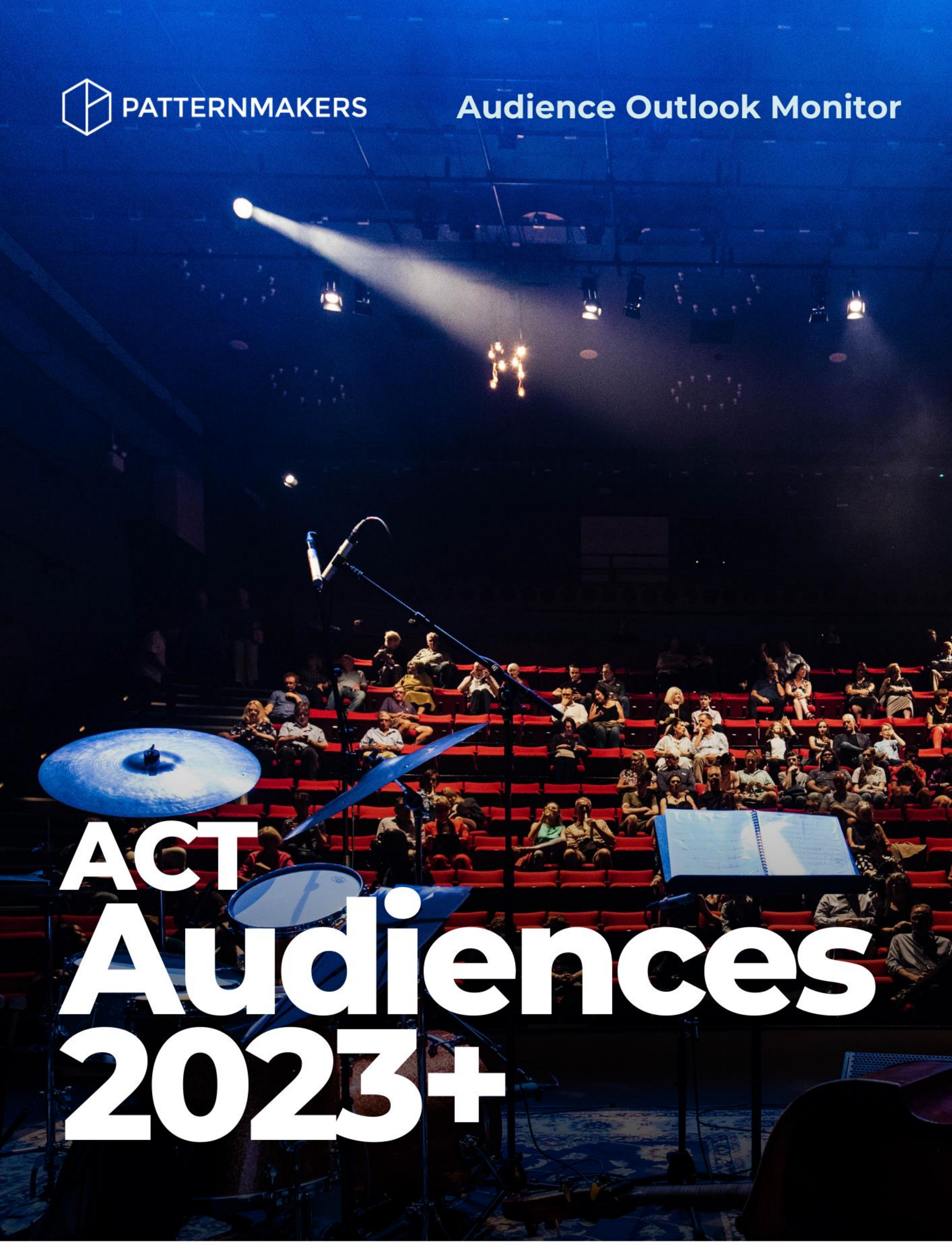
PATTERNMAKERS

Audience Outlook Monitor



ACT Audiences 2023+

wolf brown

ACT Government

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Last-minute decision-making is paramount in ACT, as audiences having more choices, taking longer to decide given their financial circumstances and don't want to be locked in. Organisations need to prepare for new phases in campaigns to reach people at the right time with the right messages.

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ACT subscribers and members are the most dedicated across the country, and are vital for many arts organisations, presenting opportunities for ACT organisations to adjust their packages to enhance the appeal for audiences.

Cover Image Credit: Wayne Kelly, courtesy of The Street Theatre.

Introduction

This report shares insights from over 300 attendees living in the Australian Capital Territory about their attendance in 2023 and beyond

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

This Australian Capital Territory (ACT) Snapshot Report outlines key findings from Phase 9 (August 2023) of the Audience Outlook Monitor in Australia, based on data collected from 324 audience members living in the ACT.

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

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

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

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

1.

Attendance trajectories

Image Credit: Creswick Collective, courtesy of The Street Theatre.

1. Attendance Trajectories

Attendance rates in ACT continue to recover since the pandemic, and with a challenging year ahead, it's wise to set sights on the right targets.

Key points:

- Museum and gallery attendance is up, while performing arts audiences are showing a slower recovery compared to October 2022.
- Australia-wide, strategic investment and programming shifts have helped many organisations sustain or increase their capacity in 2022 and 2023, but charting recovery is complex, with mixed attendance results across the market.
- 65% of ACT audience members expect their attendance levels will stay the same in the next 12 months, with major leaps in attendance appear unlikely.
- It's a good time to rethink what success looks like and adopt the right targets for the conditions.

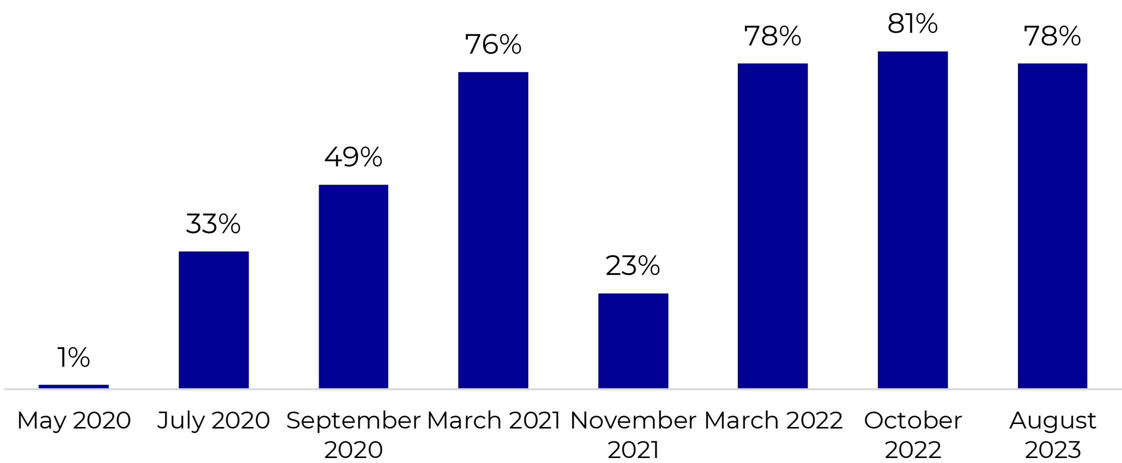
ACT audiences have maintained their attendance frequency since March 2022, but there's more to the story

As the nation continues its recovery from the pandemic, ACT audiences have maintained healthy rates of attendance to cultural events in-person. The ACT lockdowns of late 2021 saw a strong drop in participation, and attendance was lowest in November 2021 (23%). However since then, around 8 in 10 ACT audience members have reported attending at least one kind of cultural event in the fortnight prior to data collection – with attendance rates reaching their highest point in October 2022 (81%) since 2020.

In August 2023, 78% of ACT audiences said they had attended an in-person cultural event, which is consistent with the national average (79%) and slightly down from 81% in October 2022.

When comparing the results to other states, New South Wales (NSW) audiences were the most likely to have attended a cultural activity in-person in the fortnight prior to data collection (82%), while audiences from Western Australia (WA) and South Australia (SA) were the least likely (both 76%).

Figure 1: Proportion of ACT respondents answering yes to 'In the past fortnight, did you do a cultural activity in-person (not online)?' May 2020 to August 2023 (n=324)



There are also key differences in how various groups are attending and spending around the country:

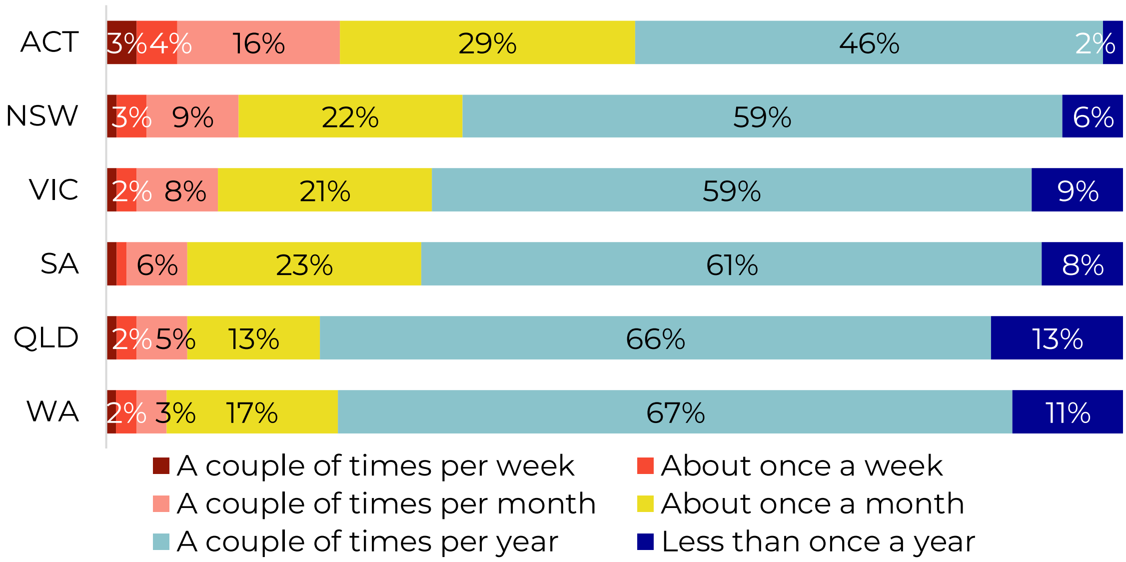
- **Young and restless:** Audiences under 35 are attending frequently, but spending the least, with concerns about their economic outlook.
- **Family frugality:** Audiences aged 35-54 with children living at home were less likely to have attended a cultural activity in the last fortnight and are managing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

Although there will always be exceptions, understanding the major differences between these three groups is a helpful starting point, with a summary of these three national segments available in Chapter 4 of this report (Segmented Approaches).

Among ACT audiences, frequency of attendance is growing at museums and galleries and at live performances

In the ACT, frequency of attendance at museums and galleries has increased in August 2023, with 52% attending at least once a month, up from 19% in October 2022. This is significantly above the national average (32%).

Figure 2: Attendance frequency at museums and galleries by state or territory, August 2023. (ACT audiences, n=289).



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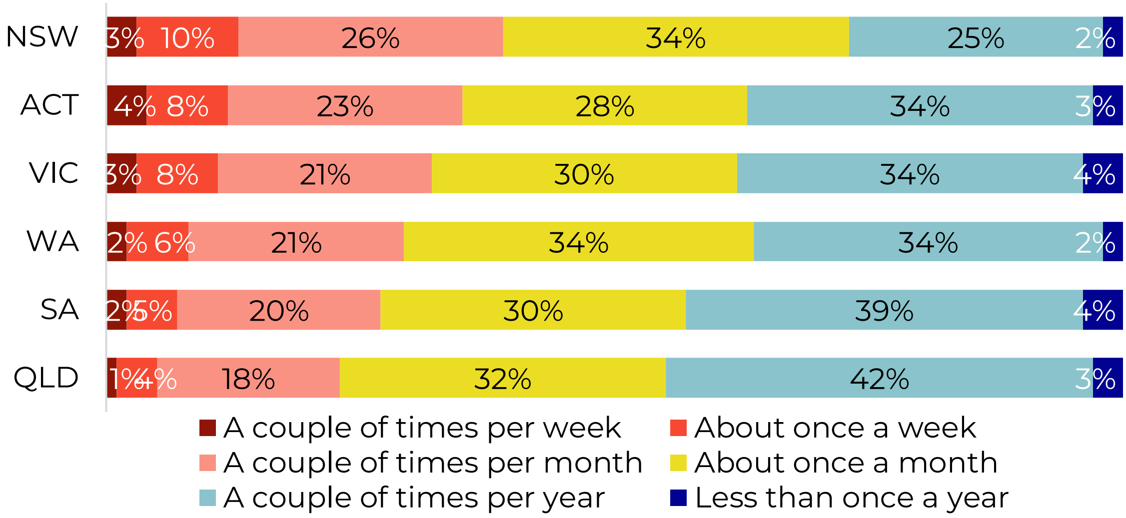
Amongst ACT audiences, attendance frequency is higher at performing arts events in August 2023, compared to October 2022. Six in 10 (63%) attended at least once a month in August 2023, up from 46% in October 2022 – suggesting that performing arts audiences in the ACT may be recovering at a slower rate compared to museums and galleries audiences.

The proportion attending performing arts in the ACT is relatively consistent with the national average (65%). Across the country, audiences in NSW are, on average, attending performing arts venues the most frequently compared to other states, with 73% attending at least once a month in August 2023. Frequency of attendance is lowest among QLD audiences, with 55% attending at least once a month.

Figure 3: Attendance frequency at performing arts events by state or territory, August 2023. (ACT audiences, n=287).



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

On a national level, although participation rates and frequency are trending in a positive direction, behaviour has not returned to pre-pandemic levels.

Arts organisations participating in the Audience Outlook Monitor were asked to provide attendance figures for 2019 and 2022, to compare how audiences have changed and to what extent the industry has rebuilt its

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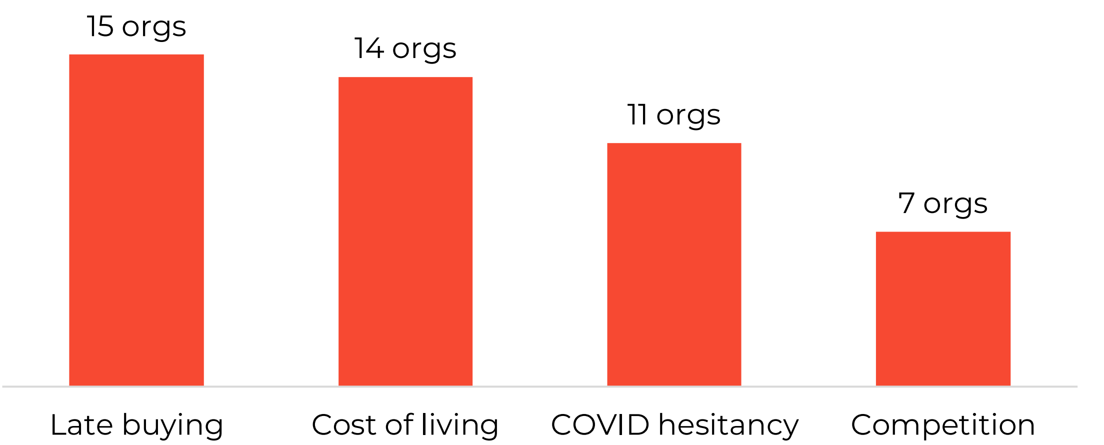
audiences following the pandemic. They were also asked what their biggest challenges and successes have been. The following sections discuss the results at the national level.

52 organisations across the country (including 2 ACT organisations) responded to the benchmarking survey, and their responses confirm the past few years have been challenging, with a range of factors impacting differently across the market. Some organisations have been affected by natural disasters, while others are unscathed. 11 of the organisations were feeling the impact of COVID as their top challenge, while others were feeling different pressures.

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

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



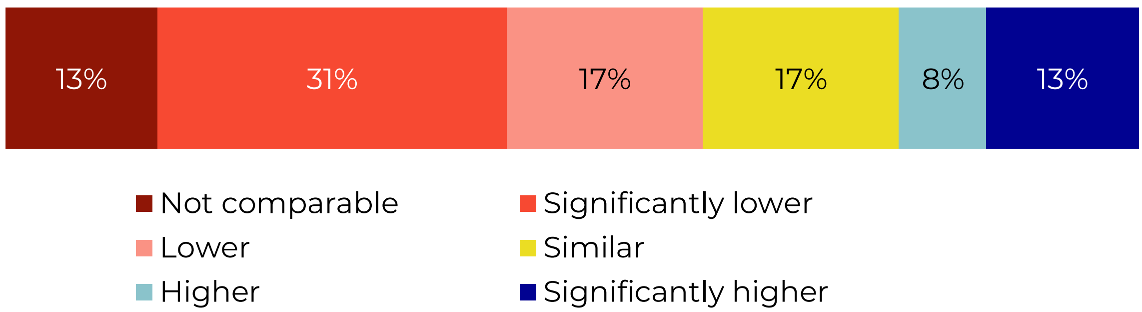
Organisations across Australia are adapting to the new landscape in different ways, and around 4 in 10 have rebuilt their audience to 2019 levels

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

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

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

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



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

Attendance numbers are influenced by changes in programming, capacity, funding and strategic shifts, so it's not always a fair comparison.

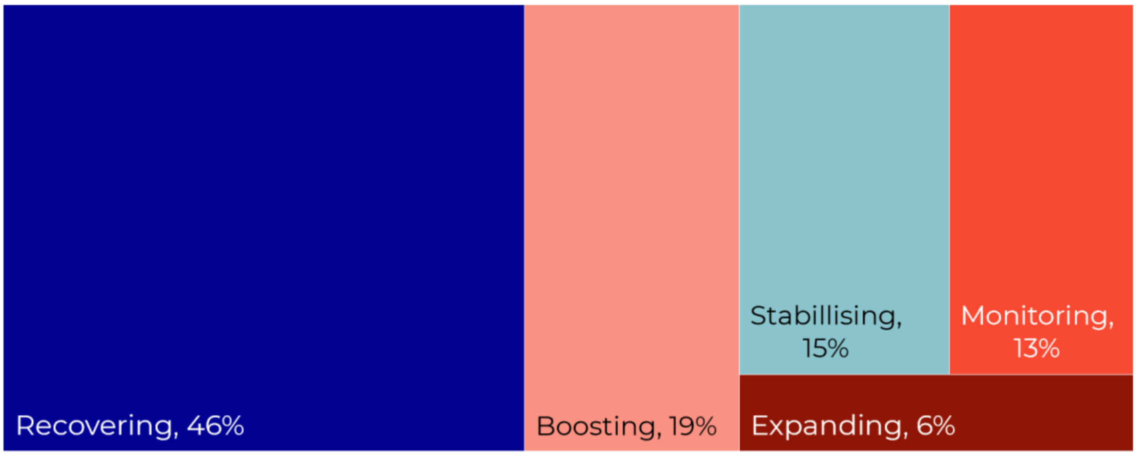
Organisations were placed into these categories by evaluating against the following four elements:

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

Five different groups of organisations are apparent:

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

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



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

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

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

One organisation classified as expanding noted that likely factors for the result related to its core business of free/cheap events and its strong trust with the community it serves.

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

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

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

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

Supply was also a common theme, with all boosting organisations reporting that they've increased the number of paid and/or free events since 2019. A number of boosting organisation noted their biggest successes were strong marketing and communication.

All boosting organisations noted changes in programming, with blockbuster programming a common trend. One organisation said their biggest success in bringing back audiences was blockbuster shows.

With international touring increasing, some boosting organisations cited this as a success. However, not all touring product is reaching an audience.

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

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

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

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

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

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

The 2 participating organisations from ACT were both categorised as ‘stabilising’. Some factors for their results included having their local audiences stay close to home during restricted travel periods in neighbouring states over the last few years, one organisation shared,

> ‘Attendance was also high when there were less competing entertainment options (e.g., travel restrictions meant local residents could not travel interstate or overseas).’ (Organisation, ACT)

However, this situation has shifted over the past year and another organisation noted that,

> 'While we have been able to attract new audiences with compelling content, core and regular audiences have been slower in returning.' (Organisation, ACT)

Programs with wide appeal were also noted as being key to attracting audiences through this recovery period, with one organisation saying:

> 'Programming light-hearted, well-known commercial entertainment experiences (e.g., comedy shows, popular music acts, tributes) has brought record numbers of patrons since 2020.' (Organisation, ACT)

Organisations that were able to sustain audience levels over the past years will need to explore how the changing sentiments and challenges faced across the country will impact their reach.

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

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

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

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

Across Australia, 30% of recovering organisations mentioned cost of living and 39% mentioned late-buying ticket cycles as a barrier to recovery.

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

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

In ACT, big increases in attendance appear unlikely over the next 12 months, with 6 in 10 predicting their attendance will stay the same

In October 2022, about half of ACT respondents to the Audience Outlook Monitor survey (56%) said their current level of attendance would 'definitely' or 'likely' increase over the following year. In August 2023, that proportion dropped to 1 in 3 respondents (29%), while 65% said they expect that their current level of attendance at cultural events will stay 'about the same'.

This trend is consistent throughout the states and territories, with fewer audiences in August 2023 expecting their attendance will likely or definitely increase moving forward, compared to October 2022.

On a national level, in August 2023, 66% audiences expect their attendance will stay the same, while 27% expect it will 'definitely' or 'likely' increase.

Inflationary pressures are impacting household budgets, ultimately affecting attendance decisions and frequency – with major changes unlikely for at least 12-18 months (the Reserve Bank of Australia (RBA) predicts inflation to return to the target range by late 2025). This topic is covered in depth in the next chapter.

"Programming light-hearted, well-known commercial entertainment experiences (e.g. comedy shows, popular music acts, tributes) has brought record numbers of patrons since 2020."

Organisation
ACT

Things to think about when charting attendance trajectories:

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

Here are some things for ACT organisations to consider:

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

2. Inflationary pressures and pricing

Image Credit: Creswick Collective, courtesy of The Street Theatre.

2. Inflationary pressures and pricing

ACT audiences are prioritising other things and are facing financial barriers, impacting their attendance behaviours and what they can spend on events – and some segments need targeted thinking to ensure access to arts and culture.

Key points:

- Prioritising other things and financial reasons are the top barriers to attendance facing ACT audiences, and inflationary pressures are expected to continue in 2023 and 2024.
- ACT audiences are generally feeling optimistic about their current and future financial position. compared to other states and territories.
- ACT audiences have maintained spending levels at arts and culture events, as audiences across the country weigh up value for money and take longer to make decisions.

Unlike other states and territories, the top barrier for ACT audiences is prioritising other things, closely followed by financial reasons

In August 2023, audiences were asked: ‘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)’ (Figure 7).

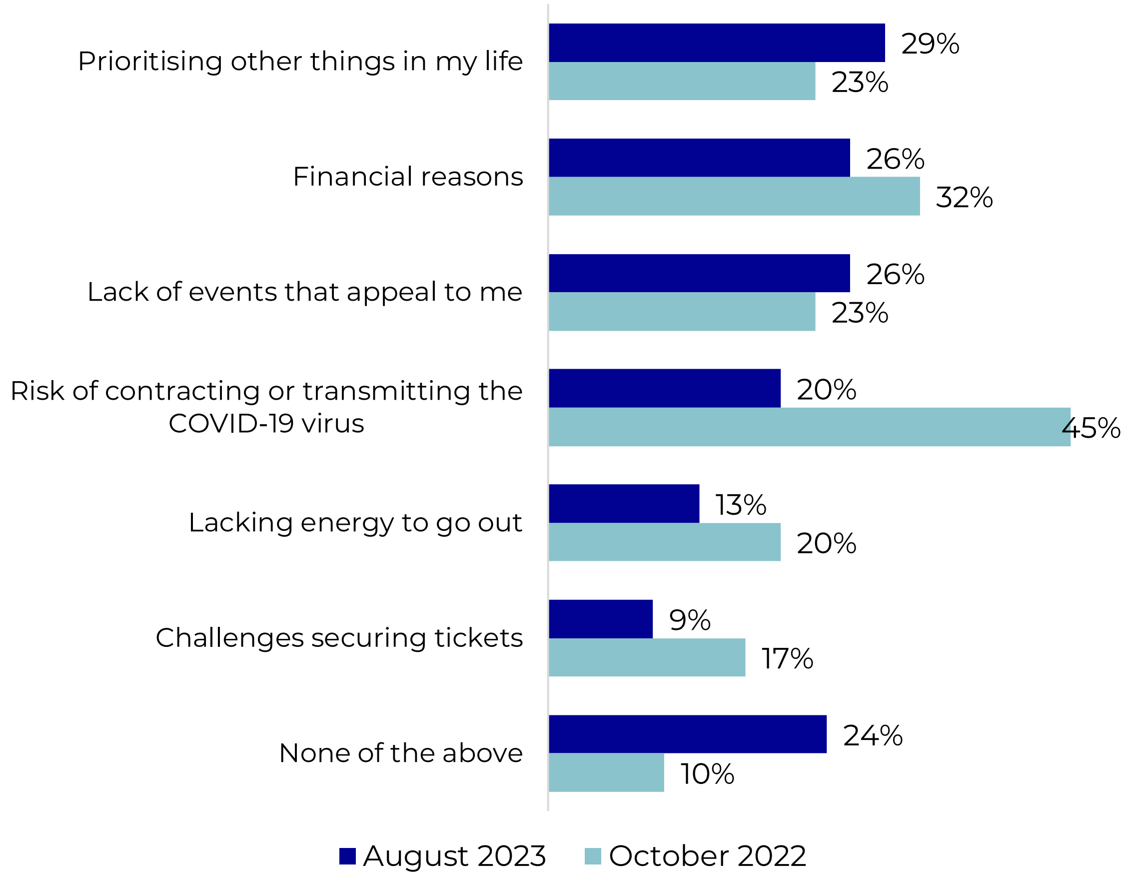
The top barrier to attendance for ACT audiences was ‘prioritising other things,’ with 3 in 10 (29%) ACT audiences saying this is preventing them from attending arts and culture events.

The picture is slightly different across the country compared to the ACT: in August 2023, data shows that across all other states and territories, financial reasons are the top barrier impacting audience attendance.

The second highest barrier for ACT audiences was financial reasons (26%), which has dropped since October 2022 from 32%. This is significantly lower compared to VIC audiences (41%) who are among the most likely to cite financial barriers, alongside QLD audiences (42%).

Compared to other states, ACT audiences are still noting the risk of contracting or transmitting the COVID-19 virus as a barrier to attending (20%). This has dropped significantly since October 2022 (45%); however, it is notably higher than NSW (9%), QLD (7%), VIC (11%) and WA (8%).

Figure 7: Can you tell us if anything is preventing you from attending in-person arts and culture events as you used to in the past? (Select up to three). ACT audiences, August 2023 (n=321) and October 2022 (n=384).



ACT audiences are spending less than the national average, and spending levels aren't growing, with consumer confidence remaining low in August 2023

The proportion of ACT audiences attending in-person cultural events has slightly dropped since October 2022, and on average, spending levels have not grown, remaining consistent with October 2022.

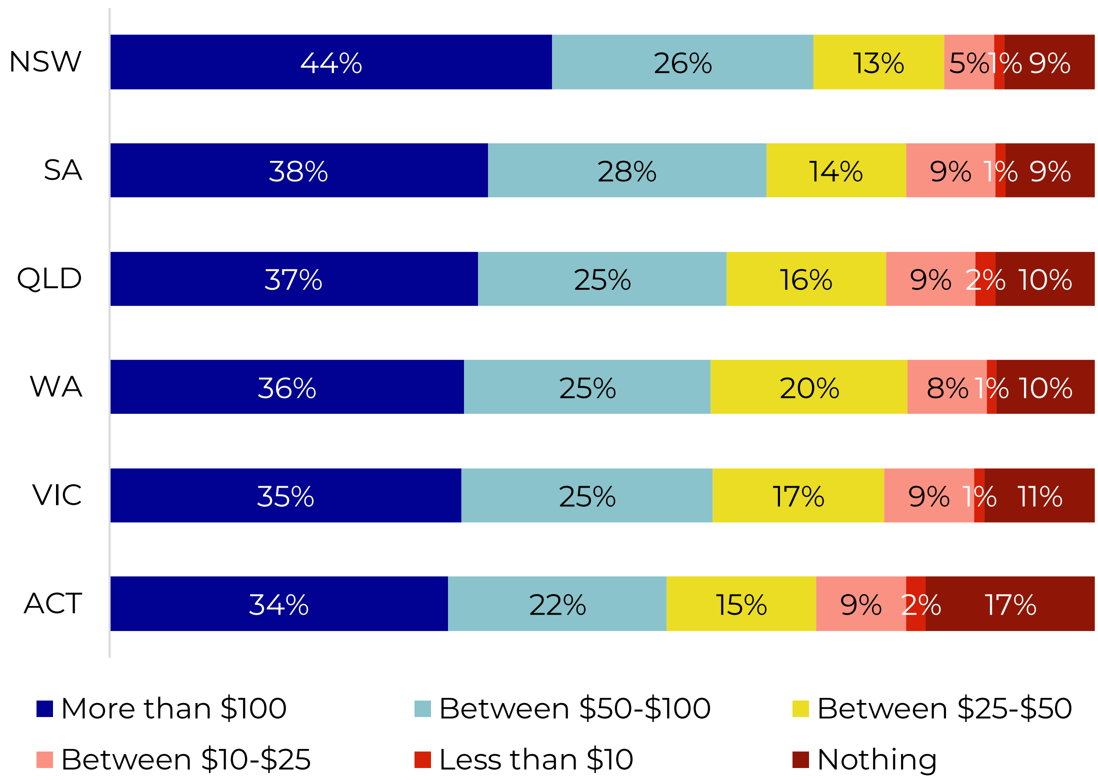
Likewise, on a national level, spending levels at arts and cultural events are not growing.

In August 2023, over half (58%) of those attending in the ACT spent $50 or more on tickets to in-person live events and cultural activities, consistent with spending in October 2022 (56%). This rate is lower than

NSW audiences, for instance (70%), and the national average (64%) (Figure 8).

The latest ANZ-Roy Morgan Australian Consumer Confidence survey reported on 8 August 2023 shows that 'confidence has been in very weak territory for 23 consecutive weeks, the longest weak streak on record.' Spending levels vary slightly between age groups (see Segmented approaches for further information).

Figure 8: In the past fortnight, how much did you spend on tickets to in person live events and cultural activities? By state (ACT audiences, n=244)



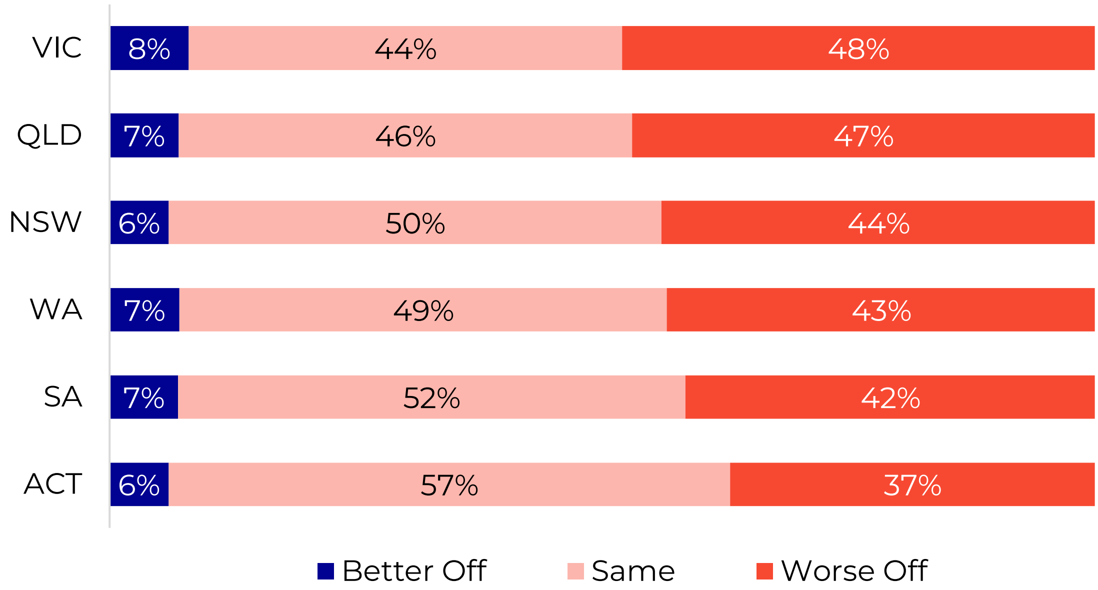
Over 1 in 3 ACT audiences said they are financially 'worse off compared to last year

In August 2023, audiences were asked: 'Would you say that you (and any family living with you) are better off or worse off financially than you were a year ago?'.

Overall, over a third of ACT audiences say they are 'worse off' (37%), while 57% say they are the 'same' as one year ago. Only 6% overall report that they are 'better off'.

Comparing the results by state/territory, VIC audiences were the most likely to say they are 'worse off' (48%) now compared to a year ago, while audiences in the ACT (37%) and SA (42%) were least likely to be feeling 'worse off' right now.

Figure 9: Would you say that you (and any family living with you) are better off or worse off financially than you were a year ago? By state of respondent, August 2023 (ACT audiences, n=320)



ACT audiences are weighing up their options and considering their priorities when it comes to attending

Qualitative data from ACT audience members suggests that many are attending cultural activities, but are seeking out value for money as they weigh up their options. One said,

> 'I am always looking for value events, but I try to budget so I can "splash out' if something special comes along.' (55-64, ACT)

Others mentioned they are thinking about the whole picture and added costs involved, even at free or cheap events. One said,

> 'The increase in food and beverages, including at free and cheap events is now a consideration.' (Age unknown, ACT)

Another said,

> 'Parents of young children have the additional cost of paying for babysitters on top of ticket prices etc.' (35-54, ACT)

Some audience members from the ACT noted not feeling the financial pressures felt by many across the country, but still enjoying the quality free arts and cultural experiences on offer in the nation's capital. One said,

> 'Arts and cultural attendance are the only form of entertainment we do outside of home and is an easy choice as the first call on disposable income. Nevertheless, we love free things that are put on by the national cultural institutions for which we happily pay taxes, and from which we benefit disproportionately because we live in the ACT.' (65-74, ACT)

Some audience respondents also noted the inadvertent costs such as medical as well as the financial position of their friends and family impacting their attendance.

> 'I am more comfortable financially than many people, but I have family and there are others in need who are not. I also need to take into account my own needs as I get older. I have spent more on health-related needs than ever before in my life this past year in Canberra. This is why I am cautious about what I go to see and where it is.' (65-74, ACT)

Compared to other states and territories, ACT audiences are generally more likely to feel stable in their future financial circumstances

Audiences were also asked: 'Now looking ahead – do you think that a year from now you (and any family living with you) will be better off financially, or worse off, or just the same as now?'.

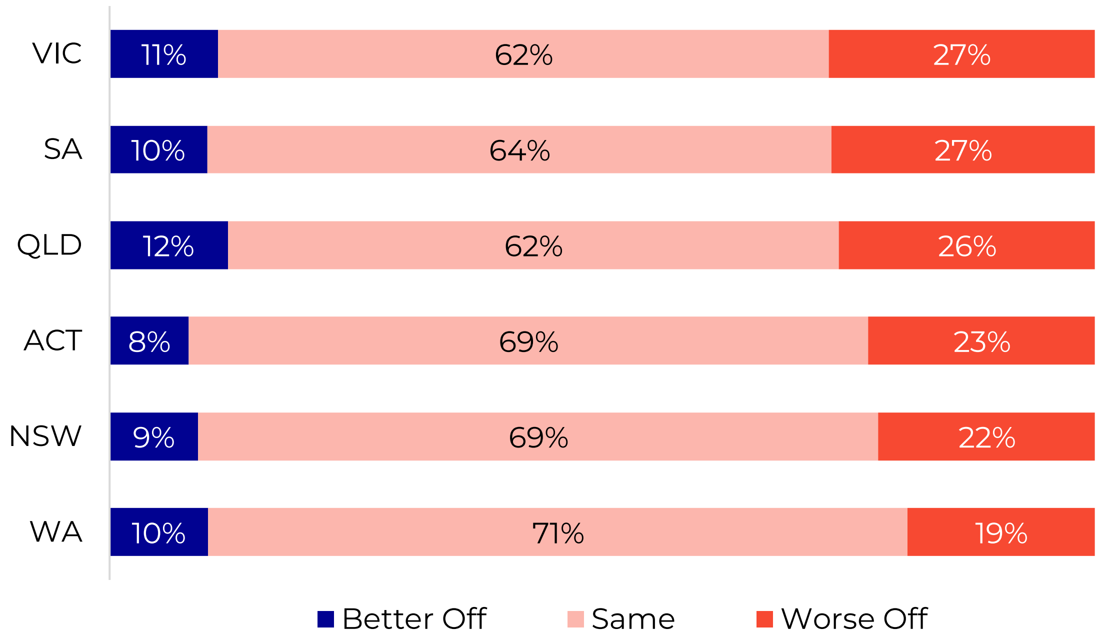
ACT audiences are among the most likely of all states and territories to be expecting financial stability in the coming year. Seven in 10 (69%) of ACT arts audiences expect to be in the 'same' financial position a year from now, consistent with NSW (69%) and behind WA (71%).

Despite more financially stable compared to other states, some ACT audiences are feeling less optimistic, with 23% expecting their financial situation will worsen over the next year. One respondent said, 'We are looking forward to shortly seeing shows that were booked last year, but once completed, will be unable to attend any further shows unless gifted or won.' (65-74, ACT)

Meanwhile, 8% expect to be 'better off' in a year's time – the lowest rate compared to other states and territories (

Figure 10).

Figure 10: Now looking ahead – do you think that a year from now you (and any family living with you) will be better off financially, or worse off, or just the same as now? By state, August 2023 (ACT audiences, n=306)

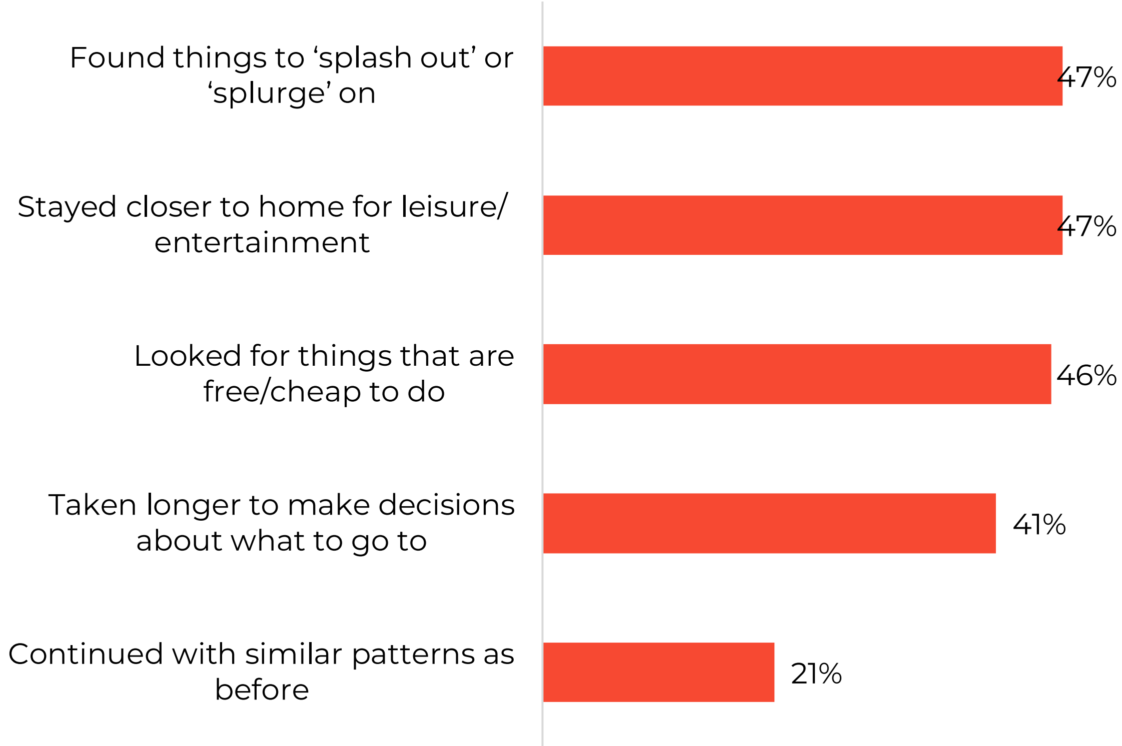


Nearly half of ACT audiences are looking for cheap things to do – and 47% are also 'splashing out' or 'splurging'

Audiences were asked about the ways in which their attendance behaviour has been affected by their financial situation at the moment.

Nearly half of ACT audiences were had been looking for things that are free/cheap to do (46% agree or strongly agree) – the lowest proportion amongst all states (Figure 11).

Figure 11: Given my financial situation, in the past 6 months, I have... (strongly agree and agree). ACT audiences, August 2023 (n=377)



One audience member noted that have swapped blockbuster shows for local offerings that are more affordable. They said,

> '[We] have chosen cheaper events to go to over big productions' (35-54, ACT)

Another respondent noted that they had to change their preferred artforms due to no longer being affordable. They said,

> 'Financial constraints. I can no longer afford opera or most classical ballet.' (65-74, ACT)

Nearly half of ACT audiences also reported finding things to 'splash out' or 'splurge' on in the past 6 months (47%). Qualitative data indicates that some ACT audiences are making decisions to forgo attending some events so they can 'splash out' or 'splurge' on the things they are really passionate about, with one saying:

> 'I am always looking for value events, but I try to budget so I can "splash out' if something special comes along' (55-64, ACT)

Four in 10 ACT audiences (41%) said that due to their financial situation, they took longer to make decisions over the past 6 months. One respondent shared that they were thinking more about how they were spending their time and money,

> 'More mindful of where my time, energy, and money goes.' (Age unknown, ACT)

While many ACT audiences have changed their attendance behaviour, 21% reported continuing similar patterns as before. One respondent noted that comfort in their financial situation means they are happy to spend on cultural activities, saying,

> 'We do not have dependents, so theatre and movies are some of the things we choose to spend our money on' (35-54, ACT)

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

Some ACT audiences are looking at the full picture and cost involved when committing to attending arts and cultural events. One respondent noted the increasing food and beverage prices at venues is impacting their decision-making, saying,

> 'Good cheap food at the event helps' (55-64, ACT)

Qualitative data shows that under 35s in ACT are eager to attend cultural events but are feeling the pinch in the cost-of-living crisis – ultimately inhibiting their ability to attend. One said,

> 'Ticket prices should be as low as possible, especially for young people and students' (Under 35, ACT)

Another respondent under 35 noted that while financial barriers play a part, tickets are worth the expense for something unique. They said,

> 'It's expected that expense is one of the biggest factors as to whether people commit to attending events/experiences, but I think the more unique, the more people are willing to go out of their way/pay to attend.' (Under 35, ACT)

Some respondents also note the importance for offering cheaper ticketing options for younger audiences, to ensure they can access artforms that are traditionally priced higher. An older audience member noted their concern of financial barriers for young audiences, saying:

> ‘Maybe cheaper tickets for young people to go to classical museum’ (75+, ACT)

"I am always looking for value events, but I try to budget so I can "splash out' if something special comes along."

Audience member
65-74, ACT

Things to think about when addressing financial barriers to attendance

ACT audiences are weighing up their options and some are feeling the pinch when balancing up the costs of attending cultural events – though some are more disadvantaged than others.

Here are some things for ACT organisations to consider:

- ❑ Prioritise discussions around meaningfully building future audiences, and consider whether you have the right strategies in place to meet this generational challenge
- ❑ With the abundance of choice in arts and entertainment alongside economic pressures, ACT arts audiences have indicated their biggest prioritising other things – so it's worth exploring new ways to simplify and clarify how you communicate your offering to make for easier decision-making
- ❑ Consider new ways to cross-subsidise events in programs and/or seek funding and partnerships to enable greater discounts and opportunities for financially disadvantaged segments
- ❑ Draw on data about how different segments may be affected in ACT when assessing the case for funding in grant, partnership and sponsorship applications.
- ❑ Review the level of discounts offered for younger people and concession pricing in relation to the level of disadvantage they experience – and for families in ACT too
- ❑ Try to avoid last-minute ticket discounts and think ahead about strategic offers that can realistically be maintained longer-term, to build consistency, clarity and trust with audiences
- ❑ Spread awareness about travel initiatives that could help audiences get to your event

3.

The desire to inspire

Image Credit: Creswick Collective, courtesy of The Street Theatre.

3. The desire to inspire

Amidst a challenging outlook, ACT audiences are in the mood for both uplifting experiences and challenging content – requiring organisations to think creatively about affecting meaning and building trust in difficult times.

Key points:

- While ACT audiences appear to be feeling budget pressures to a lesser extent, they're still leaning towards 'safer' bets – with high proportions of ACT audiences are seeking out fun, uplifting experiences and events with great reviews to ensure value for money.
- ACT audiences are the most likely to be attracted to challenging, topical things.
- High proportions of ACT audiences are seeking out fun, uplifting experiences and events with great reviews to ensure value for money.
- ACT audiences love the quality of offerings from the nation's capital, and want to ensure it continues to expand.

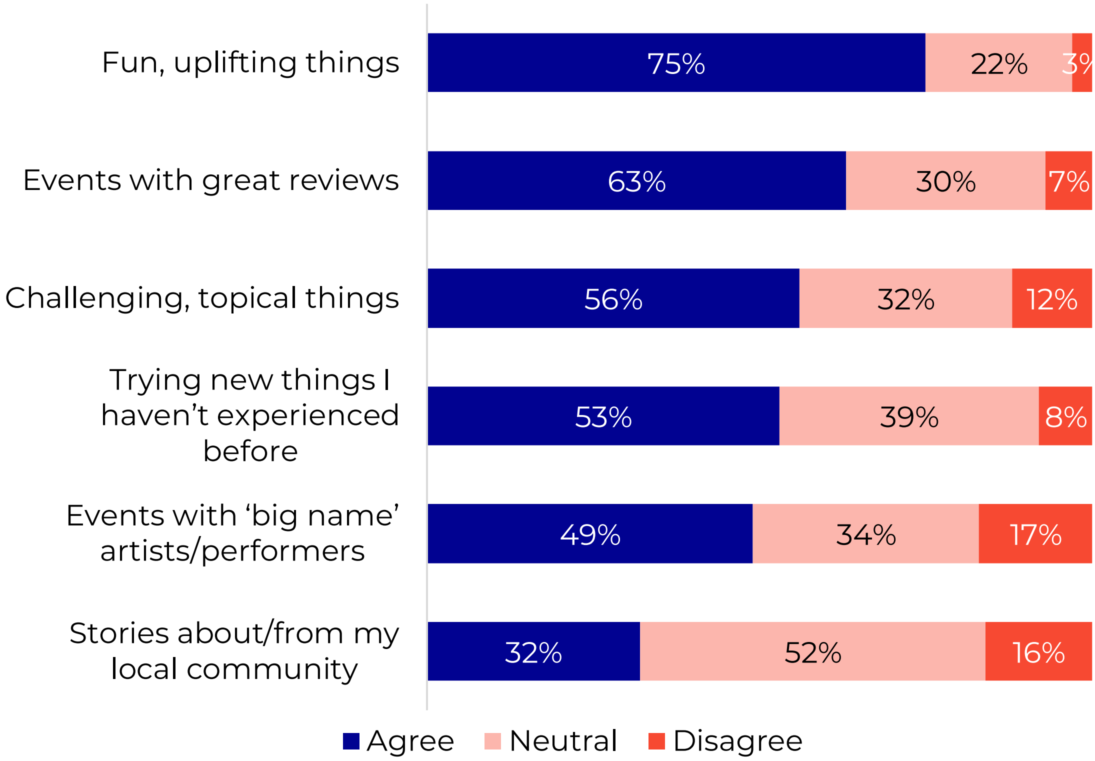
- Organisations that understand the mood can please crowds today while building trust for tomorrow.

ACT audiences are interested in a wide range of content, and are the most eager for challenging, topical things compared to other states

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

The results show significant appetite amongst ACT audiences for all options tested, including fun, uplifting things (75%), events with great reviews (63%), and challenging, topical things (56%).

Figure 12: In the coming year, I'll be most attracted to... August 2023 (ACT audiences, n=316)



PATTERNMAKERS

ACT audiences are eager for uplifting and inclusive arts experiences – which offer reprieve in challenging times

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

Responses suggest that many audiences whose wellbeing has been affected by the cost-of-living crisis and other challenges in the wake of the pandemic appear to be more likely to seek this reprieve. Many are looking for lighter works which provide opportunities for escapism, as one said,

> ‘In difficult social times, comedy, satire and light uplifting productions may be more entertaining and have a role to play in distracting us and giving us a break from reality.’ (65-74, ACT)

Others shared,

> ‘I go to be entertained or educated. I don't want to come home feeling miserable’ (55-64, ACT)

> ‘I think people are needing flexibility, accessibility, affordability, inclusivity, as well as meaningful, enriching experiences and knowledge. Times are tough and people need opportunities to integrate arts and culture with their daily lives.’ (Age unknown, ACT)

Although 53% say they’ll be drawn to things they haven’t experienced before, some audiences may be taking less risks in the face of challenging conditions.

There is appetite for the diverse and vibrant arts scene in ACT, and many want it to continue growing

ACT audiences highly value the arts, and despite challenges impacting attendance for many, they want to see the local arts scene continue to flourish. One respondent shared,

> ‘Less 'events' more daily/weekly interface…from home through a screen, within local community, maybe more subscription style access, less exclusivity but NOT dumbed down and diluted. Content that reflects our lives, our aspirations and that provides hope. People need beauty and optimism too.’ (Age unknown, ACT)

Similarly, another respondent said,

> ‘Tough times don't mean we just want to be dazzled with light entertainment. If I'm going to spend time, money and effort to attend an event, I want it to be high quality and impactful (whether that means it makes me laugh or cry or think).’ (35-54, ACT)

Some respondents were particularly focussed on supporting new work and contemporary artists. One respondent said,

> ‘More new works/fewer revivals and imports.’ (35-54, ACT)

Another said,

> ‘Provide more opportunities to interact or listen to artists, e.g., more talks about their art.’ (55-64, ACT).

A number of audiences mentioned a perceived lack of support for deeper engagement and understanding for some arts and cultural events. One said,

> ‘Without turning performances into lectures, I think there is an audience desire for more context/history/commentary associated with performances. This can add to the experience if done well and kept focused.’ (55-64, ACT)

Another said,

> ‘There are lots of options for audiences, including staying at home! Getting information out to potential audiences on why a particular event is worth attending is important. I suspect it is harder to get audiences to see very modern art and events where the meaning is not clear.’ (65-74, ACT)

Some respondents noted the importance on having clarity around the type of experience a program will bring through honest advertising. One said,

> ‘Honest, transparent marketing which gives the potential audience member/visitor an accurate description of what they are likely to see and experience.’ (55-64, ACT)

Similarly, another respondent said that they are open to different types of programming but need the right information. They said,

> ‘We are a very varied group and need to see and do things that are mainly comfortable, but we also love the challenge of new experiences. We hate condescension and appreciate information.’ (75+, ACT)

Another respondent expressed the importance of arts and cultural programming in creating a sense of connection and bringing communities together, saying,

> ‘I think after COVID we have learnt to appreciate there are lots of ways we can experience art and culture, so being open to think outside the box. But equally understand we have also learnt to value fellowship and coming together to share experiences.’ (55-64, ACT)

"I think people are needing flexibility, accessibility, affordability, inclusivity, as well as meaningful, enriching experiences and knowledge.

Times are tough and people need opportunities to integrate arts and culture with their daily lives."

Audience member
ACT

Things to think about when making creative and programming decisions

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

Here are some things for ACT organisations to consider:

- ❑ Events can be fun and uplifting while still pushing boundaries and affecting meaning around contemporary issues – so look for ways to present new, topical and challenging ideas in different ways for audiences
- ❑ With many ACT audiences reliant on reviews, consider complementary ways to build trust, such as reposting audience shares and enabling functionality for audiences to leave reviews or ratings on websites or social media (also a great audience development exercise!)
- ❑ A number of ACT audiences members are looking for balances between classical and new, local and international, emerging and 'big name' – so creating variety in programming will appeal to diverse audiences.
- ❑ Discuss the right level of investment in strategies for reaching new audiences and retaining them long-term. Sometimes, resources are better spent with targeting a specific group of interest with an event.

4.

Three segments to know

Image Credit: Creswick Collective, courtesy of The Street Theatre.

4. Three segments to know across Australia

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

Key points:

- National results demonstrate that local and economic pressures are impacting different generations in different ways. This is available in three key segments, summarised overleaf, and available to read in full in the Audiences 2023+report.
- Differences in mood, entertainment priorities, spending patterns and media consumption present a case for ACT organisations to consider how to create and execute strategies for different segments and build in flexibility to adapt as conditions evolve.

Summary of key segments

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

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

Things to think about in serving different segments

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

Here are some things for ACT organisations to consider:

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

5.

Online trends

Image Credit: @andrewruiz, courtesy of Unsplash.

5. Online trends

In 2023, online content is helping ACT audiences find out about events, discover new artists, and participate in digital experiences.

Key points:

- Digital channels are paramount to audience engagement – with 76% of recent ACT attendees finding out about arts and culture events via digital channels.
- Preferred platforms look very different across age groups: email marketing is the priority for 55+, while word-of-mouth and socials are key for under 35s.
- Half of ACT audiences continue to engage in online arts and culture, and half say digital cultural activities still play a role in their lives, despite the proportion paying for online experiences decreasing.
- It might be time to review online offerings, scrapping what's not working and freeing up resources for more targeted approaches.

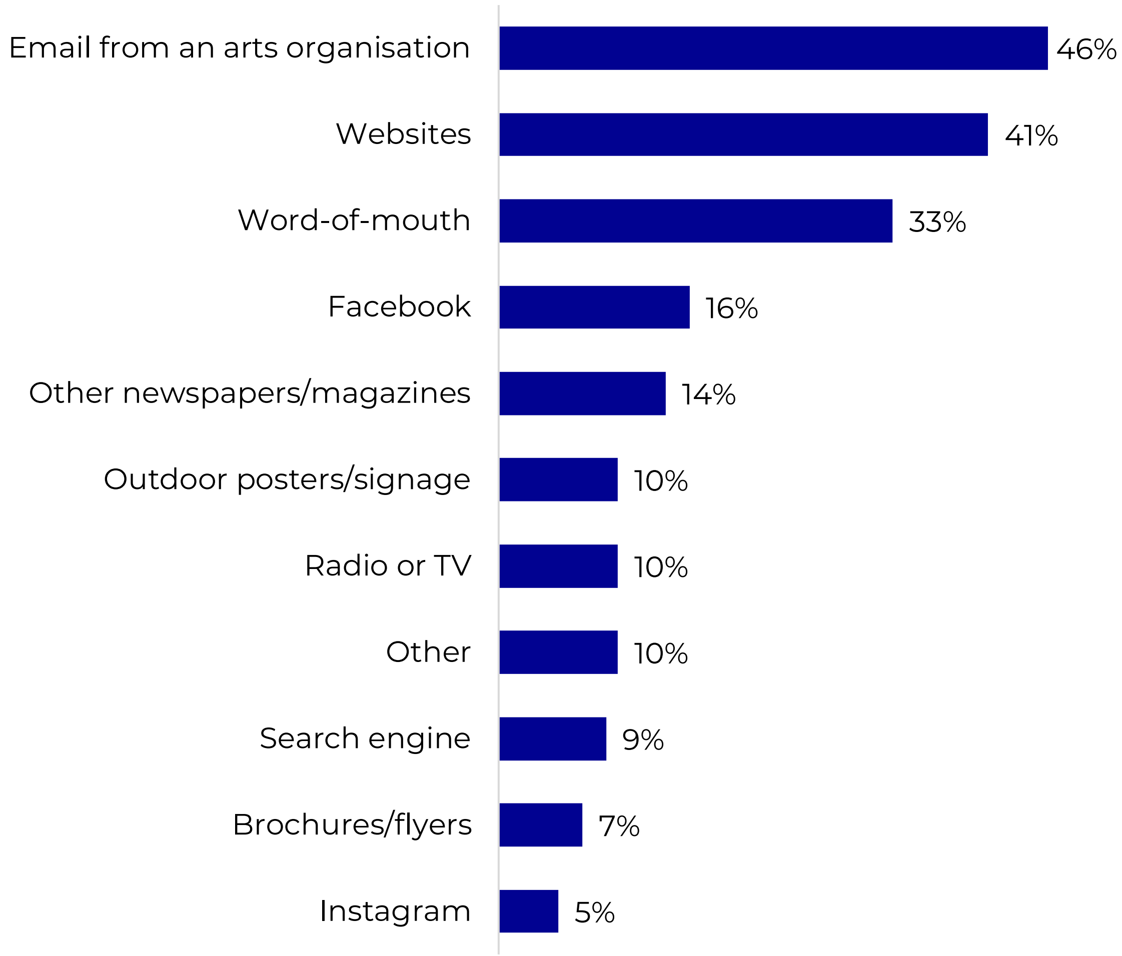
The key awareness channels for ACT audiences are emails from arts organisations, websites and word-of-mouth

When asked how they heard about the most recent event or cultural activity they attended, overall, 76% of ACT audiences cited digital channels. The key channels included direct emails from arts organisations (46%) and websites (41%) (Figure 13).

Around 1 in 3 ACT audiences are relying on word-of-mouth from friends, family, or colleagues (33%), making it the third most common channel. This proportion is consistent with the national average (35%). VIC and WA audiences are currently more likely to be relying on word-of-mouth (38%) compared to other states like NSW and QLD (both 32%).

ACT audiences are also using social media, such as Facebook (16%) and less so Instagram (5%) to find out about arts and cultural activities. These figures could be even higher, assuming a proportion of word-of-mouth occurs online.

Figure 13: How did you hear about the most recent event or cultural activity you attended? (Select all that apply). August 2023 (ACT audiences, n=252)



ACT audiences of all age groups are using online channels – however emails from arts organisations are key for over 55s

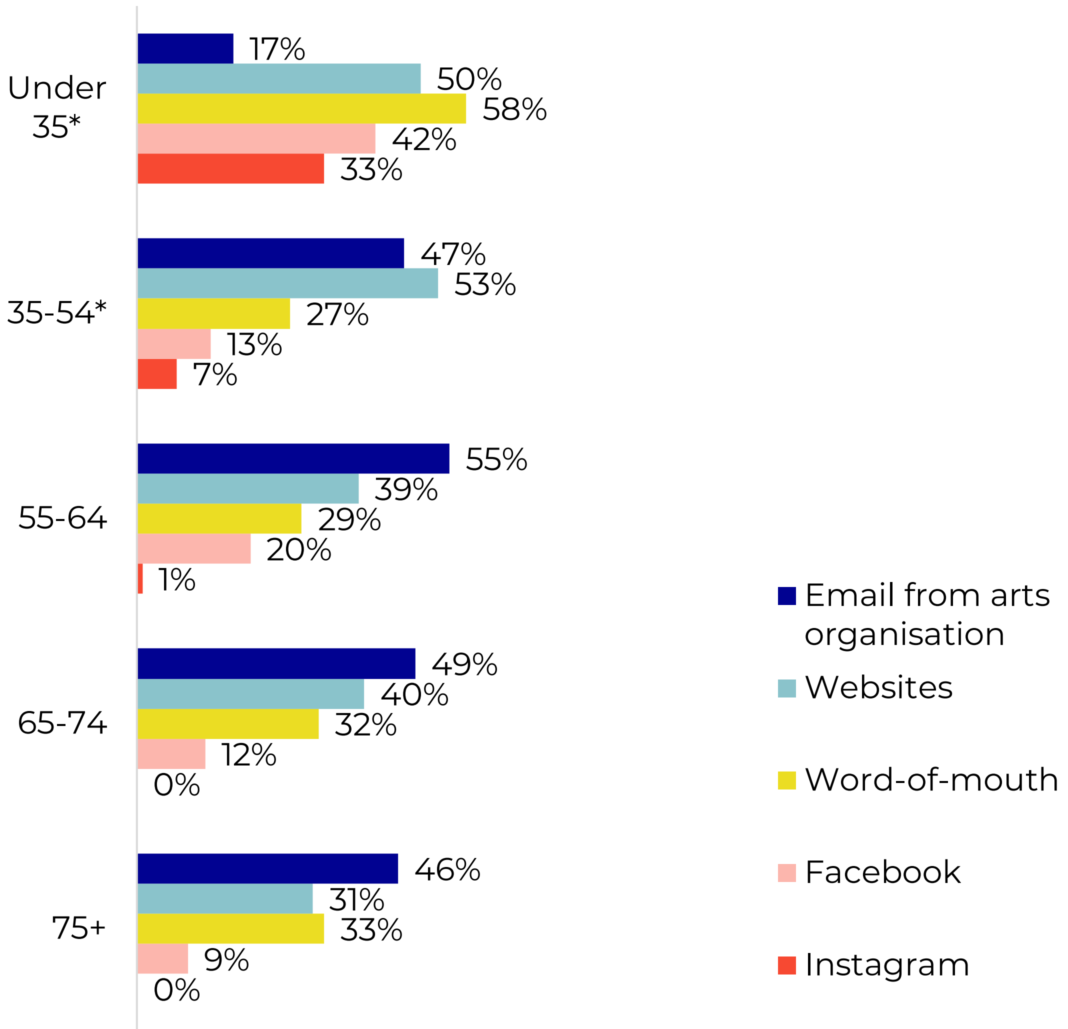
For ACT **over 55s**, the dominant awareness channel is emails from arts organisations (50%), followed by websites (38%) and word-of-mouth (32%) (Figure 14) – consistent with national trends.

While audiences are hearing about cultural activities and events via email, some mentioned missing emails or difficulty navigating digital channels – suggesting organisations should employ multiple channels to drive awareness, particularly for older and regional audiences. One said, 'Sometimes it is very hard to find out what is going on in Canberra, maybe a centralised theatre listing would help.' (65-74, ACT)

Under 35s are also utilising social media channels, like Facebook and Instagram, more frequently compared to older age groups. The sample size for under 35s is small and unstable (n=12), however the general trend indicated is in line with national results.

With this segment disproportionately facing financial barriers to attending cultural activities and events right now, word-of-mouth from family, friends and colleagues enables possible future attendees to hear reviews around the value and quality of cultural offerings.

Figure 14: How did you hear about the most recent event or cultural activity you attended? (Select all that apply). By age group, August 2023 (ACT audiences, n=252)



* Small sample size. Interpret with caution.

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

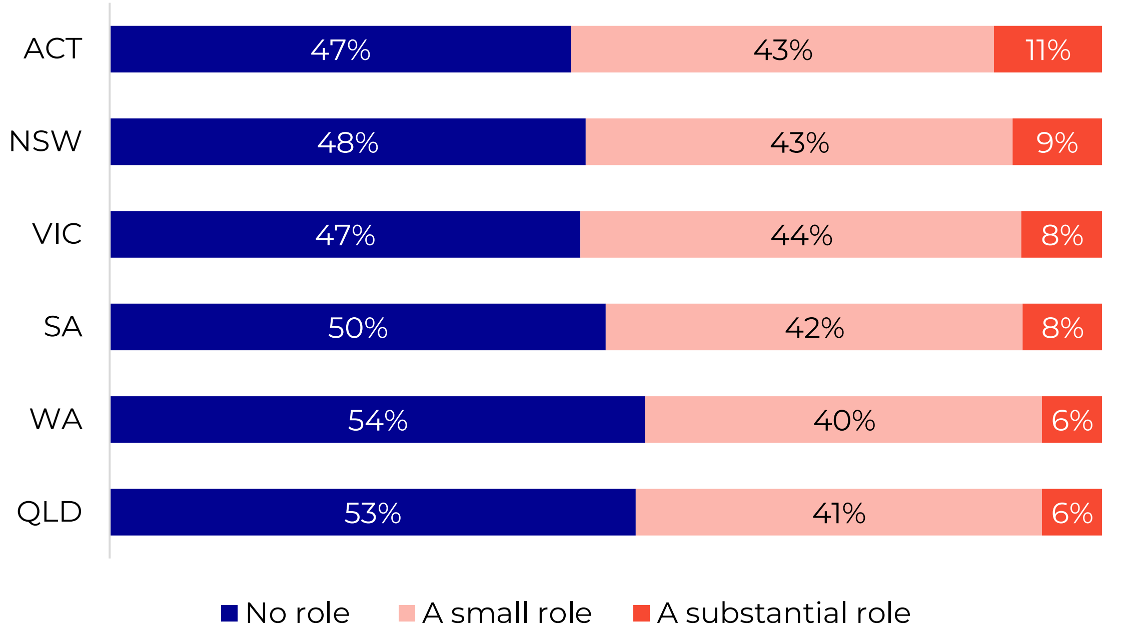
Respondents were asked what role online arts events/experiences play in their life now that venues are open for in-person attendance.

Compared to other states, ACT audiences were the most likely to say that online arts and culture are playing a small or substantial role in their lives (54%) (Error! Reference source not found.). Among ACT audiences, 11% say they play a substantial role (down from 19% in October 2022), and 43% say they play a small role (down from 55% in October 2022).

ACT audiences are slightly above the national average (51%) when it comes to online arts and culture playing a small or substantial role in their lives, and are just ahead of NSW and VIC (52%).

Participation in online arts and culture is relatively consistent across the states and territories. Currently, 37% of ACT audiences are currently participating in online or digital arts and culture experiences, slightly below the national rate (39%).

Figure 15: As venues are open and it's possible to attend in-person cultural experiences, what role do online arts events/experiences play in your life? By state or territory of respondent. August 2023 (ACT audiences, n=323)



The rate of online spending amongst ACT audiences has remained consistent since last year, with 3 in 10 audiences paying for arts digital experiences

Audiences were asked whether they had paid for any online arts and culture experiences, as well as their total spend on these experiences in the past fortnight prior to data collection.

In line with spending levels amongst ACT audiences not increasing overall, the proportion of online audiences paying for digital arts experiences has continued to stabilise.

Two-thirds (67%) of ACT audiences reported not paying for any online arts and cultural experiences, consistent with October 2022 (68%).

Amongst those paying, donations of gratitude were slightly up at 15% compared to last year (12%), and purchases of single experiences was down at 13% compared to 2022 (17%). Smaller proportions subscribed to a platform to access content on-demand (8%) or subscribed to a program/season that included the experience (3%).

Common barriers for ACT audiences include technical challenges and poor online experiences

Many audiences mentioned facing technical challenges or limitations as key barriers to engaging in digital arts and culture. These difficulties can inhibit their experiences and deter them from wanting to continue engaging online. One said,

> ‘Greatest barrier is technology and knowing how to use it.’ (55-64, ACT)

Another shared this sentiment, but also mentioned a desire to limit their screentime, saying:

> ‘I do not have sound or camera on my computer so that's an obvious limitation, but really it’s about spending as little time as possible in front of a screen.’ (65-74, ACT)

Some reported a lack in quality online offerings after the COVID lockdown period. One said,

> ‘I enjoyed online cultural events that were made available during COVID, and I made contributions to support those organisations. They don't seem to be as available these days.’ (65-74, ACT)

Other respondents mentioned having a desire to participate online, but finding time and energy poses an issue. One said,

> ‘I enjoyed watching the ballet with my eldest during lockdown and comedy shows, but now with work, school, getting kids to bed, there is hardly any time left for me to factor in watching anything more than a quick 30-minute sitcom before I fall asleep in the couch.’ (35-54, ACT)

Some ACT respondents mentioned the appeal of online experiences, given their ability to provide access to arts and culture that may be physically inaccessible to some. One said,

> ‘Subscription was to Berlin Philharmonic Digital Concert Hall – one of the best orchestras in the world with a magnificent digital concert hall. The world is made a small place by technology.’ (65-74, ACT)

Another said,

> ‘Can't travel internationally anymore because of age of partner, but online experiences of the great concert houses around the world are a fantastic substitute for actually being there – actually sometimes better because it is more comfortable at home than flying 24 hours to get to Europe.’ (65-74, ACT)

"Subscription was to Berlin Philharmonic Digital Concert Hall — one of the best orchestras in the world with a magnificent digital concert hall.

The world is made a small place by technology."

Audience member
65-74, ACT

Things to think about when connecting with audiences online

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

Here are some things to consider for ACT organisations:

- ❑ Consider reviewing the online experiences on offer at your organisation, including the journey for purchasing tickets. One ACT respondent said, 'It's tiresome to book tickets online. I know it was useful during COVID, but now it just seems that online booking is all about the organisation gathering data about me. It's just so hard to attend as the mood takes me.' (65-74, ACT)
- ❑ ACT audiences are the most likely to make a donation as an expression of gratitude online, with 15% of respondents reporting so, so it may be worth exploring how your organisation can embed related features through your online platforms
- ❑ Compare these insights with your own analytics to reflect on what is right for your audience – and where there could be gaps or opportunities to improve
- ❑ Look at what is not working and what resources could be freed up to focus on priority opportunities
- ❑ ACT audiences are currently looking for fun, energising, social experiences. Ensuring that realistic targets are set for digital experiences and that digital distribution strategies have a long-term horizon will be key
- ❑ Look at your ability to create segmented email campaigns with targeted offers and messaging for different groups (e.g., use email strategically and sparingly with under 35s and instead focus email campaigns on audiences aged 55+).

6.

Late decision-making

Image Credit: Creswick Collective, courtesy of The Street Theatre.

6. Late decision-making

Last-minute decision-making is most prominent in the ACT, with audiences having more choices, taking longer to decide given their financial circumstances and prioritising other things. Organisations need to prepare for new phases in campaigns to reach people at the right time with the right messages.

Key points:

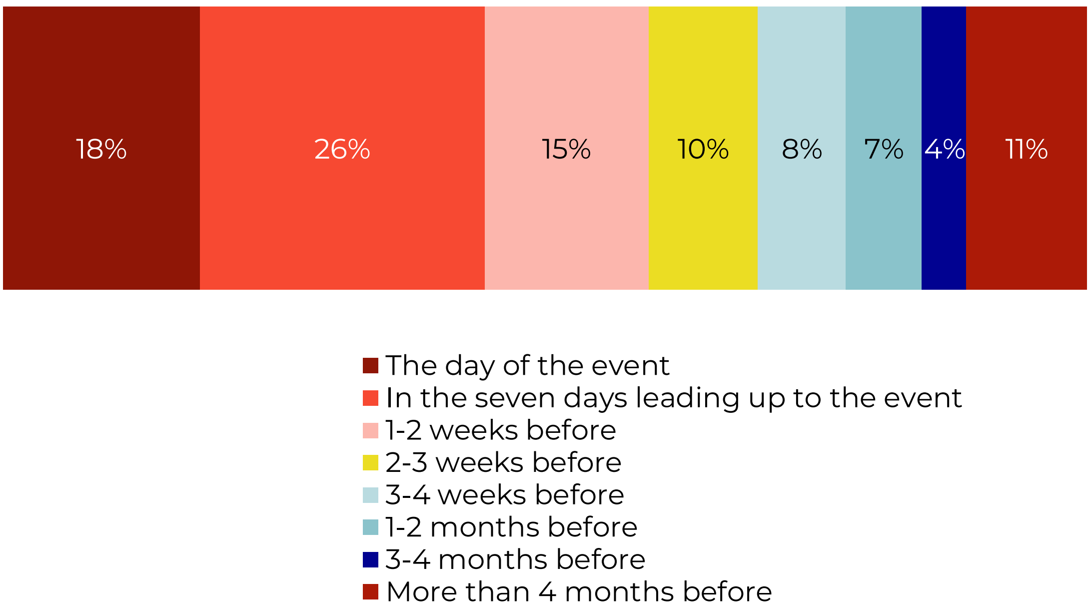
- Most ACT audiences are booking less than two weeks out (59%), or on the day of the event (18%).
- Analysis of 'last-minute bookers' shows that last-minute ticket buying is most common among ACT audiences compared to other states and territories.
- Last-minute bookers in the ACT typically hear about events via websites (46%) and word-of-mouth (38%), while early bookers rely on emails (63%).

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

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

Overall, the last-minute ticket buying trend was acute among ACT audiences. 18% of audiences reported that they booked the last event they attended on the day of the event, and 26% booked in the week leading up to it.

Figure 16: Can you tell us how far in advance you booked or committed to go…? August 2023 (ACT audiences, n=252)

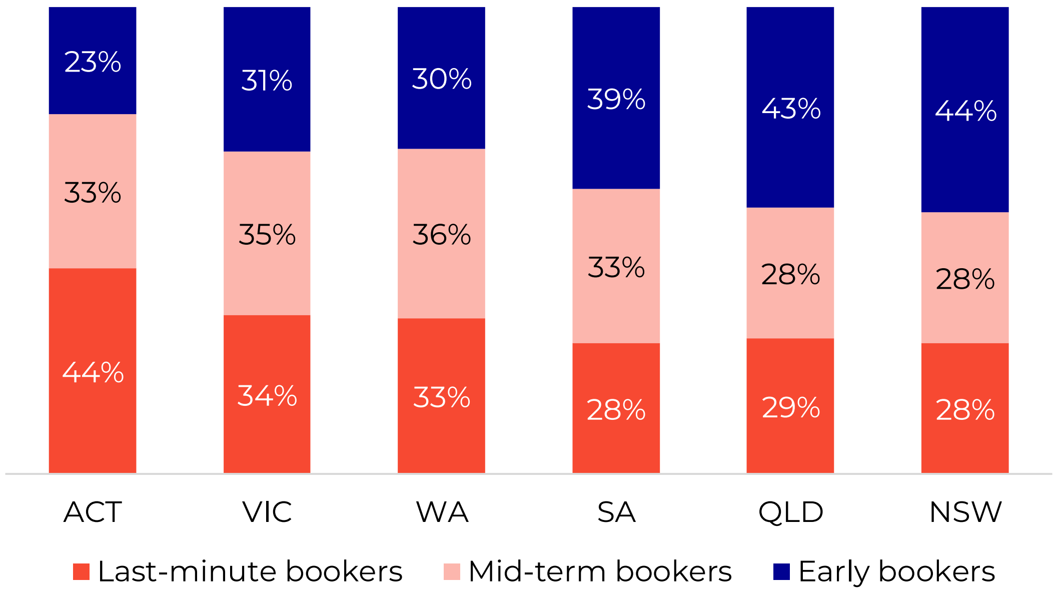


In the ACT, qualitative data indicates that key motivations for booking tickets early included wanting to secure particular seats, booking tickets as part of a subscription/membership package, and the need to plan ahead to coordinate travel timings and accommodation.

'Big name' artists/performers were also strong motivations for securing tickets early: 66% of ACT early bookers agreed that they were attracted to events with 'big name' artists/performers, as opposed to 47% of last-minute bookers.

Audiences from the ACT are most likely to be booking last-minute, with 44% classified as last-minute bookers, possibly linked to a higher frequency of gallery attendance in the ACT overall. Meanwhile, SA and NSW audiences are least likely to be booking last minute (both 28%).

Figure 17: Can you tell us how far in advance you booked or committed to go…? By state or territory, August 2023 (n=252)



Late bookers described a range of reasons for purchasing last-minute tickets

Many early bookers in ACT reported feeling 'better off' or the 'same' financially as they were a year ago (70%), whereas last-minute and mid-term bookers were slightly less likely to do so (65% amongst last-minute bookers; 60% amongst mid-term bookers).

More than half (66%) of early bookers amongst ACT audiences reported spending more than $100 in the past fortnight on in-person live events and cultural activities, compared to 32% of mid-term bookers, and 19% of those booking last-minute.

Qualitative data indicates that several ACT audiences are hesitant to book in advance because they are unsure if they will be able to make it due to illness and other ad hoc commitments that may arise. One said,

> ‘I wanted to wait to see how I was feeling on the day and if I was busy or not.’ (55-64, ACT)

Some respondents noted that a lack of awareness and sufficient advertising was the reason for booking last-minute. One said,

> ‘It wasn’t well advertised. I was invited by friends. Very small venue but still a few empty seats. Pity, it was a very good production.’ (55-64, ACT)

Another said,

> ‘I booked when I first became aware of the event.’ (75+, ACT)

Others mentioned that their attendance was a spur of the moment decision, based around various factors like not knowing what was on and not being able to commit in advance. One said,

> ‘Felt spontaneous.’ (Under 35, ACT)

Another respondent notes that the lack of flexibility in ticketing is causing last minute commitment. They said,

> ‘Too many chances we won't be able to go on the day. I have booked further in advance for must see artists in larger venues, however, am hesitant to book larger venues as my experience last time I couldn't attend was that the industry’s fight back against secondary ticket sellers has been so successful that I couldn't sell through Facebook, combined with the major venue in town’s ‘no refund policy’ meant that it cost me $250 for two tickets I couldn't utilise or give away. Ticketing companies need to facilitate resale for no-profit for people who can't attend. Can't afford to throw $250 away.’(65-74, ACT)

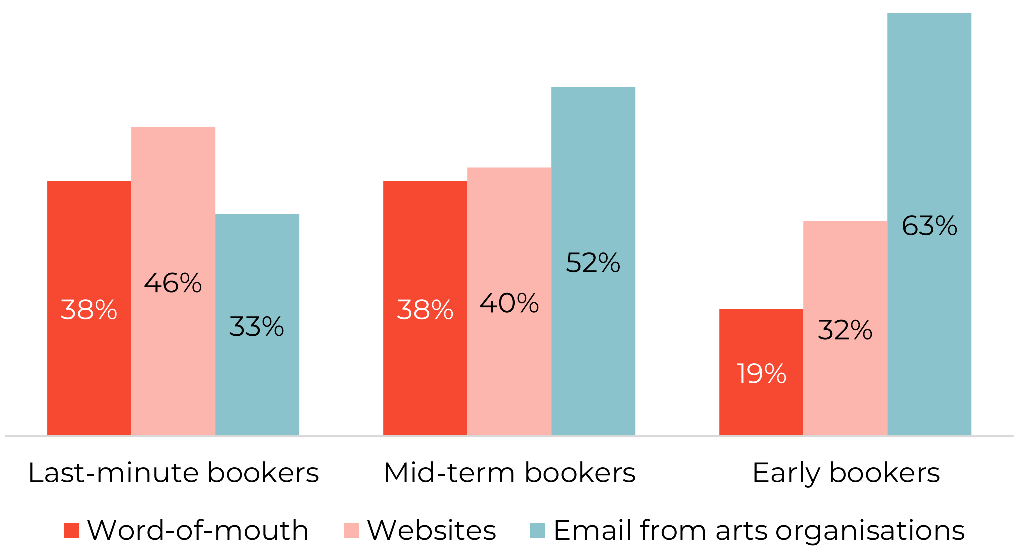
Last-minute bookers in ACT typically hear about events via websites (46%) and word-of-mouth (38%), while early bookers rely on emails (63%)

Over half (63%) of early bookers in the ACT and 52% of mid-term bookers reported emails from arts organisations as a means of hearing about the event they attended recently. Meanwhile, for late bookers in the ACT, email is less important, with 33% noting this as an awareness channel for their latest event.

Last-minute ticket buyers in the ACT were committing based on things they saw online (46%), but also due to word-of-mouth recommendations (38%), social media like Facebook (14%) and Instagram (4%), and traditional media channels like radio and TV (14%), or outdoor poster/signage (13%).

Finding out about what's on via websites is important for all types of ticket buyers and is relatively consistent in terms of proportions (Figure 18).

Figure 18: How did you hear about the most recent event or cultural activity you attended? (Select all that apply). By booking purchase timeframe, August 2023 (ACT audiences, n=252)



"I wanted to wait to see how I was feeling on the day and if I was busy or not."

Audience member
55-64, ACT

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

ACT audiences have different motivations for the timing of their ticket purchases. A significant proportion of last-minute bookers across age groups suggests the trend is here to stay, so planning ahead can help to avoid last minute 'panic' discounting.

Here are some things for ACT organisations to consider:

- ❑ Define the different phases of a campaign and review how tactics can change to suit different phases. For instance, what motivates early bookers is unlikely to work for mid-term and late bookers
- ❑ Consider methods of tracking intended attendance, beyond simply tracking ticket purchases e.g. providing opportunities to register interest
- ❑ Review ticket prices for young audiences and if youth discounts are already in place, review age limits i.e., under 35 may be more appropriate than under 30 or under 25 given current conditions, and some artforms may have a case to extend this to under 40
- ❑ Consider offering group discounts or family tickets (e.g., 2 adults, 2 kids or 1 adult, 3 kids) to relieve cost pressures on 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. Consider investigating a payments solution like ArtsPay, as some audiences are put off by high booking fees but are keen to support the arts and artists.

7. Subscriptions and memberships

Image Credit: Creswick Collective, courtesy of The Street Theatre.

7. Subscriptions and memberships

Subscribers and members are vital for many arts organisations, but their needs vary dramatically across audience segments, presenting opportunities for ACT organisations to adjust their packages to enhance the appeal for audiences.

Key points:

- 53% of ACT audiences are members or subscribers – the highest percentage across all states.
- Subscriptions uptake and motivations amongst key segments in ACT differ significantly.
- Older ACT audiences want to show financial support and lock plans in early, while younger audiences are more likely to want access to discounted tickets.
- Opportunities exist for ACT organisations to trial different offers and models, and test different

> messaging to target the unique needs and interests of different audience segments.

More than half of ACT audiences are members or subscribers in 2023 – the highest percentage across all states

Over half (53%) of ACT respondents reported having purchased season tickets or a membership to an organisation this year – significantly higher than the national average of 41%.

Compared to the season subscribers and membership rates in other states, the proportion who are season ticket holders or members is highest in the ACT (53%) and NSW (52%), and lowest in QLD (24%) (Figure 1912).

In the ACT, museum and gallery memberships are the most common (39%) compared to performing arts subscriptions which are held by 24% of respondents. This is likely due to the significant artworks, museums and galleries held in Canberra such as the National Gallery and the National Museum of Australia. A small number (14%) held another kind of membership, for example, to literary festivals.

One respondent said,

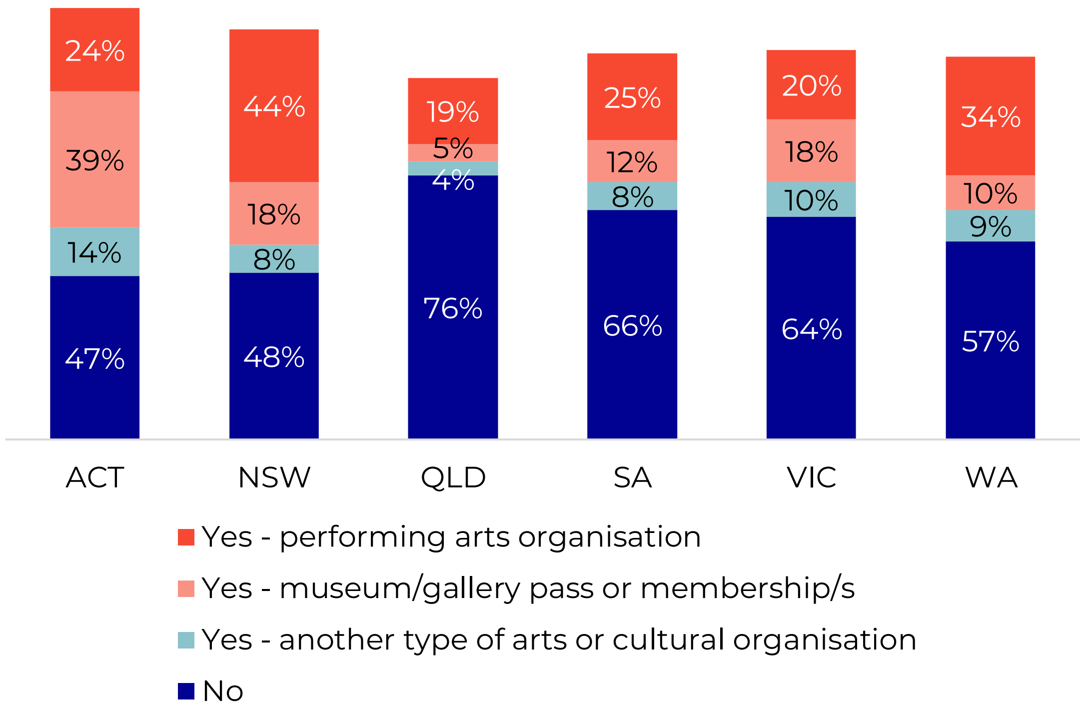
> ‘As a local I like to support museums and art galleries like NGA’ (75+, ACT)

Another said,

> ‘I purchase membership to the ANG. This gives me discounted tickets to special exhibitions, reciprocal arrangements with interstate galleries, and access to the members' lounge.’ (75+ ACT)

Parents aged 35-54 in the ACT are slightly less likely to have purchased season tickets or a membership in the latest season (27%) compared to non-parents in this age group (37%).

Figure 1912: Did you purchase a season ticket, subscription or membership? By state or territory of respondent, August 2023 (ACT audiences, n=323)



Over 55s' main motivation is to support organisations and artists financially, while under 35s want discounted tickets

Audiences were asked to select their top reason for subscribing from a list of options. Motivations for buying ticket packages are drastically different between younger and older audiences in the ACT.

Among ACT audiences over 55, the most common reason was supporting the artists/organisations financially (40%), followed by accessing other benefits such as better seats, members lounges and special access to events (23%). A smaller proportion identified their main motivation as locking in plans early (13%) or discounts (7%). One respondent said,

> 'There is still a lot of support for cultural organisations. I can't imagine giving up the subscriptions to concerts and galleries that I have had for near 40 years. They are just part of my life.' (75+, ACT)

Although the ACT sample of under 35s is unstable, looking at the national average there are strong indications that this age group is attracted to accessing discounted prices that come with memberships and subscriptions (40%), followed by accessing other benefits or privileges, such as specific seats, members-only lounges, early access, and members lounges (15%). Smaller numbers describe their main motivation as feeling like part of the organisation's community (13%) and supporting the artists/organisations financially (14%).

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

Qualitative data highlights the range of motivations for subscribing amongst key age segments in the ACT

Qualitative data from older ACT audiences suggests that many value that purchasing a subscription or membership helps them keep on top of what's on, forces them to plan fun activities ahead of time and take advantage of early-bird discounts. Some subscribers shared,

> 'More likely to hear about events and attend things if I am a member. Usually cheaper if I have membership. Helps me feel part of a community.' (55-64 ACT)
>
> 'To ensure we get in first and are informed.' (55-64, ACT)
>
> 'Have subscribed for many years and want to keep that going so we have things to look forward to.' (55-64, ACT)

Many also noted the added value of having access to members lounges, as one said:

> ‘I subscribe to encourage me to visit the NGA more regularly and to enjoy the quieter space of the Members Lounge now I live in the ACT.’ (55-64, ACT)
>
> ‘There are discounts plus special gatherings for members. I enjoy the members lounge for a rest when visiting. It is also a place to meet various friends.’ (75+, ACT)
>
> ‘I purchase membership to the ANG. This gives me discounted tickets to special exhibitions, reciprocal arrangements with interstate galleries, and access to the members' lounge.’ (75+, ACT)

Older ACT audiences are also motivated to support the artists and organisations they love that are in line with their values. Some shared,

> ‘I like the notion of supporting various performing arts organisations - and it gives them certainty of income and allows me to plan ahead.’ (55-64, ACT)
>
> ‘Promotion of First Nations cultural expression, history, are primary considerations in considering memberships or season tickets.
>
> …I purchased a season ticket to Cressida Campbell after being blown away on my first viewing, and ended up going around 10 times!’ (55-64, ACT)

Parents aged 35-54 also commented on the value for money and the benefits of having arts and cultural activities lined up for their children to participate in. Some shared,

> ‘I have a NMA membership because it is welcoming and stimulating. There is an amazing play space for my children and I feel comfortable there. The exhibitions are eclectic and inclusive. We also have a pass for Canberra Zoo just to keep the kids entertained.’ (35-54, ACT)

Despite a smaller proportion of subscribers, qualitative data from under 35s in ACT confirm they are motivated to participate and enjoy the organisations they love by purchasing subscriptions and memberships. One said,

> ‘I could get good seats and it reminded me to go rather than miss out like I have in the past’ (Under 35, ACT)

> ‘I like to support organisations that matter to me, which is excellent classical music performers’ (Under 35, ACT)

> ‘It is another way of supporting the gallery I enjoy most in my city (National Gallery)’ (Under 35, ACT)

Half of ACT audiences say they are likely to purchase a subscription or membership next year

Audiences were asked about the likelihood of them purchasing a subscription or membership next year.

One in 2 ACT audiences (49%) said they would be ‘very likely’ (25%) or ‘likely’ (24%) to purchase a subscription or membership for next year (Error! Reference source not found.). Compared to other states, ACT (49%) and NSW (47%) are most likely to say ‘very likely’ or ‘likely’ – while SA (32%) and QLD (24%) are the least likely.

Audiences were asked: ‘Do you have any suggestions about how arts and cultural organisations can improve their subscription and membership programs to suit you better?’

Value for money is important across all ages, but especially younger audiences, who noted a lack of awareness of incentives around discounts to help make subscriptions and memberships appealing. They mentioned,

> ‘Clearly define benefits if I sign up - what kind of extra service do I receive? Is there a way for me to 'break even' with the cost of membership (e.g. free/reduced tickets to an event)?’ (Under 35, ACT)

> ‘More advertising of the benefits, e.g. good seats, cheaper prices, looking in dates. So many of my friends only found out through me.’ (Under 35, ACT)

Others think that improved processes and flexibility in subscriptions and memberships could attract more audiences. For example, changing dates, and avoiding multiple booking fees. Some mentioned,

> ‘A subscription or membership tends to lock you in to specific dates and I prefer to be flexible even though it might be at the expense of a better seat.’ (55-64, ACT)

> ‘Allow for more choice, don't tie us down to picking certain performances and dates. Travelling for work may mean that we aren't available for a performance.’ (55-64, ACT)

> ‘Friendlier and clearer online subscription booking systems. Integrated and seamless booking of shows regardless of whether they are in subscription season or not. Third party booking service providers (Humantix, Trybooking, Moshtix) should allow multiple event booking without multiple fees’ (55-64, ACT)

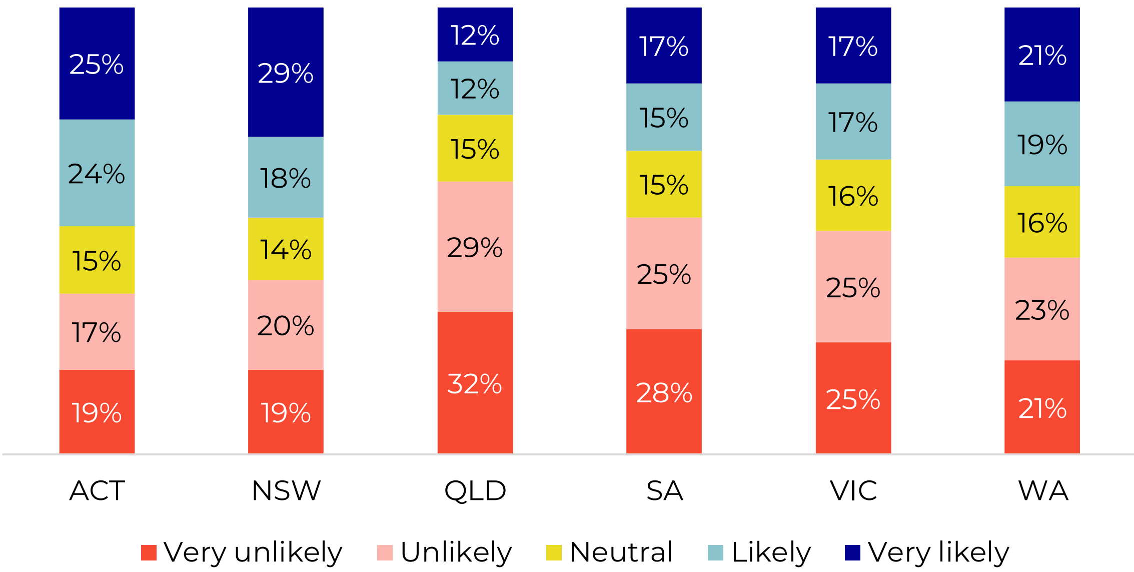
Another said,

> ‘Curation of performing arts subscription seasons does not always deliver the program I'm interested in, and I'd prefer to select individual shows to attend with friends in a shorter lead time. (age group?, ACT)

Another said,

> As we become more mobile, we might not be in that city at that time and I can't plan my life around the performances, and again there is no chance of recouping the ticket fee.’ (65-74, ACT)

Figure 2013: How likely or unlikely are you to purchase a subscription or membership next year? By state or territory of respondent, August 2023 (ACT audiences, n=323)



"More likely to hear about events and attend things if I am a member. Usually cheaper if I have membership.

Helps me feel part of a community."

Audience member
55-64, ACT

Things to think about when reviewing subscription and membership offers

Here are some things for ACT organisations to consider:

- ❑ With subscription/membership behaviours and motivations differing dramatically across key audience segments, it's important to consider whether a single subscription offering can appeal across age groups
- ❑ There may be a case to test new and different packages and target them at different age groups. Particularly looking at experimenting with ways to heighten awareness of your offering to connect with under 35s
- ❑ Messaging of subscription campaigns will work best when tailored to a target age group. For instance, campaigns targeting young people could emphasise discounts and flexibility, whereas campaigns targeted at older audiences might emphasise the benefits of locking plans in early and showing their support
- ❑ Increase general awareness around the subscriptions and memberships your organisation offers, including benefits, discounted offers, possible programming and how it provides value and support for artists and arts organisations
- ❑ Flexibility could be an untapped benefit of performing arts subscriptions in the current climate, whereby people can organise changes of dates with no extra charge.

About the survey

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

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

What's next

To read about the story so far, visit the study's Australian homepage.

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.

Acknowledgements

The Audience Outlook Monitor study in Australia is supported by Creative Australia, Create NSW, Creative VIC, the Queensland government through Arts Queensland, the Department of the Premier and Cabinet (Arts South Australia), artsACT and Department of Local Government, Sport and Cultural Industries (DLGSC) WA.

Patternmakers acknowledges Aboriginal and Torres Strait Islander peoples as the traditional custodians of our land – Australia. We acknowledge the Gadigal people of the Eora Nation as the traditional custodians of the place where Patternmakers is based, and we pay our respects to Elders past, present, and emerging.

AUDIENCE OUTLOOK MONITOR

PATTERNMAKERS

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Made possible with support from:

Australian Government

Creative Australia

NSW GOVERNMENT

Queensland Government

ACT Government

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

Government of South Australia
Department of the Premier and Cabinet

CREATIVE VICTORIA