Audience Outlook Monitor

# How cultural audiences in VIC are impacted by rising inflation

Victoria Snapshot Report – April 2023

# Contents



Cover Image Credit: Ian Laidlaw, courtesy of Arts Centre Melbourne.

# VIC audiences on the economic outlook

Some continue to spend, others make careful choices, as data collected in April 2023 from 374 past attendees shows inflationary pressures impact VIC audiences in different ways.

## 1 in 2

45% of VIC audiences say they are **worse off** than they were a year ago, and 49% say they are in the **same position**, with a mixed picture across the market.

## 58%

The proportion in VIC **spending over $50 on tickets to in-person cultural events is consistent with** October 2022 (59%) and lower than August 2022 (63%), and the outlook is uncertain.

## #1

Financial reasons are the **top barrier to attending**, and many VIC attendees are looking for free/cheap things to do (59%) taking longer to make decisions (51%) and staying close to home (50%).

# 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.

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## Key findings: April 2023

# VIC 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 VIC arts audiences are responding to changing economic conditions, based on data from 374 past attendees.
- **Consumer sentiment in VIC has declined over the past 12 months**. In April 2023, the Consumer Sentiment Index (CSI) in VIC was 79.8, down from 94.5 in April 2022, suggesting decreased confidence in household finances and economic conditions.
- **Around half (45%) VIC audience members surveyed say they are 'worse off'** financially compared to one year ago. Another half (49%) are 'the same' and just 6% are 'better off'.
- **VIC audiences are among the most likely to be attending** cultural events of any state at the moment, with 81% attending at least one event in the past fortnight, relative to a national average of 76%.
- However, while 8 in 10 are attending arts and cultural events, **half (49%) said their frequency of attendance has decreased** in the past 6 months, and the data suggests that their attendance preferences and behaviours are changing.
- **Average spending levels are lower than they were mid-last year**. Around 6 in 10 (58%) of those attending in the past fortnight spent $50 or more, consistent with October (59%) and down from August 2022 (63%). 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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# Financial reasons are the top barrier to attendance, and VIC audiences are deliberating longer on factors such as price, location and overall value

- As COVID-related concerns decline, financial reasons are the top barrier to attendance, affecting 4 in 10 VIC audience members (43%).
- A lack of money is not the only consideration – the data also suggests that 1 in 4 are prioritising other things (24%) as lifestyles continue to evolve after the pandemic.
- Qualitative data shows that the added costs of travel, meals and accommodation are playing a key role in attendance decisions, as households adapt their behaviour to suit the conditions.
- When asked about their cultural spending over the past 6 months, sizeable numbers in VIC say the price they are willing to pay to attend (39%) has decreased – the largest proportion of any state/territory, along with NSW (38%).
- 6 in 10 are looking for free and cheap things to attend (59%), and qualitative data shows that discounts and pricing offers are factoring into a decisions among many VIC audiences.
- ‘Splurging’ and ‘saving’ behaviour is present across all segments, albeit to different degrees. Some audiences 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.
- VIC audiences say they have decreased spending on donations (40%) and subscriptions/memberships (38%) – though qualitative data shows they remain committed to supporting the artists and organisations in ways they can, acknowledging tough conditions for artists and a desire to show their support in tough times.

# VIC audiences are eager to engage in a diverse arts landscape, but tailored strategies for different segments are important

- Consistent with trends at the national level, many in VIC are responding to financial pressures by **taking longer to make decisions** about attending (51%), and **last-minute ticket-buying** appears to be here to stay  for the time being.
- **The location of events is also impacting 35% of VIC attendees more than usual,** and 50% say they are staying closer to home to attend events.
- Some segments are **more disadvantaged by travel costs** than others, so there is opportunity to promote money-saving initiatives that may benefit audiences outside metropolitan Melbourne, such as the regional transport fare cap.
- Responses confirm **enduring appetites for new** (53%) and **uplifting** (67%) cultural experiences over the next 12 months. VIC audiences are also drawn to **events with great reviews** (45%) and **challenging** arts experiences (44%), suggesting that audiences are eager for a diverse and vibrant arts landscape.
- When asked to share what they've attended recently and why they prioritised those things, some common themes include a **desire to support artists and organisations** they value, wanting to feel uplifted and having a social experience.
- **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**.

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## 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 VIC Government's Creative State 2025 strategy 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 any demographic shifts affecting your area, such as Melbourne overtaking Sydney as the most populous city in Australia 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 low-cost event options or 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 over the next 12 months, 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, such as the regional transport fare cap, 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 VIC 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 early bird 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, review age limits – i.e., under 35 may be more appropriate than under 30 or under 25 given current conditions, and there may be a case to extend this to under 40s for some artforms
- 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 374 VIC past attendees of cultural events about their response to cost-of-living pressures

This Victorian (VIC) Snapshot Report outlines key findings from the April 2023 'Pulse Check' phase of the Audience Outlook Monitor in Australia, based on data collected from 374 audience members living in VIC.

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 (Phase 8), to examine how things are changing over time – and identify opportunities for programming, marketing and strategy in the current conditions. Where relevant, the VIC 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

# Almost half of VIC audiences (45%) feel their household is financially 'worse off' than they were a year ago

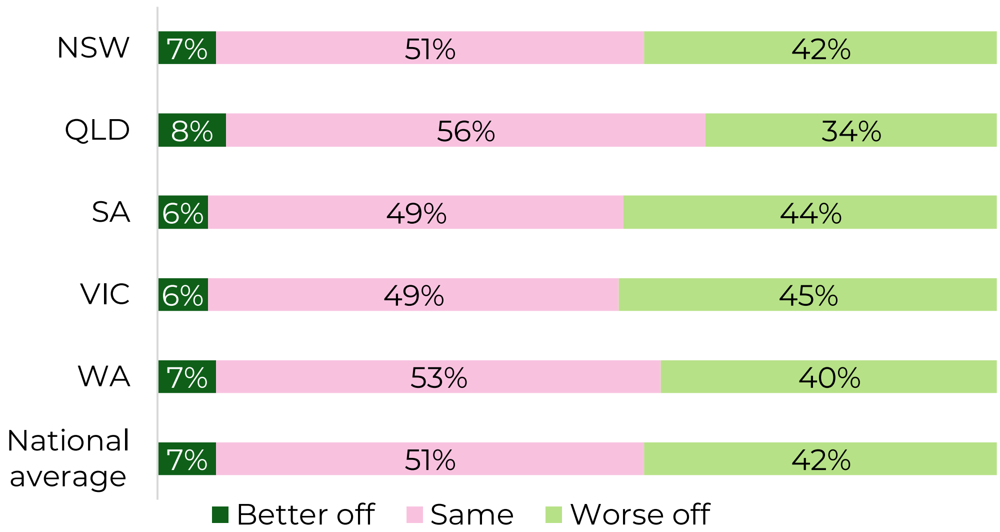
With economic pressures taking root in the post-pandemic period, households around the country are feeling the effects of the rising cost of living and interest rate increases. The Westpac – Melbourne Institute calculates that consumer sentiment among VIC residents in April 2023 was at 79.8 on the Consumer Sentiment Index (CSI), down from 94.5 in April 2022 and 121.1 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, almost half of VIC audience members said they are 'worse off' (45%), 49% said they are the 'same' and 6% said they are 'better off' – fairly 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 audiences 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).



# While many are optimistic the economy will stabilise, half of VIC audiences (48%) feel that there will be 'bad times' ahead

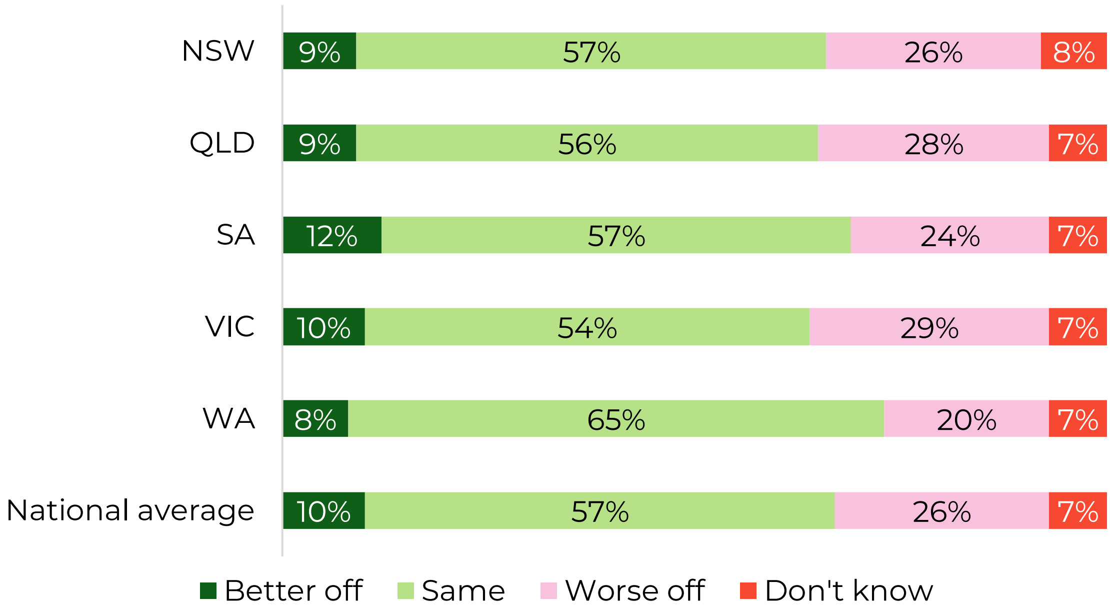
When asked, 'Do you think that a year from now you (and any family living with you) will be better off financially, or worse off, or just about the same as now?', the majority of VIC audiences expect they will be in the 'same' position (54%), while 3 in 10 (29%) expect to be 'worse off'. One in 10 (10%) expect they'll be 'better off' and 7% 'don't know'.

The outlook is relatively similar across the country, with most audiences expecting their situation will be the 'same'. This is 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, half of VIC audiences said they thought there will be 'bad times' ahead (48%) – the highest of any state or territory, compared to a national average of 40%.

Another half (45%) said the outlook was 'uncertain,' and 5% 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=1,313).

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**‘I have found it much more difficult to get tickets to events I am interested in before they sell out and I have also found that tickets are considerably more expensive than 6-12 months ago, reaching and often passing the boundaries of what I am willing/can afford to pay. My income has not gone up, but all my expenses have, both necessary and more frivolous items, so I am less likely to be able to afford to attend as many cultural events.’**

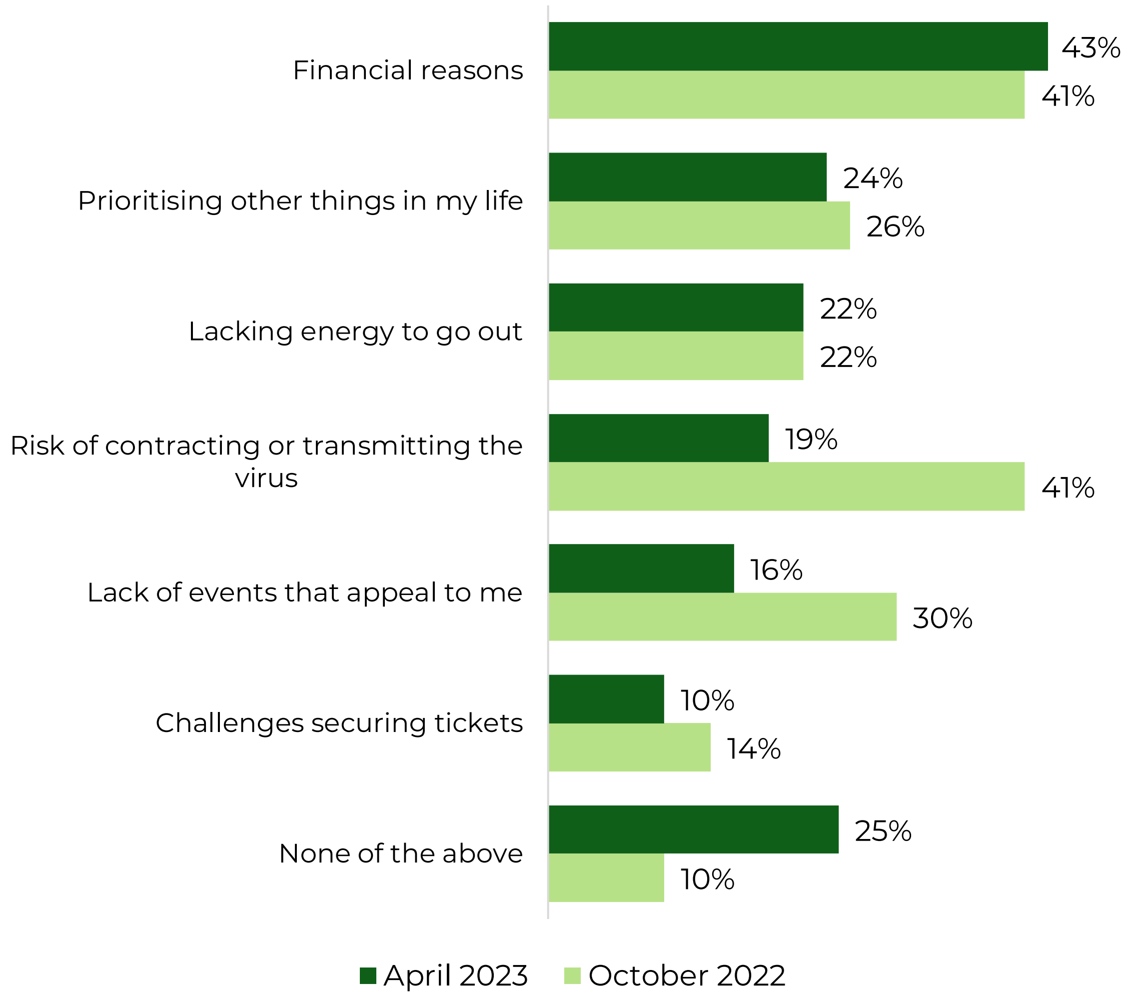
VIC audience member, April 2023

## Attendance outlook

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

Consistent with national trends, the April 2023 results show that financial reasons are the most prevalent barrier to attendance among VIC audiences (43%)– consistent with October 2022 (41%) and higher than August 2022 (26%).

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). VIC audiences (n=372)

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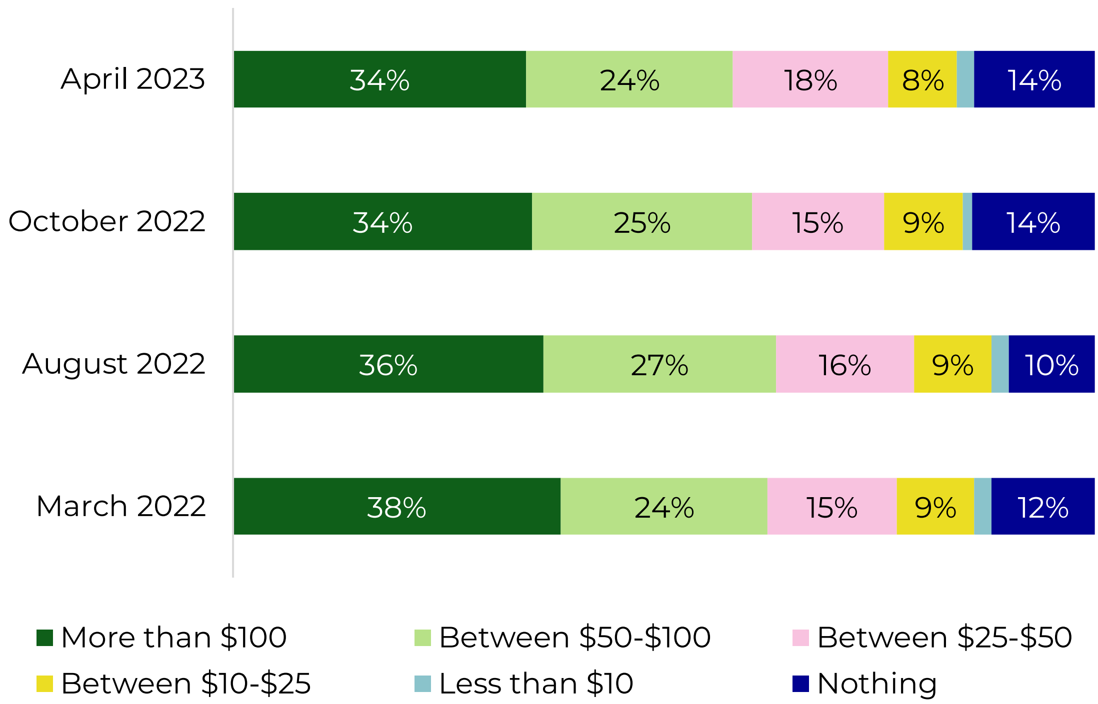
# Most VIC audiences continue to attend events amid cost-of living pressures, but spending is not increasing

Around 8 in 10 VIC audience members (81%) say they attended a cultural activity in the two weeks prior to data collection, an increase from October 2022 (72%) and August 2022 (74%).

VIC audiences reported having attended a wide variety of activities two weeks prior to data collection, including live performances (54%), museums or galleries (35%), cinemas (30%) and fairs and festivals (16%).

Spending levels are not increasing. In April 2023, the proportion that spent $50 or more on tickets to live events and cultural events was 58%, consistent with 59% in October 2022 and down from 63% in August 2022.

Figure 4: In the past fortnight, how much did you spend on tickets to in person live events and cultural activities? VIC audiences, March 2022 to April 2023 (n=303)




Qualitative data suggests that while VIC audiences are conscious of saving money, they are still keen to attend their favourite cultural activities. One VIC respondent mentioned needing to substitute their subscription for single tickets at the present time:

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> 'Still have a mortgage... so costs increasing. But great performances will still attend but do find opera costs a lot so given up subscription. And will have to be more careful next year.'

Another mentioned that they are prioritising well-known acts – and opting for free events:

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

**‘I attend less arts/cultural events, but I have become more 'discerning'. Instead of trying to experience the widest diversity of experiences, I will consider a range of options more carefully and choose one that seems the closest to my typical favourites.’**

VIC audience member, April 2023

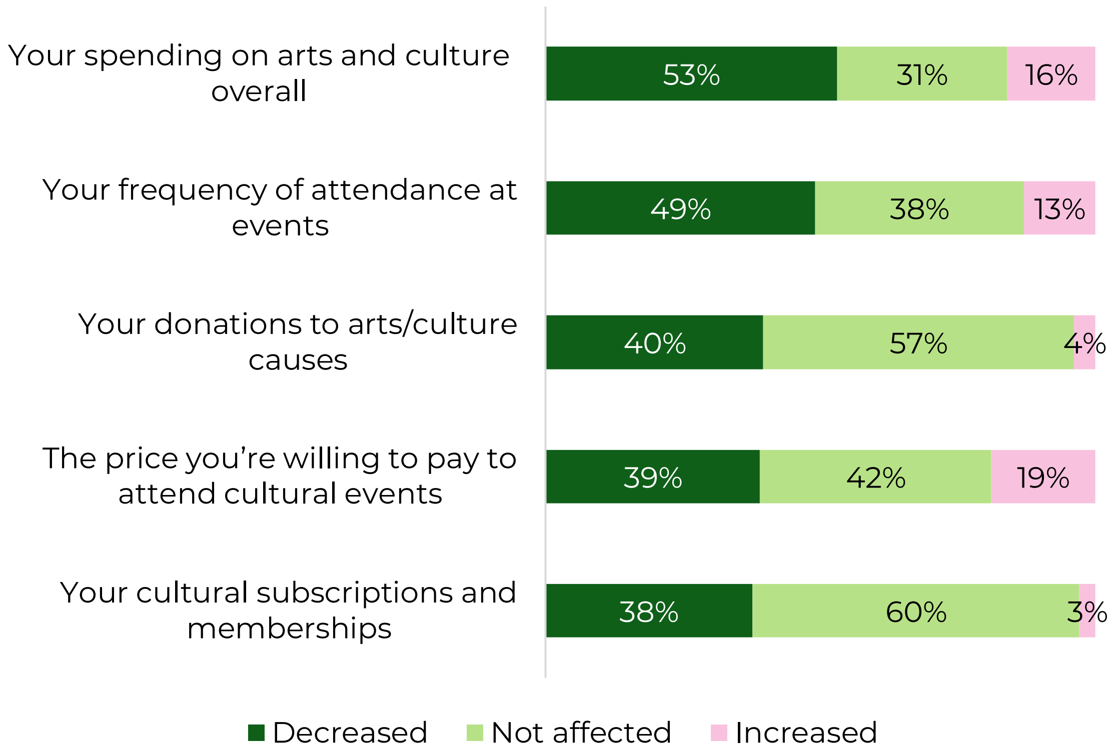
# Half say their overall spending (53%) and frequency of attendance (49%) at arts events has decreased in the past 6 months

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, VIC audiences were the most likely to say their overall spending (53%) and frequency of attendance at events (49%) has decreased in the past 6 months.

Among behaviours that are most likely to have remained steady, around 6 in 10 VIC audiences said that subscriptions and memberships (60%) and donations to arts and cultural causes (57%) have not been affected.

Figure 5: In the past 6 months, have the following things increased, decreased, or not been affected? (n=374)



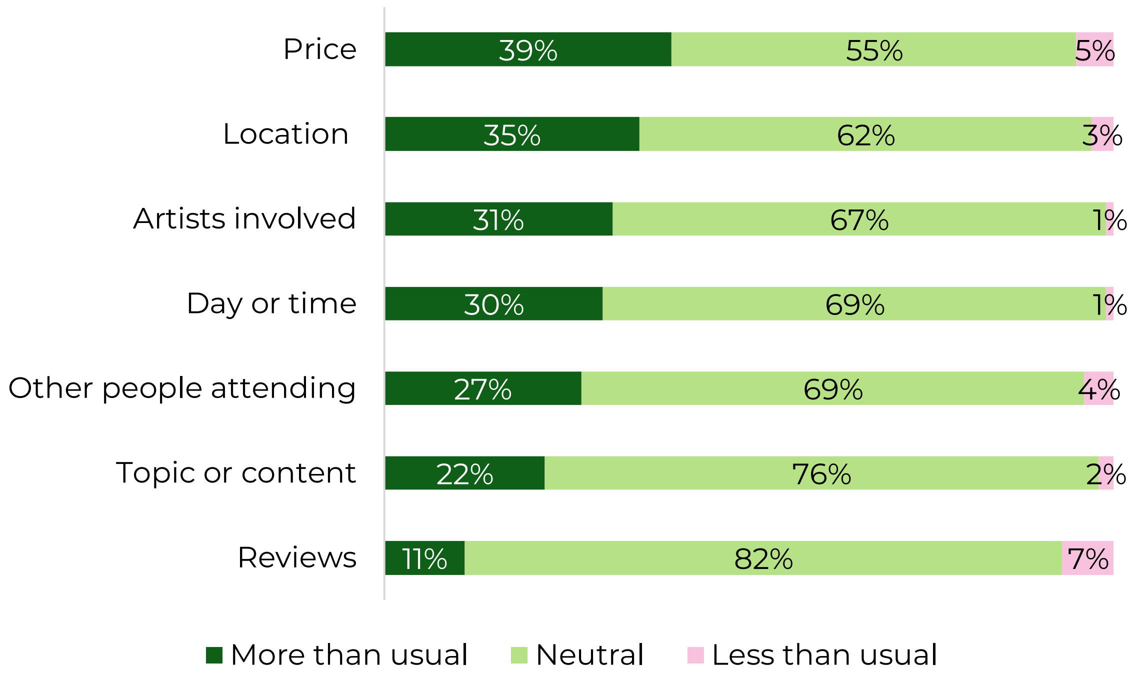
# 4 in 10 (39%) of VIC attendees say they are affected by the price of arts events more than usual at the moment

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, VIC audiences were most likely to say that price influenced them 'more than usual' compared to pre-pandemic times (39%). This was followed by the location of cultural events (35%), the artists involved (27%) and the day or time (30%)..

Reviews were the least likely factor to influence audience attendance decisions 'more than usual' at the moment (11%).

Figure 6: Compared to how you approached attending prior to the pandemic, to what extent were you more or less influenced by...VIC audiences (n=302)




One VIC audience member mentioned being more careful about what events they choose to spend on in light of costs increasing, commenting,

> ‘I have found it much more difficult to get tickets to events I am interested in before they sell out and I have also found that tickets are considerably more expensive than 6-12 months ago, reaching and often passing the boundaries of what I am willing/can afford to pay. My income has not gone up, but all my expenses have, both necessary and more frivolous items, so I am less likely to be able to afford to attend as many cultural events.’

## 6 in 10 VIC audiences are looking for free/cheap things (59%), and half are 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.

VIC audiences are the most likely to be ‘looking for things that are free/cheap to do’ (59% ‘strongly agree’ or ‘agree’) and least likely to be finding things to ‘splash out’ or ‘splurge on’ (26% ‘strongly agree’ or ‘agree’) (Figure 7).

One VIC audience member mentioned that they have been faced with a lack of affordable ticketing options, which has in turn impacted their attendance decisions:

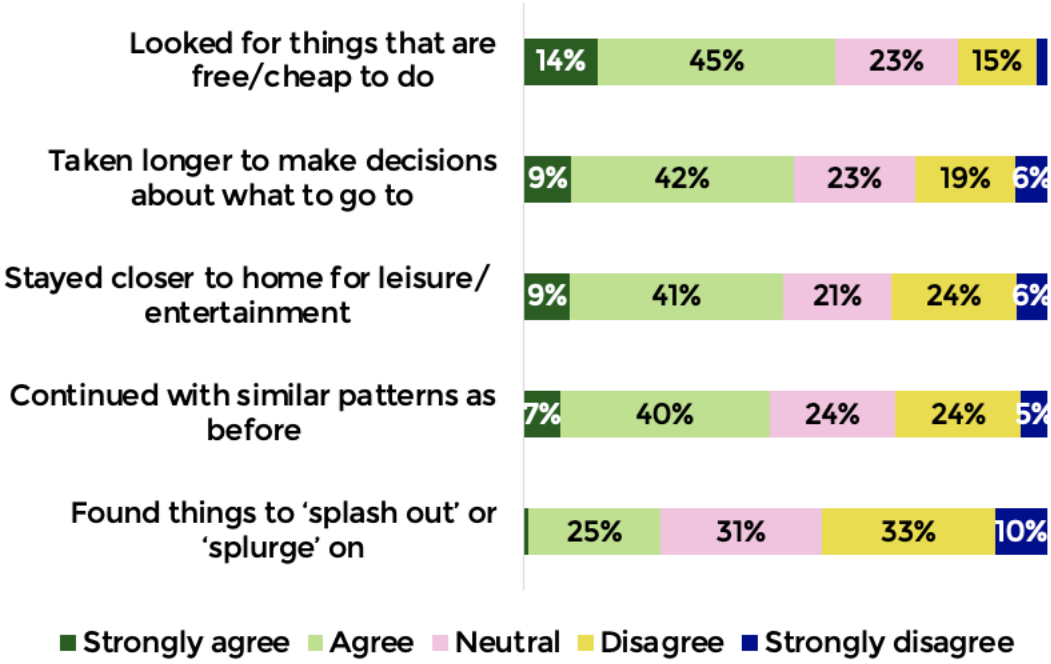
> ‘Ticket resale sites and the lack of competition in major event ticketing/promotion/booking agents has really affected the availability and price of cultural events.’

Another said,

> ‘I have always looked to enjoy free events such as Melba lunchtimes and MRC workshop sessions.’

VIC 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.

Figure 7: Given my financial situation, in the past 6 months, I have...VIC audiences (n=372)




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

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

> 'I attend less arts/cultural events, but I have become more 'discerning'. Instead of trying to experience the widest diversity of experiences, I will consider a range of options more carefully and choose one that seems the closest to my typical favourites.'

Another said,

> 'We used to go to the theatre in Melbourne regularly, but some shows are now too expensive for us as self-funded retirees, especially if we have to pay for parking as we travel from Geelong. In the future we intend to only attend a few shows a year and those that are reasonably priced for our budget. This also applies to visiting the Arts Centre, which is often expensive and very crowded, so we don't visit as often.'

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

As shown in Figure 6, one-third (35%) of VIC audiences say the 'location' of events is affecting their decision making more than usual – and many VIC audience members are opting to stay closer to home (50%).

VIC audiences living in regional areas commonly shared experiences of having to weigh up the bundled costs of travel and ticketing when making decisions. One said,

> 'Living regionally, if I want to see something in the city, I need to factor in $100+ petrol money plus parking. This is a huge hindrance to seeing an event. There are multiple events (concerts, performances, gallery openings) I have been unable to attend simply due the cost of transport and ticketing.
>
> My family took advantage of cheaper train fares last week to come to the city to see Circus Oz. Whilst it was significantly cheaper to come to the city, due to track work we were on public transport (trains and bus replacement) for a total of FIVE HOURS. Is it worth it?? It's hard to say.'

Qualitative data confirms that matinee shows and events located outside the CBD are crucial for some attendees. One said,

> 'Definitely like to attend events closer to home. Trains are not reliable and we're getting older. It's harder to go out to the city in the evenings. Matinees suit us far more.'

Several VIC respondents described the challenges presented by travel costs, after moving to outer suburban or regional areas. One said,

> 'I am a disability pensioner and due to the difficulties finding rentals, I had to move out to the suburbs. So now it takes me hours to get to and from the CBD to attend events. Furthermore, I can't really do weeknights because the trains end before some shows end.'

Another said,

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

One shared their appreciation for newly implemented public transport initiatives – but highlighted the added issue of scheduling:

> 'When I lived in Melbourne attending live events, theatre, concerts etc. was an easy thing to do. Now that I live in a region it is almost financially impossible. The cost has been relieved somewhat by the recent State Government decision to make regional ticketing (train) the same as in the city. Next step would be for regional trains to run at a time when I could attend an event and still get home the same day/night. That is not possible now.'

Melbourne-based arts companies noticing a decline in outer metropolitan 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 4 VIC 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-quarter (24%) of VIC respondents say they are prioritising other things in their life right now, consistent with findings in October 2022 (26%).

Qualitative data highlights a diverse range of circumstances which have contributed to arts and culture not being as much of a priority at the moment, from work and family or caring commitments, to health. One said,

> 'Now have a child who I need to arrange care for whenever I want to go and see something.'

Another said,

> 'Many decisions I have made are due to my health and age.'

One said,

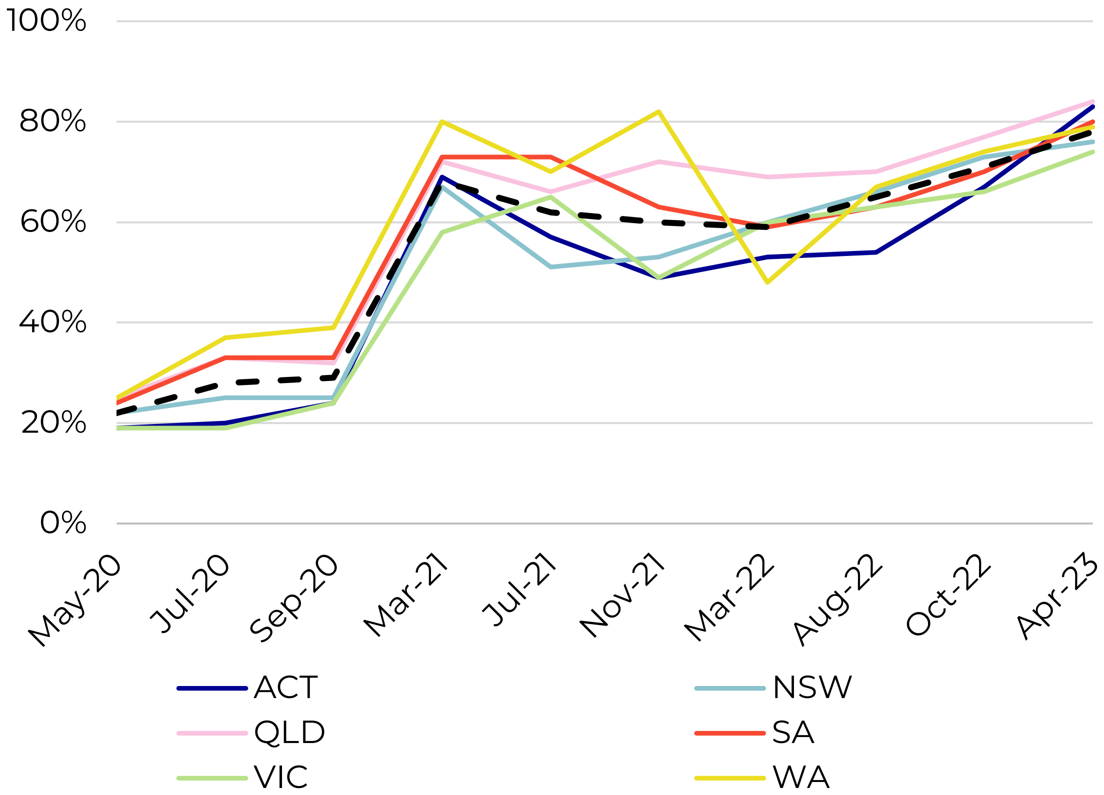
> 'My overall situation as having been a carer for a terminally ill person, having to give up income and where I live, has worsened my prospects for security in my "retirement".'

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

As we learn to live with COVID-19 in the community, fears surrounding contracting and transmitting the virus continue to decline. In April 2023, 19% selected the risk of contracting or transmitting the virus as a barrier to attendance, down from 41% in October 2022.

Three-quarters (74%) of VIC audiences said they are ready to attend 'now or whenever permitted,' an increase from 66% in October 2022. One quarter have some level of caution (25%, down from 32% in October 2022), selecting they are ready to attend 'when reasonably confident that risk of transmission is minimal,' and just 1% aren't willing to attend right now (Figure 8).

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 2 in 10 (22%) say they lack energy to go out. One said,

> 'Working very long hours and far too hard - I work in health and it has been really tough. I love music and really want to be able to get to more concerts, but very hard when I'm so tired.'

Some are feeling the impact of lockdowns and detachment from arts and culture. One said,

> '[I have] social anxiety from disconnection with [the] arts community.'

Despite the numerous complex barriers to attendance cited by many, a quickly growing proportion say they are not currently facing any barriers to attending – 1 in 4 (25%) in April 2023, up from 10% in October 2022. Qualitative data suggests many audience members are 'seizing the moment' to enjoy arts and cultural experiences, after years of disruptions. One said,

> ‘COVID prevented travel and [it] cancelled events. There is more to see now, and I realise that life is too short to not see arts and cultural events. It is needed mentally and emotionally and good to get out. Live events have so much more to offer.’

Another said,

> ‘I'm careful with my money as I'm retired but have decided that if I really want to see something should do it.’

## Looking ahead

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

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

VIC audiences are most likely to agree that they’ll be attracted to fun, uplifting things (67%,) and more than half (53%) will be seeking new things they haven’t experienced before (Figure 9). Many respondents reported having enjoyed the Melbourne International Comedy Festival, often mentioning how it satisfied their need for uplift, in the wake of tough times.

> ‘Melbourne International Comedy Festival; needed a laugh – it's been a tough year.’

Another said,

> ‘I've been to see 5 comedy shows at the Comedy Festival. When times are stressful like at work you really need a good laugh.’

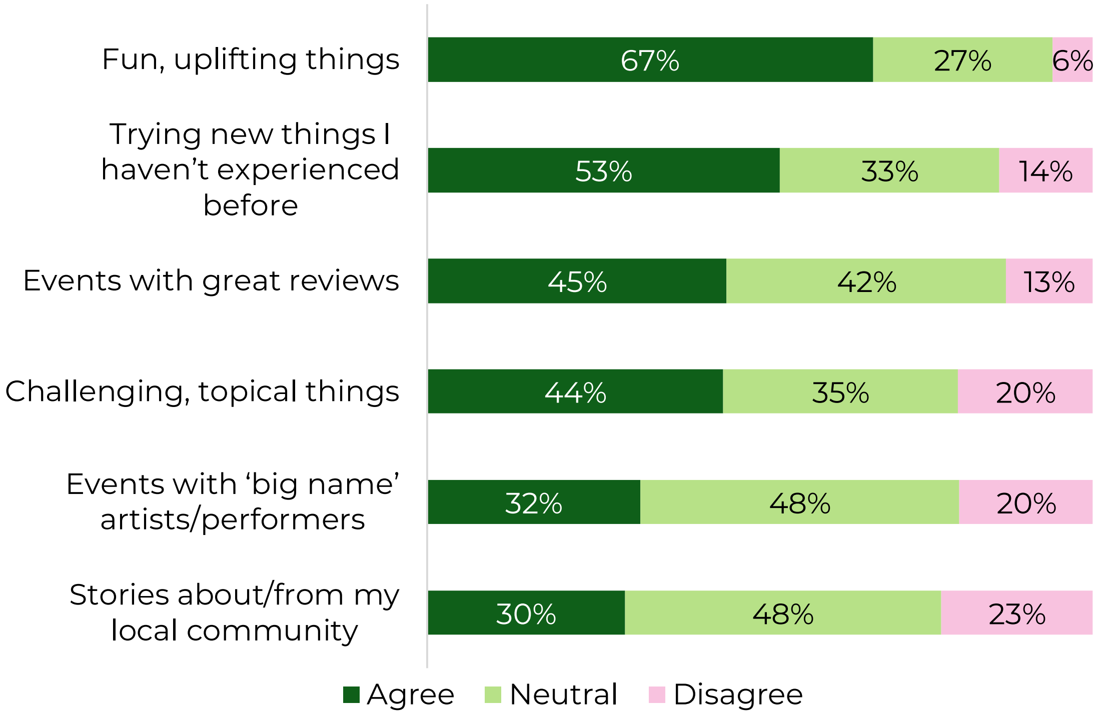
One mentioned having recently opened up to more light-hearted content, commenting,

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

However, there is also a strong appetite for challenging, topical things (44% agree), and events with great reviews (45%), suggesting that diverse programming remains key to attracting different types of audience members. One said,

> 'I don't think [artists and arts organisations] should address my needs or interests. They should lead the way, challenge us. I might want slightly more uplifting content right now (why is Ted Lasso so popular?), but we need our creatives to be fearless, and supported.'

Figure 9: In the coming year, I'll be most attracted to … VIC audiences (n=372)



# VIC respondents suggested ideas for reviewing ticket models 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 VIC audience members made practical suggestions for addressing financial barriers in the current climate. One suggested,

> ‘Reassess ticket prices for concession card holders – often tickets are less than $5 cheaper than full price and big companies seem to prioritise cheaper tickets to under 30s, even if they work full time and earn more than someone like myself who is a part-time worker with a pensioner card.’

Another said,

> ‘Better promo[tional] options such as earlybird pricing, and better ticket insurance that allows for change of mind more broadly. This allows people to cancel without penalty if they are unwell but not necessarily with COVID. I'd be much more likely to book expensive tickets with this protection.’

One said,

> ‘Having now experienced a pension – which is below the poverty line – but desperately in need of the arts for mental health reasons – I would love to see more significant pension/health care card discounts on shows of all kinds. Even if it's just matinees.

Some respondents made suggestions around handling fees – and there may be a case to review this aspect, especially for single ticket buyers. One said,

> ‘Maybe not charge the booking fee or be able to buy tickets at events without the extra cover charge and make tickets easier to purchase on-line and have fair cancellation policies.’

## As audiences become increasingly selective, many will be relying on clear and easy-to-access information about events

Some VIC respondents advocated for better communication in relation to arts and culture activities to improve confidence in their spending decisions. One said,

> ‘Pricing visibility would be helpful. Many events I wanted to go to have recently increased their prices and then hid it behind checkout, so you can't see how much it is until you select seats. I don't like that approach. I came expecting a $40 ticket, so I'm fairly [annoyed] when it's $70. I could have thought about whether it was worth $70 to me but when I'm surprised with that info at the end, I'm totally annoyed. I understand the artists' and venues' right to set prices but don't hide the prices please.’

Some VIC respondents shared suggestions to make planning their attendance easier, through information provided about event logistics. One said,

> ‘Venues should be clear about where people line up to wait for venue access, or whether they just wait in a certain area. Venues should have some seat available for waiting wherever possible (a friend has mobility issues), and should make it clear when buying tickets if the venue has access issues (for example, you must use stairs to access the room in the venue).’

Another said,

> ‘Suggestions by organisers on parking and transport at the venue that make my trip easier.’

One shared a similar sentiment about the timing of promotions, commenting,

> ‘Accessible, easy to navigate event/program information. There is a lot available to engage in, but often I read about it after it's been and gone. I love the small regional hall project entertainment initiative and family-friendly and all abilities events at affordable prices.’

# Many support a diverse and vibrant arts landscape, and there is a case for different events and price points tailored to different segments

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

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

However, considering economic pressures – organisations should remain conscious of the barriers – and consider tailored strategies for target segments. One said,

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

Overall, VIC audiences are eager to participate in a vibrant arts landscape, and many showed their willingness to support struggling artists and organisations as they navigate the current conditions. One regional respondent said,

> 'Visit the regional towns please! We would love to see and support you. Bendigo has some great venues, particularly the Capital & Ulumbarra Theatres. The regional towns need to see more arts and culture.'

Another respondent said,

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

# 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.<br>• 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.<br>• 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.<br>• 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.<br>• Families see the arts as important for their children – and many are prioritising it within their budget.<br>• 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.<br>• They're facing financial barriers at twice the rate of their parents' generations – and feel more down about their economic future.<br>• 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.<br>• Some are looking with keen eyes for student or youth discounts – and ways to cover the costs of travel and eating out. |

## 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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AUDIENCE OUTLOOK MONITOR

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