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Audience Outlook Monitor

NSW Audiences 2023+

wolf brown

NSW GOVERNMENT

Contents

Cover Image Credit: Jamie Williams, courtesy of Sydney Writers Festival.

Introduction

This report shares insights from over 2,500 New South Wales arts and cultural audience members 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 New South Wales (NSW) Snapshot Report outlines key findings from Phase 9 (August 2023) of the Audience Outlook Monitor in Australia, based on data collected from 2,560 audience members living in NSW.

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: Jamie Williams, courtesy of Sydney Writers Festival.

1. Attendance Trajectories

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

Key points:

- NSW audiences are the most active of any state and their frequency of attendance is increasing, but the recovery process continues.
- 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.
- Major leaps in attendance appear unlikely, with 2 in 3 NSW audiences expecting their attendance will stay the same over the next 12 months.
- It's a good time to rethink what success looks like and adopt the right targets for the conditions.

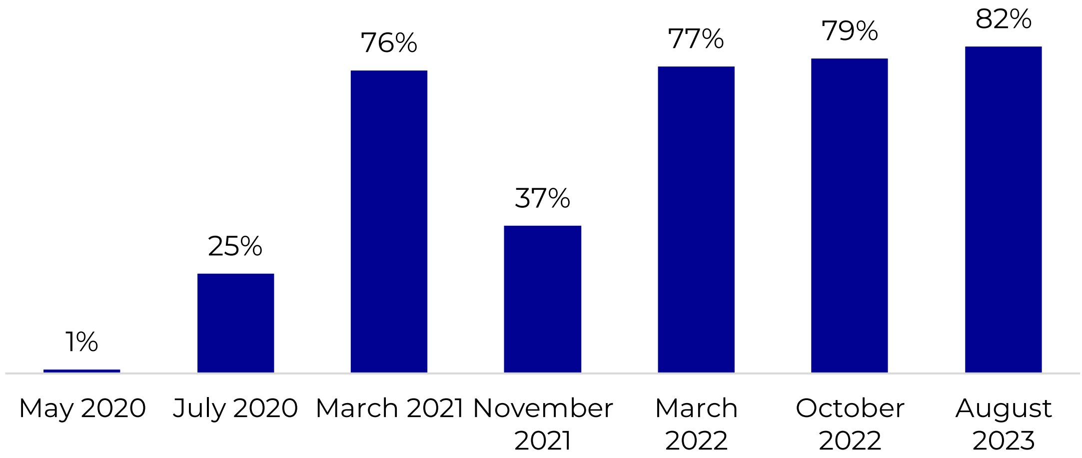
In 2023, attendance amongst NSW audiences is reaching its highest point since 2020, but there's more to the story

As the nation continues its recovery from the pandemic, NSW audiences have gradually returned to attending cultural events in-person, with attendance reaching its highest point in August 2023 since 2020.

Eight in 10 NSW audience members say they attended at least one kind of cultural event in the fortnight prior to data collection (82%), slightly up from the national average (79%) and up from 79% in October 2022.

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

Figure 1: Proportion of NSW respondents answering yes to 'In the past fortnight, did you do a cultural activity in-person (not online)?' May 2020 to August 2023 (n=2,560)



However, this overall participation rate only tells part of the story, with spending levels not growing alongside participation. 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.

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- **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.

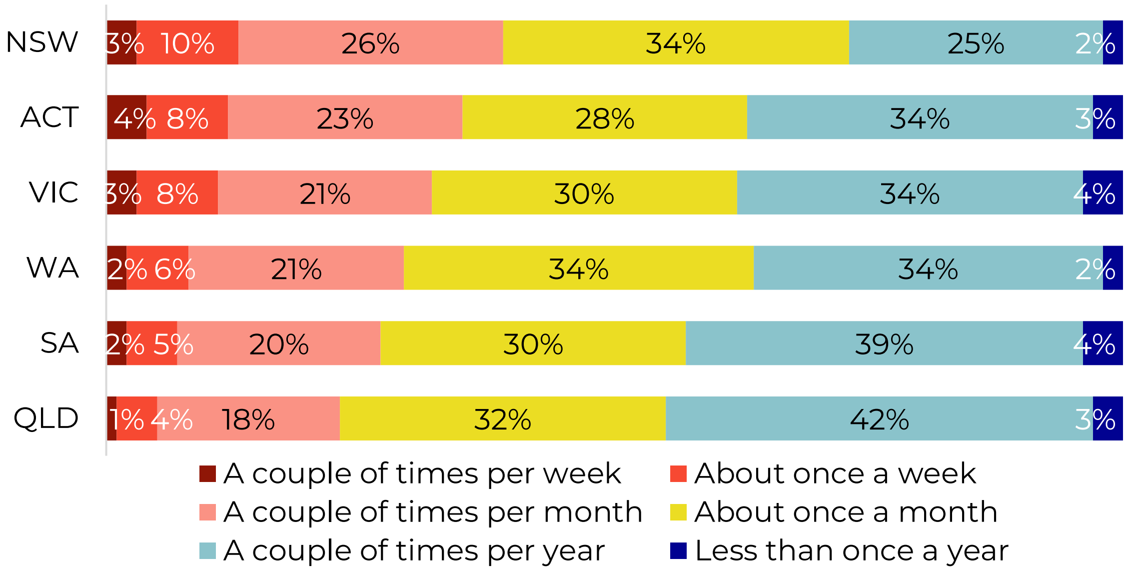
Although there will always be exceptions, understanding the major differences between these three groups is a helpful starting point, with a summary of these three national segments available in Chapter 4 of this report (Segmented Approaches).

Among NSW audiences, frequency of attendance is growing at performing arts venues and at museums and galleries

Amongst NSW audiences, attendance frequency is growing at performing arts events in August 2023, compared to October 2022. Seven in 10 (73%) attended at least once a month in August 2023, up from 56% in October 2022.

NSW audiences are, on average, attending performing arts venues the most frequently compared to other states. This is above the national average (65%). Frequency of attendance is lowest among QLD audiences, with 55% attending at least once a month.

Figure 2: Attendance frequency at performing arts events by state or territory, August 2023. (NSW audiences, n=2,460).



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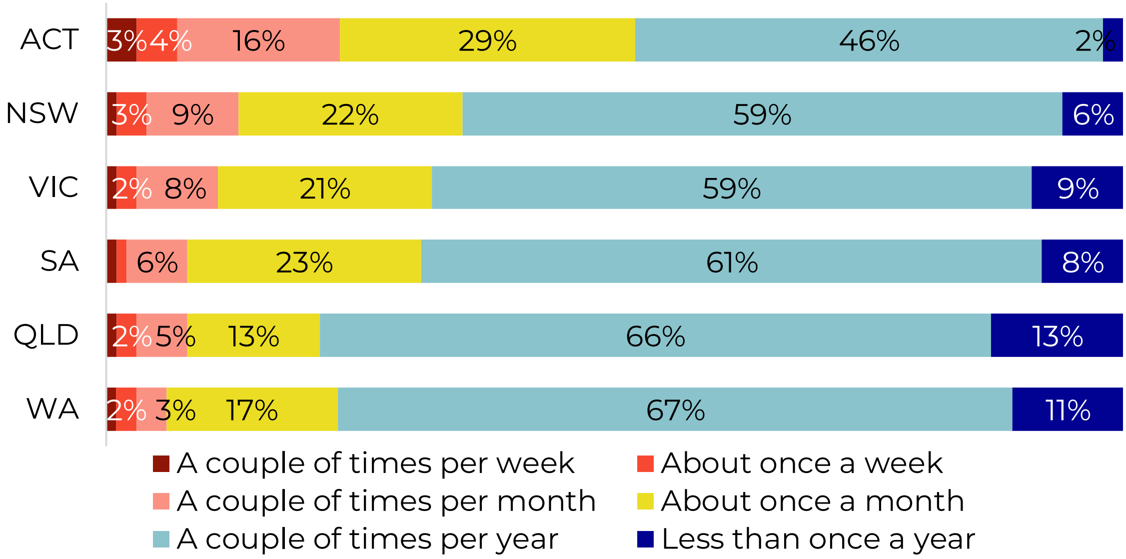
In NSW, frequency of attendance at museums and galleries has also increased significantly in August 2023, with 35% attending at least once a month, up from 22% in October 2022. This is slightly up from the national average (32%).

Figure 3: Attendance frequency at museums and galleries by state or territory, August 2023. (NSW audiences, n=2,307).



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.

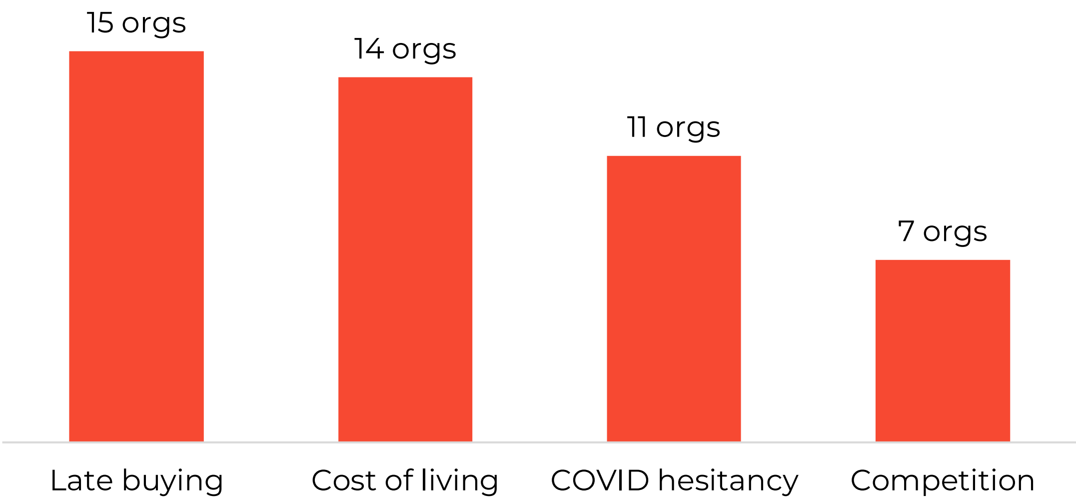
Arts organisations participating in the Audience Outlook Monitor were asked to provide attendance figures for 2019 and 2022, to compare how audiences have changed and to what extent the industry has rebuilt its audiences following the pandemic. They were also asked what their biggest challenges and successes have been. The following sections discuss the results at the national level.

52 organisations across the country (including 14 NSW 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)



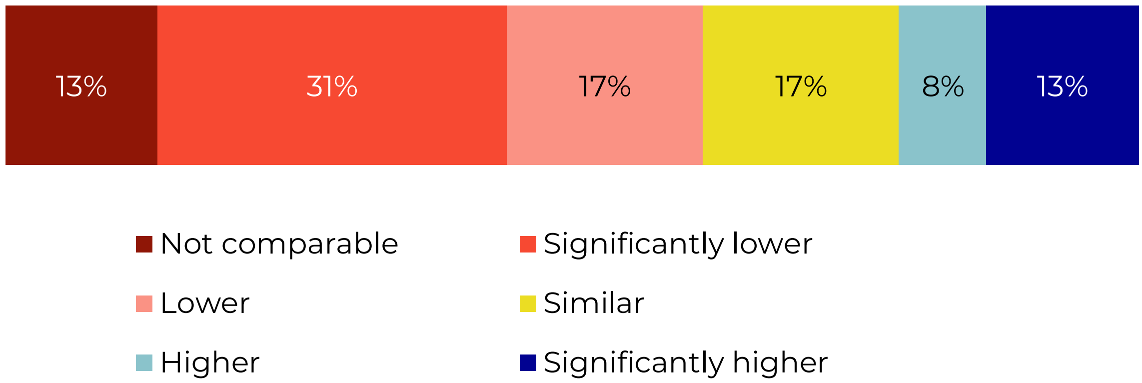
Organisations across Australia are adapting to the new landscape in different ways, and around 4 in 10 have rebuilt their audience to 2019 levels

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 (**Figure 5**).

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:

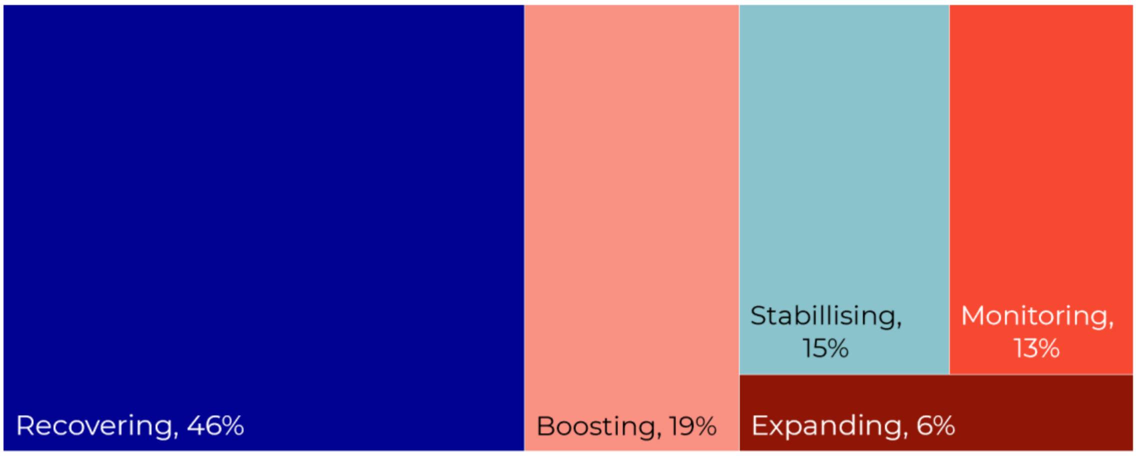
Audience recovery	Events and capacity	Programming	Organisational changes
Is total paid and free attendance higher or lower compared to 2019?	Has the number of events and tickets available changed?	Were there changes in approach to the types or genres of events?	Were there changes in funding or big strategic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

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

One organisation was classified as expanding, with likely factors being 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 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.

One boosting NSW organisation shared their biggest successes in attracting audiences were:

> ‘Having international acts come through (who were in Australia and not able to travel overseas) built on confidence and lifted our profile. Once all the restrictions were lifted, we found audiences were hungry for performances.’ (Venue, Regional NSW)

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

> ‘Marketing the unique opportunity [we] offer to expand perspectives and learn about First Nations cultures.’ (Producer, NSW)

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:

> ‘Competing for our audience’s attention and getting them back into the routine of looking for entertainment and going out for entertainment.’ (Venue, regional NSW)

> ‘Encouraging audiences to book early, most audiences book in the week or two before the performance.’ (Producer, NSW)

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 and at a similar volume compared to 2019.

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.

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 fewer events, or similar events but with fewer 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 ticket buying cycles as a barrier to recovery. One NSW organisation shared,

> 'Early ticket sales, there seems to be lots of last-minute ticket buying happening. Also, overall attendance is down so making audiences see the value in our offerings has been a challenge as we are finding people are becoming more selective in where they spend their $$$. With so much on offer in terms of live music and gigs it's also hard to cut through the noise and connect with new audiences especially online.' (Producer, metropolitan NSW)

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. In NSW, successful strategies in bringing audiences back have included,

> ‘Putting audience needs first. Using data and insights from consistently monitoring sentiment and tracking behaviour has given us the confidence to make informed decisions. Initially, these decisions focused on safety measures, now we're much more focused on creating initiatives that provide audiences with additional value such as integrated transport.’ (Venue, metropolitan NSW)

Others mentioned that partnerships and collaboration have played important roles. As one NSW org said,

> ‘Collaborative approach to running events, either through partner events or a united program which helped cut through some of the noise that came from the overabundance of events taking place post-COVID.’ (Producer, metropolitan NSW)

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 NSW, big increases in attendance appear unlikely over the next 12 months, with 2 in 3 predicting their attendance will stay the same

In October 2022, just over half of NSW respondents to the Audience Outlook Monitor (55%) said their current level of attendance would ‘definitely’ or ‘likely’ increase over the following year. In August 2023, that proportion dropped to 1 in 4 respondents (24%), while 67% 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% of 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 covered in depth in the next chapter.

"Putting audience needs first. Using data and insights from consistently monitoring sentiment and tracking behaviour has given us the confidence to make informed decisions.

Initially, these decisions focused on safety measures, now we're much more focused on creating initiatives that provide audiences with additional value such as integrated transport."

Venue
Metropolitan NSW

Things to think about when charting attendance trajectories:

Attendance is 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 NSW 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 in 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 other 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
- ❑ Stay abreast of NSW population projections, which could present opportunities for building audiences.

2.

Inflationary pressures and pricing

Image Credit: Nicholas Smith, courtesy of Campbelltown Arts Centre.

2. Inflationary pressures and pricing

Financial barriers are impacting NSW audiences and what they can spend on events, and some segments need targeted thinking to ensure access to arts and culture.

Key points:

- 'Financial reasons' is the top barrier to attendance facing NSW audiences, and inflationary pressures are expected to continue in 2023 and 2024.
- While NSW audiences are spending more than the national average, spending levels are not growing as they weigh up value for money and take longer to make decisions.
- With younger NSW audiences and families continuing to be the most impacted, a key opportunity is developing sustainable strategies for targeting disadvantaged segments.

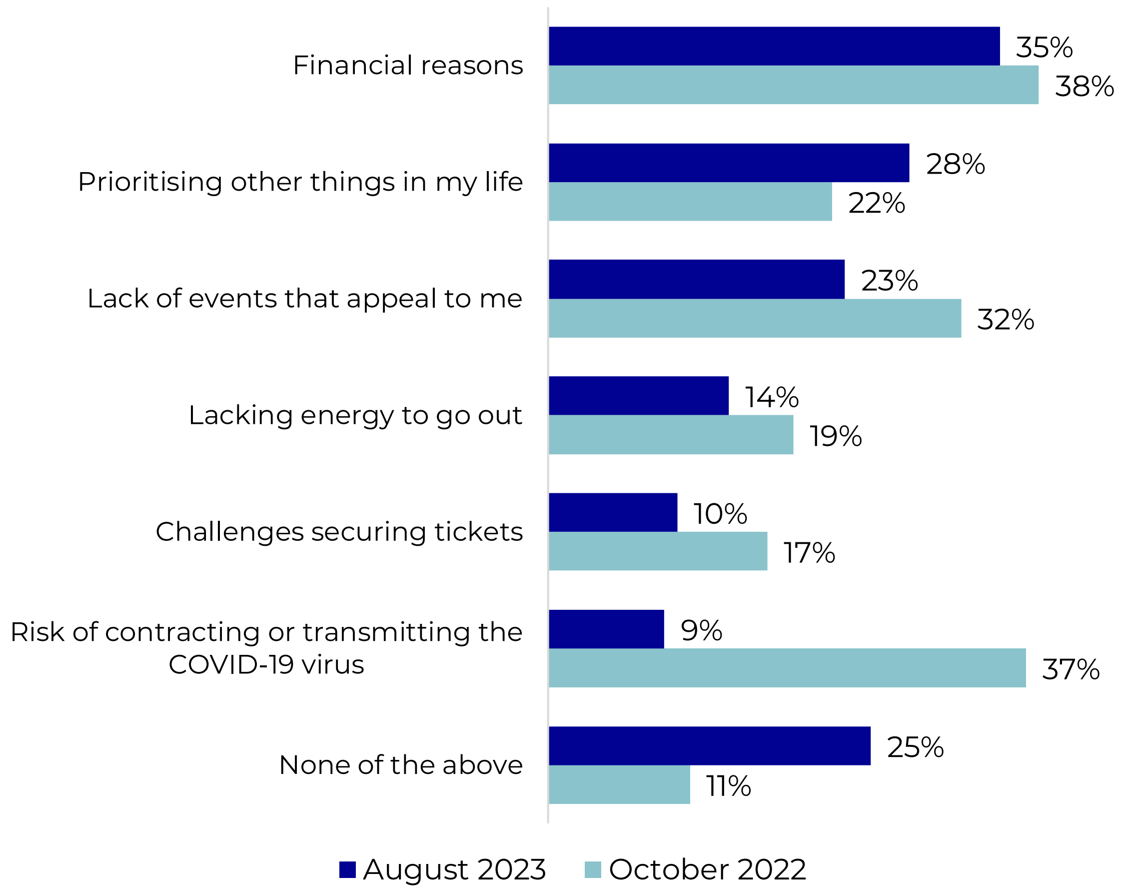
‘Financial reasons’ remains the top barrier to attendance, impacting 3 in 10 NSW audience members

Consistent with previous results from October 2022, the August 2023 results show that ‘financial reasons’ is the most prevalent barrier to attendance among NSW audiences (35%). This is followed by audiences ‘prioritising other things’ in their lives (28%).

Comparing different states and territories, QLD audiences are the most likely to cite financial barriers (42%), alongside VIC audiences (41%). Meanwhile, ACT audiences are least likely (26%).

After 3 long years of the pandemic and lockdown periods in NSW, fears of contracting or transmitting COVID have steadily decreased among audiences, with 9% citing it as a barrier to attendance in August 2023, down from 37% in October 2022.

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). NSW audiences, August 2023 (n=2,530) and October 2022 (n=1,295).



NSW audiences are spending more than the national average, although spending levels aren't growing

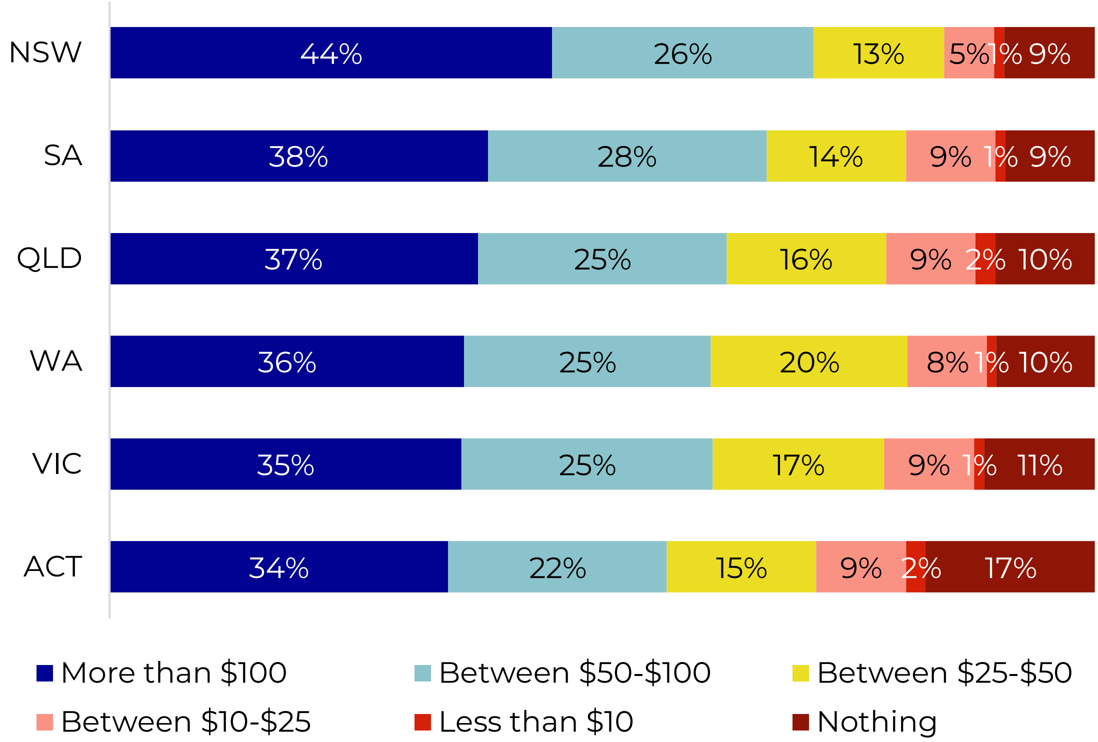
While the proportion of NSW audiences attending in-person cultural events has increased significantly, on average, their spending levels have not increased and remain consistent with spending levels in October 2022. This trend is consistent across the country.

71% of NSW audiences spent $50 or more on tickets to in-person live events and cultural activities over the fortnight prior to data collection, stable since October 2022 (71%).This rate is higher than the national average (64%), while ACT audiences spent the least in August 2023, with 56% spending $50 or more on tickets (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.' Sharp increases to inflation have heightened cost of living pressures amongst NSW households, leading to weaker household consumption levels — with economic growth forecasted by the State Government to be 1.50% in 2023-24, compared to 1.8% in 2021-22 (actual).

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 (NSW audiences, n=2,041)



4 in 10 NSW audiences — and two thirds of parents aged 35-54 - said they are financially 'worse off' compared to one year ago

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, almost half of NSW audiences say they are 'worse off' (44%), while another 50% say they are the 'same' as one year ago. Only 6% overall report that they are 'better off'.

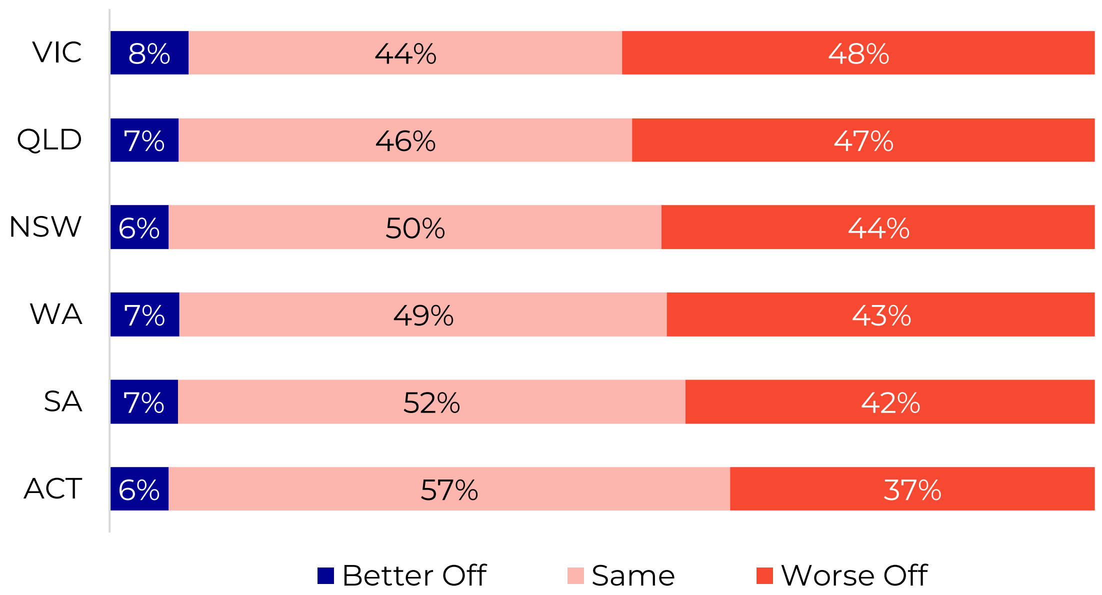
Comparing the results by state/territory, VIC audiences were the most likely to say they are 'worse off' now compared to a year ago (48%), while audiences in the ACT (37%) and SA (42%) were least likely to be feeling 'worse off' right now.

NSW audiences under 35 were more likely to say that they are 'worse off' (54%) compared to those over 35 (43%). Although it is a small proportion, 19% of under 35s said they are 'better off' — the highest of any age group. This result may be linked to many under 35s breaking into the workforce and commencing full-time work and/or their perceptions of financial stability differing from that of older NSW audiences.

In NSW, 65% of **parents aged 35-54** responded that they felt 'worse off' than last year and were less likely to say they are 'better off' (6%) compared to non-parents aged 34-55 (9%).

Meanwhile, **over 55s** were the most likely of any age group to say they are in the 'same' financial position compared to a year ago (58%).

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 (NSW audiences, n=2,533)



NSW audiences are thinking carefully about how to balance attending and costs

Qualitative data from NSW audience members suggests that many are attending cultural activities, but are seeking out options to spend less, for example, through discounted ticketing offers or keeping an eye out for free or low-cost events in their area. One said,

> 'I have to think about what I attend, but at present this does not stop me from seeing what I am interested in.' (65-74, NSW)

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Others mentioned they are changing their spending behaviours at events, such as selecting more affordable seats or opting for cheaper food and drink options. One said,

> ‘I wait for discounted offers for musicals/plays and buy cheaper tickets (e.g., D Reserve).’ (55-64, NSW)

Many NSW audiences mentioned they are currently deliberating more about what they can justify spending on. For instance, some are skipping events they may have been interested in to prioritise the things that really grab their attention. One said,

> ‘I will gladly spend money on galleries or museums at any time. I will also spend for events that mean a lot to me but not on things I am less sure about..’ (55-64, NSW)

Another shared,

> ‘I basically pick & choose events that interest me as they come up. For major events or more costly events like opera/ballet I'll take a bit longer to decide - as tix are purchased far in advance and I may be away or have family commitments. I'm happy to travel interstate for exhibitions or festivals that interest me (particularly to the NGV & Bendigo Art Gallery, or Dark MOFO)’ (45-54, NSW)

Compared to other states, NSW audiences are among the most optimistic about 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?’.

Seven in 10 (69%) NSW audiences say they expect to be in the ‘same’ financial position a year from now, the second-highest rate across all states, behind WA (71%). Only 9% expect to be ‘better off’ (Figure 10).

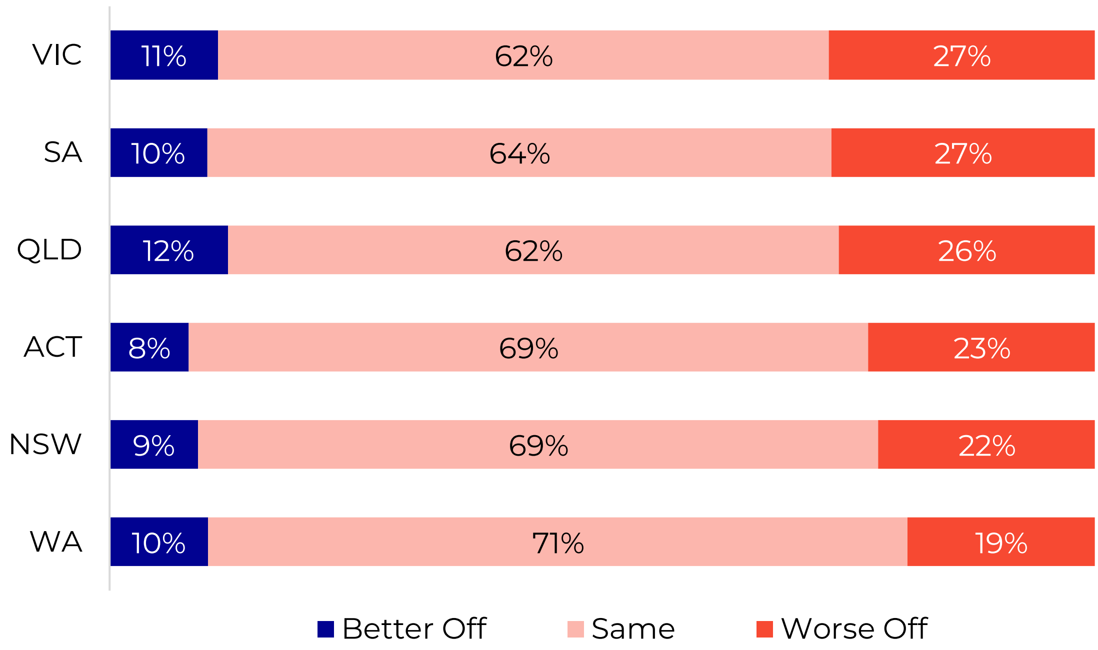
However, with 22% expecting to be ‘worse off’ a year from now, NSW audiences are among the most optimistic currently, along with ACT (23%) and WA (19%) audiences. Meanwhile, VIC audiences are the most likely to be feeling that their financial position will be 'worse off' in the coming year, alongside SA (both 27%).

One in 4 NSW audiences aged **under 35** predicted they will be 'worse off' (25%) in the coming year. However, under 35s are also the most optimistic at the moment, with 23% anticipating they will be 'better off', perhaps related to their prospects of career progression.

NSW **parents aged 35-54** are expecting slightly more stability in their financial circumstances in the coming year, with 58% expecting they will be the 'same', compared to 55% of non-parents aged 35-54.

Over 55s in NSW are, on average, not expecting much change to their financial circumstances looking forward a year from now, with 75% saying they expect to be in the 'same' position.

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 (NSW audiences, n=2,367)



Half of NSW audiences are looking for cheap things to do — but some 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.

Half of NSW audiences say they have been ‘looking for things that are free/cheap to do’ (51% agree or strongly agree). One said,

> ‘There is more selectivity in the events we are going to - we prefer to go to more "free" or "cheap" events more or looks for cheaper seats than what we used to buy.’ (Under 35, NSW).

However, 4 in 10 NSW audiences are finding things to ‘splash out’ or ‘splurge’ on (42%) — suggesting that NSW audiences are willing to spend more on things they love while saving elsewhere. One said,

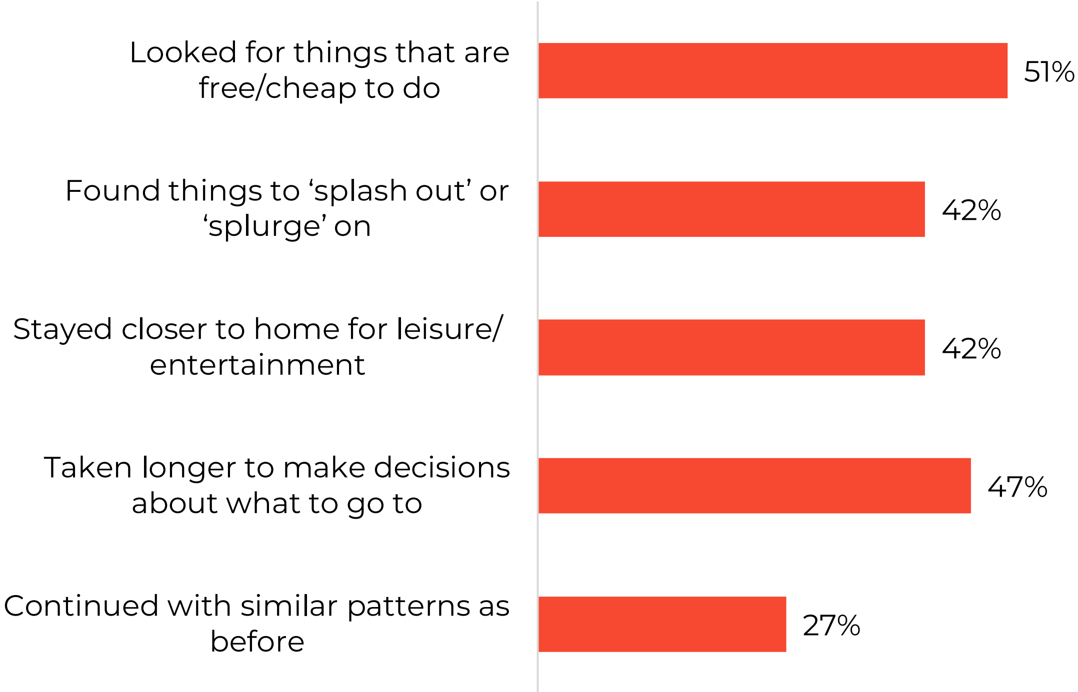
> ‘We are frugal in many aspects of life. However, when it comes to doing something we really enjoy or something that will teach us about the world we will splash out and spend the money.’ (Age 35-54, NSW)

With many being less able to attend as frequently as they want to, they are seeking out memorable experiences they could splurge on and are passionate about, as opposed to choosing multiple activities. One said,

> ‘I am now more selective with what I attend - I can't afford to say yes to everything. Price is now definitely a consideration when choosing which events, I will go to and big tickets items like big theatre company performances are off the table.’ (35-54, NSW)

4 in 10 NSW audiences are also staying closer to home (42%) and almost half are deliberating longer on their decisions to attend 47%).

Figure 11: Given my financial situation, in the past 6 months, I have... (strongly agree and agree). NSW audiences, August 2023 (n=2,522)



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

For many NSW audiences, the additional travel costs are compounding the financial barriers affecting their attendance. For some, cumulative travel costs can be prohibitive, particularly for those living in regional or remote areas. One said,

> 'Distance is always an issue that makes it more expensive however if the event is something that I wish to attend I will.... Carpé Diem.' (55-64, NSW)

Another mentioned the need to make compromises related to their work schedule — alongside weighing up the costs,

> 'Due to work and time constraints, I have also had more near home events and enjoyed local events more. We went to Sydney and went to the art gallery out to dinner and light festival. Accommodation for the night adds to cost of course so twice a year we'll maybe do a Sydney trip.' (55-64, NSW)

Another said,

> 'Another thing impacting going to galleries are opening hours e.g., difficult to go after work or around work hours during the week.' (under 35-54, NSW)

Due to the cost of travel, some respondents mentioned they are opting to attend more local productions to keep costs down, as one said,

> 'We definitely factor money into our decisions - as it's not just the event but also organising babysitting - so that affects how close the event is and also how much it will cost' (Age unknown, NSW)

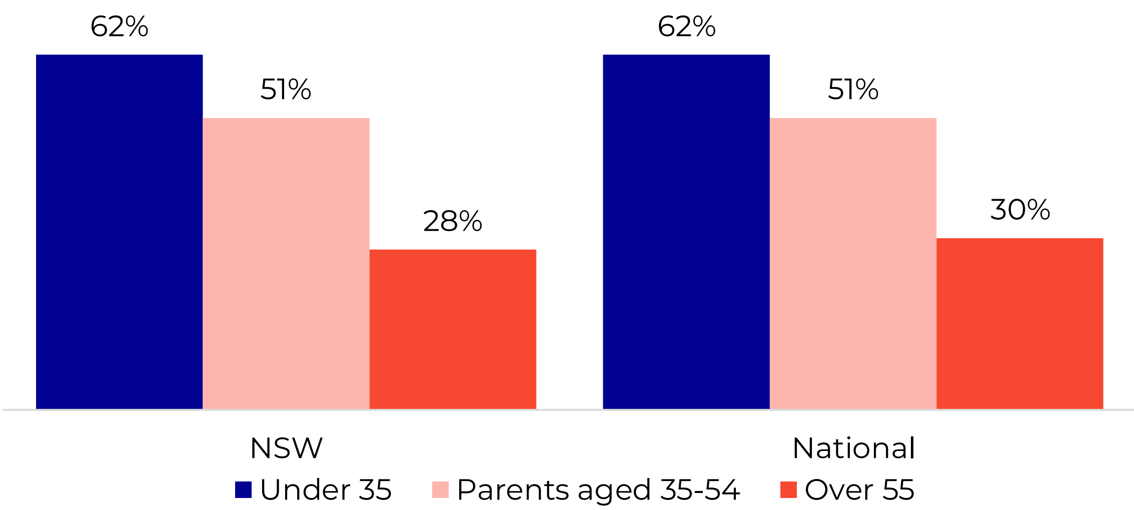
Younger audiences and families continue to be the most impacted by financial barriers

Across all NSW age groups, financial barriers take effect; however, they are most pronounced amongst **under 35s**, with 62% experiencing financial barriers to attending.

Meanwhile, 28% of NSW **audiences over 55** are affected. The proportion is even lower among those aged 75+, with 21% in this group saying financial barriers have prevented them from attending as they did in the past.

Around half (51%) of NSW **parents aged 35-54** are affected by financial barriers — on par with the national rate for this segment (51%).

Figure 12: Proportion of audiences experiencing financial barriers, By key segment, August 2023. August 2023 (NSW audiences, n=2,530)



Qualitative data shows that under 35s in NSW 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,

> ‘I've been more open to going out now "after" COVID, but at the same time am more conscious of finances. So, the two sort of balance each other out and we are going out to things at about the same rate. We still like to go out and enjoy shows where we can, but will think more carefully about it, and/or choose cheaper seats etc’ (Under 35, NSW)

Another shared,

> ‘I have been spending a lot on entertainment recently as there have been lots of big-name performers doing shows in Australia, but I am feeling the pinch so will need to cut down on spending on arts from this point onwards.’ (Under 35, NSW)

Meanwhile, responses from parents aged 35-54 shared similar sentiments, despite many being eager to attend family events. One shared,

> ‘All events I attend are with a family of 4 including young adults so affordability, relevance and proximity to home are very important. We believe in supporting the arts and live music and also our small local cinema. It is integral to our lives and outlook and brings great joy but cost of living is impacting us.’ (35-54, NSW)

"I've been more open to going out now "after" COVID, but at the same time am more conscious of finances. So, the two sort of balance each other out and we are going out to things at about the same rate.

We still like to go out and enjoy shows where we can, but will think more carefully about it, and/or choose cheaper seats etc."

Audience member
Under 35, NSW

Things to think about when addressing financial barriers to attendance

NSW audiences in all age groups are feeling the pinch when weighing up the costs of attending cultural events — though some are more disadvantaged than others.

Here are some things for NSW 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
- ❑ 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 are affected in NSW when assessing the case for funding in grant, partnership and sponsorship applications.
- ❑ Review the level of discounts offered for younger people and families in NSW, and ensure concession pricing is set in relation to the level of disadvantage they experience
- ❑ Try to avoid last-minute ticket discounts and instead think ahead about strategic offers that can realistically be maintained longer-term to build consistency, clarity and trust with audiences
- ❑ With many NSW audiences deterred by travel costs, consider packaging tickets with food, drink and travel options, and/or partnerships with local vendors and businesses, where nearby options and offers could be cross-promoted to audiences
- ❑ Spread awareness about any money saving travel initiatives that could help audiences get to your event.

3.

The desire to inspire

Image Credit: Cecilia Martin, courtesy of Spaghetti Circus.

3. The desire to inspire

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

Key points:

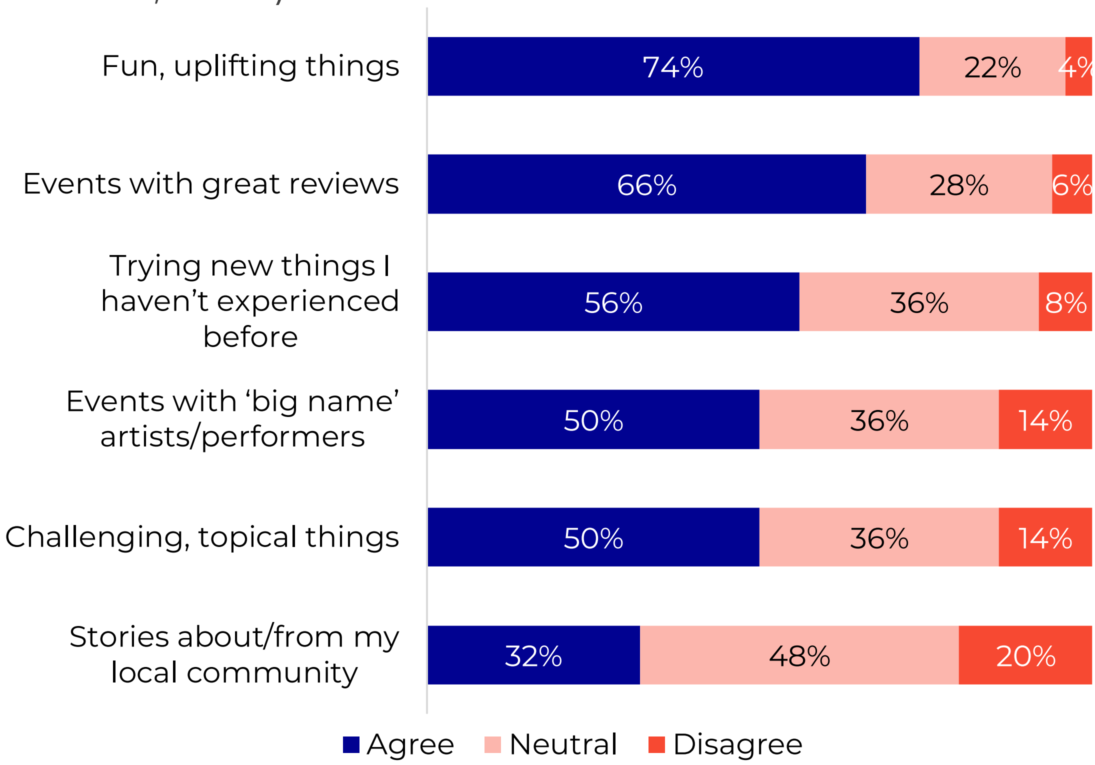
- NSW audiences are finding a wide range of content appealing, though like those around the country, budget pressures are leading some audiences towards ‘safer’ bets or ‘guaranteed fun’.
- A significant proportion of NSW audiences is seeking out fun, uplifting experiences and events with great reviews to ensure value for money.
- NSW audiences want to see the NSW arts scene nurtured and appreciated, and ensure it reflects the diverse community.
- Organisations that understand the mood can please crowds today, while building trust for tomorrow.

NSW audiences are interested in a wide range of content, though budget pressures are leading some towards 'safer' bets

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 NSW audiences for all options tested, including fun, uplifting things (74%), events with great reviews (66%), and trying new things they haven't experienced before (56%).

Figure 13: In the coming year, I'll be most attracted to... August 2023 (NSW audiences, n=2534)



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,

> 'People want to feel good & forget about their worries for a while. Therefor[e] they can & will make sacrifices to bring joy into their lives.' (Age unknown, NSW)

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In NSW, audiences under 35 are currently the most likely to agree they will be attracted to new experiences, with 68% agreeing — suggesting that although this group are favouring fun and assured quality, they're also open to risk-taking to some extent. This group is also showing appeal for challenging/topical things (50%), suggesting a wide variety of interests in this cohort to consider in programming.

By comparison, NSW audiences over 55 are less likely to say they will be attracted to trying new things they haven't experienced before (54%) — however this group is also strong interest in challenging, topical things (52%).

NSW parents aged 35-54 are the most likely segment to be seeking fun, uplifting events (83%) and less likely to be attracted to challenging and topical events (40%). Meanwhile, 59% say they'll be attracted to new things, slightly higher than NSW audiences in general (56%).

Audiences want to see the NSW arts scene nurtured and appreciated — and reflective of Australia's diverse population

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?'

The vibrant and diverse arts scene in NSW is widely considered to be a vital part of the state's character. Audiences mentioned their love for local art in the area and are motivated to show their support. One said,

> 'I think we are very lucky to have such a wide range of arts and cultural experiences available to us here in Sydney. It is one of the reasons I want to continue to live near the inner city.' (65-74, NSW)

Another shared,

> 'Proud of our Australian talent. Our local artists are as good, if not better, than their international counterparts.' (35-54, NSW)

Many audiences in NSW want their local areas and stories to be showcased and elevated — especially those which reflect the diversity of the community. One said,

> ‘Increasing and promoting events about Australian culture amongst the visitors who might be only in Australia for a short time - few weeks but can use the time to understand the culture. A lot of visitors have no idea about events and ways to participate in a short time, making it more accessible to those people and easier to navigate through would make a big difference in my opinion and increase participation.’ (35-54, NSW)

Another said,

> ‘The importance of how multicultural Australian population is and how to engage those communities that feel a bit disconnected from it all.’ (35-54, NSW)

Audiences expressed their appreciation for all the arts and culture that NSW provides, and their hopes for it to continue — but some suggested more could be done to spread awareness about the variety of what’s on at a local level. One said,

> ‘Australian audiences won't engage with culture unless they know it exists. There needs to be a lot more variety and venues in the regions and the outer suburbs of the major cities where the work of emerging artists can flourish, and it should be publicised accordingly.’ (55-64, NSW)

Another said,

> ‘I would like to see local councils in the Sydney area more proactive about "what's on" in their communities. At present it is up to the cultural group to submit information and so it is very passive. There are a lot of small activities and live performances going on that are not picked up and attended as much as they deserve.’ (65-74, NSW)

"Australian audiences won't engage with culture unless they know it exists.

There needs to be a lot more variety and venues in the regions and the outer suburbs of the major cities where the work of emerging artists can flourish, and it should be publicised accordingly."

Audience member
55-64, NSW

Things to think about when making creative and programming decisions

While NSW 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 NSW organisations to consider:

- ❑ Events can be fun and uplifting while still pushing boundaries and affecting meaning around contemporary issues — so look for how to present new, topical and challenging ideas in different ways
- ❑ With many NSW 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!)
- ❑ Many NSW audience 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. One NSW respondent shared: 'From my own personal experience, I think Australian audiences are very lucky with our offerings and choices. Our artists and cultural organisations are hugely diverse covering ample choice to suit our own personal preferences whatever they may be.'
- ❑ Discuss the right level of investment in strategies for reaching new audiences, and retaining them long-term
- ❑ Sometimes, resources are better spent by targeting a specific group of interest with an event

4.

Three segments to know

Image Credit: Jacquie Manning, courtesy of Sydney Writers Festival.

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 NSW 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 to consider:

- ❑ Consider whether your organisation is across the different trends taking place and whether it has adequate insight 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 pressure 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: @raddfilms, courtesy of Unsplash.

5. Online trends

NSW audiences continue to engage online, and in 2023, online content is helping audiences find out about events, discover new artists and participate in digital experiences.

Key points:

- With 3 in 4 (75%) of NSW attendees finding out about arts and culture online, digital channels are proving paramount to audience engagement.
- 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.
- 4 in 10 NSW audiences continue to engage in online arts and culture, and 52% 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.

Emails from arts organisations, websites and word-of-mouth are key channels for NSW audiences

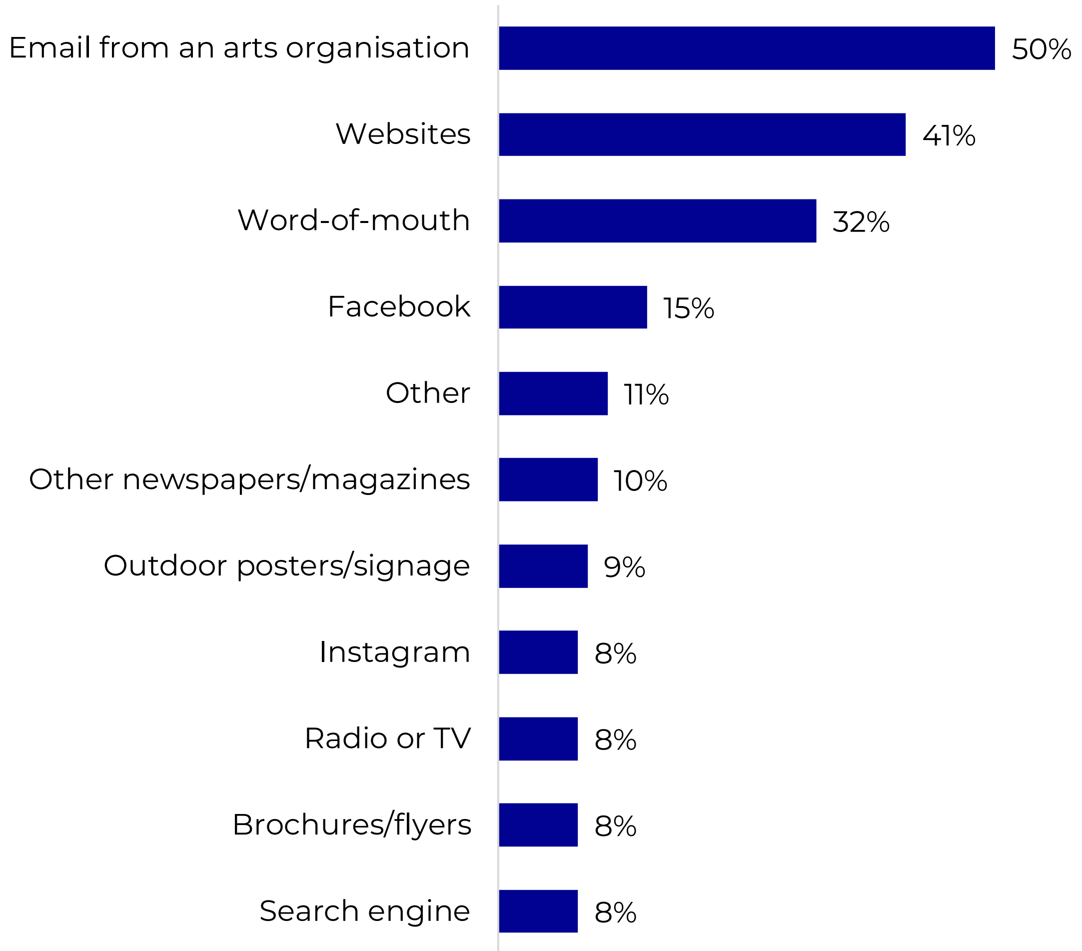
When asked how they heard about the most recent event or cultural activity they attended, overall, NSW audiences are relying on online channels (75%), consistent with the national rate (75%). This includes direct emails from arts organisations (50%) and websites (41%). The proportion of audiences in NSW relying on emails from arts organisations is higher than the national average (45%) (Figure 14).

Around 2 in 3 NSW audiences are relying on word-of-mouth from friends, family or colleagues (32%). This proportion is slightly below the national average (35%), and amongst the least likely of all states to be using this channel to hear about what's on, alongside QLD (32%).

Meanwhile, VIC and WA audiences are currently more likely to rely on word-of-mouth (both 38%) compared to other states.

Smaller proportions of NSW audiences are relying on social media, such as Facebook (15%) and Instagram (8%). These figures could be even higher, assuming a proportion of word-of-mouth occurs online.

Figure 14: How did you hear about the most recent event or cultural activity you attended? (Select all that apply). August 2023 (NSW audiences, n=2,081)



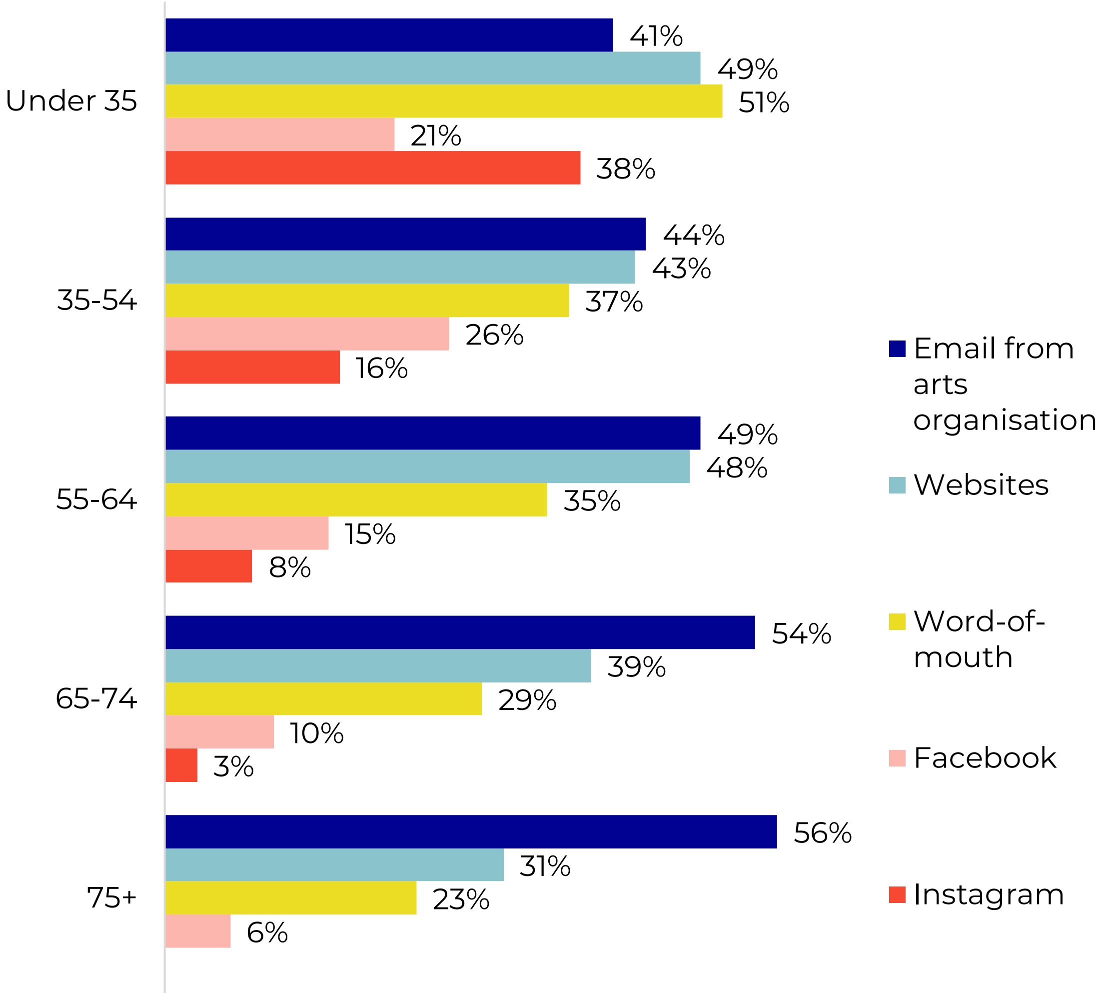
All age groups in NSW are using online channels — and word-of-mouth is especially significant for half of under 35s

Around half (52%) of NSW **over 55s** say the dominant awareness channel is emails from arts organisations, followed by websites (40%) and word-of-mouth (29%) — consistent with national trends.

Meanwhile, half (51%) of **under 35s** say they heard about a recent arts or cultural activity via word-of-mouth. 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.

Under 35s are also utilising social media channels, like Facebook and Instagram, more frequently compared to older age groups.

Figure 15: How did you hear about the most recent event or cultural activity you attended? (Select all that apply). By age group, August 2023 (NSW audiences, n=1,750)



4 in 10 NSW audiences continue to engage in online arts and culture, and half say digital cultural activities still play a role in their lives

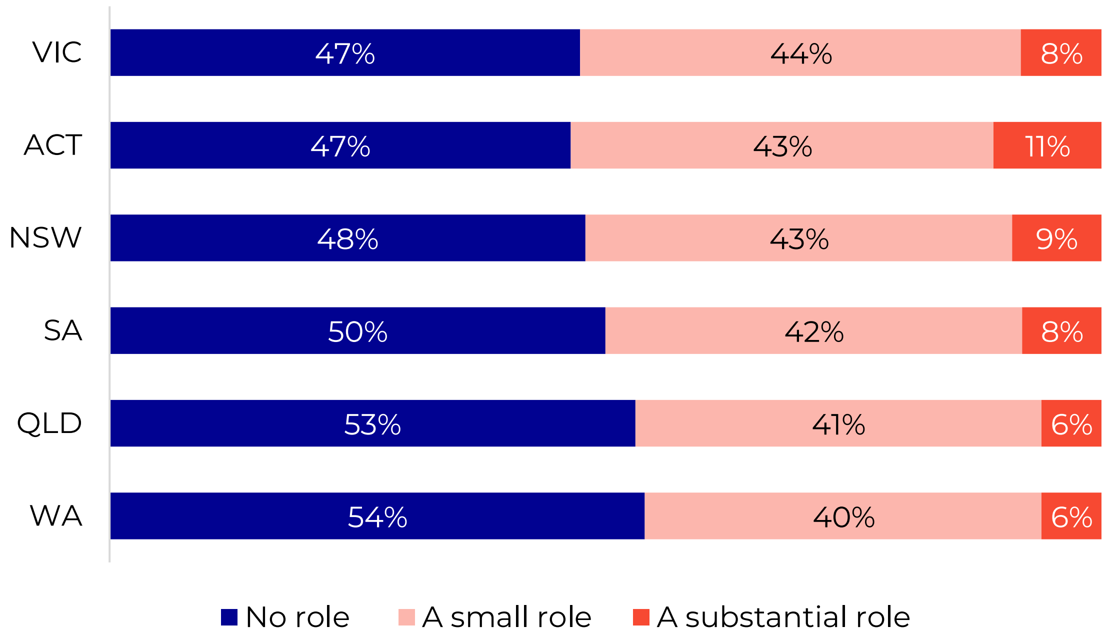
Four in ten (41%) NSW audiences participated in online or digital arts and culture experiences in the fortnight prior to data collection, consistent with the national rate (39%).

Participation in online arts and culture is relatively consistent across the states and territories. NSW and VIC audiences were the most likely to say they had engaged in arts and cultural activities online in the fortnight prior to data collection (both 41%), higher than WA audiences (36%), who were least likely to have engaged in online activities.

Respondents were asked what role online arts events/experiences play in their life now that venues are open for in-person attendance. Among NSW audiences, 9% say they play a substantial role (down from 21% in October 2022), and 43% say they play a small role (down from 50% in October 2022).

Compared to other states, NSW audiences are among the most likely to say that online arts and culture are playing a small or substantial role in their lives (52%), consistent with alongside VIC (52%) and behind ACT (54%)

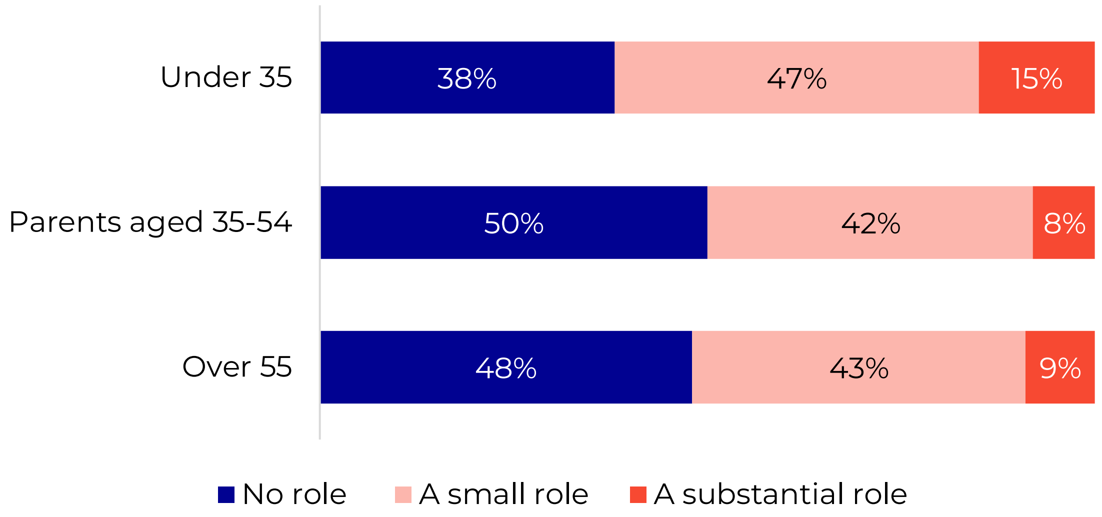
Figure 16: As venues are open and it's possible to attend in-person cultural experiences, what role do online arts events/experiences play in your life? By state or territory of respondent. August 2023 (NSW audiences, n=2,555)



Among the three key segments, NSW audiences **under 35** were the most likely to say that digital experiences will play some role in their life — either a small role (47%) or a substantial role (15%). Amongst **over 55s,** around half say online arts and cultural experiences are playing a small role (43%) or substantial role (9%) — with another half (48%) saying that they play no role.

Meanwhile, half of **parents aged 35-54** say that digital arts and culture plays a small role (42%) or a substantial role (8%) in their lives — and another half (50%) say they play no role.

Figure 17: What role do online arts events/experiences play in your life right now? August 2023, by key segment (NSW audiences, n=2,555)



NSW audiences' online spending has decreased since November 2021, with 3 in 10 digital audiences paying for arts experiences

In line with spending levels amongst NSW audiences not increasing overall, the proportion of online audiences paying for digital arts experiences has continued to decline steadily over the past 18 months.

Three in 10 (32%) said they paid for an experience in the past fortnight, down from 37% in October, 35% in March 2022 and 44% in November 2021.

NSW audiences who were paying for digital arts and cultural experiences in the fortnight prior to data collection were most likely to have purchased single experiences (13%), subscribed to on-demand platforms (10%) and made donations (10%). Fewer subscribed to programs or seasons that included the experience (6%).

Common barriers for NSW audiences include technical challenges and time restrictions

Many audiences mentioned facing technical challenges or set-up limitations as key barriers to engaging in digital arts and culture. This may mean some only engage in online arts experiences in a highly selective way, as these difficulties can inhibit their experiences. One said,

> ‘My home equipment is a poor substitute for the live experience. I have only watched international performances on a streaming platform post-COVID.’ (65-74, NSW)

Another said,

> ‘Barriers are usually technological. User-friendliness. Errors. Bugs. We try to use technology a lot for my disabled mother who can't go to events in person as much as she can so try the online options. Would be great if ABC could collaborate with performing arts hubs to stream content and make accessible to more Australians, since commercial streaming services wont because not financially beneficial for them, and you cannot expect performing artists to do it for themselves - they need a platform with that expertise.’ (55-64, NSW)

Some respondents mentioned finding that the timing of available events presents issues., and others mentioned being limited by connection issues in their area. One said:

> ‘The greatest barrier is usually a restricted time frame for watching it online. It is also difficult due to a poor internet connection where we live. We do not have the NBN.’ (65-74, NSW)

While some NSW audiences value opportunities to engage online, others prefer live events due to perceived value for money and the atmosphere that comes with live

Several NSW 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,

> 'I very rarely participate in ticketed or live online arts events and much prefer to attend shows in person. However, as a visual artist I am regularly viewing commercial art exhibitions online, particularly those from interstate galleries which I wouldn't be able to see in person.' (Under 35, NSW)

Another shared,

> 'Most of my entertainment is online. Also, I do regular online courses. I love having access to stuff from overseas which I'd never get to see otherwise.' (65-74, NSW)

However, a significant number of respondents mentioned that while they do not face any barriers to online participation, they simply prefer the atmosphere and opportunities to socialise and explore their local area that is created at live events. One said,

> 'No barriers to digital participation. [I] like live participation as I enjoy the special event nature of live performances, frequently attend with friends, and/or go out to dinner. Also like to use and enjoy the physical spaces of the city that are in and around performance venues.' (65-74, NSW)

Others mentioned that there is a plethora of free material online that they can access, without needing to pay for specific experiences. One said,

> 'With so much content via paid subscription or free to access, I don't feel the urge to pay for a specific online one-off arts event/experiences.' (35-54, NSW)

Some NSW audiences queried whether online experiences offer value for money, especially given the cost-of-living challenges facing them right now. One commented,

> ‘Online is not the same as in person, to me it's not worth watching a taped theatre performance and paying for it, it's cheaper to watch a tv show. Online gallery experiences do not appeal to me at all, as it's incomparable to being physically in a gallery.’ (Under 35, NSW)

Another shared,

> ‘I have no interest in online or digital events. They remove the tactile, sensory & atmospheric elements that are the main reasons I enjoy arts & culture. I can't see things up close or at different angles, I can't hear things in live surround, I can't feel the excitement & joy of others around me, etc.’ (Age unknown, NSW)

"Most of my entertainment is online. Also, I do regular online courses.

I love having access to stuff from overseas which I'd never get to see otherwise."

Audience member
65-74, NSW

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 NSW organisations:

- ❑ 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
- ❑ NSW 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
- ❑ Promoting online experiences which are low-cost could help to build audiences in the current financial climate. One NSW respondent shared: 'If the event was something that interested me or was an option, then online would be considered, particularly if the event was a distance away, as the added cost to go in person may be difficult to budget for.'
- ❑ Some NSW audiences are particularly reliant on word-of-mouth, especially under 35s, who are also using social media at high rates. Leverage this prominence as an awareness channel online, employing strategies that promote the social aspects of events, or encourage sharing
- ❑ 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: Cecilia Martin, courtesy of Spaghetti Circus: The Globe at National Circus Festival.

6. Late decision-making

Last-minute decision-making persists in NSW, 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:

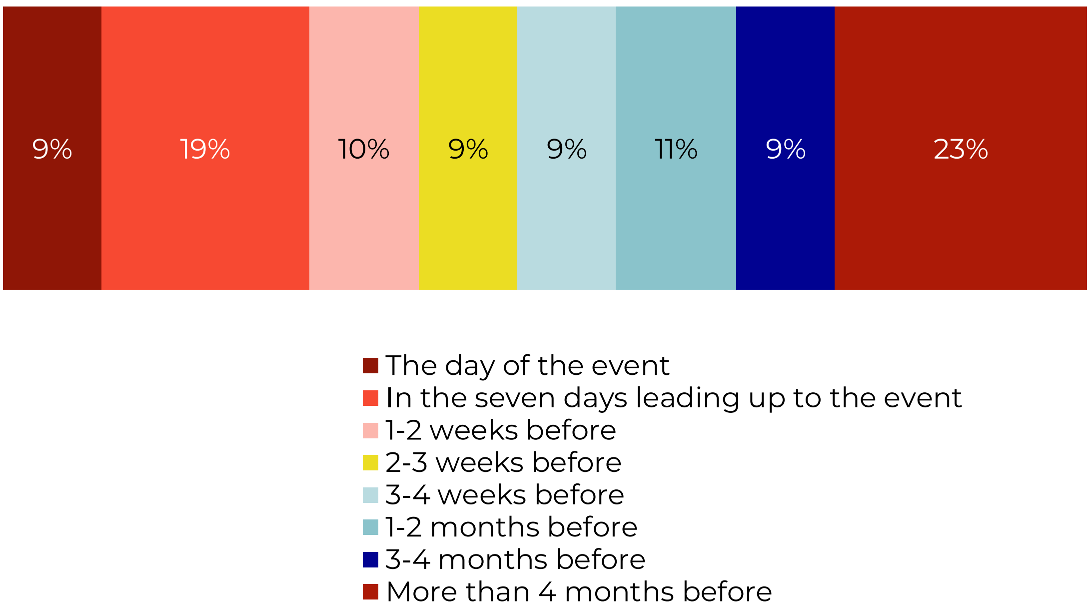
- 4 in 10 NSW audiences are booking less than 2 weeks out, with 9% booking on the day
- Analysis of 'early bookers', 'mid-term bookers' and 'last-minute bookers' shows that last-minute ticket buying is most common among under 35s, families and lower spenders. They are also more likely to rely on word-of-mouth.
- Ticketing initiatives to support more price sensitive audiences are important, but last-minute discounting may not be the answer.

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 prevails among NSW audiences. One in ten (9%) audience members reported that they booked the last event they attended on the day of the event, and 19% booked in the week leading up to it.

Figure 18: Can you tell us how far in advance you booked or committed to go...? August 2023 (NSW audiences, n=2,081)

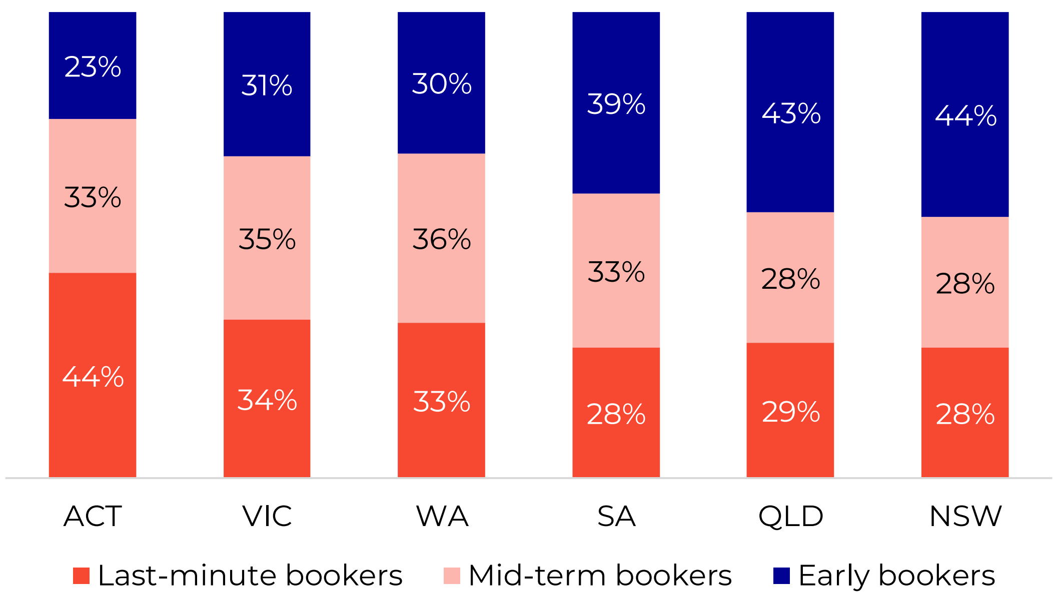


In NSW, qualitative data indicates that key motivations for booking tickets early included wanting to secure particular seats, booking tickets as part of a subscription/membership package, the need to plan ahead to coordinate travel timings and accommodation.

Compared to other states, NSW audiences are most likely to be early bookers and amongst the least likely to be booking last-minute, though last-minute booking is relatively consistent across the states and territories.

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 19: Can you tell us how far in advance you booked or committed to go...? By state or territory, August 2023 (n=6,926)



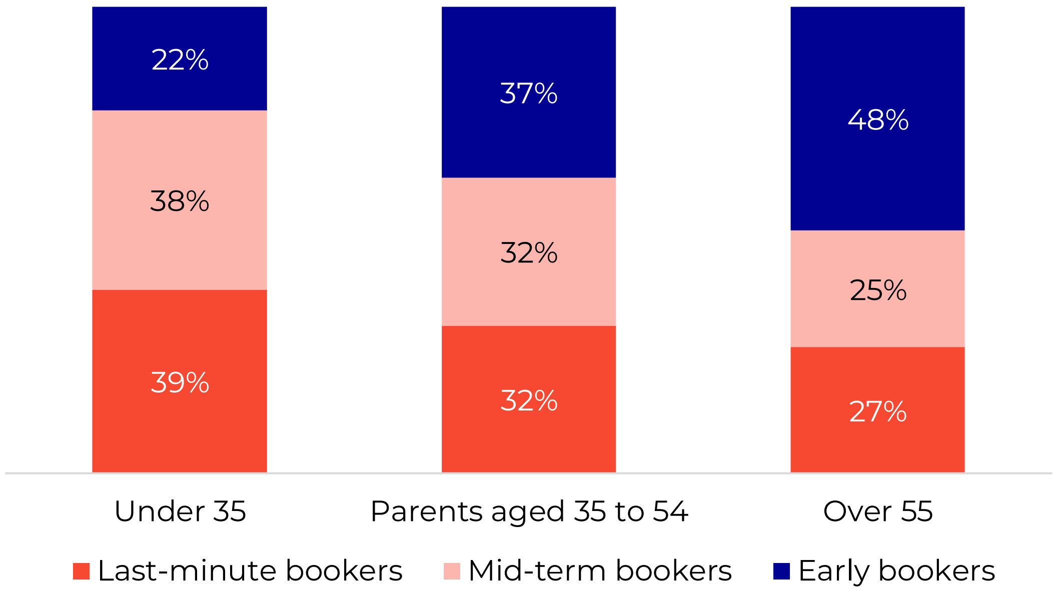
In NSW, last-minute ticket buying is most common among under 35s, families and lower spenders

Seven in 10 (72%) NSW attendees under 35s reported taking longer to make decisions about attending — consistent with trends around increased financial barriers for this group (Error! Reference source not found.). They comprise a significant proportion of last-minute ticket buyers, with 39% booking within the week of the event.

NSW parents aged 35-54 are more likely to agree that they are taking longer to make decisions about attending (48%) compared to non-parents aged 35-54 (43%).

Over 55s in NSW are least likely to be booking tickets last-minute (27%), and this proportion is lowest amongst those aged 75+ (23%). Over 55s are also the least likely of any NSW segment to agree that they are taking longer to make decisions based on their financial circumstances (37%).

Figure 20: Can you tell us how far in advance you booked or committed to go...? By key segments, August 2023 (NSW audiences, n=2,081)



Many early bookers reported feeling 'better off' or the 'same' financially as they were a year ago (62%), whereas last-minute and mid-term bookers were slightly less likely to do so (55% amongst last-minute bookers; 51% amongst mid-term bookers).

Six in ten (60%) of early bookers in NSW reported spending more than $100 in the past fortnight on in-person live events and cultural activities, compared to 38% of mid-term bookers, and 27% of last-minute bookers.

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

> 'Before having a kid I would book events months in advance, but since having a kid, life is a little more unpredictable so at the moment it can be difficult to commit to future events.' (35-54, NSW)

Another said,

> 'I do not live locally so was unsure I would be able to make the trip down to the city as I needed to find childcare.' (Under 35, NSW)

Some mentioned having to weigh up their budget closer to the event:

> 'I sometimes plan ahead for attending performances but most often I work out if I have the time and finances to go and do this closer to the time of the event. Sometimes I capitalise on early ticket offers from various arts organisations.' (55-64, NSW)

Others in NSW are feeling spoilt for choice right now with the current range of offerings but are prioritising some events over others and may be waiting to see which event appeals most to them on a certain day. One shared,

> 'There are lots of other things on and I like to be flexible as to what I go to, without missing out on something better on that particular day. I provide care to a family member and have to wait to ensure all is well with the relative before I commit to go anywhere.' (Age unknown, NSW)

With audiences currently tending to seek experiences they know they will enjoy and find greater value for money; some NSW attendees may be waiting for factors like reviews and word-of-mouth recommendations to decide. One said,

> 'It wasn't really on my radar, despite getting a regular email from the theatre company. Once the short season for the play began and people started talking about it on social media, as well as positive reviews appearing in the press, I was keen to go.' (55-64, NSW)

Last-minute bookers typically hear about events via word-of-mouth and websites, while early bookers rely more on emails

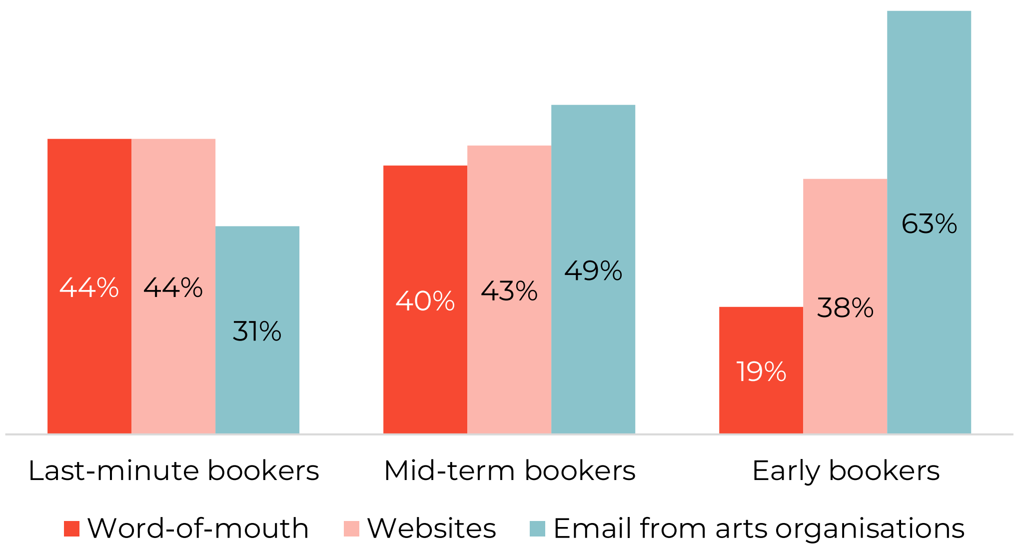
Last-minute ticket bookers in NSW are frequently hearing about events via websites and word-of-mouth (both 44%). These channels are also prevalent amongst mid-term bookers, with 43% using websites and 40% utilising word-of-mouth. Another half (49%) of mid-term bookers are hearing about things via emails from arts organisations (compared to 31% of last-minute bookers).

Meanwhile, 6 in 10 (63%) of early bookers are finding out about events via emails from arts organisations, and 38% via websites. Although a significant proportion (19%), word-of-mouth has slightly lower penetration among this group, relative to last-minute and mid-term bookers.

Last-minute ticket buyers were also mentioning a variety of other channels, including newspapers and magazines (16%), outdoor posters and signage (15%), social media like Facebook (15%) and Instagram (9%), and traditional media channels like radio and TV (14%).

Finding out about what's on via websites is important for all types of ticket buyers and is relatively consistent in terms of proportions (Error! Reference source not found.).

Figure 21: How did you hear about the most recent event or cultural activity you attended? (Select all that apply). By booking purchase timeframe, August 2023 (NSW audiences, n=2,081)



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"I sometimes plan ahead for attending performances but most often I work out if I have the time and finances to go and do this closer to the time of the event.

Sometimes I capitalise on early ticket offers from various arts organisations."

Audience member
55-64, NSW

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

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

Here are some key considerations:

- ❑ 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 offers 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. One NSW respondent said, ‘Booking fees are incredibly annoying, especially exorbitant ones. I have often not booked tickets because trying to book multiple performances in a single booking is often too complex or do not allow enough time before the session expires. PLEASE include booking fees in the price of the tickets!!!!! It would mean I would book more often, including on the spur of the moment.’

7.

Subscriptions and memberships

Image Credit: Nicholas Smith, courtesy of Campbelltown Arts Centre.

7. Subscriptions and memberships

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

Key points:

- 52% of NSW audiences are members/subscribers — amongst the highest rate across the states and territories.
- Uptake and motivations for subscribing vary drastically amongst key segments in NSW.
- Older NSW audiences want to lock plans in early, while younger audiences are more likely to want access to discounted tickets.
- Opportunities exist for NSW organisations to trial different offers and models, and test different messaging to target the unique needs and interests of different audience segments.

Compared to other states, NSW audiences are among the most likely to be members or subscribers in 2023

Half (52%) of NSW respondents reported having purchased season tickets or a membership to an organisation this year — higher than the national average of 41% (Figure 22).

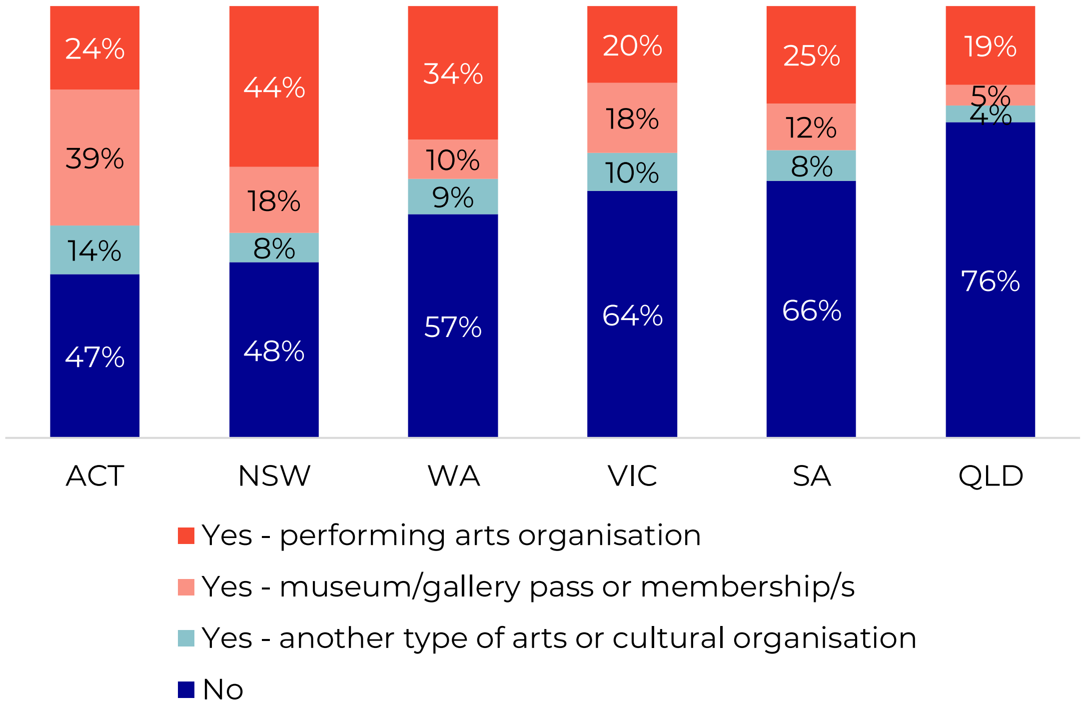
The proportion of those in NSW who subscribed or purchased a membership to an arts organisation is among the largest of any state or territory, along with the ACT (53%). The proportion who are subscribers or members is lowest in QLD (24%).

In NSW, performing arts subscriptions were more common in this sample, held by 44% of respondents, followed by museum/gallery memberships (18%). A small number (8%) held another kind of membership, for example, to literary festivals.

Over 55s in NSW are more likely to be subscribers/members right now than other segments in NSW. Six in 10 (62%) of audiences over 55s are subscribers/members, compared to just a quarter (24%) of under 35s.

Parents aged 35-54 are less likely to have purchased season tickets or a membership in the latest season (35%) compared to non-parents in this age group (57%).

Figure 22: Did you purchase a season ticket, subscription or membership? By state or territory of respondent, August 2023 (NSW audiences, n=2,546)



In NSW, older audiences are more motivated to purchase a subscription/membership to lock plans early, while younger audiences are seeking discounted tickets

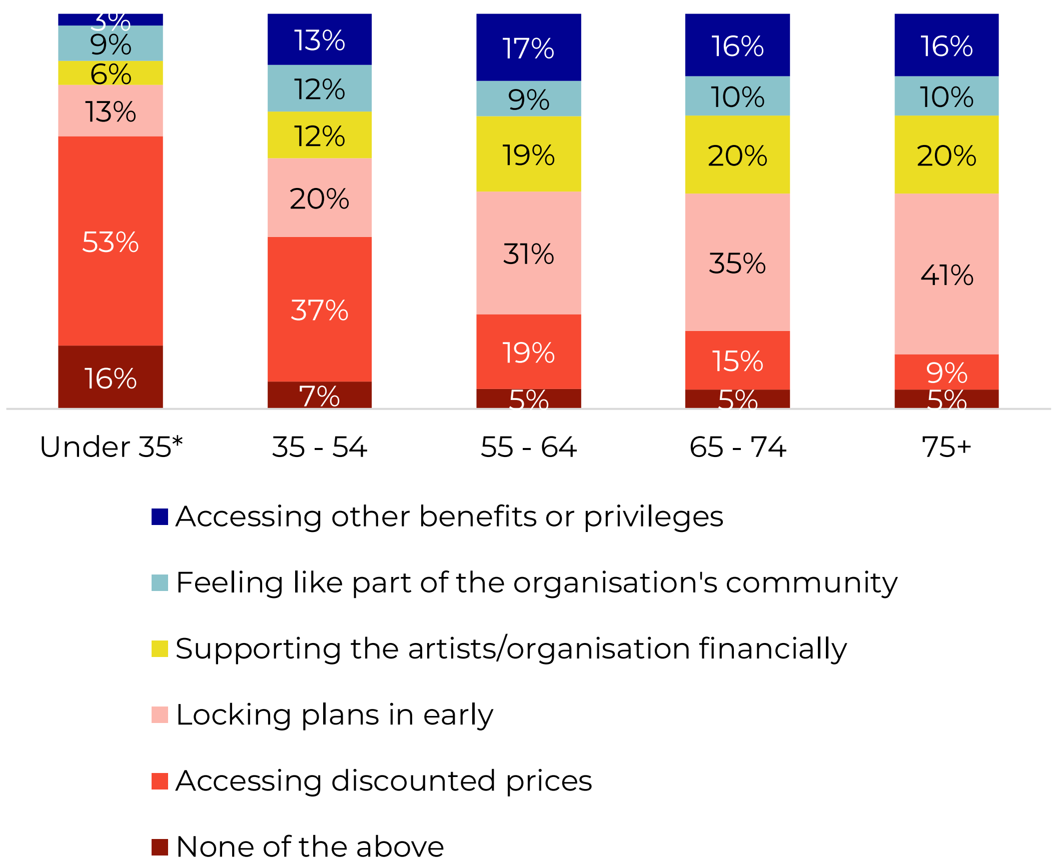
Audiences were asked to select their top reason for subscribing from a list of options. Motivations for buying ticket packages are drastically different between younger and older audiences in NSW (Figure 23).

Among NSW audiences **over 55**, the most common reason was locking in plans early (36%), followed by supporting the artists/organisations financially (20%). Smaller proportions identified their main motivation as accessing other benefits (like special seats, members only events, early access) (16%), accessing discounts (14%), or feeling like part of the organisation's community (10%).

Meanwhile, younger audiences such as those **under 35** are more attracted to accessing discounted prices that come with memberships and subscriptions, compared to other reasons. With a small sample size of subscribers in the under 35s group (n=34), these results should be interpreted with caution.

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

Figure 23: From the following list, what was the top reason for your decision to subscribe or purchase a season ticket or membership? By age group, August 2023 (NSW audiences, n=1,333)



Qualitative data highlights that motivations for subscribing are varied between the key age segments in NSW

Many older NSW audiences like the fact that purchasing a subscription or membership forces them to plan ahead, but they also appreciate when subscriptions/memberships come with options for enhanced flexibility compared to other tickets — in case plans need to change. One subscriber shared,

> ‘Locking in things to do in advance. It is great when the date comes around. Like a little gift. It is good if the booking is flexible - so if you book a date well in advance you can change closer to the time if needed and if the seats are available.’ (55-64, NSW)

Others mentioned the value for money, especially if they can access other bonuses which help make the event even more special. One said,

> ‘The AGNSW membership entitled us to a free exhibition ticket, discounted events and members lounge with cheaper food. The movie club accrues points, so we get a lot of free tickets just from buying popcorn and a glass of wine. The STC gave us discounted theatre ticket for buying a package. The ACO membership the same.’ (55-64, NSW)

Older NSW audiences are also motivated to show their support for the artists and organisations they love, with several noting they’ve been loyal subscribers or members for years. Some shared,

> ‘I love variety and surprises, things that make me think and revisit old favourites. I subscribe to 4 theatre seasons that I trust and three classical music seasons. Also ask children for tix to musicals for gifts. Also support local musical societies. I strongly believe performing arts are the life blood of our society need support.’ (65-74, NSW)

> ‘I have attended with season tickets to the Australian Ballet for 54 years! (since high school); often have season Opera Australia tickets and for many years now SSO season tickets. It is easier, though feels more pricey (despite season ticket discounts), to organise the concerts at one time and have those dates booked for the year.’ (65-74, NSW)

Another shared a similar sentiment, and added that the experience is enhanced by the sense of belonging they feel in the community who supports the organisation and the art, saying:

> ‘Supporting [artists and organisations] along with like-minded people. Also having a strong lifelong interest in playing and listening to music and a deep appreciation of art.’ (75+, NSW)

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. One shared,

> ‘Given the desire to give these cultural experiences to my kids (coming into an appropriate age); I thought it would be cheaper than buying individually. Also, having a 'go-to' place where my membership is first up cuts down time spent looking at various options.’ (35-54, NSW)

Qualitative data from under 35s confirms they are seeking quality and value for money. Perks such as access to discounted tickets and flexibility are also strong motivators for under 35s purchasing subscriptions and memberships. One said,

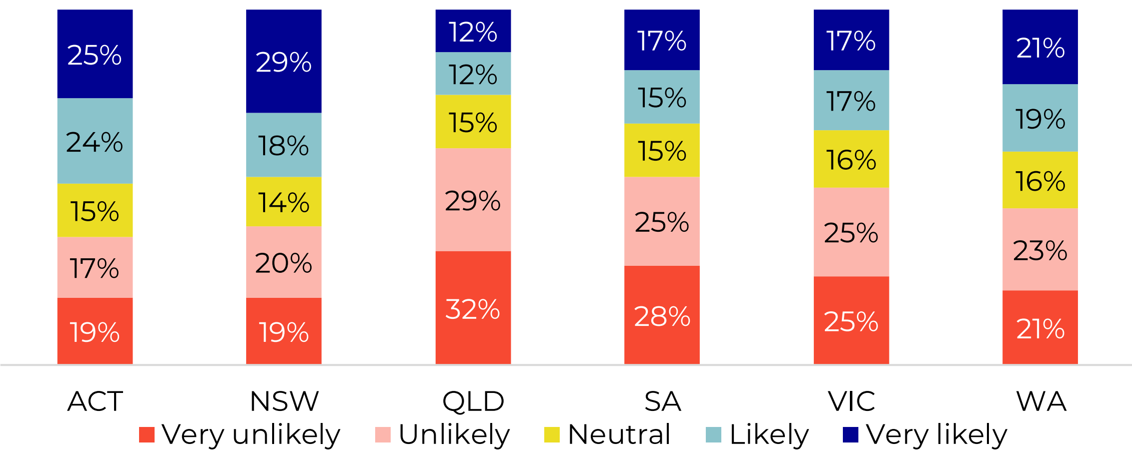
> ‘STC subscriber—have subscribed for the last 5 years now, go with a group of friends. Price is cheaper and we can exchange without fees.’ (Under 35, NSW)

Looking ahead, almost half of NSW 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.

Almost half of NSW audiences (47%) said they would be 'very likely' (29%) or 'likely' (18%) to purchase a subscription or membership for next year. Audiences in NSW (47%) and ACT (49%) are most likely to say 'very likely' or 'likely' — while SA (32%) and QLD (24%) are the least likely.

Figure 24: How likely or unlikely are you to purchase a subscription or membership next year? By state or territory of respondent, August 2023 (NSW audiences, n=2,553)



NSW audiences made suggestions for improving booking processes and greater promotion of the perks and benefits

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?'

Some NSW audiences suggest improving group booking processes for members/ subscribers who want to sit together at events. One said,

> ‘Allow groups who subscribe together online to select slightly different plays/performance date (very frustrating that we all have to our subscriptions in separately and therefore we don't sit together just because we have one or two different plays/dates. Also, better discounts and benefits for subscribing.’ (Age unknown, NSW)

Value for money is important across all ages, but especially younger audiences, who suggested more incentives around discounts and lower concession prices would make subscriptions and memberships appealing. They mentioned,

> ‘As a younger person, the primary reason for me to subscribe is the somewhat cheaper pricing and ability to be flexible with our bookings without fees. Given the prices of tickets are going up and flexibility becoming more important, I would prefer a multipack/spend and save model over a traditional sub.’ (Under 35, NSW)

Another said,

> ‘Having better options to get refund or date changes on tickets would be extremely helpful. I would be more inclined to get a membership with an organisation it offered more flexibility.’ (Under 35, NSW)

Others mentioned that subscribing to organisations based in Sydney is less inviting for regional and remote audiences, due to the need to travel into the city. Some suggested having programming in regional areas would be beneficial:

> ‘Try and reach a broader audience and not just the 'inner-city' types. Partner with local arts centres — for example the Casula Powerhouse.’ (Age unknown, NSW)

Others think that improved communication around the benefits of subscriptions and memberships could get potential audiences over the line. This includes clear communication around future programming, exclusive offers, flexibility and discounted prices. One NSW audience member said,

> ‘Advertise program as far in advance as possible so I can make a more informed decision about value of subscription.’ (55-64, NSW)

Another said,

> ‘I am more likely to attend events that have last-minute discounts. However, I'm also currently buying well in advance for the 2024 Sydney Festival, so good publicity well in advance is also helpful for me.’ (65-74, NSW)

Some are finding it challenging to navigate online booking platforms, confirming the importance of telephone support — particularly for older subscribers and members. One said,

> ‘I find that it is not so convenient to purchase tickets through the internet — it can be a turn off when you are stopped by some simple thing, when speaking to a person could fix it in a second.’ (75+, NSW)

"Having better options to get refund or date changes on tickets would be extremely helpful.

I would be more inclined to get a membership with an organisation it offered more flexibility."

Audience member
Under 35, NSW

Things to think about when reviewing subscription and membership offers

Here are some things for NSW organisations to consider:

- ❑ With subscription/membership behaviours and motivations differing dramatically across key audience segments in NSW, 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. One NSW respondent under 35 suggested: 'I believe there should be a tier depending on the age group and or promo codes/voucher for different community groups (govt employees, students, enthusiasts, etc).'
- ❑ 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 the 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
- ❑ Payment plans and/or monthly fees could have their place in memberships for younger people and other segments across NSW — it's a space worth watching.

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.

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

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