Audience Outlook Monitor

How cultural audiences in NSW are impacted by rising inflation

NSW Snapshot Report – April 2023

Contents

Cover Image Credit: Cecilia Martin, courtesy of Spaghetti Circus: The Globe at National Circus Festival.

NSW audiences on the economic outlook

Some continue to spend, others make careful choices, as data collected in April 2023 from 376 past attendees shows inflationary pressures impact NSW audiences in different ways.

4 in 10

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

63%

The proportion in NSW **spending over $50 on tickets to in-person cultural events has fallen** from 71% in October 2022 to 63% in April 2023, with the outlook uncertain.

#1

Financial reasons are the **top barrier to attending**, and many NSW attendees are looking for free/cheap things to do (52%), staying close to home (44%) and taking longer to make decisions (51%).

Key national segments

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

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

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

Key findings: April 2023

NSW audiences are spending less on cultural events than they did 6 months ago, but are the most active nationally

- **Increasing interest rates and cost-of-living pressures are impacting consumer confidence** around the country. This 'Pulse Check' explores how NSW arts audiences are responding to changing economic conditions, based on data from 376 past attendees.
- **Consumer sentiment in NSW has declined over the past 12 months.** In April 2023, the Consumer Sentiment Index (CSI) in NSW was 88, down from 99.1 in April 2022, suggesting decreased confidence in household finances and economic conditions.[1]
- **Around 4 in 10 (42%) NSW audience members surveyed say they are 'worse off'** financially compared to one year ago. Just 7% are 'better off' and 5 in 10 (51%) are 'the same'.
- **While 77% attended a cultural event** in the fortnight before data collection (19-23 April), consistent with October (79%) and August 2022 (79%), **attendance preferences and behaviours are changing.**
- NSW audiences are among the most likely to be attending cultural events of any state at the moment (77%, relative to a national average of 76%), however **almost half (46%) said their frequency of attendance has decreased in the past 6 months.**
- **Average spending levels are decreasing**, with 6 in 10 (63%) of those attending in the past fortnight spending over $50 or more, down slightly from 7 in 10 in October (71%) and August 2022 (68%). However, averages should be interpreted with caution, as some segments are actually spending more, and others less. Jump to the National Segments for a breakdown of who in Australia is impacted differently.

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[1] https://melbourneinstitute.unimelb.edu.au/publications/macroeconomic-reports.

NSW audiences are deliberating longer on factors such as price, location and overall value

- As COVID-related concerns decline in prevalence, financial reasons are the top barrier to attendance, affecting more than a third of NSW past attendees (35%).
- A lack of money is not the only consideration – the data also suggests that 1 in 4 are prioritising other things (23%) as lifestyles continue to evolve after the pandemic. Qualitative data shows that bundling travel, meals and accommodation play a role as household budgets adapt to suit the conditions.
- When asked about their cultural spending over the past 6 months, sizeable numbers in NSW say the price they are willing to pay to attend (38%) has decreased – the largest proportion of any state/territory, along with VIC (39%).
- When reflecting on the most recent event they attended, 4 in 10 NSW audience members said that price influenced them 'more than usual' (37%) – consistent with audiences generally (39%).
- Around half are looking for free and cheap things to attend (52%), and qualitative data shows that discounts and pricing offers are factoring into a high number of decisions among NSW audiences.
- Many NSW attendees are 'splurging' and 'saving' to different degrees – and some are doing both, opting to splash out on events that are important to them while making savings elsewhere by looking for low-cost alternatives or supplementing subscriptions for a select few 'large' shows.
- NSW audiences say they have decreased spending on donations (37%) and subscriptions/memberships (33%) – though many who engage in these forms of support say they plan to continue, acknowledging tough conditions for artists and a desire to show their support in tough times.

NSW audiences welcome a diverse arts landscape, but tailored strategies for different segments are key

- Consistent with trends at the national level, many in NSW are **taking longer to make decisions** about attending (51%), and **last-minute ticket-buying** appears to stay for the time being.
- **The location of events is also impacting 34% of NSW attendees more than usual,** and 44% say they are staying closer to home. Qualitative data suggests that proximity to events plays an important role, with one saying, 'Given I live in country NSW entertainment isn't always available, but I do try to be a supporter when possible.'
- Some segments are **more disadvantaged by travel costs** than others, and logistical considerations in scheduling events will be important for catering to a range of audiences.
- Responses confirm **enduring appetites for new** (54%) and **uplifting** (66%) cultural experiences over the next 12 months. NSW audiences are the most drawn to **challenging** arts experiences (49%) of any state – and while some are opting to be more selective, they are eager to support a dynamic, vibrant arts landscape: 'Continue to produce performances of variety, challenge and enjoyment.'
- When asked to share what they've attended recently and why they prioritised those things, some common themes include a **desire to support emerging and struggling artists and organisations** they value, return to things they've missed and spend time with loved ones.
- **Economic conditions are complex and affect every household differently**. However, looking at the trends in three key national audience segments can assist with understanding some of the differences and identifying practical implications (overleaf).
- With an uncertain outlook, and the possibility of a recession, it's wise to stay flexible and consider how **strategies and tactics can be adjusted as conditions change**.

Opportunities

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

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

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

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

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

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

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

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

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

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

Introduction

This April 2023 'Pulse Check' asked 376 NSW past attendees of cultural events about their response to cost-of-living pressures

This New South Wales (NSW) Snapshot Report outlines key findings from the April 2023 'Pulse Check' phase of the Audience Outlook Monitor in Australia, based on data collected from 376 audience members living in NSW.

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

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

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

This report compares the new results with data collected previously in March 2022 (Phase 7), August 2022 ('Pulse Check') and October 2022, to examine how things are changing over time – and identify opportunities for programming, marketing and strategy in the current conditions. Where relevant, the NSW results are compared to those in other states/territories, noting that results for the Northern Territory (NT) and Tasmania (TAS) are not reported separately due to small sample sizes in those areas.

Consumer confidence

4 in 10 NSW audiences feel their household is financially 'worse off' than they were a year ago

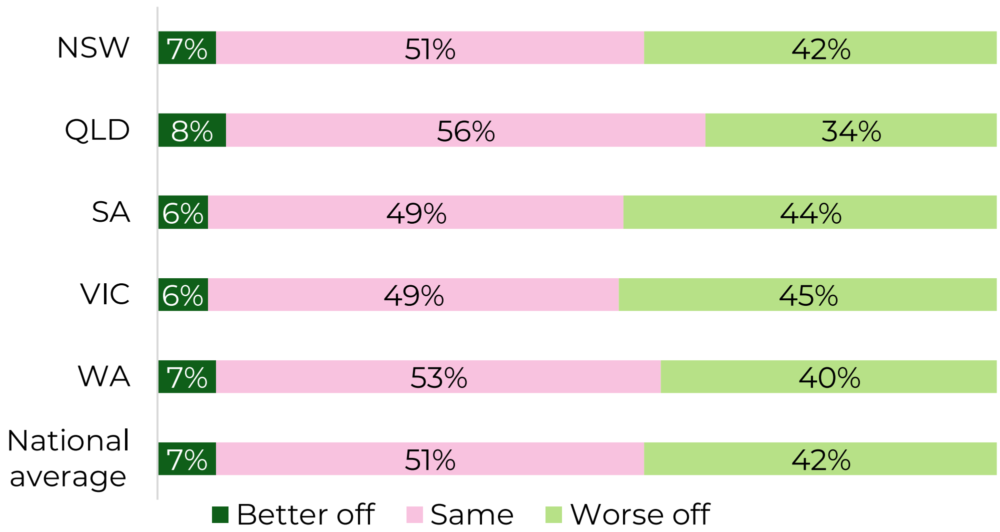
With economic pressures taking root in the post-pandemic period, households around the country are feeling the effects of the rising cost of living and interest rate increases. The [Westpac – Melbourne Institute] calculates that consumer sentiment among NSW residents in April 2023 was at 88 on the Consumer Sentiment Index (CSI), down from 99.1 in April 2022 and 117.3 in April 2021.

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

In April 2023, audiences were asked 'Would you say that you (and any family living with you) are better off or worse off financially than you were a year ago?'. On average, 2 in 5 NSW audience members said they are 'worse off' (42%), 51% said they are the 'same' and 7% said they are 'better off' – consistent with the national average.

The results vary slightly between states. QLD audiences are the most likely to say they are the 'same' (56%) or 'better off' (8%) of any state. VIC and SA are the least likely to say they are the 'same' (both 49%) or 'better off' (both 6%).

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



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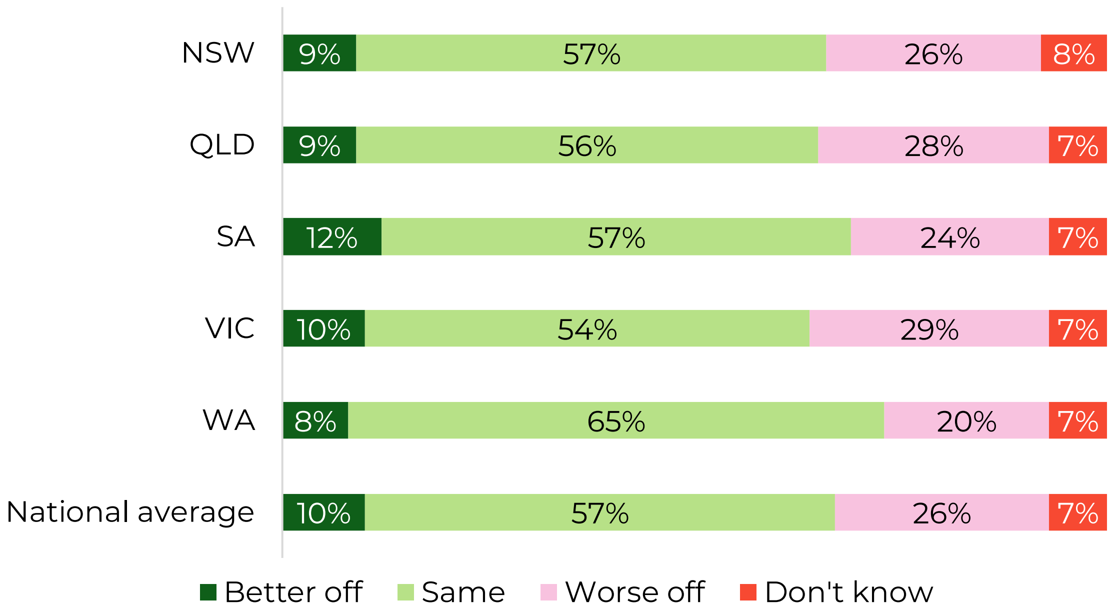
While many are optimistic the economy will stabilise, 2 in 5 NSW audiences feel that there will be 'bad times' ahead

When asked, 'Do you think that a year from now you (and any family living with you) will be better off financially, or worse off, or just about the same as now?', the majority of NSW audiences expect they will be in the same position (57%) while one quarter (26%) expect to be worse off. One in 10 (10%) expect they'll be 'better off' and 7% 'don't know' (Figure 2).

The outlook is relatively similar across the country, with most audiences expecting their situation will be the 'same'. This is slightly highest in WA (65% said 'same'), where the CSI is trending the most positively at the moment.

When it comes to economic/business conditions in the country, more than half of NSW audiences said they thought the outlook was uncertain (55%), while 2 in 5 (38%) said the country will have 'bad times'. Only 4% expect the country will have 'good times'.

Figure 2: Proportion of audiences who say that in a year from now, they expect to be financially worse off, the same, and better off, compared to one year ago, by state (n=370).



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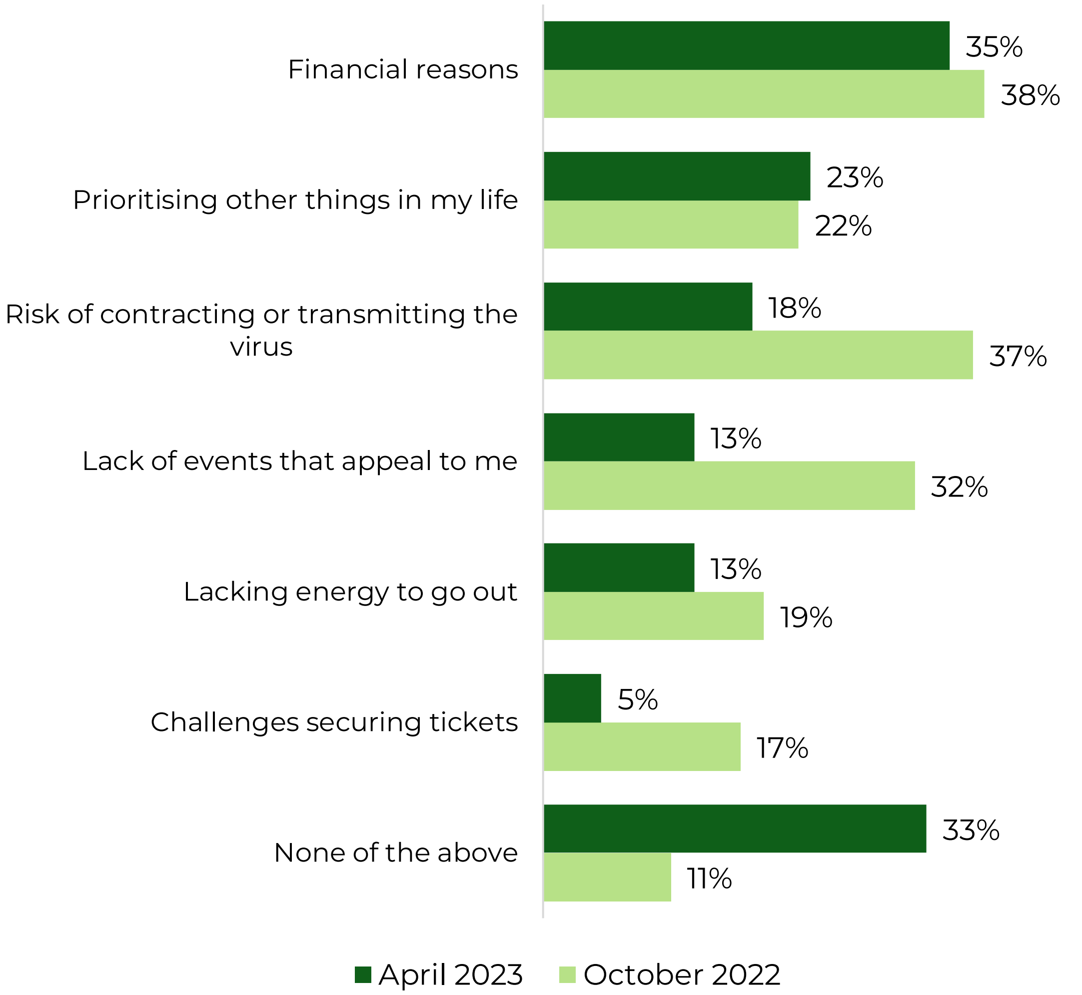
Attendance outlook

Financial reasons are the top barrier to attendance, affecting 1 in 3 NSW audience members

Consistent with results in October 2022 (38%), the April 2023 results show that financial reasons are the most prevalent barrier to attendance (35%) among NSW audiences – higher than August (23%) and March 2022 (16%).

Figure 3: Can you tell us if anything is preventing you from attending in-person arts and culture events as you used to in the past? (Select up to three). NSW audiences (n=368)



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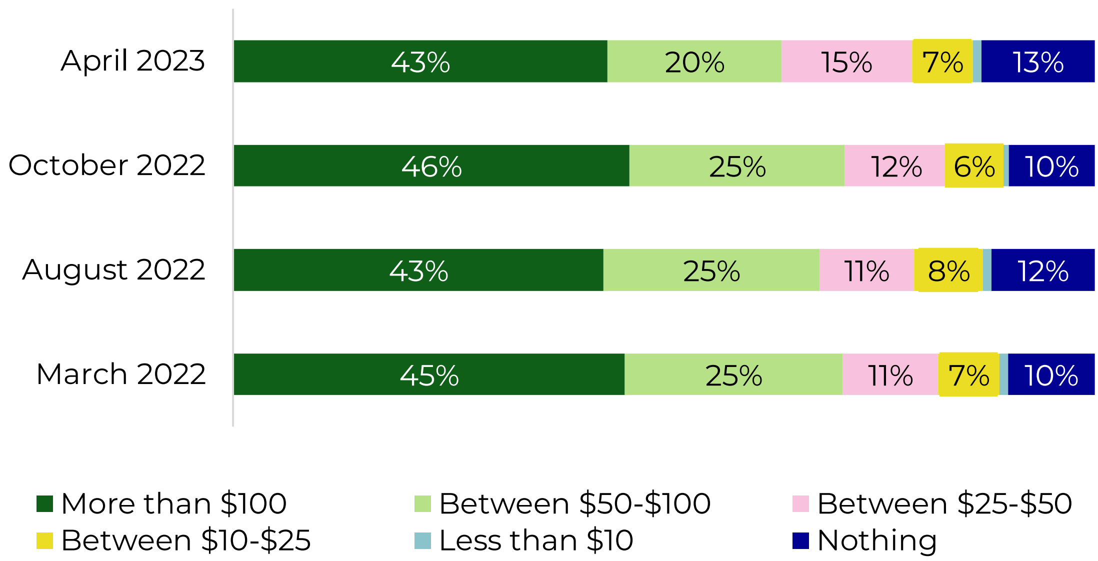
Most NSW audiences continue to attend events amid cost-of living pressures, but their behaviour and spending have changed

Around 8 in 10 NSW audience members (77%) say they attended a cultural activity in the two weeks prior to data collection, which is consistent with October 2022 (79%) and August 2022 (79%).

NSW audiences reported having attended a wide variety of activities two weeks prior to data collection, including live performances (51%), cinemas (33%) and museums or galleries (28%).

While NSW are the most likely to be spending higher amounts on cultural activities compared to other states, spending levels are not increasing. In April 2023, the proportion that spent $50 or more on tickets to live events and cultural events was 63%, down from 71% in October 2022 and 68% in August 2022.

Figure 4: In the past fortnight, how much did you spend on tickets to in person live events and cultural activities? NSW audiences, March 2022 to April 2023 (n=290)



Qualitative data suggests that NSW audiences are conscious of saving money while still keen to attend their favourite cultural activities. One NSW respondent mentioned the appeal of discounted offers at the moment:

> ‘I saw Don Quixote performed at the Opera House by the Australian Ballet; I was able to get a subscription deal with the under 30s discount, appealing as a ballet student.’

Another commented on the need to factor in a night’s worth of costs when planning their attendance.

> ‘A regular jazz night in Newcastle on a Tuesday night. The groups are high quality, usually from Sydney. I've been to this regular event a couple of times before. It's a good venue. The ticket was affordable ($27). I have to take into consideration meals ($35) and the expensive drinks though ($10.80 for a schooner - should be $7.30!). Including transport costs, it's about a $100 for the night. ‘

‘While my mum was here [we] popped into Carriageworks to check out the exhibits there that are part of the National. We have always enjoyed arts and culture and if we haven't been to something in a month or so we would start looking around for something to go to. We always keep an eye on what big exhibitions, concerts, plays or shows are on. We can't afford to go to everything though and like to have a mix of free and lower cost things with maybe one or two more expensive events each year.’

NSW audience member, April 2023

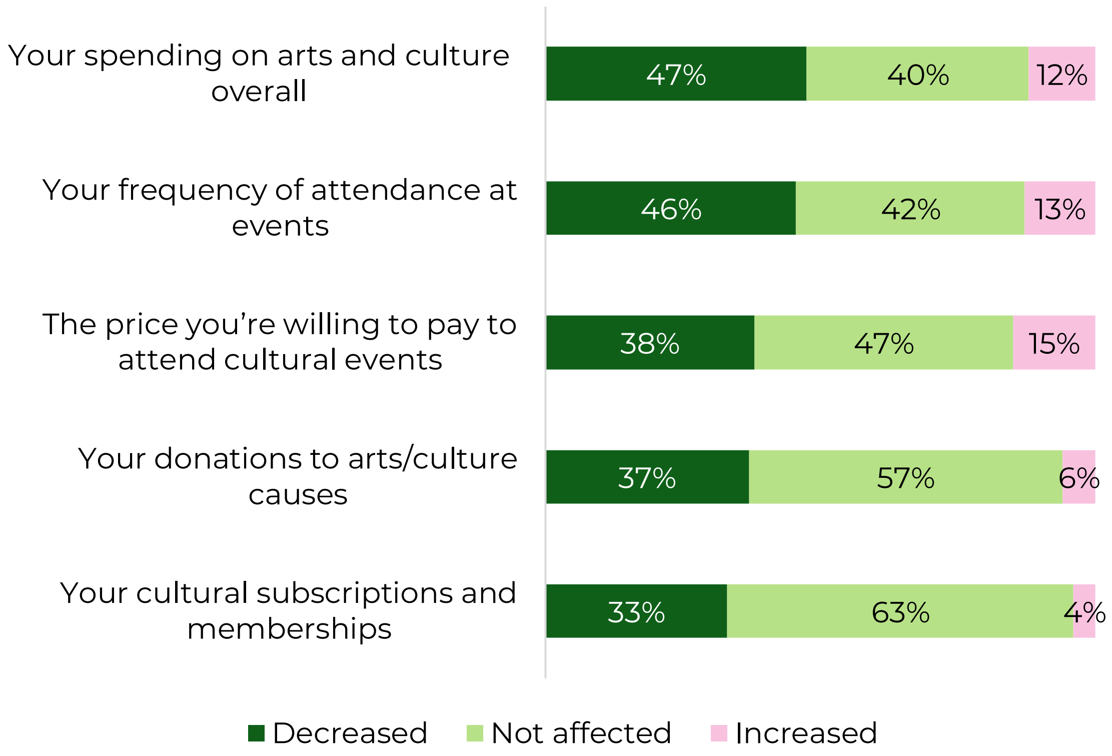
Almost half say their overall spending (47%) and frequency of attendance (46%) at arts events has decreased in the past 6 months

Respondents were asked to indicate the extent to which their arts and cultural spending has been affected by economic conditions, and in what ways.

From the list of options, NSW audiences were the most likely to say their overall spending (47%) and frequency of attendance at events (46%) has decreased.

Among behaviours that are most likely to have remained steady, around 6 in 10 NSW audiences said that donations to arts and cultural causes (57%) and subscriptions and memberships (63%) have not been affected.

Figure 5: In the past 6 months, have the following things increased, decreased, or not been affected? (n=375)



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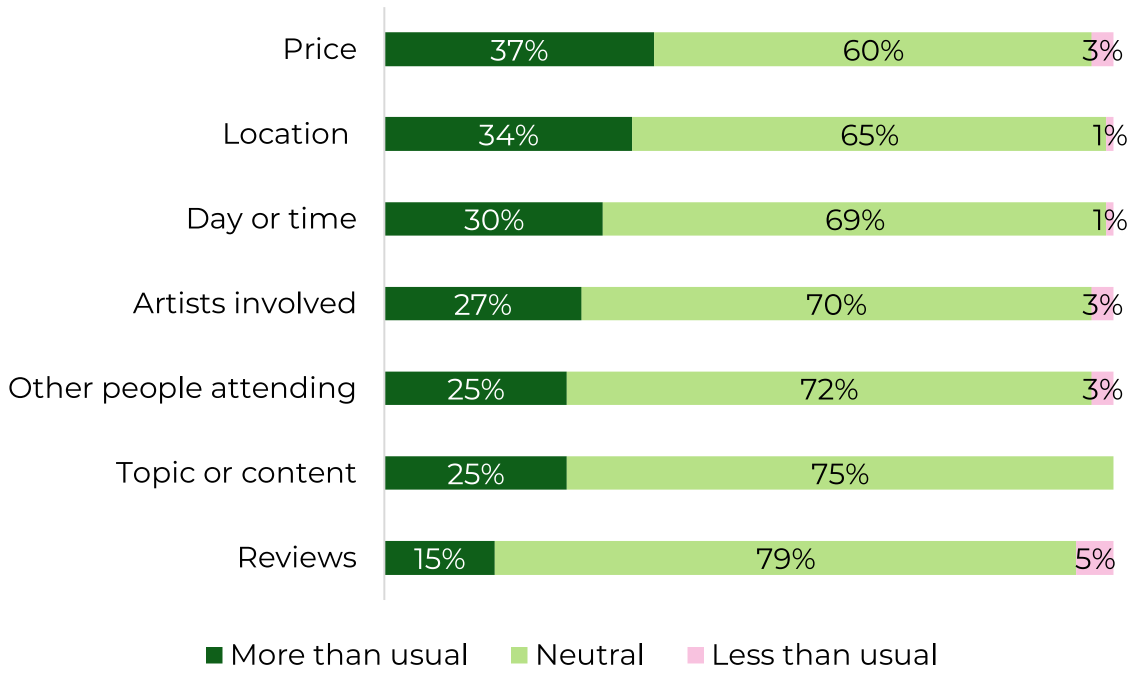
More than one-third (37%) of NSW attendees say they are affected by the price of arts events more than usual at the moment

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

From a list of options, NSW audiences were most likely to say that price influenced them 'more than usual' compared to pre-pandemic times (37%). This was followed by the location of cultural events (34%), the day or time (30%) and the artists involved (27%).

Reviews were the least likely factor to influence audience attendance decisions (15% said more than usual).

Figure 6: Compared to how you approached attending prior to the pandemic, to what extent were you more or less influenced by...NSW audiences (n=290)



One NSW audience member mentioned being more careful about what events they choose to spend on, particularly as a family, commenting,

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> ‘I have definitely found myself checking the price of tickets before committing to purchasing (especially things we might go to as a whole family so would need to buy 5 tickets). We have passed up events we might otherwise have gone to because it is just too big of a financial commitment at the moment.
>
> …Over the last year we've been to a number of big concerts and shows but I'd seriously reconsider spending more than about $75 a ticket for anything at this point. We just saw Into the Woods at Belvoir St and adult tickets were $82 but they had a student rate of $47 which made it doable as a family.’

Half of audiences are looking for free/cheap things (52%), or taking longer to make decisions about what to attend (51%)

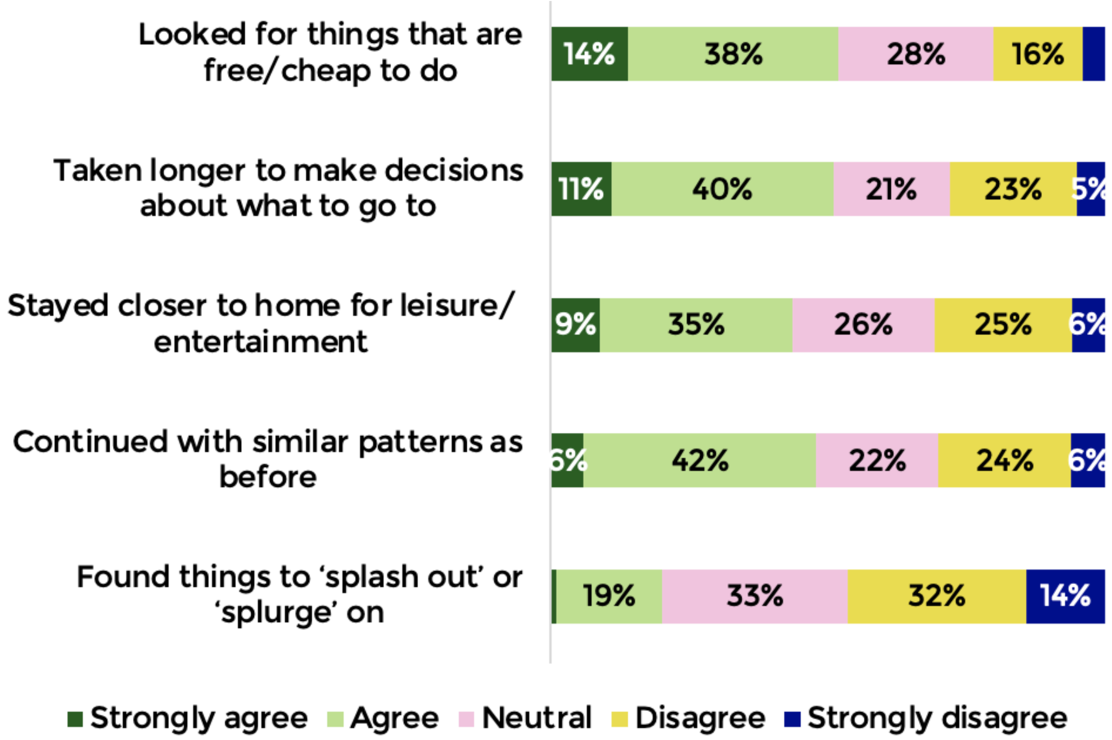
Audiences were asked about the behaviour they’ve engaged in over the past 6 months, in light of their financial situation. NSW audiences are the most likely to be ‘looking for things that are free/cheap to do’ (52% ‘strongly agree’ or ‘agree’) and least likely to be finding things to ‘splash out’ or ‘splurge on’ (20% ‘strongly agree’ or ‘agree’) (Figure 7).

Audiences are also taking longer to make decisions about attending (51%) – consistent with trends observed in previous phases of data collection around last-minute ticket buying.

One noted that while they are choosing to attend less frequently, the total cost of what they’ve spent on cultural activities has not changed – due to increased prices overall. They commented,

> ‘I have chosen to attend less events because of increased charges but spent about the same in total as before.’

Figure 7: Given my financial situation, in the past 6 months, I have...NSW audiences (n=375)



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

However, several NSW respondents shared that despite costs increasing, prioritising the cultural events they can attend within their budget is important. One said,

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

Another said,

> 'I still attend events, but also look for things such as ticket lotteries and special offers rather than paying full price (which is simply too expensive).'

Although some are not personally affected, they remain sensitive to the financial circumstances of those who they attend with. One said,

> 'I am fortunate that my financial situation is secure enough that I am able to afford to attend events without worrying too much about the cost to myself. However, I do try it be mindful of the budgets of any companions, so that probably impacts my decisions more than my own financial situation.'

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

As shown in Figure 6, one-third (34%) of NSW audiences say the 'location' of events is affecting their decision making more than usual – and many NSW audience members are opting to stay closer to home (44%).

Event times comes into play when considering the transport to events, as one older NSW attendee suggested,

> 'Shorter events – 60-90 mins – [are] favoured, as these can be easily fitted into transport times and parking restrictions. Seniors/retirees are less likely to attend evenings events due to age related issues; dark evenings, unfamiliar surroundings, impaired sight, hearing.'

Another NSW audience member living outside a metropolitan area shared,

> 'Cultural entertainment options [are] only in the major populated areas. Have to add on price of travel and accommodation. Too expensive now.'

As touring becomes increasingly costly for arts organisations, regional NSW attendees are aware of limited options outside of major cities – and added costs related to travel are a key factor at the moment. One said,

> 'I live in a regional area where there is less on offer than in the city. I will usually participate in anything of quality that is made available even if it costs a little more. Unfortunately, I pay travel and accommodation costs to go to events that will never travel to our area and that is very restricting.'

Another said,

> 'Given I live in country NSW, entertainment isn't always available, but I do try to be a supporter when possible.'

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

Other lifestyle changes continue to impact attendance for 1 in 5 NSW audiences

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

One-fifth (23%) of NSW respondents say they are prioritising other things in their life right now, consistent with findings in October 2022 (22%).

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

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

> 'Working from home means going into the city for work is a big day and often I stagger days with family so staying in the city isn't something I do any more.'

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

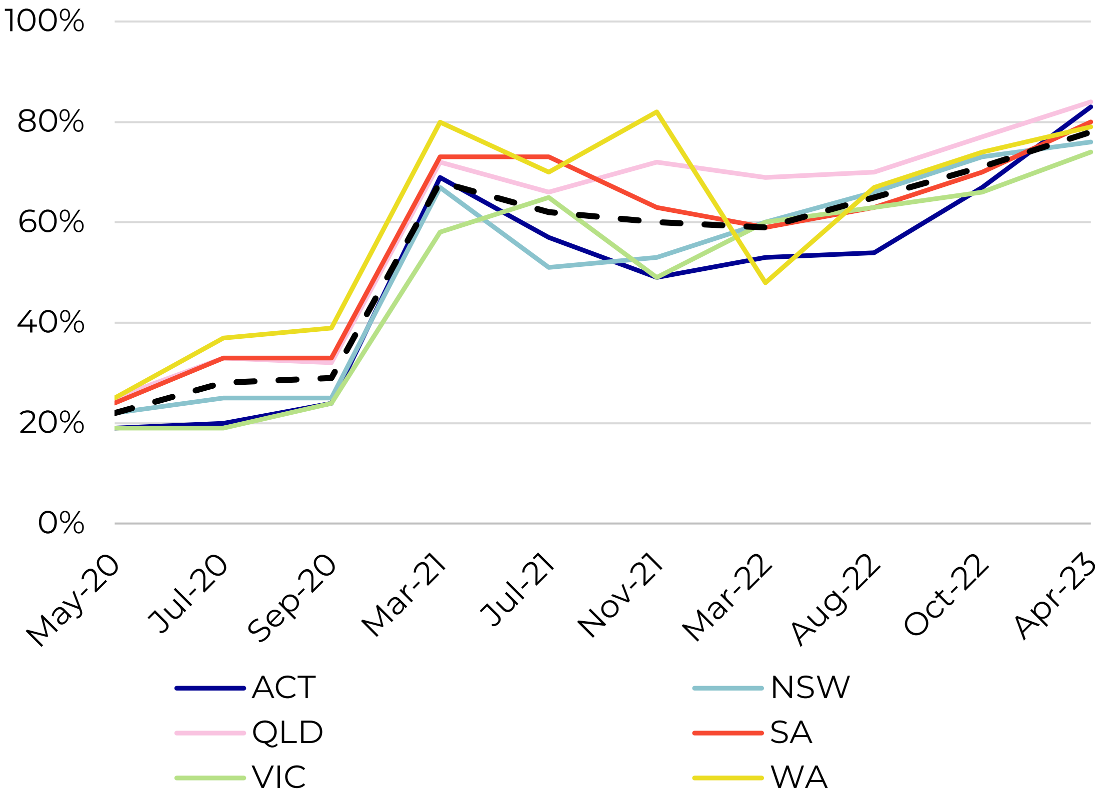
> 'Planned travel overseas this year has decreased our cultural expenditure.'

Though COVID-related barriers have declined, 1 in 10 cite a lack of energy to attend cultural events

As we learn to live with COVID-19 in the community, fears surrounding contracting and transmitting the virus continue to decline. In April 2023, 18% selected the risk of contracting or transmitting the virus as a barrier to attendance, down from 37% in October 2022.

Three-quarters (76%) of NSW audiences said they are ready to attend 'now or whenever permitted,' up slightly from 73% in October 2022. One in 5 have some level of caution (22%, down from 26%) and just 2% aren't willing to attend right now.

Figure 8: Proportion of audiences who are 'ready to attend now or whenever permitted', May 2020 to April 2023, by state/territory (n=1,311).



However, the long-term effects of the pandemic continue to impact some audiences' stamina for attending, and around 1 in 10 (13%) say they lack energy to go out. One NSW respondent said,

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> 'My behaviour has not returned to pre-pandemic levels. And the reason for this is a combination of the residue of the pandemic effect (almost like PTSD) and the inflation we're currently experiencing. I used to go to the cinema once a week pre COVID. I've only gone once since the cinemas reopened.'

Despite the numerous complex barriers to attendance cited by many, a quickly growing proportion say they are not currently facing any barriers to attending – 3 in 10 (33%) in April 2023, up from 11% in October 2022. One respondent said,

> 'I have been retired for a long time and although I am on a fixed income and feeling financially challenged, I feel I need to live my life in a positive way and continue to enjoy the things I love while I am still healthy and active.'

Another said,

> 'Arts are very important to me. I save money on other things including food and clothing before arts.'

Looking ahead

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

Previous rounds of the study revealed a trend of last-minute ticket buying. In August 2022, 27% of NSW audience members were most likely to have been booking for events within the next seven days and the next 2-3 weeks (46%), and qualitative data in October 2022 highlighted the ongoing prevalence of the trend.

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

Financial pressures may cause some audiences to hesitate before making bookings in advance, with some opting for rush tickets and last-minute offers. One said,

> 'Prices for shows etc. are very expensive, so you really have to pick and choose and try to take advantage of rush tickets etc.'

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

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

Another said,

> 'Resent having to buy tickets so far in advance /6mth commitment. Prefer to be more spontaneous. Loving the comeback of pub concerts and more intimate settings.'

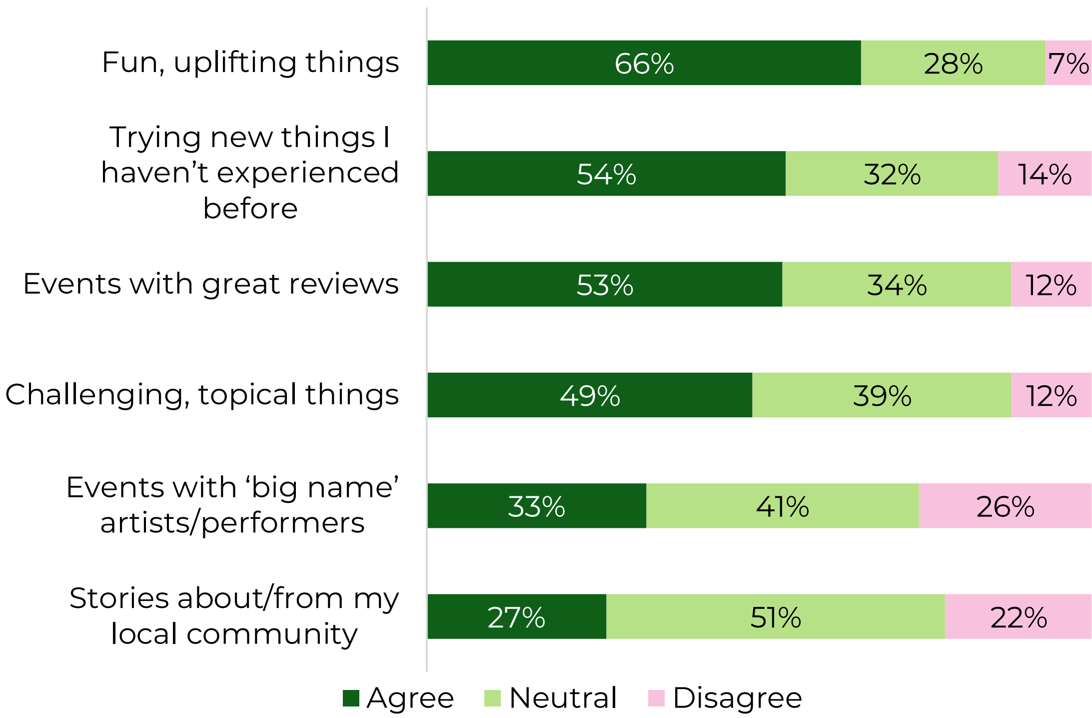
2 in 3 NSW audiences say they will be attracted to fun, uplifting things in the coming year – and 54% want to try new things they haven't experienced before

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

NSW audiences are most likely to agree that they'll be attracted to fun, uplifting things (66%,) and more than half (54%) will be seeking new things they haven't experienced before (Figure 9).

However, there is also a strong appetite for challenging, topical things (49% agree), suggesting that diverse programming remains key to attracting different types of audience members.

Figure 9: In the coming year, I'll be most attracted to ... NSW audiences (n=374)



NSW respondents suggested ideas for helping to address financial barriers

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

Several Sydney-based respondents acknowledged that they are offered more choice than those in other cities, and that some are financially impacted in different ways.

> 'No not really. There is a lot of choice in Sydney and the events are fairly priced. You just have to prioritise. Many people can't go to anything, so I am very lucky.'

However, several audience members made practical suggestions for addressing financial barriers in the current climate. One suggested reviewing ticketing models,

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

One suggested,

> ‘Ability to move or refund tickets when you test positive for COVID.’

For some audience members, value for money includes complementary programming enhance their cultural experience. One said,

> ‘I'm seeking connection to community and am interested in greater depth of understanding in what I'm seeing. Not so much with comedy, but with other things like ballet, theatre and culture. I'd be swayed to buy tickets to things that had a 'free' element that provided added value like an artist talk.’

After the uncertainty of the pandemic era, expectations of clear communication around ticketing may be heightened

Some NSW respondents advocated for better communication around cancelled shows, to improve confidence in their spending decisions. One said,

> ‘I know it's such a hard time for the arts and particularly for touring musicians. We have booked for several concerts that have been 'postponed' (most recently Robert Glasper at the Metro Theatre) and it's annoying to hand over the money and not know when or if you will get to go to the show. We recently saw the last of our postponed pre-COVID shows and they'd held onto our money for more than 2 years.’

Subscribers to NSW-based organisations expressed their willingness to continue showing their support and encouraged minimising barriers for this to happen. One said,

> ‘We subscribe to Opera Australia, Sydney Theatre Company, and The Australian Ballet, and have done so for many years. We also regularly attend movies at Palace Cinemas. Please – make it easy for existing subscribers to book for each upcoming season. Also, make it easy to upgrade seats each year.’

One mentioned communication around refund policies, commenting,

> ‘Change the 'no refunds' terms and conditions. I feel VERY STRONGLY about this. This is what makes me more likely to limit or stop my subscriptions.’

Another alluded to pre-sale campaigns,

> ‘I like pre-sales, as long as I have notice! An email saying "the pre-sale starts *now*,” with no prior email, annoys me because I usually need to ask family and/or friends in advance of the pre-sale, to see if they want to go, which day and/or time, etc.’

Many support a vibrant landscape – though some may be feeling overwhelmed with choice

NSW audiences are generally appreciative of variety in cultural offerings, and encourage arts organisations to continue offering challenging, inspiring and innovative work. One said,

> ‘Continue to produce performances of variety, challenge and enjoyment.’

Another said,

> ‘Don't be too frightened or conservative. Keep experimenting. The arts generate dynamic energy, never forget this.’

As international touring returns, NSW audiences are eager to participate in a vibrant and expansive arts landscape. One said,

> ‘Musical theatre has been growing in popularity, with big and small theatres hosting more of them in recent months. We should get behind that more and help the world class creatives here in Australia establish a larger musical theatre industry. We are fans of Sydney becoming its own West End or Broadway location for Asia.’

However, considering economic pressures – organisations should remain conscious that the range of choice presents a challenge for those who are needing to be more selective. One said,

> ‘I'm sorry to say that there seems to be too much for Sydneysiders to choose from – overwhelming in fact. And in the end (with fees the way they are) we can only go to one or two major ticket events a year.’

National audience segments

Inflationary pressures are experienced differently across the population. Three key audience segments are presented below, based on April 2023 data analysed at the national level. For more detail about these three demographic segments, head to the National Key Findings.

Older and bolder	Family frugality	Young and restless
Arts audiences aged 55+	Arts audiences aged 35-55 with children living at home	Arts audiences under 35
▸ After several years shaped by virus concerns and mask-wearing, older audiences are now enjoying higher attendance levels and spending. ▸ As the most likely audiences to experience no barriers to attending right now, this group is open to a range of experiences and are the most likely to seek out challenging, topical works in the next 12 months. ▸ Email is the top way they find out about events, so consider ways to continually improve your databases and eDMs.	▸ Rising housing costs are affecting families more than households without children, and audiences with kids at home have reduced their arts spending more than others. ▸ High numbers are staying closer to home, looking for free/cheap things to do and taking longer to commit, as they weigh up costs for 3 or more people. ▸ Families see the arts as important for their children – and many are prioritising it within their budget. ▸ For Kids and Family shows, consider a pricing and promotion strategy tailored to this group (they're the most likely group to find out about events on Facebook!).	▸ Despite being eager to get out and about, young people are attending at slightly lower levels than they did 12 months ago and are spending less too. ▸ They're facing financial barriers at twice the rate of their parents' generations – and feel more down about their economic future. ▸ They're eager to connect socially, attend fun/uplifting events and try new things they haven't experienced before, but may need support to attend. ▸ Some are looking with keen eyes for student or youth discounts – and ways to cover the costs of travel and eating out.

PATTERNMAKERS

What's next

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

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

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

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

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