Audience Outlook Monitor

How cultural audiences in WA are impacted by rising inflation

Western Australia Snapshot Report – April 2023

GOVERNMENT OF WESTERN AUSTRALIA
Department of Local Government, Sport and Cultural Industries

Contents

Cover Image Credit: Cast members Mandy McElhinney and Joel Jackson in The Glass Menagerie. Photo by Daniel J Grant, courtesy of Black Swan State Theatre Company.

WA audiences on the economic outlook

Some continue to spend, others make careful choices, as data collected in April 2023 from 123 past attendees shows inflationary pressures impact WA audiences in different ways.

4 in 10

40% of WA audiences say they are **worse off** than they were a year ago, and 53% say they are in the **same position**, with a mixed picture across the market.

50%

The proportion of WA audiences who say their **frequency of attendance** at arts and cultural events **has decreased in the past 6 months**.

#1

Financial reasons are the **top barrier to attending**, and many WA attendees are looking for free/cheap things to do (54%), taking longer to make decisions (43%) and staying close to home (36%).

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

While WA audiences feel the most optimistic about the economic outlook, their spending and attendance behaviours are changing

- **Increasing interest rates and cost-of-living pressures are impacting consumer confidence** around the country. This 'Pulse Check' explores how WA arts audiences are responding to changing economic conditions, based on data from 123 past attendees.
- **Consumer sentiment in WA has increased over the past 12 months,** with the Westpac-Melbourne Institute calculating the Consumer Sentiment Index (CSI) in WA to be at 103.6 in April 2023, up from 93.2 in April 2022.
- **WA audiences are currently feeling the most optimistic of any state at the moment**: One-third (32%) of those surveyed expect the country will have financially 'bad times' ahead, compared to a national average of 40%.
- **Three-quarters (75%) in WA attended a cultural event** in the fortnight before data collection (19-23 April), consistent with October (77%) and August 2022 (78%), **however the data suggests that attendance preferences and behaviours are changing.**
- **Half (50%) say their frequency of attendance has decreased in the past 6 months.** Qualitative data suggests financial reasons are the dominant factor: 'I'm happy with the options to attend performances in Perth. I just don't have enough money to go to as many things as I would like to.'
- **Average spending levels are steady**, with 2 in 3 (66%) of audiences spending $50 or more, up from 61% in October and 52% in August. However, averages should be interpreted with caution, as spending levels vary between segments. Jump to the National Segments for a breakdown of who in Australia is impacted differently.

Though WA audiences are spending the most nationally, many 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 one-third of WA past attendees (33%) – though this is the smallest proportion of any state.
- Financial barriers are not the only consideration – the data also suggests that 1 in 5 are prioritising other things (22%), as lifestyle factors continue to evolve, and audiences are re-establishing their attendance habits: 'I haven't got back into [attending] WAAPA [events] since I got out of the habit during COVID times but hope to.'
- When asked about their cultural spending over the past 6 months, 3 in 10 (31%) past WA audience members say the price they are willing to pay to attend events has decreased.
- Reflecting on the most recent event they attended, one-third of WA audience members said that price influenced them 'more than usual' (36%) compared to pre-pandemic – consistent with audiences nationally (39%).
- More than half (54%) are looking for free and cheap things to attend, and qualitative data shows that free events, discounts and pricing offers are factoring into decision-making among WA audiences.
- Some WA attendees are 'splurging' and 'saving'– and some are doing both, opting to splash out on events that are important to them, while making savings elsewhere.
- Some WA audiences say they have decreased spending on donations (31%) and subscriptions/memberships (31%) – though 64% say this type of spending has not been affected. Qualitative data indicates that many who engage in these forms of support say they plan to continue, highlighting their desire to show appreciation for the arts and support artists in tough times.

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

- Consistent with trends at the national level, many in WA are **taking longer to make decisions** about attending (43%), and **last-minute ticket-buying** appears here to stay for the time being.
- **The location of events is also impacting 23% of WA attendees more than usual,** and 36% say they are staying closer to home. Qualitative data suggests that travel costs are playing a key role: 'Because I live 250 to 350 kms from arts/cultural venues, I have to consider the cost of fuel on top of the cost of the ticket.'
- 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.
- Audiences are commonly interested in **new** (49%) and **uplifting** (72%) experiences over the next 12 months, and the appetite for **challenging or topical** arts experiences continues (31%). Although many are opting to be selective, qualitative comments indicate that WA audiences are eager to support a dynamic, 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 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 WA Government's Cultural Infrastructure 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 travel and transport initiatives to encourage regional or outer metro attendance at inner city events, or metropolitan attendance at regional or outer metro events
- ❑ Consider creating and promoting itineraries for a 'night out' based on different budgets, e.g., suggested transport, pre-show drink 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)
- ❑ When an 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 123 WA past attendees of cultural events about their response to cost-of-living pressures

This Western Australia (WA) Snapshot Report outlines key findings from the April 2023 'Pulse Check' phase of the Audience Outlook Monitor in Australia, based on data collected from 123 audience members living in WA.

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. In reporting the results, the results for WA audiences should be interpreted with caution due to a small sample size.

Results have been triangulated with other data sets. Where relevant, the WA 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 WA 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.

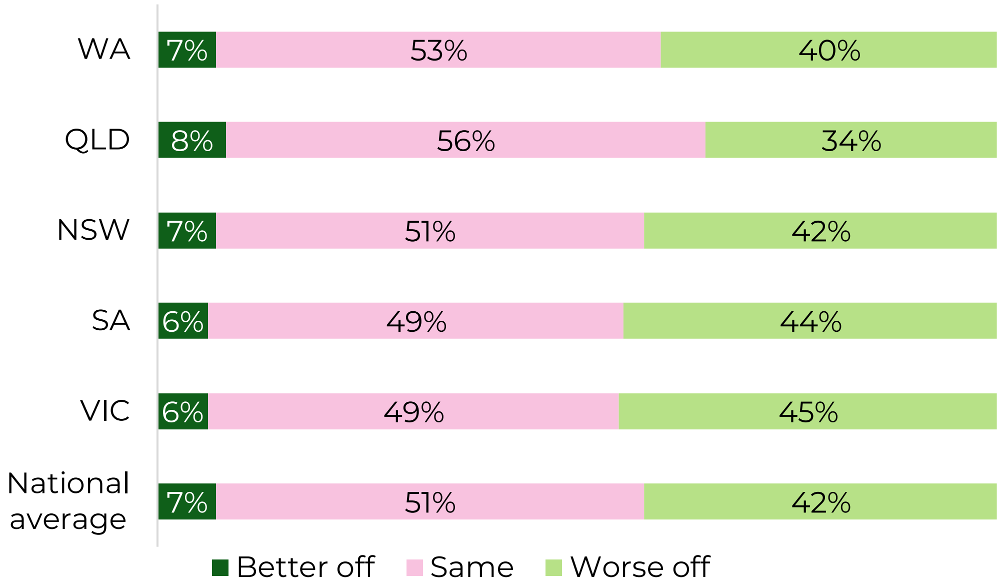
WA consumers are currently the most optimistic nationally. The Westpac – Melbourne Institute calculates that consumer sentiment among WA residents in April 2023 was at 103.6 on the Consumer Sentiment Index (CSI). These results show an increase from 93.2 in April 2022, but a decrease from 120.1 in April 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, 2 in 5 (40%) WA audience members said they are 'worse off', half (53%) said they are the 'same' and 7% said they are 'better off' – consistent with the national average (Figure 1).

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).



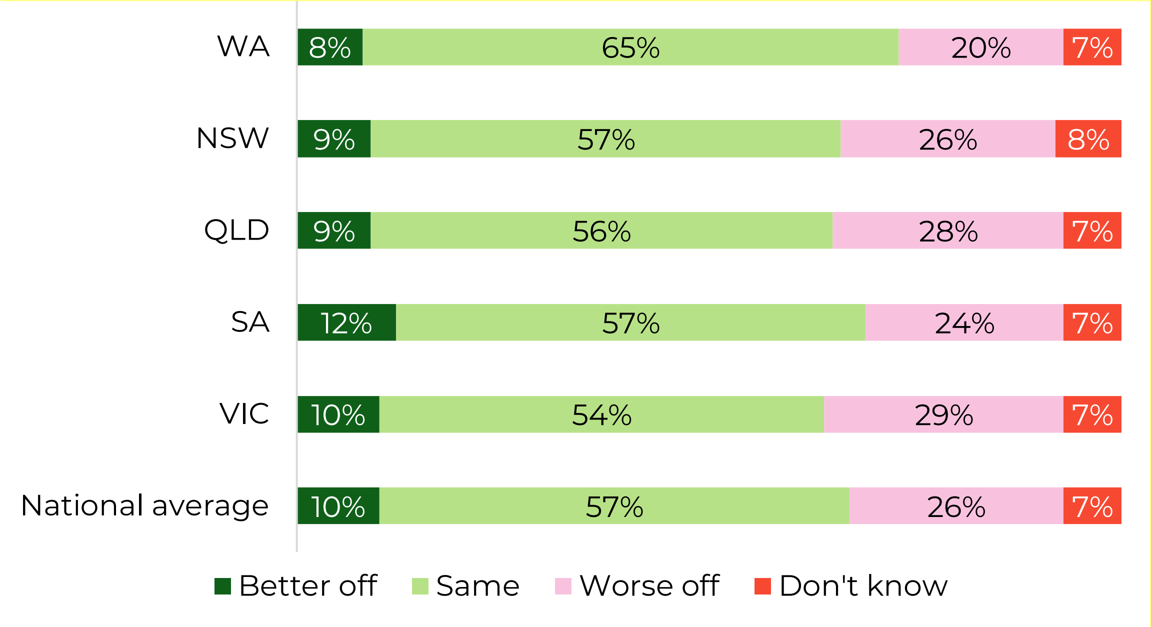
Many in WA are optimistic the economy will stabilise, with 3 in 10 feeling there will be 'bad times' ahead – the lowest across the states

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?', two-thirds of WA audiences expect they will be in the same position (65%), while 1 in 5 (20%) expect to be worse off – the lowest across all states. One in 10 (8%) expect they'll be 'better off' and 7% 'don't know' (Figure 2).

The outlook is relatively similar across the country, with the majority of audiences expecting their situation will be the 'same'. VIC audiences are the least optimistic, with 3 in 10 (29%) expecting their financial circumstances will be worse in a year's time.

When it comes to economic conditions in the country as a whole, 6 in 10 WA audiences said they thought the outlook was uncertain (60%), while a third (32%) said the country will have 'bad times' ahead – the lowest across all states. Just 7% expect the country will have 'good times' – consistent with the national average.

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=1,307).



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‘I'm still going to shows but have had to spend less money while out to manage the rising cost of living. This means I spend less money of food and drinks while out and am more likely to drive myself rather than catch an Uber.’

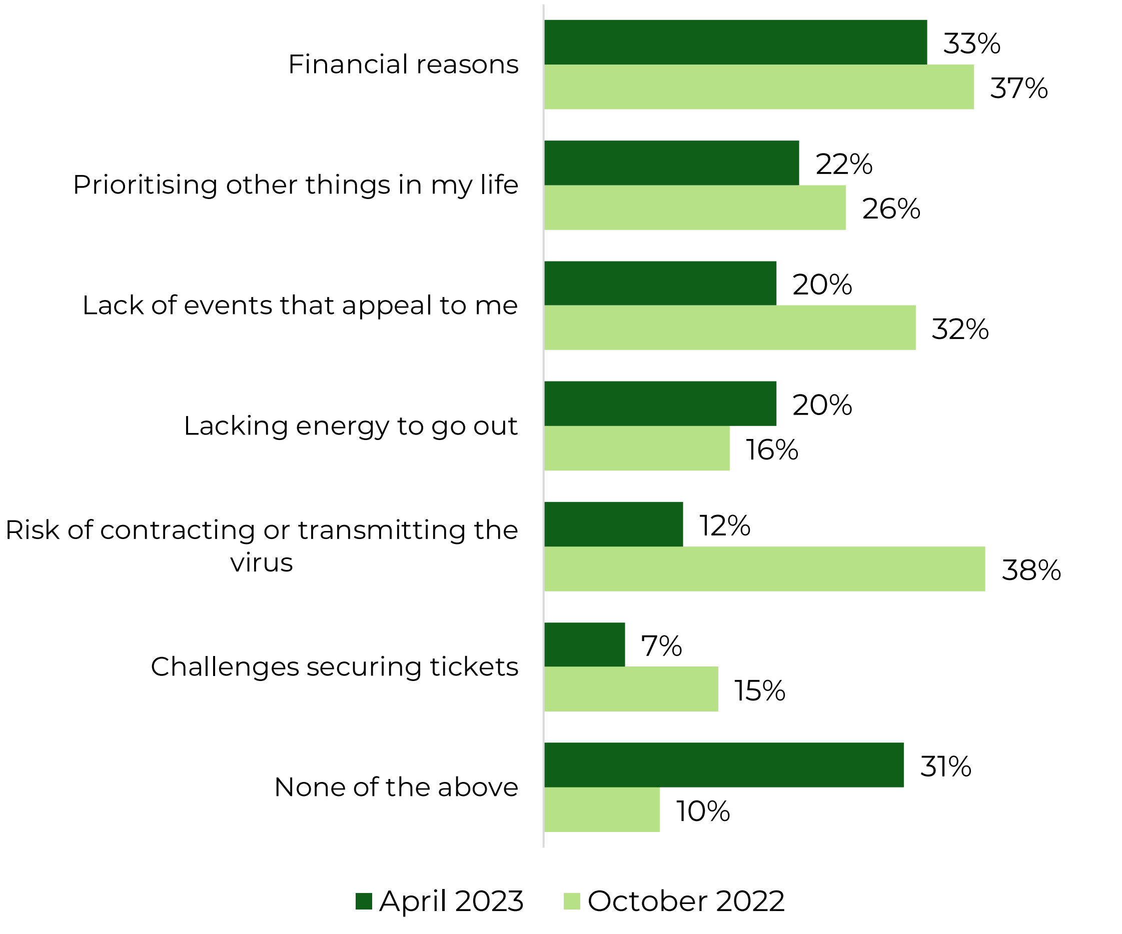
WA audience member, April 2023

Attendance outlook

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

Although slightly down from results in October 2022 (37%), the April 2023 results show that financial reasons are the most prevalent barrier to attendance, affecting one-third (33%). This is higher than August (25%) and March 2022 (13%).

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). WA audiences (n=122)



On average, WA attendees are spending the most of any state – but economic pressures are impacting audiences differently

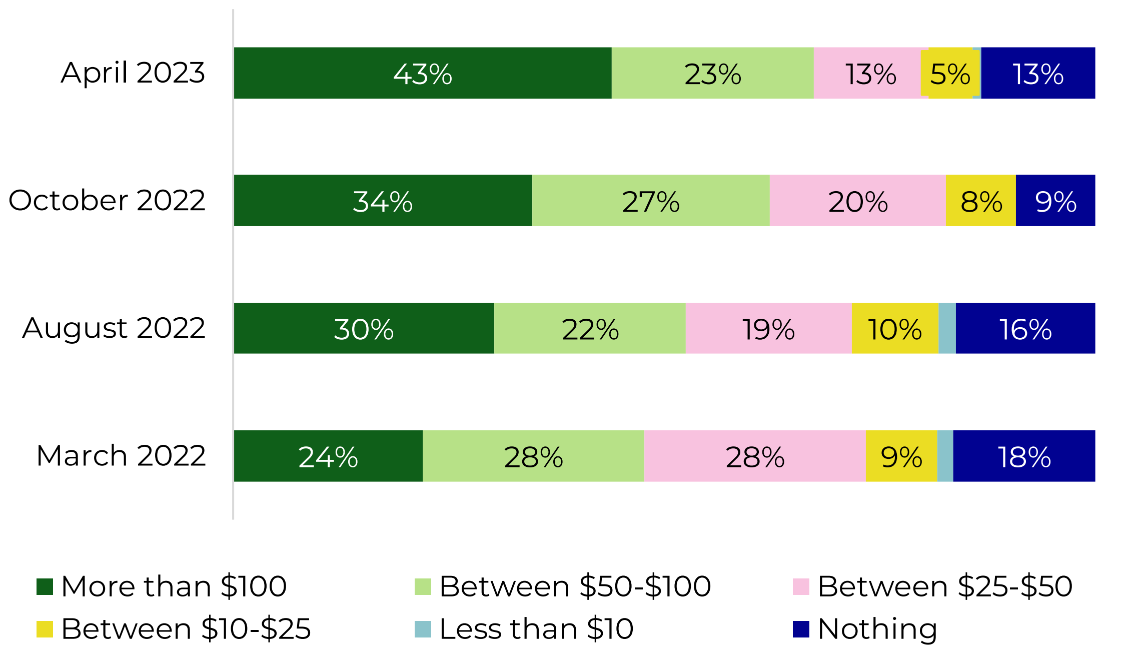
Three-quarters of WA audience members (75%) say they attended a cultural activity in the two weeks prior to data collection, which is consistent with October 2022 (77%) and August 2022 (78%).

WA audiences reported having attended a wide variety of activities two weeks prior to data collection, including live performances (53%), cinemas (33%) and museums or galleries (25%).

Among those attending, WA audiences are the most likely to be spending higher amounts on cultural activities compared to other states, and spending levels have increased slightly. In April 2023, two-thirds spent $50 or more on tickets to live events and cultural events (66%), up from 61% in October 2022 and 52% in August 2022.

However, these results should be interpreted with caution, as some segments are spending more and others less. Jump to the National Audience Segments for more details.

Figure 4: In the past fortnight, how much did you spend on tickets to in person live events and cultural activities? WA audiences, March 2022 to April 2023 (n=92)



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Qualitative data suggests many WA audiences are impacted by the current economic context and are conscious of saving money while still keen to attend their favourite cultural activities. One WA respondent commented on the need to factor in multiple costs when planning their attendance,

> ‘I'm still going to shows but have had to spend less money while out to manage the rising cost of living. This means I spend less money on food and drinks while out and am more likely to drive myself rather than catch an Uber.’

Another mentioned changing their booking habits to ensure they are able to maintain their level of attendance, while keeping costs down:

> ‘I book cheaper seats but still for similar events and frequency, so I book early to get the best possible in my price range. I've switched to bequests rather than donations.’

Some audience members mentioned they are attending less due to overall increases in the cost of expenses. One said,

> ‘Every other element of our lives COSTS MORE NOW, so even if the cost of attending arts, live events and cultural activities stayed the same, these would be left behind or miss out because of this crippling inflation.’

Another said,

> ‘Mortgage going up, and work opportunities declining has had the biggest impact on my spending.’

‘[We attended] free city and building tours as part of the Boorloo Heritage Festival, school holiday workshops and events at the WA Museum for myself and daughter; free or affordable ticket prices, whatever fit into our schedule, interest, ability to access activity via public transport.’

WA audience member, April 2023

Half say their overall spending (53%) and frequency of attendance (50%) 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, WA audiences were the most likely to say their overall spending (53%) and frequency of attendance at events (50%) as decreased in the past 6 months. One said,

> 'As a pensioner my spending power is not great, so I have not been in the habit of spending big amounts. At the moment I am able to spend a little less than before inflation became a factor.'

While some are content with the attendance options available to them, they are opting to attend fewer events due to tighter budgets. One respondent said,

> 'I'm happy with the options to attend performances in Perth. I just don't have enough money to go to as many things as I would like to.'

Many WA audience members are eager to show their support for arts and cultural organisations they value

Among behaviours that are most likely to have remained steady, around two thirds of WA audiences said that donations to arts and cultural causes (64%) and subscriptions and memberships (64%) have not been affected (Figure 5).

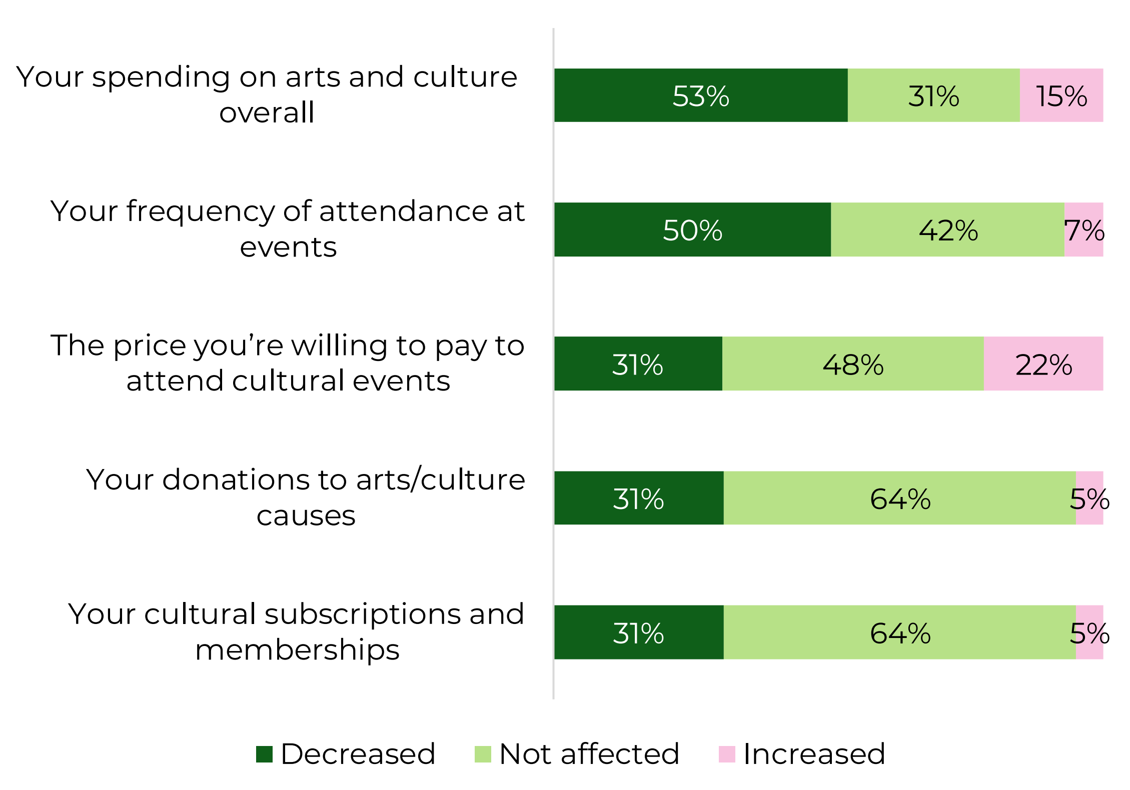
Qualitative data highlighted many respondents continue to subscribe to organisations they love amidst the current economic conditions. One said,

> 'I have an annual subscription to the WASO. This is the third year I have done so and did not hesitate to renew it for this year.'

Another said,

'We subscribe to the WA Opera Company and WASO as well as the WA Ballet Company. We are or have attended a maximum of 10 WASO concerts this year. We have booked for three of the WA Opera Company season offerings and three of the WA Ballet Company programmes.'

Figure 5: In the past 6 months, have the following things increased, decreased, or not been affected? WA audiences, (n=123)



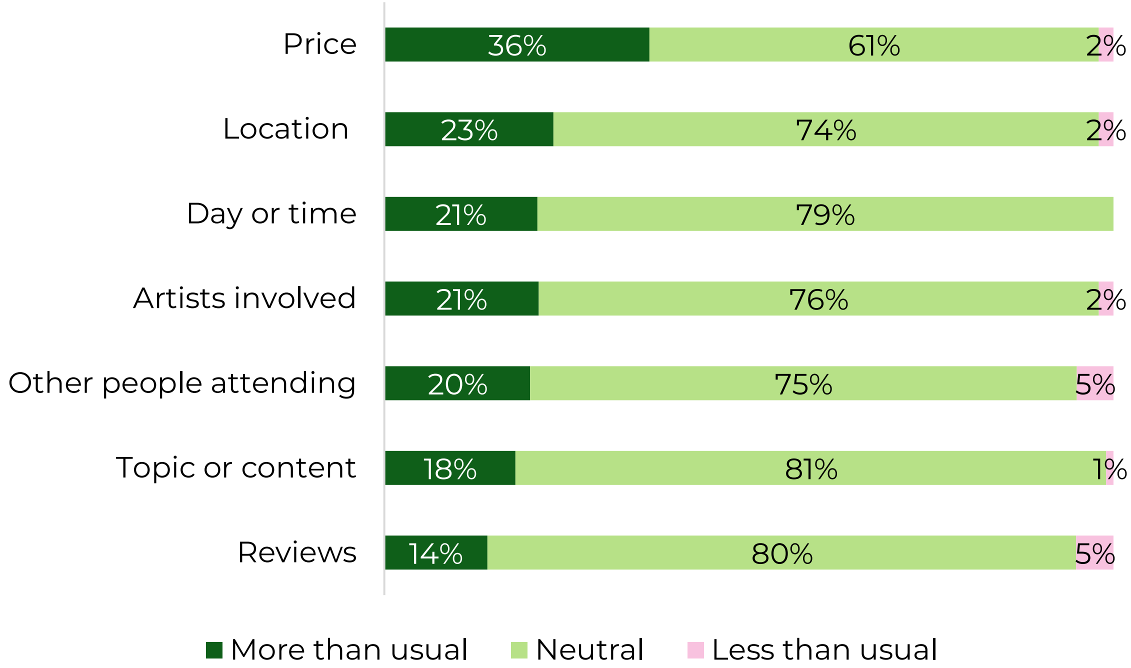
Over one-third (36%) WA attendees say they are affected by the price of cultural events more than usual at the moment

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, WA audience members were most likely to say that 'price' influenced their decision 'more than usual', relative to pre-pandemic times (36%). This was followed by the location of cultural events (23%), the day or time (21%) and the artists involved (21%) (Figure 6).

Reviews were the least likely factor to influence audience attendance decisions more than usual, compared to pre-pandemic (14%).

Figure 6: Compared to how you approached attending prior to the pandemic, to what extent were you more or less influenced by... WA audiences (n=90)

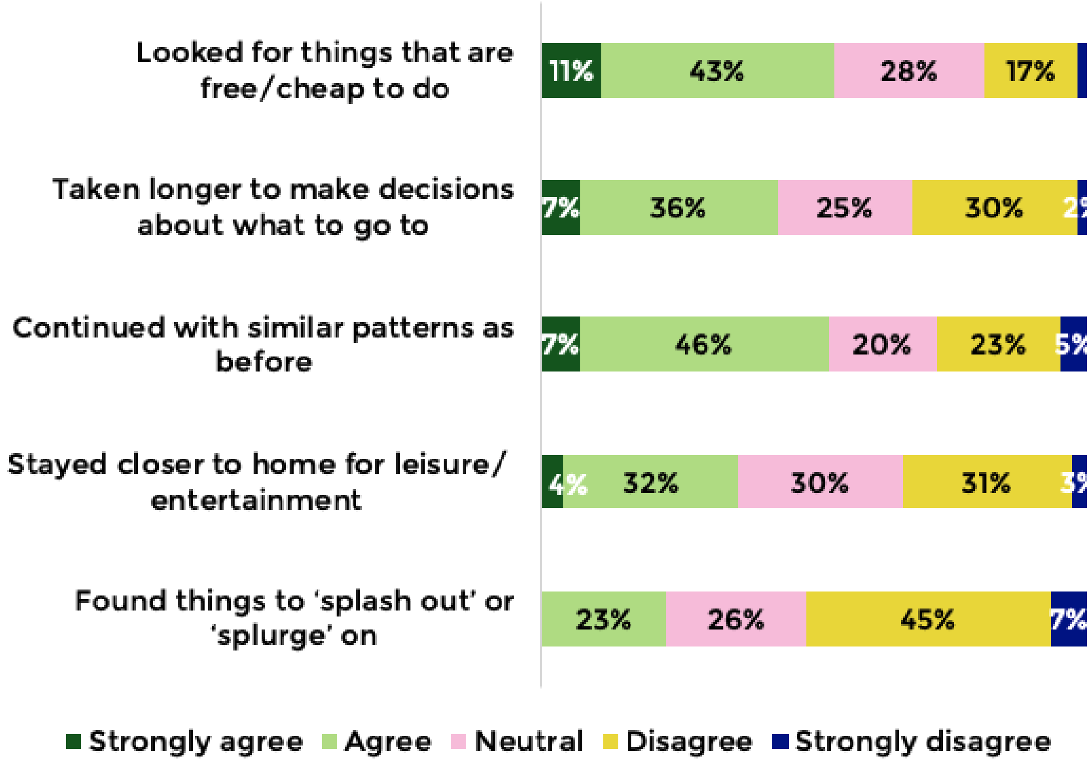


Over half of WA audiences are looking for free/cheap things (54%) – and 4 in 10 are taking longer to make decisions (43%)

Audiences were asked about the behaviour they've engaged in over the past 6 months, in light of their financial situation. WA audiences are the most likely to be 'looking for things that are free/cheap to do' (54% 'strongly agree' or 'agree') and least likely to be finding things to 'splash out' or 'splurge on' (23% 'strongly agree' or 'agree') (Figure 7).

Audiences are also taking longer to make decisions about attending (43%) – consistent with trends observed in previous round around last-minute ticket buying.

Figure 7: Given my financial situation, in the past 6 months, I have...WA audiences (n=122)



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

However, several WA respondents shared that despite costs increasing, they have continued to prioritise attending things they love. When asked about their recent attendance at arts and cultural activities, one said,

> 'WA Opera presenting Sondheim's Into the Woods. A major work, rarely seen in Perth and must-see despite the high cost. Rarely performed in WA, excellent cast, international production, well-tested.'

Others are opting to save money in some areas and maintaining their spending behaviours in others. One said,

> ‘I still subscribe to The Blue Room and Opera but go to only occasional ballet, contemporary dance, Black Swan Theatre and WASO. I did a lot of Fringe Festival events but only one Perth Festival event (i.e., going to as much but the cheaper events).’

Prioritising events within their budget is important for many WA audiences, who may be choosing to attend based on the affordability of events. One said,

> ‘[We attended] free city and building tours as part of the Boorloo Heritage Festival, school holiday workshops and events at the WA Museum for myself and daughter; free or affordable ticket prices, whatever fit into our schedule, interest, ability to access activity via public transport.’

Others are on the lookout for free arts and cultural activities, but are still willing to pay for occasional, higher-priced experiences. One shared,

> ‘I look for free family festivals and exhibitions, but still like to go to good quality entertainment sometimes too.’

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

As shown in Figure 6, around one-quarter (23%) of WA audiences say the ‘location’ of events is affecting their decision making more than usual – and over 1 in 3 audience members are opting to stay closer to home (36%).

Respondents living in regional areas noted they are considering other costs like travel, food and accommodation when deciding which cultural activities to attend. One said,

> ‘Now living in a "regional" area means not only purchasing tickets but also adding on petrol, accommodation and meals. So, I have to be picky as to what I choose.’

Another said,

> ‘Because I live 250 to 350 kms from arts/cultural venues, I have to consider the cost of fuel on top of the cost of the ticket. That plays a large part in determining what events I attend.’

As touring becomes increasingly costly for arts organisations, regional WA 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,

> ‘Living regionally – [there are] more limited options.’

Some respondents shared other reasons why travelling is difficult, including work and family commitments, and health. One said,

> ‘We are both unwell so have travelled less to cultural events, sadly.’

Perth-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 of attendees by providing instructions on how to arrive on their websites, newsletters or pre-event emails.

Other lifestyle changes continue to impact attendance for 1 in 5 WA 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 (22%) of WA respondents say they are prioritising other things in their life right now. Qualitative data highlights a diverse range of circumstances which are contributing to arts and culture not being as much of a priority anymore in the lives of some respondents, including work, family commitments, travel and health.

One respondent mentioned forming new habits when factoring in the needs and interests of others,

> ‘I have recently had a partner who now I try to factor into my activities, including going to arts and cultural events. Sometimes I don't attend them as we are doing other things. However, some things that I might not have attended, now both of us attend.’

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

> ‘Now being able to travel, money being spent on this, maybe more than average, to make up for lost time, this spending instead of arts, theatre etc. Also, COVID limited choice of live shows, especially those needing planning well in advance, but hopefully more things will be happening.’

Others are feeling spoilt for choice by the current programming, and they are being more selective. One said,

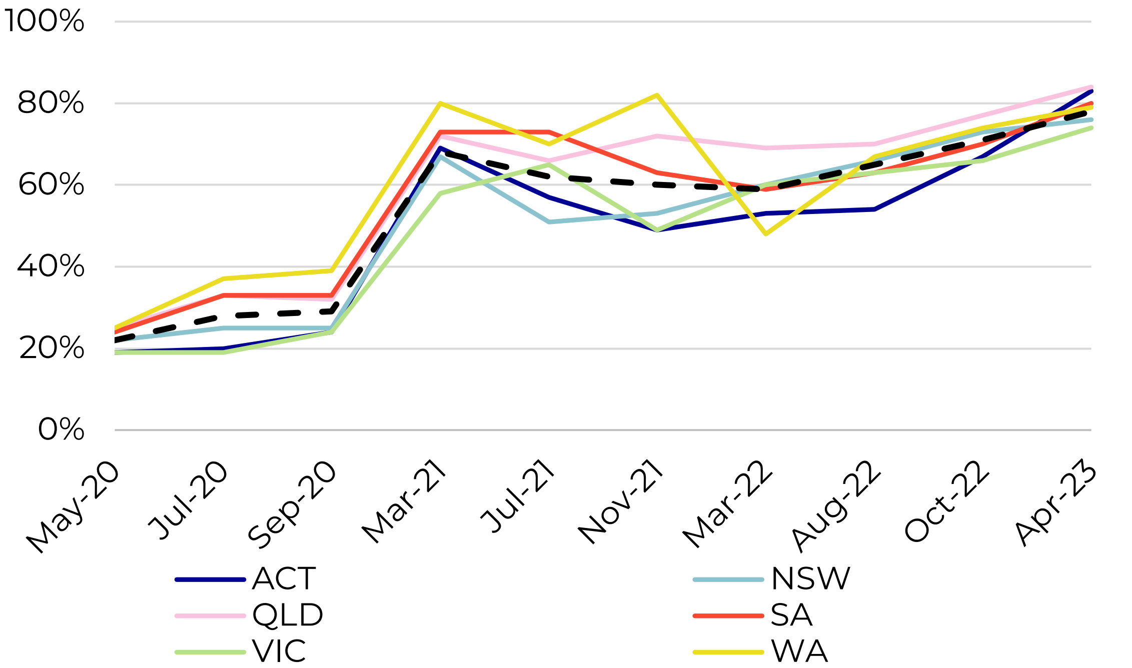
> ‘So many things to choose from means that sometimes I'll miss a good show to go to another one instead.’

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, 12% of WA audiences selected ‘the risk of contracting or transmitting the virus’ as a barrier to attendance, down from 38% in October 2022 (Figure 8).

Eight in 10 WA audience members (79%) said they are ready to attend ‘now or whenever permitted,’ up from 74% in October 2022. One in 5 have some level of caution (21%), slightly down from 24% in October 2022.

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 5 (20%) say they lack energy to go out. One WA respondent said,

> 'Have been reluctant to take up annual sales [subscriptions] and book event by event, which means I sometimes am lazy and don't go to as many as before.'

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 (31%) in April 2023, up from 10% in October 2022, which is consistent with national findings. One respondent said,

> 'I think working a stable job has allowed me to spend more on the arts, there are also a lack of lockdowns. Because of this I have been going to more events with international artists.'

Another said,

> 'If I see anything that appeals to me, I will book, it is variable depending on what's on offer.'

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, one-fifth (21%) of WA audience members were most likely to have been booking for events within the next seven days and the next 2-3 weeks (34%), 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.

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

One respondent suggested that clarifying refund policies would provide audiences with more assurance when booking cultural events. They commented,

> 'Actually, have a promised refund or credit in the event of cancellation or shut down I was told I would be given extension on gift cards for movies and an event... they refused, so my gift and show didn't happen. I don't know where the money went to) as well. I had tickets to a show that got rescheduled... our seats were adjusted and ended up in less expensive section and angled viewing. We had wanted to see this show mostly because [the] performers, post COVID, [did not] come to WA, and that is not a reason for credit or refund.
>
> As a result of these negative experiences...we will not be purchasing any event tickets in advance, only last minute (shows within 24 hours).'

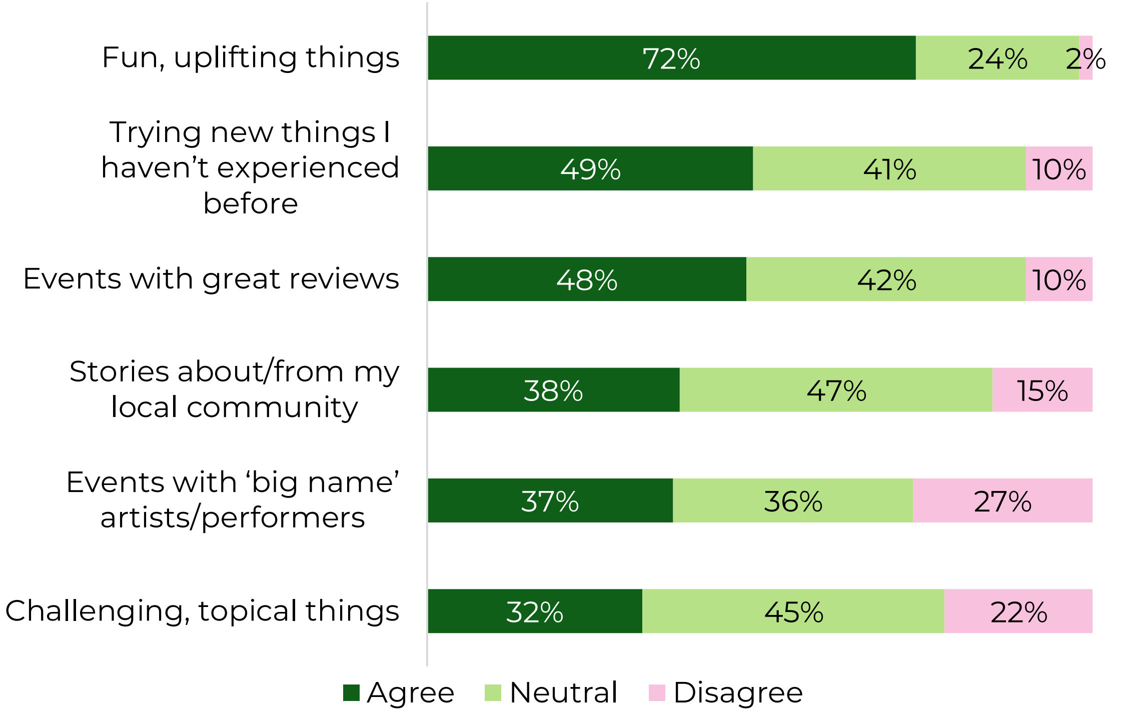
7 in 10 WA audiences say they will be attracted to fun, uplifting things in the coming year – and half want to try new things they haven't experienced before

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

WA audiences are most likely to agree that they'll be attracted to fun, uplifting things (72%) and half (49%) will be seeking new things they haven't experienced before.

However, there is also a strong appetite for challenging, topical things (32% agree), suggesting that diverse programming remains key to attracting different types of audience members (Figure 9).

Figure 9: In the coming year, I'll be most attracted to ... WA audiences (n=121)



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

> ‘Focus on programs that produce joy, I like to be entertained. good artists won't lecture you. They can weave messages with entertainment.’

While many are looking for new experiences, in times of uncertainty and change, some audiences may be looking to experience things they are familiar with, demonstrating a need for organisations to strike a balance between new and familiar in their programming. One said,

> ‘Perhaps it's nostalgia, but I do love the 'classics' of entertainment, e.g., Beethoven, The Mouse Trap, rather than modern pieces.’

WA respondents made practical suggestions around the time and duration of events - as lifestyles and habits evolve

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 respondents, of different age groups, cited their interest in earlier shows and events with shorter durations. One said,

> ‘The older I get the less I want to go out at night. I go out a lot during the day.’

Another said,

> ‘More opportunities for daytime events… perhaps of shorter duration suitable for slightly younger children with a short attention span.’

Some attendees have a preference for venues with adequate parking options – and suggested that cultural organisations promote these options more widely to assist patrons in streamlining their attendance. One said,

> ‘I do look to known venues with good safe parking, not too far from home and earlier performance times.’

Many WA respondents made suggestions around managing pricing to incentivise attendance

Considering the current economic climate, some WA audience members made practical suggestions for addressing financial barriers. Following the uncertainty of the pandemic era, audiences may be more conscious and appreciative of refund policies, which can improve their confidence in making purchasing decisions.

> ‘I feel it's important to offer refunds or credits within a reasonable time frame.... too many people attend a performance whilst unwell rather than lose out on the money they spent. As a result, it can be very harmful to others trying to maintain their health.’

Some suggested there may be a case to consider offering discounts for people booking for groups, as one said,

> ‘Provide offers to encourage people to come as small groups.’

As they deliberate over incidental costs such as travel, food, and accommodation when planning their attendance, some audience members may be weighing up overall value for money in their attendance decisions. One said,

> ‘Whilst I appreciate [that] vendors need to make a profit, at a recent concert a bottle of wine selling for $11 outside venue was $65 inside. The profiteering of food and beverage vendors is what stops me attending large events.’

However, others acknowledged the challenges in terms of balancing ticket prices with fair compensation for artists and organisations amidst the cost-of-living crisis. One said,

> ‘Obviously, I want affordability, but I want artists to be paid fairly for what they do. Finding that balance is important to me.’

WA attendees have an appetite for both local acts and touring acts, to support a diverse cultural landscape

Many audiences in WA are eager to see a return to touring from interstate and international artists and companies, following years of disruptions. One said,

> ‘I feel that in Perth we miss out on some of the bigger, more exciting exhibitions and events. I used to attend a lot more of the Perth Festival events than I do now as I find them not so inviting. The Art Gallery [of Western Australia] also does not hold the international exhibitions it once did, which is a shame. I am keen to see local things but would appreciate more from overseas or from other states.’

Others are keen to support local talent, demonstrating the need for balanced programming. One said,

> ‘I like to support good (hopefully) local content and smaller organisations. I don't like theatres putting on overseas shows that have been proven. It's probably a commercial decision but would like to see more local content supported.’

Many regional audiences want to experience more in their areas, as coordinating travel to see events can be challenging due to time and resources. One respondent said,

> ‘Last show I went to was Anh Do at Bunbury Entertainment Centre, fairly local. Would have loved to have seen Moulin Rouge but tickets too expensive especially for regional travellers. Would have loved to have gone to The Mousetrap but not enough dates were available that suited me to organise going to Perth.’

Another said,

> ‘Bring more shows to the country or at least to larger regional centres. Albany Entertainment Centre has some great shows that I attend in preference to Perth because of ease of driving around and finding parking.’

One audience member emphasised the need for inclusivity and support for established, working artists, saying,

> ‘It seems there is strong support for new and emerging artists, and the 'big names' are so big they don't need support. The established artists, that are not making big dollars are not supported as much.’

Audiences suggested enhancing marketing and advertising across a broad range of channels

Some WA respondents advocated for organisations to utilise the affordances of digital channels to boost audiences’ awareness of what’s on offer. One said,

> ‘All art places are doing a good job of advertising shows on social media, print media and around my city. Maybe they could advertise more on TikTok? I've noticed a lot younger demographic (12-17) use the service and do have an interest in the arts. I often see posts about them wanting to do more art stuff and looking for things to do in my city.
>
> It's hard though. I feel influencers do not really suit the promotion of cultural art activities, but there needs to be a fine balance. Unsure how to do this approach.’

However, it’s important to consider that audiences rely on various channels to hear about arts and cultural offerings, as one said,

> ‘Advertise better – don’t assume everyone resorts to their devices for update information.’

Another said,

> ‘Just as long as the information is made available, most particularly through the venues I most regularly attend, I find that sufficient.’

One mentioned including messaging about the organisation, the act, and reviews in the marketing, saying,

> ‘Keep providing plenty of reviews. Provide background to the company performing.’

Further insights about key communications channels catered to different segments are provided in the National Audience Segments, overleaf.

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.

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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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