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Audience Outlook Monitor

VIC Audiences 2023+

wolf brown

CREATIVE VICTORIA

Contents

Cover Image Credit: Charlie Kinross, courtesy of ACMI.

Introduction

This report shares insights from over 3,000 Victorian 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 Victorian (VIC) Snapshot Report outlines key findings from Phase 9 (August 2023) of the Audience Outlook Monitor in Australia, based on data collected from 3,046 audience members living in VIC.

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: Mark Gambino, credit of Arts Centre Melbourne.

1. Attendance Trajectories

Attendance rates in VIC 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:

- VIC audiences are among 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.
- With 6 in 10 VIC audience members expecting their attendance levels will stay the same in the next 12 months, 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.

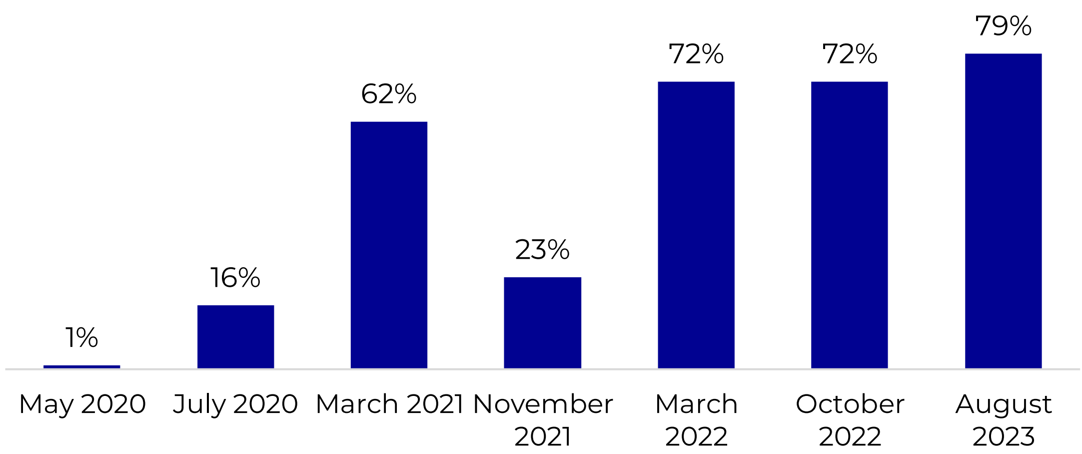
In 2023, attendance amongst VIC audiences is reaching its highest point since 2020, but there's more to the story

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

Eight in 10 VIC audience members say they attended at least one kind of cultural event in the fortnight prior to data collection (79%), consistent with the national average (79%) and up from 72% 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 VIC respondents answering yes to 'In the past fortnight, did you do a cultural activity in-person (not online)?' May 2020 to August 2023 (n=3,046)



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.

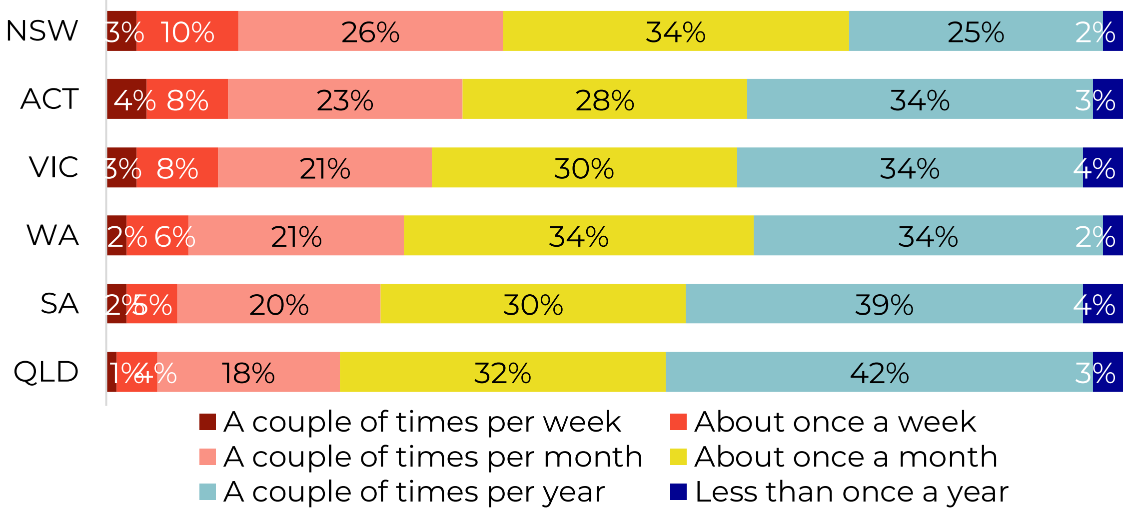
Although there will always be exceptions, understanding the major differences between these three groups is a helpful starting point, with a summary of these three national segments available in Chapter 4 of this report (Segmented Approaches).

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

Amongst VIC audiences, attendance frequency is growing at performing arts events in August 2023, compared to October 2022. Six in 10 (62%) attended at least once a month in August 2023, up from 47% in October 2022. This 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 2: Attendance frequency at performing arts events by state or territory, August 2023. (VIC audiences, n=2,861).



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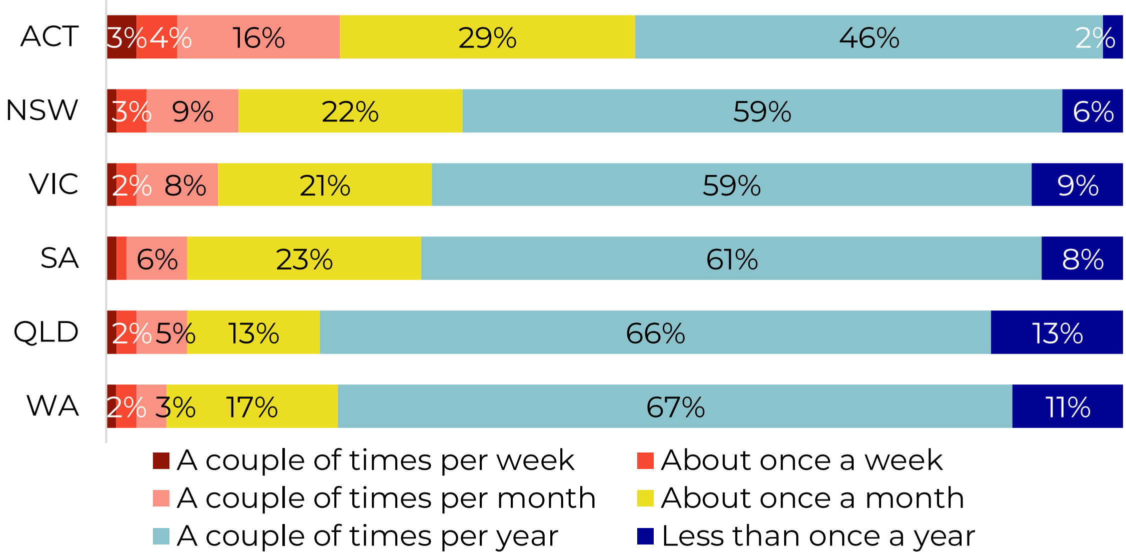
In VIC, frequency of attendance at museums and galleries has also increased in August 2023, with 32% attending at least once a month, up from 24% in October 2022. This is consistent with the national average (32%).

Figure 3: Attendance frequency at museums and galleries by state or territory, August 2023. (VIC 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.

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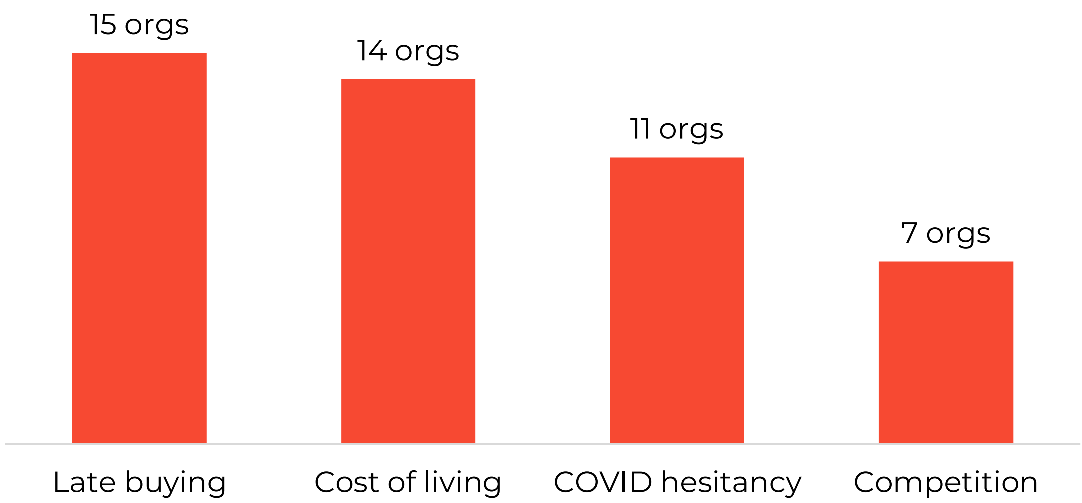
52 organisations across the country (including 16 VIC organisations) responded to the benchmarking survey, and their responses confirm the past few years have been challenging, with a range of factors impacting differently across the market. Some organisations have been affected by natural disasters, 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)



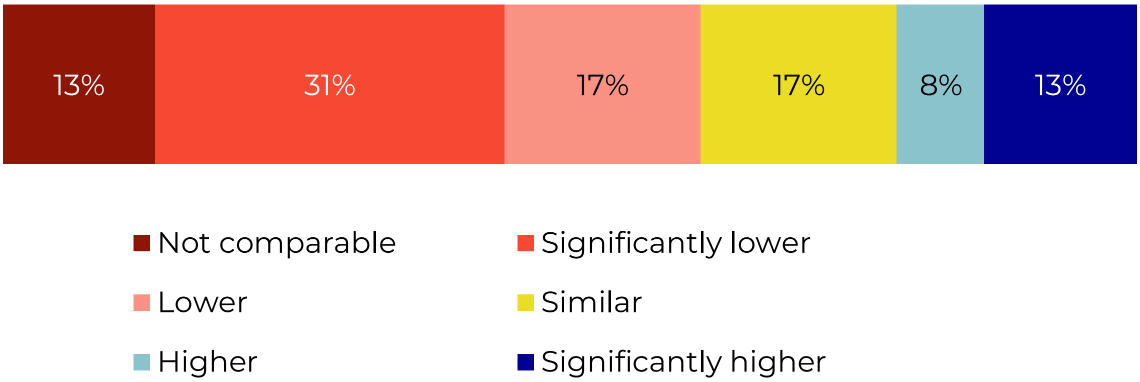
Organisations across Australia are adapting to the new landscape in different ways, and around 4 in 10 have rebuilt their audience to 2019 levels

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.

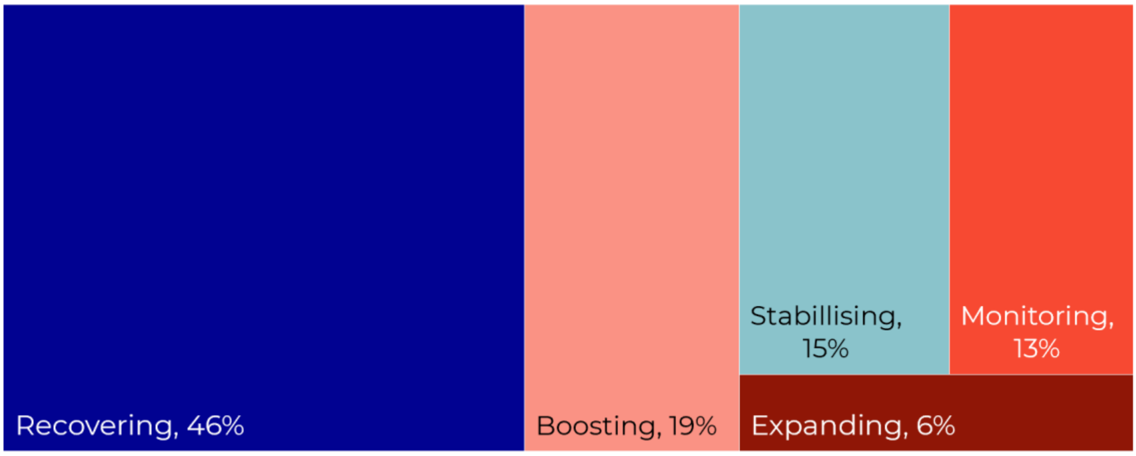
Organisations were placed into these categories by evaluating against the following four elements:

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

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

One VIC 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.

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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.

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

> 'Variety of entertainment, communicating COVID-safe venue practices, lots of marketing.' (Venue, Regional VIC)

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

> 'High rate of new audience in 2022 due to large scale musical.' (Producer, Metro VIC)

With international touring increasing, some boosting organisations cited this as a success. However, not all touring product is reaching an audience, with one regional VIC producer saying,

> 'Touring shows have been very difficult to sell post-COVID'. (Producer, regional VIC)

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:

> 'There was also a lot of in-industry competition with so many events back in full force.' (Multi-artform venue, regional VIC)

> 'Market saturation. Competition due to so many events happening at the same time, all over the city.' (Producer, metropolitan VIC)

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.

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. VIC organisations shared,

> 'Audiences still buy in the last one to two weeks, which is very nerve wracking for hirers and the venue.' (Producer, regional VIC)

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 VIC, a recovering organisation shared that their successes in bringing audiences back have been,

> 'Big name artists are beginning to return which has brought key audience demographics back. Making our spaces feel safe and comfortable for folks who were unsure about venturing out after COVID.' (Venue, metropolitan VIC)

Another said,

> 'We have only just this year seen a return of audiences and over the last 12 months seen over 2000 new ticket buyers. But we have increased our members, and the feedback has been really positive.' (Producer, regional VIC)

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 VIC, 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, around half of VIC respondents to the Audience Outlook Monitor survey (53%) 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 (30%), while 62% 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 covered in depth in the next chapter.

"Touring shows have been very difficult to sell post-COVID. except for a small period when everyone wanted to get out.

Now there are financial pressures which are keeping audiences very low since second half of 2022 and into 2023."

Producer
Regional VIC

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 VIC 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
- ❑ Stay abreast of local population changes which could present opportunities for building audiences – such as Melbourne becoming Australia’s most populous city and international migration (including the return of international students) set to recover in VIC.

2.

Inflationary pressures and pricing

Image Credit: Eugene Hyland, courtesy of ACMI.

2. Inflationary pressures and pricing

Financial barriers are impacting VIC 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 are the top barrier to attendance facing VIC audiences, and inflationary pressures are expected to continue in 2023 and 2024.
- VIC audiences are feeling the least optimistic about their current and future financial position of any state or territory.
- Spending levels at arts and culture events are not growing, as VIC audiences weigh up value for money and take longer to make decisions.
- With younger VIC audiences and families continuing to be the most impacted, a key opportunity is developing sustainable strategies for targeting disadvantaged segments.

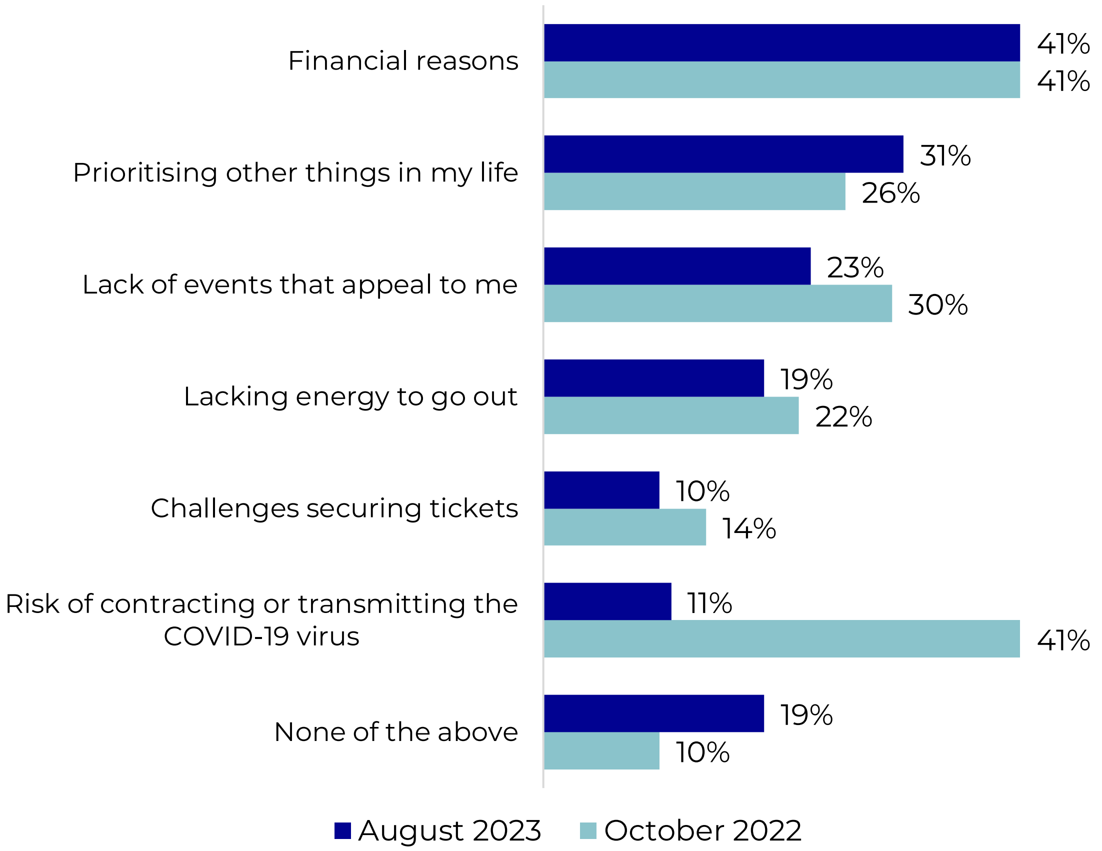
Financial reasons remain the top barrier to attendance, impacting 4 in 10 VIC audience members

Consistent with previous results from October 2022, the August 2023 results show that financial reasons are the most prevalent barrier to attendance among VIC audiences (41%). This is followed by audiences 'prioritising other things' in their lives (31%) and a perceived lack of appealing events (23%).

Comparing different states and territories, VIC audiences are among the most likely to cite financial barriers, alongside QLD audiences (42%).

After 3 long years of the pandemic and extended lockdown periods in VIC, fears of contracting or transmitting COVID have steadily decreased among audiences, with 11% citing it as a barrier to attendance in August 2023, down from 41% 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). VIC audiences, August 2023 (n=3,024) and October 2022 (n=1,582).



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

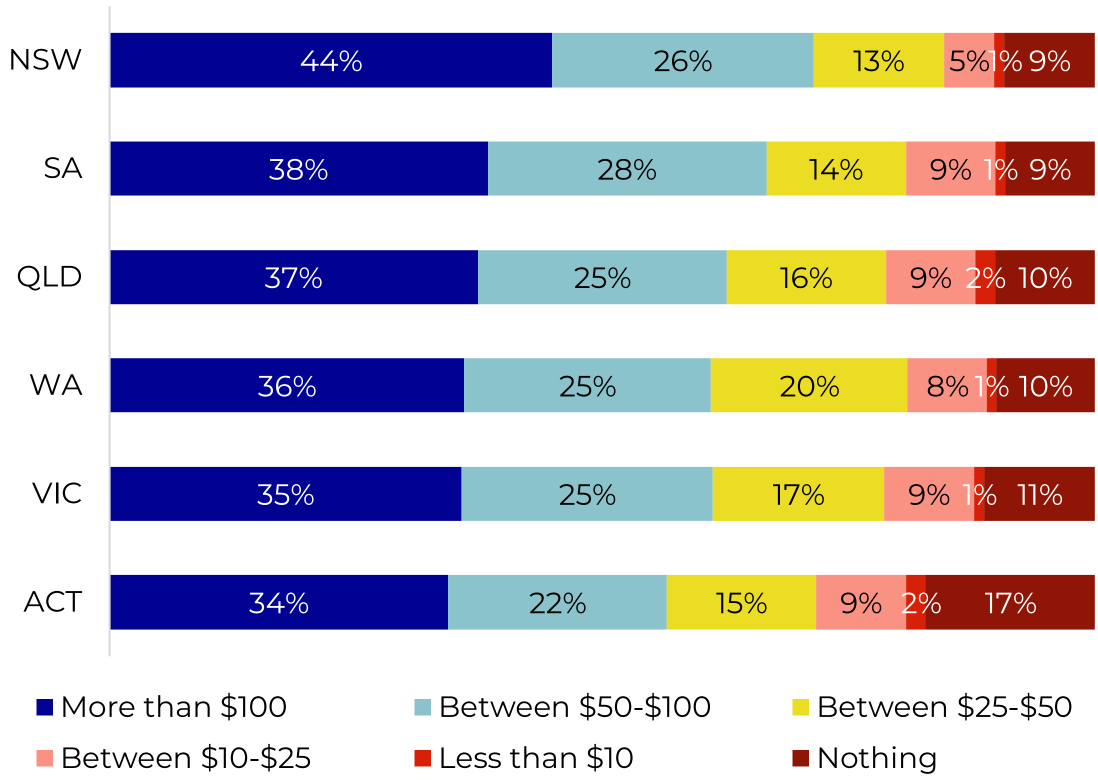
While the proportion of VIC audiences attending in-person cultural events has increased, on average, their spending levels have not increased and remain consistent with spending levels in October 2022. This trend is consistent across the country.

In August 2023, 6 in 10 (60%) of those attending in VIC spent $50 or more on tickets to in-person live events and cultural activities, consistent with spending in October 2022 (59%). 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.' Sharp increases to inflation have heightened cost of living pressures amongst VIC households, leading to weaker household consumption levels, with economic growth forecasted by the State Government to be 1.50% in 2023-24, compared to 5.6% 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 (VIC audiences, n=2,358)



Almost half of VIC audiences said they are financially 'worse off' compared to one year ago – especially under 35s

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 VIC audiences say they are 'worse off' (48%), while another 44% say they are the 'same' as one year ago. Only 8% 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, while audiences in the ACT (37%) and SA (42%) were least likely to be feeling 'worse off' right now.

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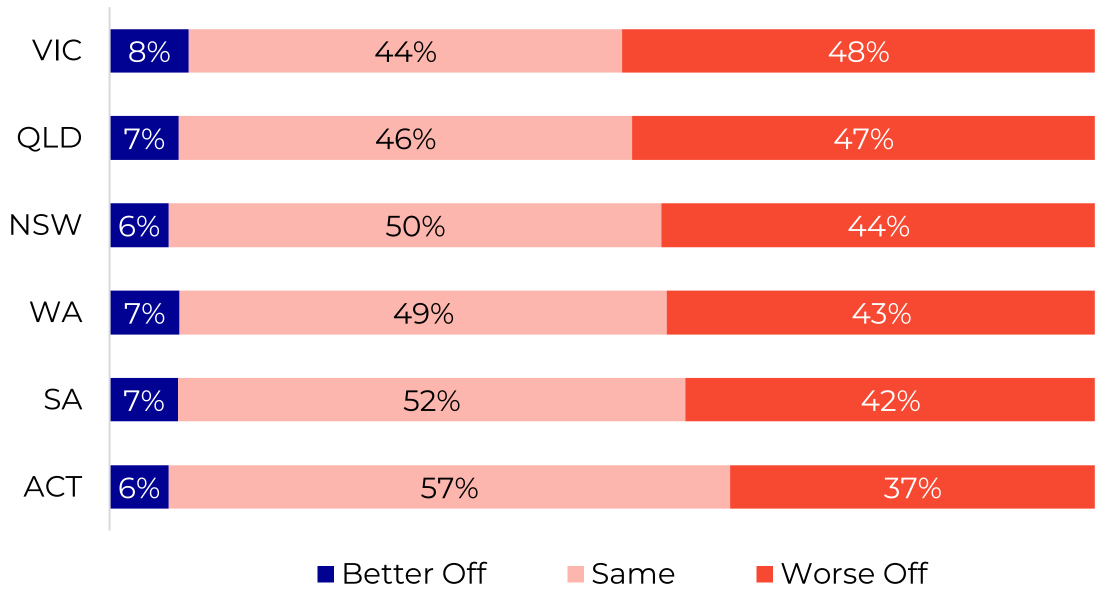
VIC audiences **under 35** were more likely to say that they are 'worse off' (53%) compared to those over 35 (48%). Although it is a small proportion, 13% of under 35s said they are 'better off' – the highest of any age group. This result may be linked to many under 35s breaking into the workforce and commencing full-time work and/or their perceptions of financial stability differing from that of older VIC audiences.

Parents aged 35-54 were less likely to say they are 'better off' compared to one year ago (8%) compared to non-parents aged 34-55 (12%).

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 (52%), relative to the VIC average of 44%.

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 (VIC audiences, n=3,011)



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

Qualitative data from VIC 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,

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> ‘I enjoy a wide range of arts experiences. I'm very pleased that Melbourne offers many free or low-cost experiences, for example local amateur theatre and live music. Although money is 'limited' I am willing to pay for something I feel is worthwhile. I'm concerned that some events (particularly big musicals) are becoming out of reach for many people.’ (65-74, VIC)

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] continue to go but might go down a level grade of seating. I will use the Tuesday tickets at Arts Centre sometimes. I will eat out before or after less or have a drink rather than a meal. (55-64, VIC)

Many VIC 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,

> ‘For what is essentially a discretionary spend, it becomes harder to justify paying the ticket prices for the small gigs that I enjoy attending. We want to continue to support artists but current financial constraints and increasing cost of tickets are pricing us out of the market. As a result, I am having to be far more selective about what gigs I am prepared to spend on, whereas a year ago, I had a calendar full of gigs and tickets all lined up.’ (55-64, VIC)

Despite their love for arts and culture, others are having to re-evaluate or forgo attending altogether, in light of cost-of-living pressures. One shared,

> ‘Everything has increased financially except my wages. (Public Transport Victoria) has so many disruptions I can't rely on it to attend most functions. There’re so many events I would like to attend but unfortunately, it's not in my budget. Can really only afford rent, groceries, bills and petrol. Even trying to get a haircut or new underwear and socks is a major financial challenge. Only use bulk billed GPs.’ (35-54, VIC)

Compared to other states and territories, VIC audiences are feeling the least 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?’.

Six in 10 (62%) VIC audiences say they expect to be in the ‘same’ financial position a year from now, while 27% expect to be ‘worse off’. One in 10 (11%) expect to be ‘better off’ (Figure 10).

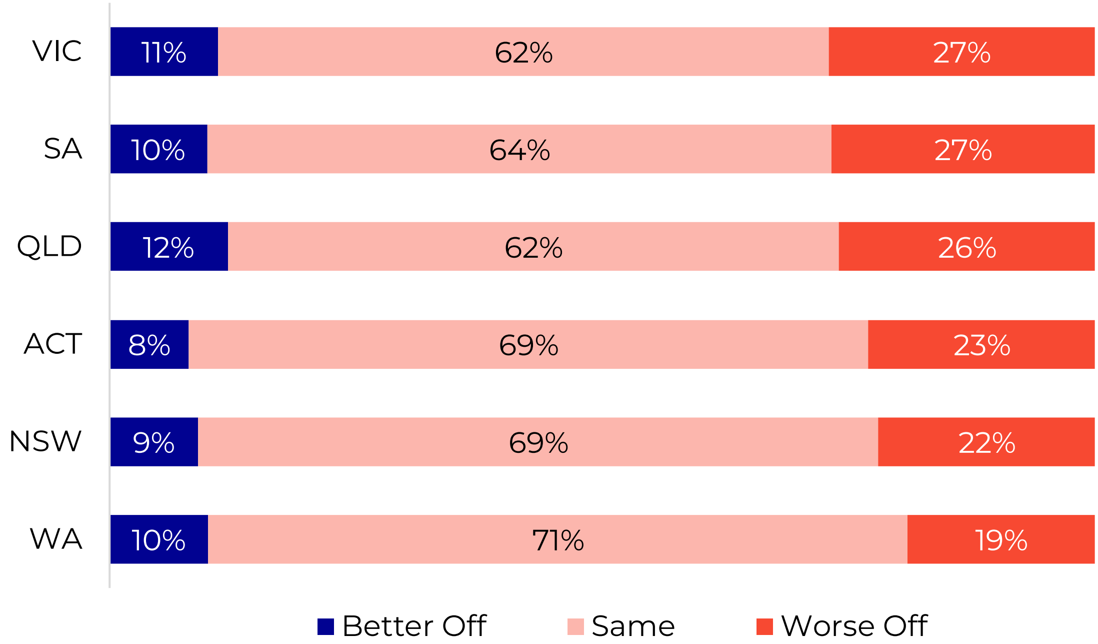
VIC audiences are the most likely of all states to be feeling that their financial position will be ‘worse off’ in the coming year, alongside SA (27%). Meanwhile, this rate is lowest among WA audiences (19%).

Three in 10 VIC audiences aged under 35 predicted they will be ‘worse off’ (30%) in the coming year – and across all states, they are the most likely to be feeling this way, alongside SA audiences aged under 35 (31%). However, under 35s are also the most optimistic at the moment, with 25% anticipating they will be ‘better off’, perhaps related to their prospects of career progression.

VIC parents aged 35-54 are feeling slightly less optimistic about their financial circumstances in the coming year, with 13% expecting they will be ‘better off’, compared to 16% of non-parents aged 35-54. One in 4 (27%) expect to be ‘worse off.’

Over 55s in VIC are, on average, not expecting much change to their financial circumstances looking forward a year from now, with 68% 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 (VIC audiences, n=2,805)



"As the cost of living increases, my ability to afford entertainment may be limited.

I choose to spend on entertainment that holds real meaning or interest for me or is cheap/free and of interest."

Audience member
35-54, VIC

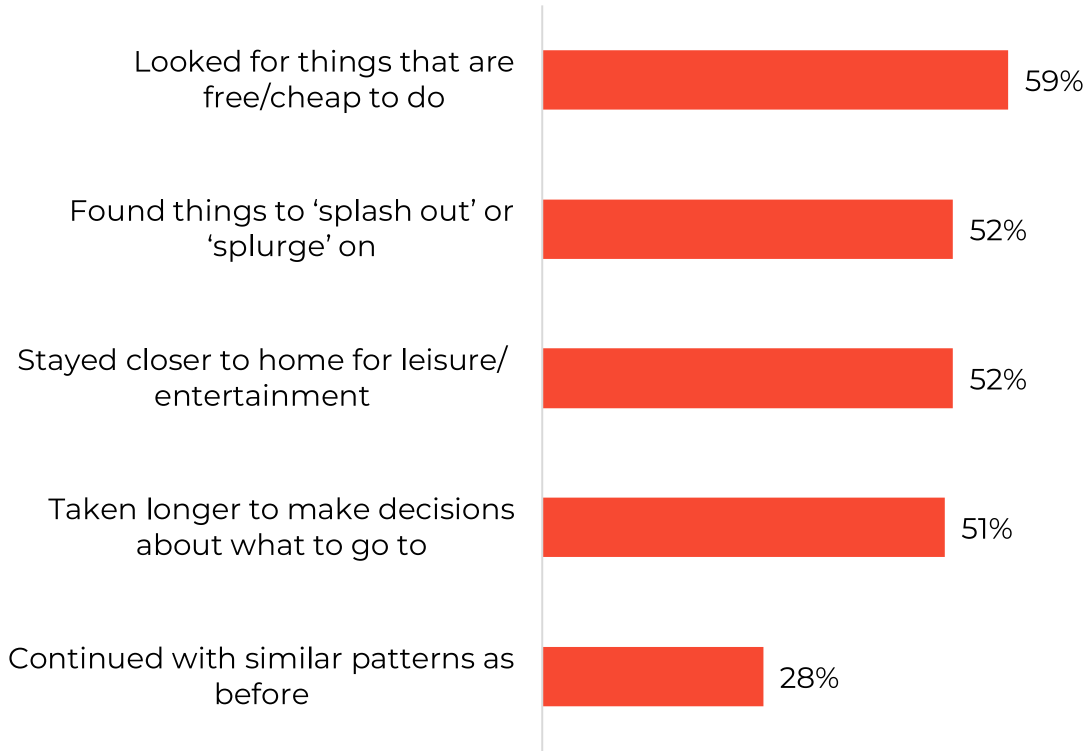
VIC audiences are most likely to be looking for cheap things to do – but half are also ‘splashing out’ or ‘splurging’

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

VIC audiences were most likely to say they have been ‘looking for things that are free/cheap to do’ (59% agree or strongly agree) – the highest proportion amongst all states. One said,

> ‘I'm under 30, so events with cheaper tickets for u30s have been a big part of deciding whether I'm going to attend something or not. It really incentivises me to go if I can get a cheaper ticket.’ (Under 35, VIC).

Figure 11: Given my financial situation, in the past 6 months, I have... (strongly agree and agree). VIC audiences, August 2023 (n=3,019)



However, around half of VIC audiences are finding things to ‘splash out’ or ‘splurge’ on (52%) – suggesting that VIC audiences are willing to spend more on things they love while saving elsewhere. One said,

> ‘I'm happy to make the decision to splurge on things when money is tight but there needs to be value for money, e.g., I'd rather spend $150 on event/s I know I will enjoy, whether it's one ticket or 3 events at $50 each, than on things that may leave me feeling I've wasted my money. (Age unknown, VIC)

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 think there is a desire and a need to experience visual and performance art, but audiences are being really selective about the experiences they are after. I think it's more about looking for quality rather than quantity when it comes to paying for experiences. I want to spend money on something I'll think about for years to come. I want to save for it and count down the days to it. Something to look forward to.’ (Under 35, VIC)

Around half are also staying closer to home (52%) and deliberating longer on their decisions to attend (51%). VIC audiences are less likely to have continued with similar patterns as before (28%), relative to other behaviours, suggesting that many are finding themselves adapting to the changing conditions.

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

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

> ‘As I am from a regional town, the cost of the ticket is only 1 issue. I also have to factor in transport, accommodation & meals. A $140 show ticket can end up costing over $500 per person. (55-64, VIC)

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

> ‘Because I live in a regional / remote area, attending performing arts events usually requires significant travel. That means fuel,

> accommodation, living expenses away from home, all of which are getting more expensive, plus possibly time off work. Tickets are usually the cheapest part, but any saving helps.' (Under 35, VIC)

Other respondents noted the additional challenges of unreliable public transport and parking options, but mentioned the benefits of capped regional fares introduced earlier this year in VIC. One said,

> 'Sometimes public transport from my regional city to major city (Melbourne) has been disrupted, resulting in reluctance to make the trip for cultural events. However, reduced transport costs in Vic have been an incentive to travel greater distances.' (65-74, VIC)

Another queried,

> 'Accessibility matters. Can I get there and back safely and without stress? How much will it cost me in fuel/tolls/parking/transport, etc?' (35-54, VIC)

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

> 'I will continue to attend events and performances, especially in my local area, as I like to support the arts in general and local performers in particular. It is so much easier, too, to attend local shows.' (65-74, VIC)

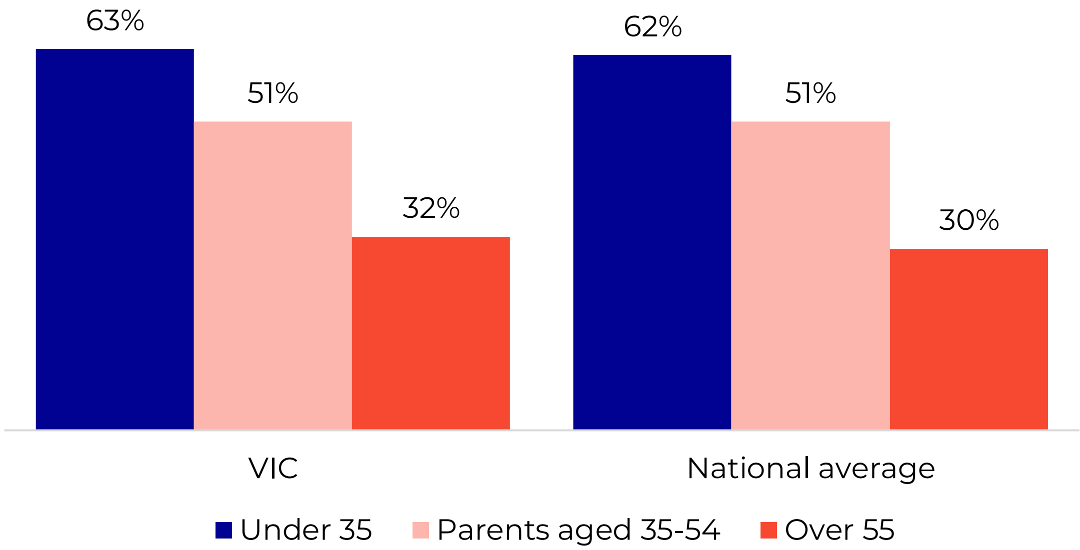
Younger audiences and families continue to be the most impacted by financial barriers

Across all VIC age groups, financial barriers taking effect; however, they are most pronounced amongst under 35s, with 63% experiencing financial barriers to attending.

Meanwhile, 32% of VIC audiences over 55 are affected. The proportion is even lower among those aged 75+, with 26% in this group saying financial barriers have prevented them from attending as they did in the past.

Around half (51%) of VIC parents aged 35-54 are affected by financial barriers – one of the highest rates across the states and territories.

Figure 12: Proportion of audiences experiencing financial barriers, August 2023. By key segment and state August 2023 (VIC audiences, n=3,024)



Qualitative data shows that **under 35s** in VIC 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 am a gig fiend, but I simply do not have the funds to attend every single one I'm interested in anymore. I am a minimum wage earner, cost of living has inflated, and tickets now cost $60-100 for any international act, regardless of whether it is their debut tour, or the size of the venue. It's just not feasible.' (Under 35, VIC)

Another shared,

> 'I've definitely enjoyed going to quality and high value free or low-cost ticket events (like $0-30). I love (Melbourne International Film Festival) for example, but the cost of opening night and closing night tickets are HUGE! Not affordable for a large group of Melbourne people in the creative industry and otherwise. Which is saddening as then it becomes an event of privilege.' (Under 35, VIC)

Meanwhile, responses from **parents aged 35-54** shared similar sentiments, despite many being eager to attend family events. One shared, ‘The cost of living such as increased rates and groceries has made enjoying or attending events, shows etc. increasingly more difficult and as we have a large family with many children it has become less enjoyable to attend these events, even if the time and money to do so is available, as with this comes a lot of guilt and fear of what may be yet to come…

…Hopefully as we recover from this situation and the current state of inflation, we will be able to resume our attendance to more events.’ (35-54, VIC)

Things to think about when addressing financial barriers to attendance

VIC 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 VIC 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 VIC when assessing the case for funding in grant, partnership and sponsorship applications. One VIC respondent under 35 said: 'The young people who care about the arts, including artists themselves, are skint. Patronage will dwindle until significant policy reform is enacted that prioritises arts funding and low-income earners.'
- ❑ 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 VIC 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
- ❑ With many VIC audiences deterred by travel costs, consider packaging of 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 travel initiatives that could help audiences get to your event, such as Victorian regional fare caps.

3.

The desire to inspire

Image Credit: Duncan Jacob, courtesy of Melbourne Fringe.

3. The desire to inspire

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

Key points:

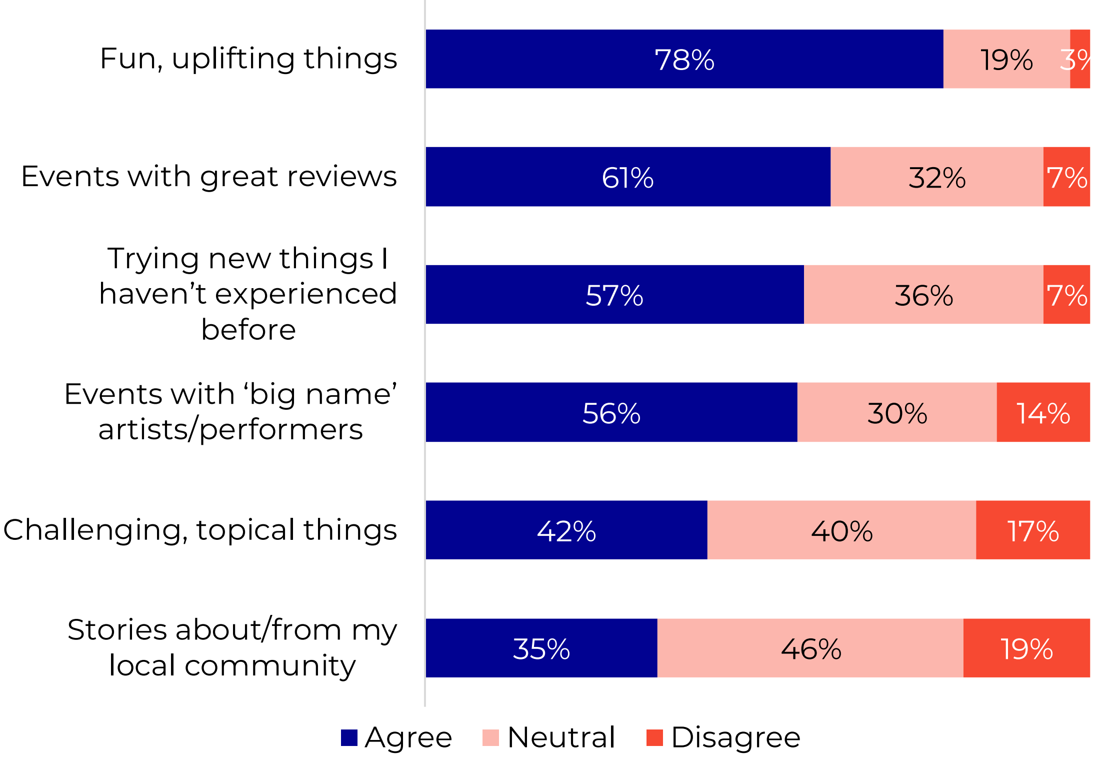
- VIC audiences are finding a wide range of content appealing, though like those around the country, budget pressures are leading some audiences towards 'safer' bets or 'guaranteed fun'.
- High proportions of VIC audiences are seeking out fun, uplifting experiences and events with great reviews to ensure value for money.
- Audiences love the vibrant and diverse arts scene in VIC and want to ensure it continues to expand.
- Organisations that understand the mood can please crowds today while building trust for tomorrow.

VIC 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 VIC audiences for all options tested, including fun, uplifting things (78%), events with great reviews (61%), and trying new things they haven't experienced before (57%).

Figure 13: In the coming year, I'll be most attracted to... August 2023 (VIC audiences, n=3,002)



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 are fatigue and experiencing burnout. They are wanting to want challenging topical art but actually watching easy, uplifting material due to burnout.' (Age unknown, VIC)

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In VIC, audiences under 35 are currently the most likely to agree they will be attracted to new experiences, with 71% 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 (45%) – suggesting a wide variety of interests in this cohort to consider in programming.

By comparison, VIC audiences over 55 are less likely to say they will be attracted to trying new things they haven't experienced before (51%) – however this group is also strong interest in challenging, topical things (43%).

VIC parents aged 35-54 are the most likely segment to be seeking fun, uplifting events (85%) and less likely to be attracted to challenging and topical events (38%). Meanwhile, 60% say they'll be attracted to new things, slightly higher than VIC audiences in general.

Audiences love the vibrant and diverse arts scene in VIC, and want to ensure it continues to expand

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 VIC is widely valued, and many consider it to be a vital part of the state's character. Audiences mentioned their love for local art in the area and some are feeling dismayed by the current financial pressures which are inhibiting attendance and ability for audiences to show support. One said,

> 'That many people are very supportive of their local artists and local events and somewhat proud as well. Not much funding is given to local community events – or there are many barriers to applying for grants etc. Melbourne has the best music scene in the world, and we should not be struggling this much. More local artists competitions, battle of the bands- for all ages.' (Age unknown, VIC)

Many audiences in VIC want their local areas to be showcased – but there is also a desire for continued touring artists and performers to enhance Victoria's cultural character. One said,

> 'We want a variety of local and international. We're so far from Europe and other big nations that having things here from elsewhere is appealing because it's very difficult to travel there as it's expensive and so far away.' (35-54, VIC)

Some audiences view the arts as important in shedding light on critical issues, such as climate change and the Voice to Parliament, and enhancing audience's awareness of them. One said,

> 'Love variety of choice. Stimulating contemporary ideas, things that entertain and which are uplifting. Content which enhances our understanding of important issues – refugees, First Nations People/The Voice, our multinational community, world politics. Appreciation of the natural environment and how to protect it.' (65-74, VIC)

Audiences expressed their appreciation for all the arts and culture that VIC provides, and their hopes for it to continue. One said,

> 'Just how much Victorians love arts and culture, as evidenced by our insatiable desire since COVID. Keep providing – we love you!' (65-74, VIC)

Another said,

> 'The arts in Australia, particularly Victoria, are wonderful. The fact that Geelong brings the (Melbourne Symphony Orchestra) for special performances is a real honour for us living in the area.' (75+, VIC)

"Audiences are still looking for new experiences and new talent - it’s important to play safe and bring in guaranteed funds, but keep producing exciting new works!"

Audience member
55-64, VIC

Things to think about when making creative and programming decisions

While VIC 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 VIC 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 VIC 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 VIC 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. One VIC respondent shared: ‘I just love the effort that they all make to give us good choices of programmes, and differing programmes and times available, over such a wide variety of interests.’
- 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. One VIC audience member said, ‘I think it's important to consider appealing to specific audiences rather than casting a wide net that ends up appealing to nobody.’

4.

Three segments to know

Image Credit: Courtesy of Science Gallery Melbourne.

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 VIC 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 VIC 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: James Henry, courtesy of ACMI.

5. Online trends

VIC 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:

- Digital channels are paramount to audience engagement – with 75% of recent VIC attendees finding out about arts and culture events online.
- 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 VIC 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.

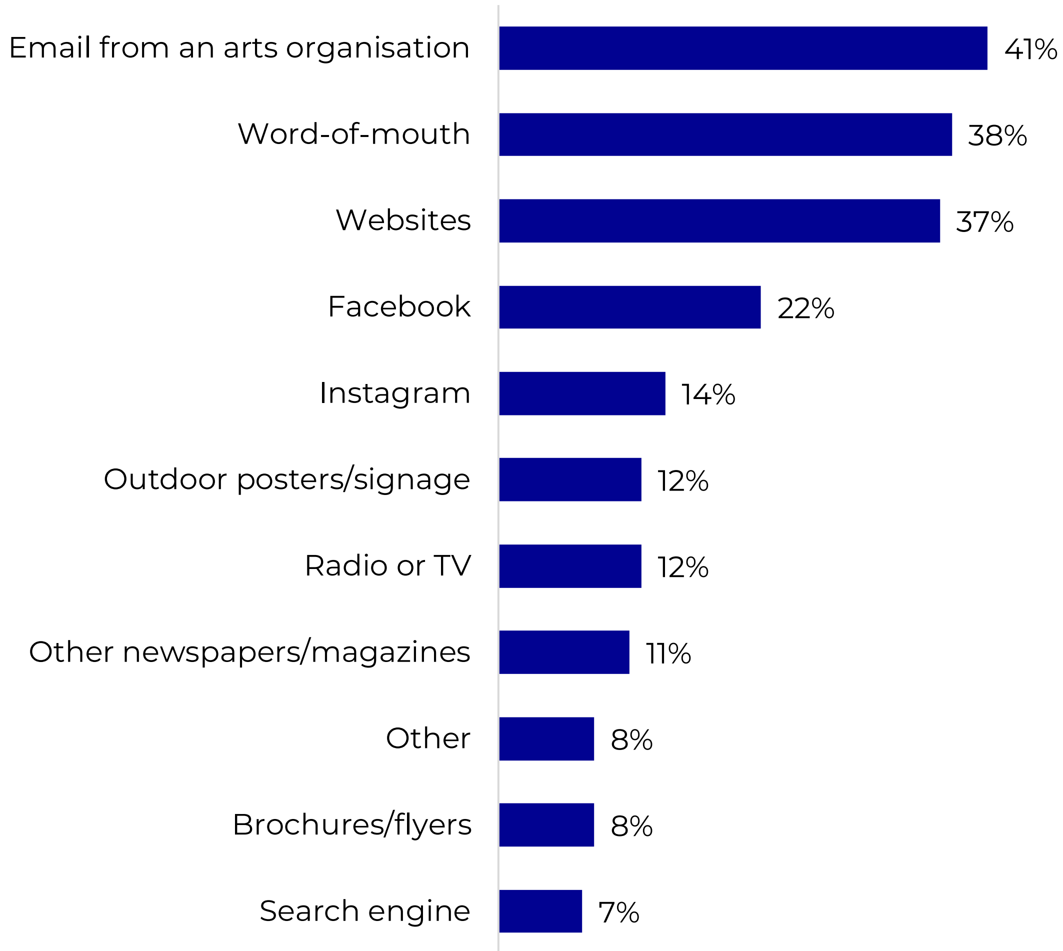
Key channels for VIC audiences are emails from arts organisations, word-of-mouth and websites

When asked how they heard about the most recent event or cultural activity they attended, overall, VIC audiences cited online channels (75%), consistent with the national rate (75%). This includes direct emails from arts organisations (41%) and websites (37%) (Figure 14).

Around 4 in 10 VIC audiences are relying on word-of-mouth from friends, family or colleagues (38%), making it the second most common channel. This proportion is slightly higher than 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%).

VIC audiences are also relying on social media, such as Facebook (22%) and Instagram (14%). 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 (VIC audiences, n=2,400)



VIC audiences of all age groups are using online channels – and word-of-mouth is key for over half of under 35s

For VIC **over 55s**, the dominant awareness channel is emails from arts organisations, followed by websites and word-of-mouth – consistent with national trends.

While audiences are hearing about cultural activities and events via email, some mentioned 'email fatigue' and often missing emails – suggesting organisations should employ multiple channels to drive awareness. One said,

> 'I believe audiences are challenged by financial stress and the challenges of time commitments, and technology overload in

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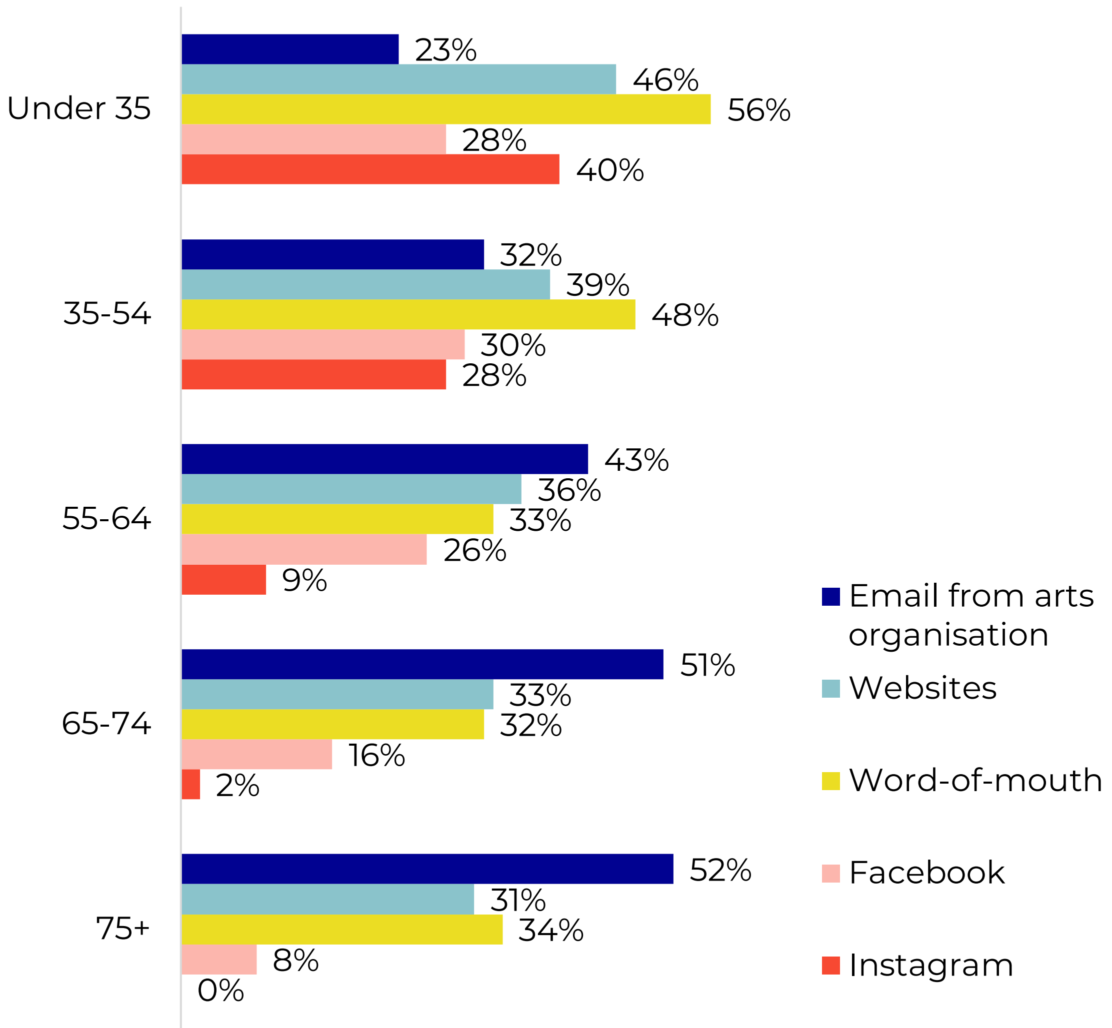
> terms of emails - although this is the best method from my perspective of gaining real attention. Whilst social media is helpful - all too often, it is simply something that scrolls past too quickly.' (55-64, VIC)

Meanwhile, over half (56%) 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 (VIC audiences, n=2,400)



"I believe audiences are challenged by financial stress and the challenges of time commitments, and technology overload in terms of emails...

...Whilst social media is helpful — all too often, it is simply something that scrolls past too quickly."

Audience member
55-64, VIC

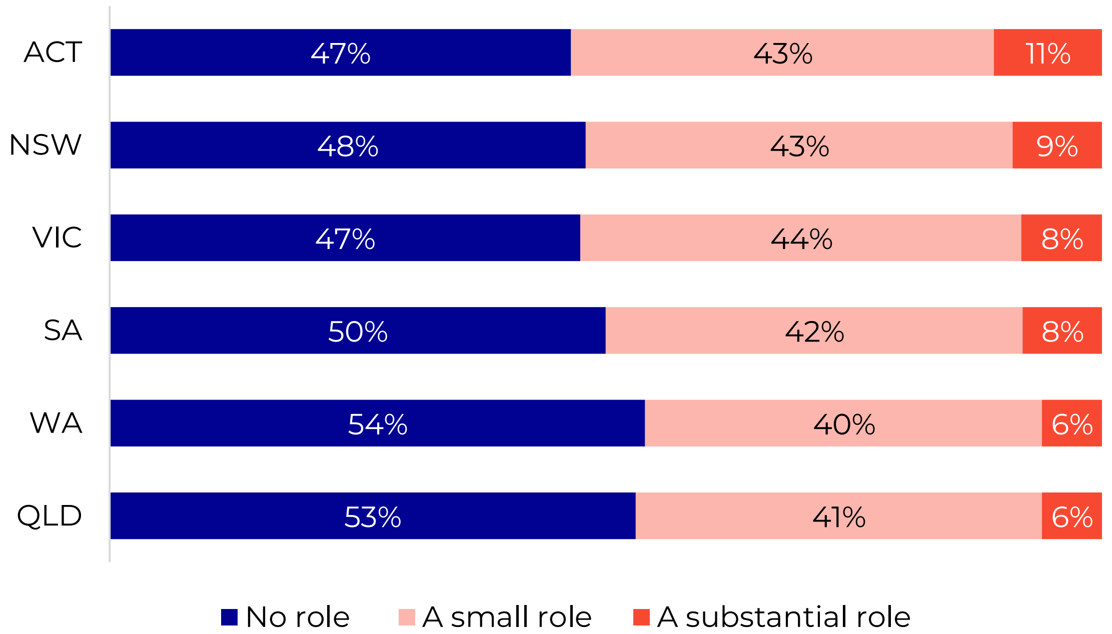
4 in 10 VIC audiences continue to engage in online arts and culture, and half say digital cultural activities still play a role in their lives

Four in ten VIC audiences are currently participating in online or digital arts and culture experiences (41%), consistent with the national rate (39%).

Participation in online arts and culture is relatively consistent across the states and territories. VIC and NSW 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 VIC audiences, 8% say they play a substantial role (down from 18% in October 2022), and 44% say they play a small role (down from 50% in October 2022).

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 (VIC audiences, n=3,046)



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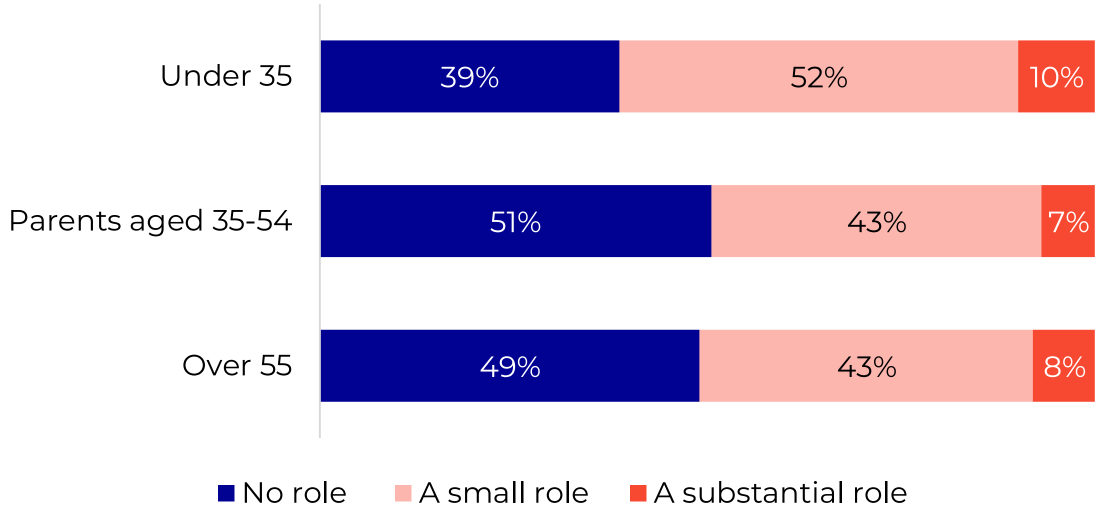
Compared to other states, VIC audiences are among the most likely to say that online arts and culture are playing a small or substantial role in their lives (52%), consistent with NSW (52%) and ACT (54%)

Among the three key segments, VIC audiences **under 35** were the most likely to say that digital experiences will play some role in their life – either a small role (52%) or a substantial role (10%). Amongst **over 55s,** online arts and cultural experiences are playing a small role (43%) or substantial role (8%) – though around half (49%) say that they play no role.

Meanwhile, **parents aged 35-54** say that digital arts and culture plays a small role (43%) or a substantial role (7%) in their lives – with half (51%) saying they play no role.

Figure 17: What role do online arts events/experiences play in your life right now? August 2023, by key segment (VIC audiences, n=3,042)



Online spending amongst VIC audiences has decreased since November 2021, with 3 in 10 digital audiences paying for arts experiences

In line with spending levels amongst VIC 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 (28%) said they paid for an experience in the past fortnight, down slightly from 32% in October, 35% in March 2022 and 39% in November 2021.

VIC audiences who were paying for digital arts and cultural experiences in the fortnight prior to data collection were purchasing single experiences (13%), subscribing to on-demand platforms (10%) and making donations (8%). Even fewer subscribed to programs or seasons that included the experience (4%).

Common barriers for VIC audiences include technical challenges and poor internet connection

Many audiences mentioned facing technical challenges or set-up 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,

> ‘I am mainly interested in music performances, and I don't have a great set up at home for watching a whole concert. I don't have a large screen TV or great sound. I have a notebook computer.’ (55-64, VIC)

Some are limited by connection issues in their area, which can diminish their enjoyment of the experience. One said,

> ‘We live in Brunswick and surprisingly our online streaming experience is very mixed, with frequent hang-ups that can thoroughly spoil the experience.’ (65-74, VIC)

Other respondents mentioned having a desire to participate online but finding that the timing of available events presents issues – particularly when viewing international work. One said,

> ‘Online arts give access to things we can't experience in person. This can be especially valuable to a country like Australia that is geographically far away and with flight costs and financial pressures high. However, most real time online arts experiences transpire at a time of day that is impractical for all but the most die-hard of fans.’ (35-54, VIC)

While some VIC audiences value opportunities to engage online, others prefer live events in the wake of the pandemic and lockdowns in VIC

Several VIC 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 subscribe annually to an online on-demand international performing arts platform to watch performances and world-class performers that don't come to Australia or could afford if they did. It expands on what I go to see here.’ (65-74, VIC)

Others mentioned they love watching old digital arts and cultural programs from different organisations from within their own home. One said,

> ‘Being able to access documentation of performances online is amazing. In particular, I enjoy 'going down the rabbit hole' and discovering videos, articles and recordings of performances by bands and performers from the past.’ (35-54, VIC)

However, a significant number of respondents mentioned that the prospect of in-person events was more appealing than online events, particularly for those already working on screens all day. One said,

> ‘I prefer the connections and energy that come from face to face and try to minimise screen time outside work…’ (Under 35, VIC)

As many VIC audiences lived with significant restrictions during the pandemic, some reflected that online activities were no longer a priority following VIC’s extended lockdown periods. One commented,

> ‘I just prefer music and art / cultural experiences in person. On-line live streamed concerts were great during the pandemic and very helpful for artists' income during that period, but now live performances are back, I prefer to attend & interact in person. I also prefer to be active during the day and not sit in front of a screen when I could be out exercising, visiting friends or working in the garden/house.’ (65-74, VIC)

Another shared,

> ‘I wish streaming events appealed to me but most of the time they just bring back bad memories of lockdown and lack the excitement of in-person events.’ (35-54, VIC)

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 for VIC organisations to consider:

- ❑ 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
- ❑ VIC 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 VIC respondent shared: '…we have started seeing the kids shows at local venues if we can because the tickets are cheaper and [there is] free parking. If we couldn't get to see something live because of costs, I'd seriously think about online if available.'
- ❑ VIC audiences 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: Jason Lau, courtesy of Arts Centre Melbourne.

6. Late decision-making

Last-minute decision-making persists in VIC, 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:

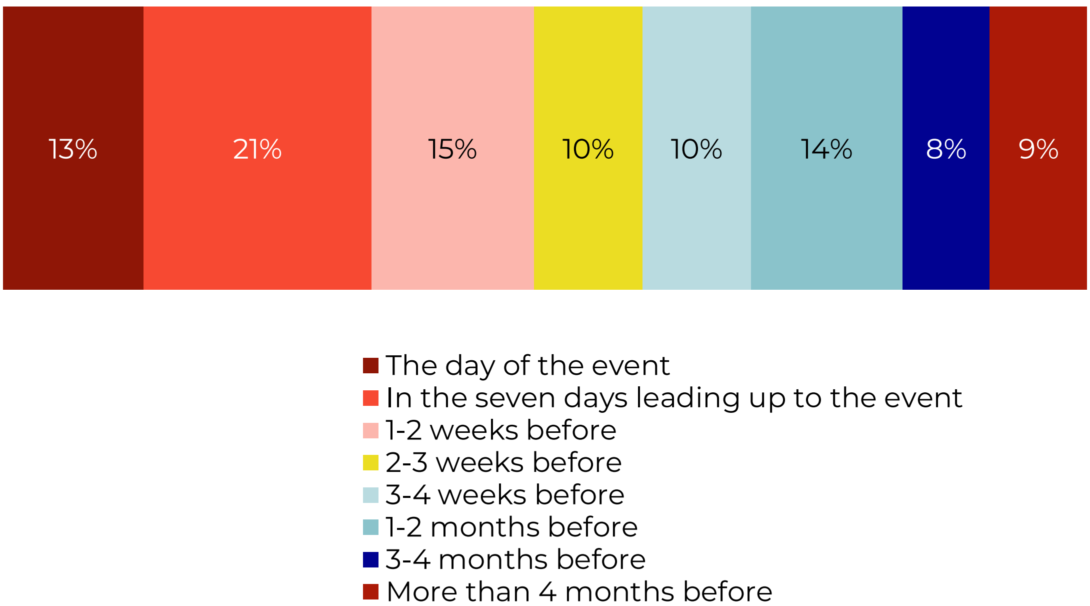
- Half of VIC audiences are booking less than two weeks out, with 13% on the day of the event
- Analysis of 'early bookers', 'mid-term bookers' and 'last-minute bookers' shows that last-minute ticket buying is most common among under 35s and lower spenders. Those booking later are also more likely to 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 VIC audiences. 13% of audiences reported that they booked the last event they attended on the day of the event, and 21% 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 (VIC audiences, n=2,398)



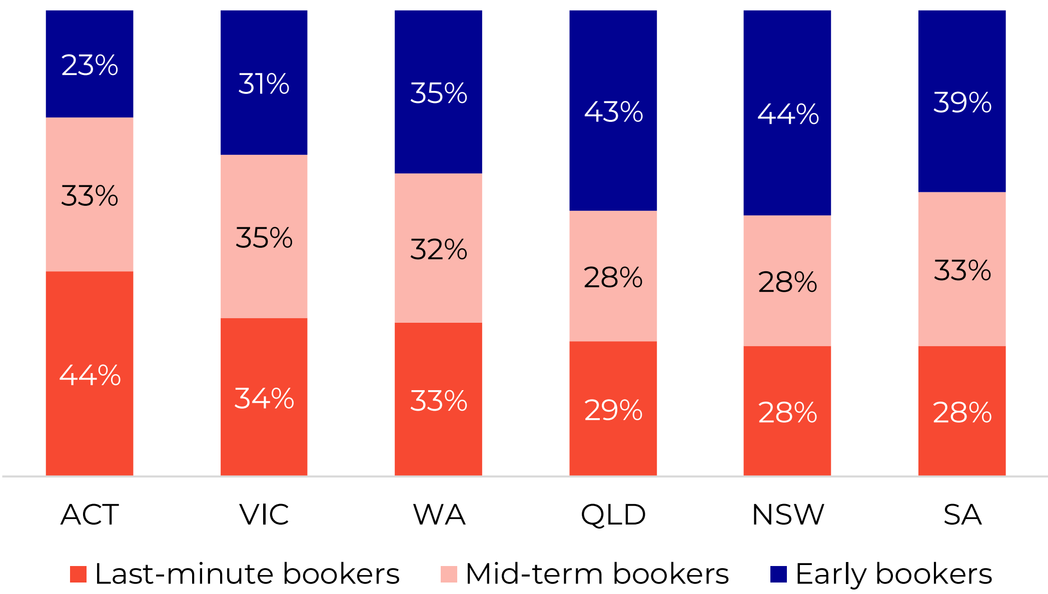
In VIC, qualitative data indicates that key motivations for booking tickets early included wanting to secure particular seats, booking tickets as part of a subscription/membership package, the need to plan ahead to coordinate travel timings and accommodation.

'Big name' artists/performers were also strong motivations for securing tickets early: 62% of early bookers agreed that they were attracted to events with 'big name' artists/performers, as opposed to 54% of last-minute bookers.

Compared to other states, VIC audiences are most likely to be mid-term bookers and are the second-most likely to be last-minute bookers, 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=6,878)



Last-minute ticket buying is most common among under 35s and lower spenders

Half (49%) are committing or booking less than two weeks out, with 13% on the day of the event.

Seven in 10 (70%) under 35s reported taking longer to make decisions about attending – consistent with trends around increased financial barriers for this group (Figure 20). They comprise a significant

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proportion of last-minute ticket buyers, with 44% booking within the week of the event.

Parents aged 35-54 are less likely to agree that they are taking longer to make decisions about attending (58%) compared to non-parents aged 35-54 (63%). However, a third (34%) in both groups are booking tickets last-minute, within the week leading up to the event.

Over 55s are least likely to be booking tickets last-minute (32%), and this proportion is lowest amongst those aged 55-64 (28%) and 75+ (31%). Over 55s are also the least likely to agree that they are taking longer to make decisions based on their financial circumstances (44%).

Many early bookers reported feeling ‘better off’ or the ‘same’ financially as they were a year ago (56%), whereas last-minute and mid-term bookers were slightly less likely to do so (51% amongst last-minute bookers; 52% amongst mid-term bookers).

Around half (52%) of early bookers reported spending more than $100 in the past fortnight on in-person live events and cultural activities, compared to 35% of mid-term bookers, and 19% of those booking last-minute.

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

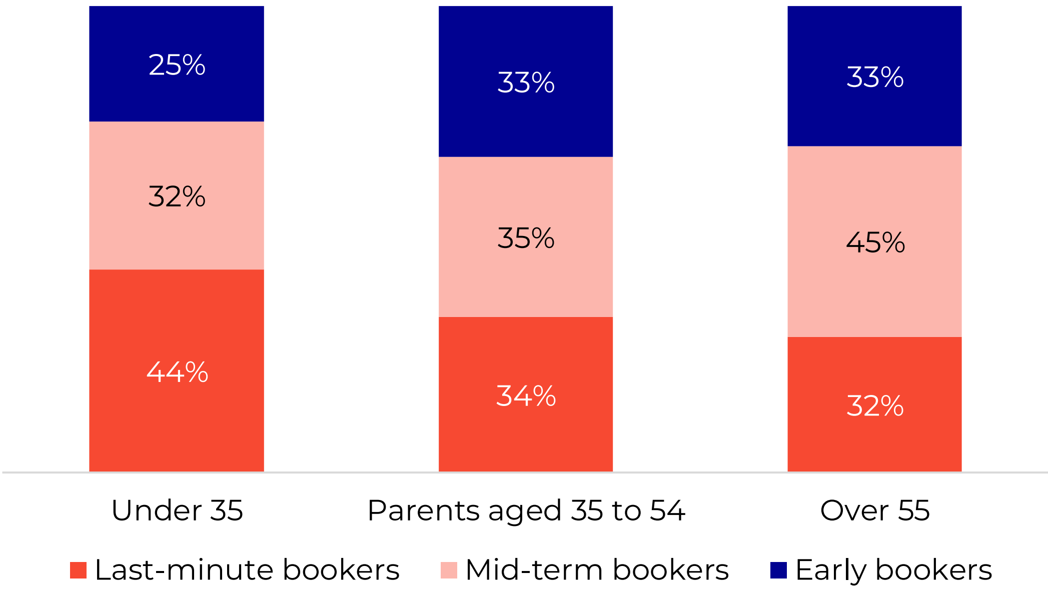
> ‘Often you book for an event then there is a problem with illness or another family issue. I like being able to turn up on the day to gain entry to an event.’ (65-74, VIC)

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 financially in advance. Some shared,

> ‘Uncertainties about weather, household budget and free time.’ (35-54, VIC)

> ‘I didn't know about it before, but even if I did, I would likely not book that far ahead due to external and internal factors such as work, commitments, fatigue etc.’ (Age unknown, VIC)

Figure 20: Can you tell us how far in advance you booked or committed to go...? By key segments, August 2023 (VIC audiences, n=1,998)



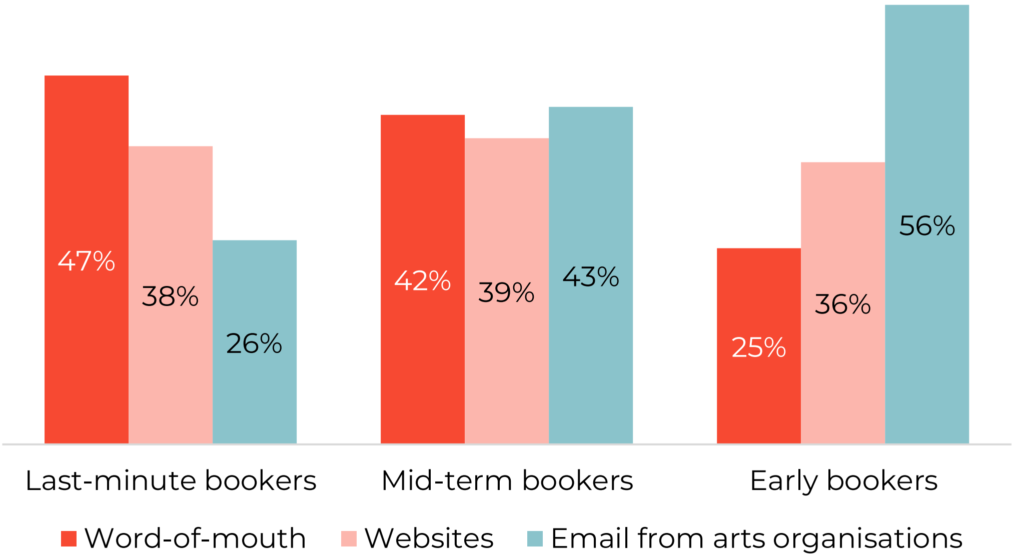
Last-minute bookers typically hear about events via word-of-mouth (47%), while early bookers rely on emails (56%)

Over half (56%) of early bookers in VIC and 43% of mid-term bookers reported email as a means of hearing about the event they attended recently. Meanwhile, for late bookers in VIC, email is less important, with 26% noting this as their awareness channel for their latest event.

Last-minute ticket buyers weren't necessarily committing based on things they saw online, but due to word-of-mouth recommendations (47%), social media like Facebook (20%) and Instagram (17%), and traditional media channels like radio and TV (18%), or outdoor poster/signage (15%).

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 21).

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 (VIC audiences, n=2,400)



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

VIC 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 things for VIC 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. A VIC respondent (under 35) said: 'It's rare that I'll commit to going to gigs very far in advance, I usually just save or say I'm interested on Facebook or put in my calendar when I hear about a gig I might wanna go to and if I end up being free and feeling like going out then I'll go.'
- 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
- With VIC audiences feeling burnt out by cancellations as a result of lockdowns, clearly communicating any flexible exchange policies at point of purchase may help alleviate fears and encourage early booking
- 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 VIC respondent said, 'I usually buy tickets at the venue. It saves the onerous handling fees. These fees only benefit banks, not me, not the venue, nor the musicians.'

7.

Subscriptions and memberships

Image Credit: Shannon McGrath, courtesy of ACMI.

Subscriptions and memberships

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

Key points:

- 36% of VIC audiences are members or subscribers – lower than the national average.
- Subscriptions uptake and motivations amongst key segments in VIC differ significantly.
- Older VIC 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 VIC organisations to trial different offers and models, and test different messaging to target the unique needs and interests of different audience segments.

Around 1 in 3 VIC audiences are members or subscribers in 2023 – lower than the national average

Around a third (36%) of VIC respondents reported having purchased season tickets or a membership to an organisation this year – lower than the national average of 41%.

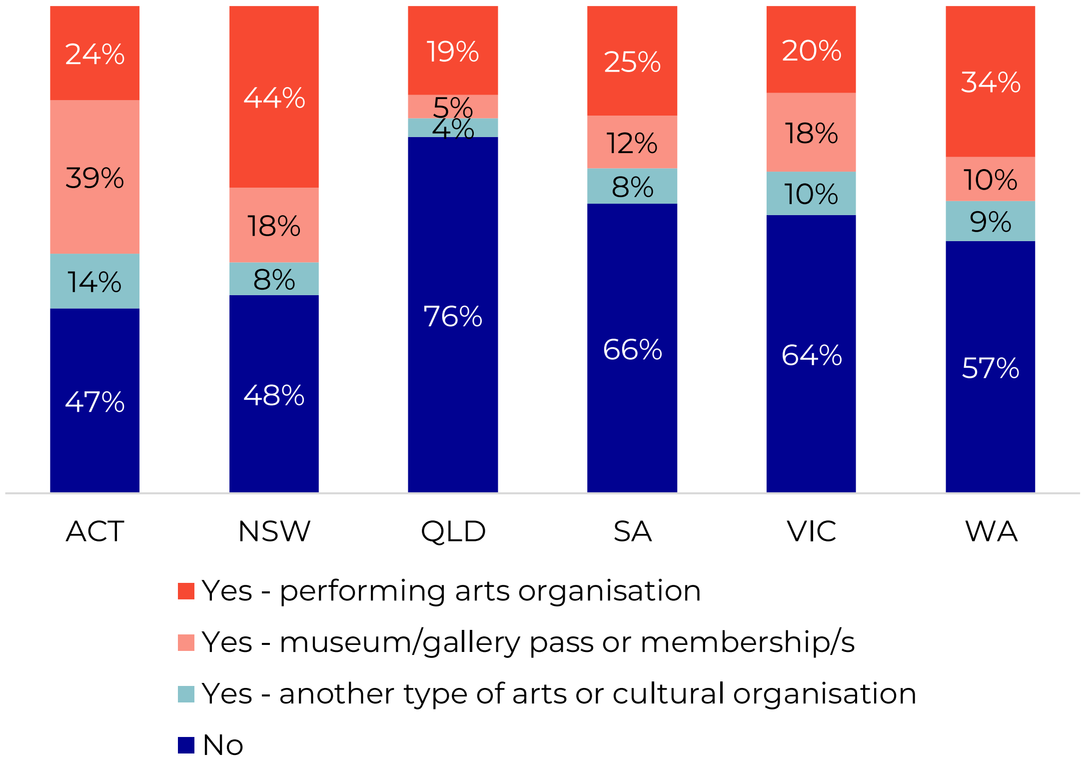
Compared to other states, season subscribers and membership rates are slightly lower in VIC (Figure 22). The proportion who are season ticket holders or members is highest in the ACT (53%) and NSW (52%), and lowest in QLD (24%).

In VIC, performing arts subscriptions were slightly more common in this sample, held by 20% of respondents, followed by museum/gallery memberships (held by 18%). A small number (10%) held another kind of membership, for example, to literary festivals.

VIC over 55s are more likely to be subscribers/members right now. For example, 53% of audiences aged 75+ are subscribers/members, compared to just 22% of under 35s.

Parents aged 35-54 are slightly more likely to have purchased season tickets or a membership in the latest season (31%) compared to non-parents in this age group (27%).

Figure 22: Did you purchase a season ticket, subscription or membership? By state or territory of respondent, August 2023 (VIC audiences, n=3,027)



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

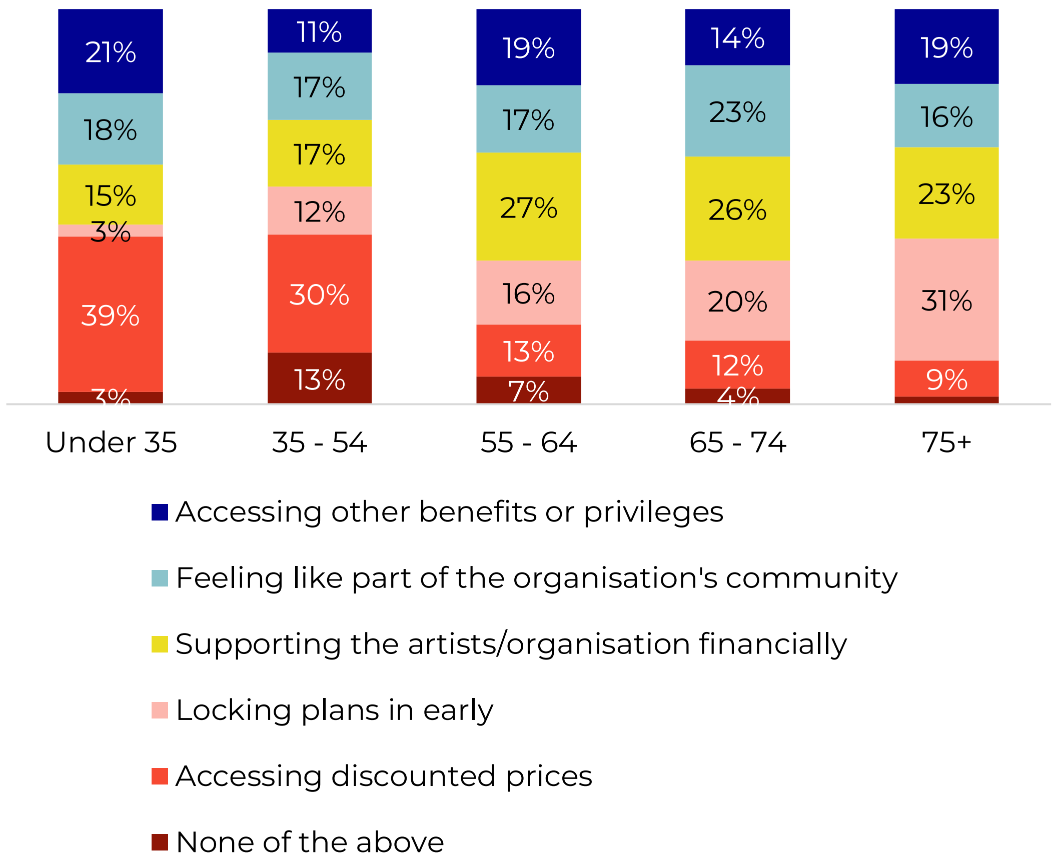
Audiences were asked to select their top reason for subscribing from a list of options. Motivations for buying ticket packages are drastically different between younger and older audiences in VIC (Figure 23).

Among VIC audiences over 55, the most common reason was supporting the artists/organisations financially (25%), followed by locking in plans early (22%). A smaller proportion identified their main motivation as accessing other benefits (17%) or discounts (12%).

Meanwhile, under 35s in VIC are most frequently attracted to accessing discounted prices that come with memberships and subscriptions (39%), followed by accessing other benefits or privileges, such as specific seats, members-only lounges, early access, and members lounges (21%). Smaller numbers describe their main motivation as feeling like part of the organisation's community (18%) and supporting the artists/organisations financially (15%).

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 (VIC audiences, n=966)



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

Qualitative data from older VIC audiences suggests that many value that purchasing a subscription or membership forces them to plan ahead. This also comes with options for enhanced flexibility compared to other tickets and allows audiences to try things they ordinarily would not have. Some subscribers shared,

> ‘It's good to plan things and book them. If I subscribe, I don't miss out and [am] forced on the odd occasion to see/hear something I may not have chosen.’ (65-74, VIC)

> ‘Able to plan out year ahead, usually cheaper and good to give that support to the arts organisation. Often come with discounts to other events etc which is attractive. Also, easier to exchange if circumstances change.’ (75+, VIC)

Many also noted the convenience aspect, as one said:

> ‘I subscribe to ACO, MSO, ANAM, VIC Opera. I like to have a program ahead of me rather than making decisions week by week. I also get better seats at lower cost.’ (75+, VIC)

Older VIC 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,

> ‘Our local art gallery offers fabulous exhibitions as well as reciprocal memberships to other galleries. Always good to support local, regional galleries and concert venues when they deliver good value for money, and they are easily accessible.’ (65-74, VIC)

> ‘We like to visit National Trust properties in the UK and AUS. MSO and MTC and NGV subscriptions enable us to plan our year and give financial support.’ (65-74, VIC)

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 always buy annual membership to Museums VIC because a family membership is excellent value, and we will always visit Melbourne Museum and Scienceworks a few times each year.’ (35-54, VIC)

> ‘My son has ASD and I spend time on Thursday and Friday taking him to therapies as well as to the museum, science works the NGV and the zoo. I like that these activities are not costing each time I go. I work weekends and my husband can take the kids on the weekends.’ (35-54, VIC)

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

> ‘ACMI membership – very inexpensive membership, best audio-visual quality cinemas in town, interesting and varied programming, access to advance/discounted tickets for screenings and events. Palace Cinemas and Lido Cinemas membership(s) – similar reasons, also applicable benefits at several partner venues.’ (Under 35s, VIC)

Looking ahead, 1 in 3 VIC 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 3 VICs (34%) said they would be ‘very likely’ (17%) or ‘likely’ (17%) to purchase a subscription or membership for next year (Figure 24).

Compared to other states, this rate is slightly lower. Audiences in 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?’

Some VIC audiences suggest a pay-as-you-go model would help to relieve some of the financial pressure that comes with purchasing a subscription or membership, especially given the current cost-of-living climate. One said,

> ‘One of the ones I subscribe to has you book now but instead of paying for all the shows you only have it taken from your credit card on the day of the show. Saves having to pay out a lot of money at the one time.’ (65-74, VIC)

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,

> ‘Offer better perks, sometimes 10-15% off (which is a generic scenario) isn't tempting enough. Having a paid membership that entitled you to something like 4 x complimentary tickets a year would be good, even if that was a situation where you had to buy one ticket to get it.’ (Under 35, VIC)

> ‘I am currently a student, and even though there are concession prices, I still find it challenging financially to be able to afford memberships. Possibly if there [were] options to partner with certain universities to have a separate discount that might attract more students to have a memberships and subscriptions.’ (Under 35, VIC)

Others mentioned that subscribing to organisations based in Melbourne is less inviting for regional and remote audiences because this requires travelling into the city. Some suggested having programming in regional areas would be beneficial:

> ‘Subscriptions are often focussed around major arts organisations in the capital cities - in my case Melbourne. I live in a regional area. Decentralised regular regional events with membership discounts associated- like ballet, opera, orchestral etc seasons/series - maybe even as little as 3-4 times a year in my regional area with benefits for members would be inviting.’ (65-74)

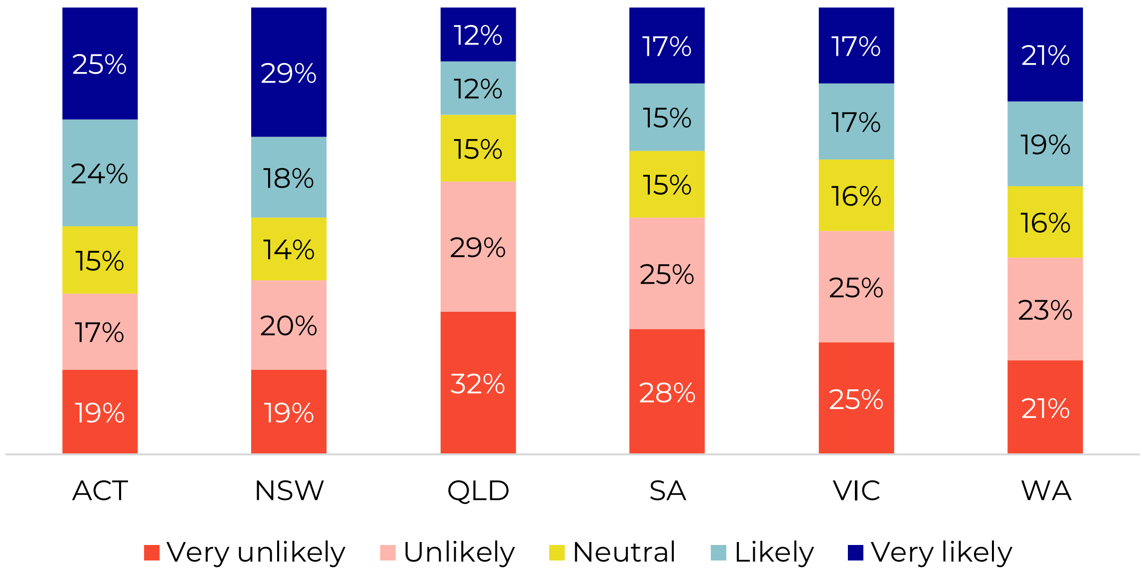
Others think that more communication around the benefits of subscriptions and memberships could attract more audiences. For example, clear communication around future programming, exclusive offers, flexibility and discounted prices. Some mentioned,

> ‘Communicate better the need for subscriber support in the current climate. Highlight flexibilities in subscription models.’ (Age unknown, VIC)

> ‘Make the memberships very attractive; have 'add-ons' as part of the membership. Have member only events. Have early bird offers for members. Free coffee or wine before a show for members. Stage events that are attractive and encourage memberships.’ (Age unknown, VIC)

> ‘Provide more info on what they might have to offer in the upcoming year. It's hard for me to justify spending money on a subscription if it's a total gamble on whether their events that year will actually be interesting to me or not.’ (Under 35, VIC).

Figure 24: How likely or unlikely are you to purchase a subscription or membership next year? By state or territory of respondent, August 2023 (VIC audiences, n=3,031)



"Provide more info on what they might have to offer in the upcoming year.

It's hard for me to justify spending money on a subscription if it's a total gamble on whether their events that year will actually be interesting to me or not."

Audience member
Under 35, VIC

Things to think about when reviewing subscription and membership offers

Here are some things for VIC organisations to consider:

- ❑ With subscription/membership behaviours and motivations differing dramatically across key audience segments in VIC, 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 VIC under 35 respondent suggested: '[Offer] more levels of subscription to suit attendees that want to experience a lot of events, some, or just a few. Currently a lot of subscriptions follow an "all in" approach that can be too much financial/time commitment.'
- ❑ 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 VIC – 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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Creative Australia

NSW GOVERNMENT

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GOVERNMENT OF WESTERN AUSTRALIA

Government of South Australia

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CREATIVE VICTORIA