ Described as 'a conglomeration of concepts and experiences shaped by the western fringe of lutruwita/Tasmania', since its beginning in 2010, the festival has focused upon re-imagining the future of the region through reflecting its history in new ways.
- ▶ The most recent festival, held in October 2023 attracted between 2,000-3,000 people to Queenstown. Artistic Director Travis Tiddy says, 'We work hard to engage both locals and visitors, and for a town of 1,400, that level of attendance is really strong. Our data shows that 1,500 people experienced one of the festival highlights in a local quarry, basking under the celestial glow of Luke Jerram's extraordinary Museum of the Moon, and artistic installations commissioned by the festival saw between 600-800 attendees; strong audience engagement for independent artists participating in the festival.'
- ▶ This year's event was the first festival in five years, after the 2021 event was cancelled on the opening night due to a sudden COVID-19 lockdown in the state.
- ▶ Travis says that part of the challenge for the festival is telling local stories in a unique way – merging experimental contemporary art and community heritage in a way

that engages both newcomers to the town and those that have lived there for generations. Travis stated: 'It is a large program for a small town - but our focus is upon creating different access points for our diverse audience into the program.'

- ▶ Certain works, like Guided Memories by artist Emma Bugg, become 'mooring points' for people to share and discover stories of the place through a contemporary art lens.
- ▶ The final event of the festival is a football game, 'The Unconformity Cup', where 'The West' play 'The Rest' on Queenstown's infamous gravel oval, a symbol of the mining community's grit and determination.
- ▶ However, rather than focusing on any one event, Travis emphasises that the process of co-devising and making the festival with artists and community members is most important.

Cairns, QLD and Cairns Art Gallery

- ▶ Home to 171,970 residents, Cairns population has grown an average of 1% in the five years preceding the 2021 census, making it the fifth-most populous city in Queensland. However, with pandemic border closures causing 9,000 tourism jobs to be lost as of 2022, audience recovery is likely to be some time away.
- ▶ Cairns-based audience members want to improve perceptions of the regions, and broaden understanding of the breadth of opportunity outside of big cities. One said, 'A lot of people down South think Cairns is the end of the line, but we're a gateway to a huge area up west and north and I don't think there's that understood everywhere down south.' (Cairns, Qld)
- ▶ Additionally, Cairns audiences are conscious of a lack of touring opportunities, with some feeling they are missing out on being able to attend major acts. One audience member said, 'Once/twice a year I go to Brisbane from Cairns to performances. I look forward to Bangarra in September in Brisbane. I wish more orchestras would visit Cairns. Queensland Ballet comes once a year?' (Cairns, QLD).
- ▶ Cairns Art Gallery is one of Australia's leading regional galleries, celebrating the unique heritage and living culture of tropical North Queensland. The Gallery welcomes local and touring exhibitions from around the country, allowing local audiences to gain access to world renowned artists and artworks.
- ▶ Andrea Churcher, Director at Cairns Art Gallery said that despite the fact that '[local audiences] tend to go for more local artists, because they know local artists,' one touring exhibition – Sidney Nolan's Ned Kelly series – helped to attract larger, more diverse audiences. She stated, 'It was successful because it's one of the most important series of paintings, so suddenly audiences were having access to that and not having to travel. There was a lot of goodwill from local audiences who would not have to travel to see great art.' Additionally, she said, 'The brand identity brought in a lot of male audiences – where our audience has been traditionally female.'

- ▶ Removing the entry fee also made for successful audience engagement – particularly in attracting new audiences: ‘When it was \$5, there were a lot of walkaways. It’s a real barrier, even when it’s a dollar entry. A lot of tourists say things up here are expensive. If they don’t know they’ll like the exhibition, they don’t want to spend more money.’

Geraldton, WA and Museum of Geraldton

- ▶ Western Australia’s creative economy was better positioned to weather the COVID-19 pandemic compared to other states and territories, having undergone a total of 12 days in lockdown and freezing their domestic borders. Due to the lack of restrictions compared to other states during the 2020-21 period, WA increased in productivity and exceeded growth trajectories across household incomes.
- ▶ Geraldton is the third most populous city in Western Australia’s Mid West region. It is 424 km north of Perth, and home to over 41,000 residents. The waterfront regional city of Geraldton is particularly known for its mining, agriculture and eco tourism industries.
- ▶ In the last 12 months, Greater Geraldton has seen some of the highest population growth rates in the country (5%), largely due to internal migration. Geraldton has been identified as one of four ‘creative hotspots’ in Western Australia, due to its innovation in connecting the arts with other sectors and supporting grassroots organisations.
- ▶ The Museum of Geraldton is one of nine museums and cultural sites managed by the Western Australian Museum, and operates with free entry and a suggested donation of \$5. The Museum of Geraldton holds a distinct permanent collection closely tied to the local area, and hosts rotating travelling exhibitions.
- ▶ Sara Walker, Learning and Engagement Officer at Museum of Geraldton notes that different times of the year bring in different audiences and programming needs. She says, ‘Because of the large number of tourists, we have our permanent displays - and most of the time they’ve never seen them before. Meanwhile, the rotating exhibitions which are different every school holidays with different programs every time is really for the locals.’
- ▶ As a port-side city, Sara says, ‘We do get large cruise ships passing through, where we can have up to 750 people through in a day – which is multiple times our usual visitation numbers’. And although ‘...most visitation throughout the year are tourists passing through,’ the Museum strikes a balance between catering for locals and tourists. She notes, ‘Rotating travelling exhibitions ensure local audiences have something new to engage with, particularly for local families during school holidays.’
- ▶ Due to a regular suite of school holiday programming, Sara points out, ‘We have families in town that come to the museum every school holidays because they know there’s something new on.’ The key factor for success is consistent delivery, as ‘there’s a regular assortment of activities that families know they can expect when they visit.’

- ▶ Some of the key programs run by the Museum of Geraldton include their Museum Trails and their Drop-in Science Hour. While these programs change according to theme and exhibition in focus, the consistent format and delivery of these hands-on activities builds confidence amongst audiences and especially younger regular visitors. Sara highlighted that the Drop-in Science Hour are 'so that kids can see objects in a museum and handle them and get a sense of the tactile nature of history'.
- ▶ Relationships within the region bring additional value to the Geraldton community. Sara also highlighted that the WA museum has 1 of the 2 full-time arachnologists in Australia on staff, Dr Mark Harvey, who flew up to the Museum of Geraldton and was able to give public talks about spiders, coinciding with the popular Sixteen Legs exhibition produced by Bookend Trust. The exhibition toured the Museum of Geraldton in 2022 and involved a range of specimens that visitors could explore under a microscope, and a trapdoor spiders' burrow which provided experiences of 'things that kids wouldn't normally get to see.'
- ▶ Sara noted that 'Dr Mark Harvey provided a lot of information, so that allowed me to be that conduit of the museum based in Perth', which ensured that expert knowledge was shared to those facilitating the public programs. Sara indicated that for cultural institution in the regions, 'when you have resources brought up from cities, you tend to make the most of it –so we made sure he got to speak to schools – like Meekatharra School of the Air, which is an online school for children living on pastoral stations and remote locations in the Mid West.'

Northern Rivers, NSW and NORPA, Love for One Night



Image Credit: Kurt Petersen, *Love for One Night*, courtesy of NORPA.

Northern Rivers NSW and NORPA, Love for One Night

- ▶ In recent years, the Northern Rivers NSW community has been affected by the Black Summer Bushfires, the pandemic and 2022's flood and storm events, which saw more than 6,200 homes lost.
- ▶ Local arts organisation NORPA creates its own brand of original work that connects to regional communities through adventurous and site-specific theatre. NORPA has developed a reputation for creating engaging and popular works that combine dance, physical theatre, live music and story.
- ▶ In 2022, six months after the floods destroyed its venue, Lismore City Hall, the company produced a new site-specific work. 'Love for One Night' was staged at the Eltham Hotel, and all 12 performances sold out within 2 days of opening night – 3,200 tickets sold. A further 700 people watched a live stream of the performance through Australian Digital Concert Hall.
- ▶ Executive Director Libby Lincoln says the show appealed to theatre lovers and those less familiar with the form. She says, 'We have bold audiences that want new, original local work. But not everyone in the community feels comfortable to enter some venues. Bringing a show to a pub, it takes away that barrier.'
- ▶ Speaking about the content of the show, she said, 'The show itself was accessible with its themes and portrayals. It wasn't threatening. In Lismore, we have a reputation for making theatre everyone would enjoy. Audiences know they're going to have a good night.'
- ▶ The production went on to win a PAC Impact Award in 2023. Libby notes, 'It really reinforced how theatre can deliver economic, social, and cultural outcomes for a region. We're pleased it went further than just a cultural offering.' The company recently attended APAX to explore re-staging it with national partners: 'It has a strong cultural tourism value. We see it as a viable and important product to test partnerships with tourism businesses for a regional company.'
- ▶ Continuing their outdoor work in November 2023, the company is presenting Flow, a free outdoor community event celebrating kinship, culture and connection. Yaegl Bundjalung man Mitch King is joined on stage by sound artist Blake Rhodes, and the work is directed by Jade Dewi Tyas Tunggal. All 3 performances at the Lismore Quad were snapped up within one week, with 2,100 tickets booked, and the 2 performances (1,400 capacity) at the Maclean Showgrounds are 80% allocated. Libby says, 'We were thrilled to offer Flow for free to the community. It's not sustainable but it's so important at this time to bring the community together.'
- ▶ One audience member said, 'I am looking forward to once again attending NORPA events, post COVID and post flood disaster' (Lismore, NSW). While getting the programming right for local audiences is key, the company said, 'We're still in the thick of it, the confusion and uncertainty. But our hand has been forced and so we have to move forward.'

Tips for connecting with audiences in the regions

- ❑ Consider the feasibility of travelling to audiences living in the regions, as many are eager to attend, but may be struggling to get into big cities or other areas.
- ❑ To attract outer suburbs residents into other areas, communicate any travel incentives, accommodation offerings and other cost-saving initiatives as well as information about other things happening in the area so the trip feels more worthwhile.
- ❑ To attract audiences in from big cities and outer suburbs into the regions, give them plenty of notice. Despite the trend towards last minute commitments, some audiences are considering their options (and logistics) well in advance.
- ❑ Keep fun, uplifting, connective and escapist events on the agenda for 2024 and 2025 and continue supporting local talent to cultivate your region's vibrancy and identity.
- ❑ With a significant proportion of regional audiences engaging in online arts and culture, consider how to use resources to best connect with audiences' needs, tastes and preferences online.
- ❑ Last-minute events and offers can be targeted to 'hyper-local' audiences, people likely to be in the area for another reason, and those with easy public transport connections.
- ❑ Use email, websites and Facebook to connect with regional audiences – and explore ways to amplify word of mouth and social reviews, with recommendations from trusted sources being especially powerful right now.

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

For a deep dive into the top trends affecting Australian audiences, read our report [Audiences 2023+](#).

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 Patternmakers' news [here](#).

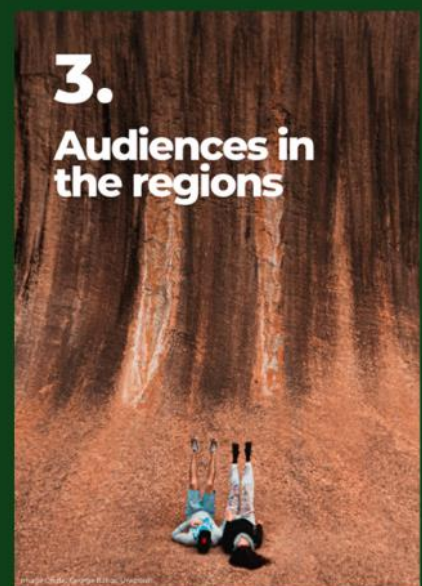
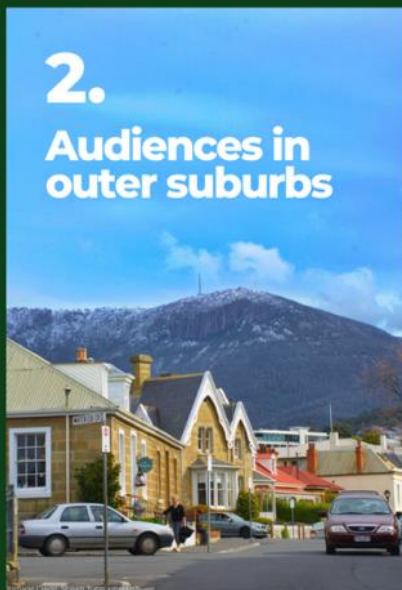
If you have a question, or an idea to put forward, relating to this study, you can contact info@thepatternmakers.com.au.

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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.

City lights to red dirt:



Made possible with support from:

