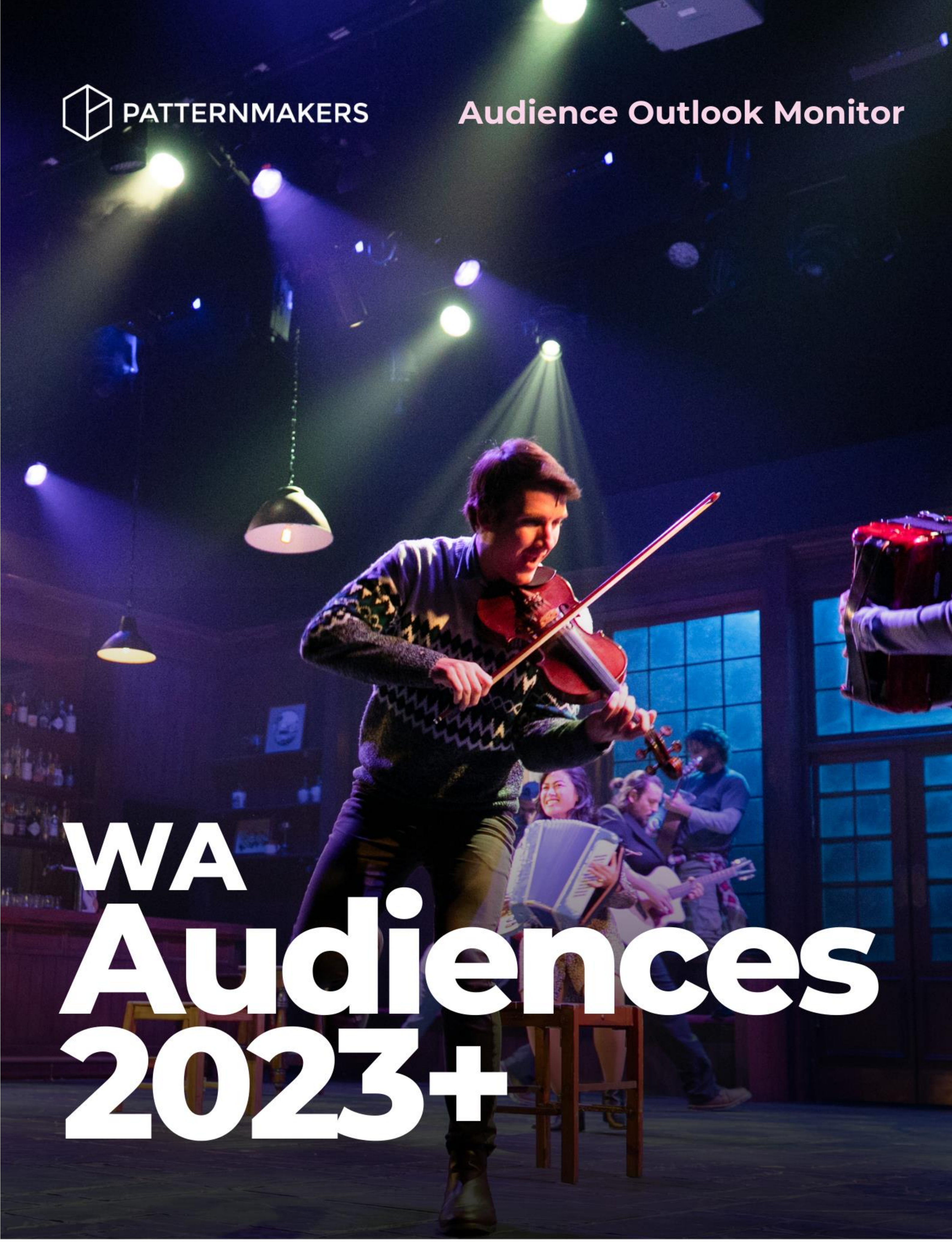
PATTERNMAKERS

Audience Outlook Monitor



WA Audiences 2023+

wolf brown

GOVERNMENT OF WESTERN AUSTRALIA

Department of Local Government, Sport and Cultural Industries

Contents

Cover Image Credit: Once – The Musical, Daniel J. Grant, courtesy of Black Swan State Theatre Company.

Introduction

This report shares insights from almost 1,000 Western Australian 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 Western Australia (WA) Snapshot Report outlines key findings from Phase 9 (August 2023) of the Audience Outlook Monitor in Australia, based on data collected from 988 audience members living in WA.

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: Courtesy of HOTA.

1. Attendance Trajectories

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

Key points:

- Three-quarters of WA audiences are attending arts and cultural events, stable since October 2022 – but the frequency of attendance is not growing.
- 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 69% of WA audience members expecting their attendance levels will stay the same in the next 12 months, major leaps in attendance appear unlikely.

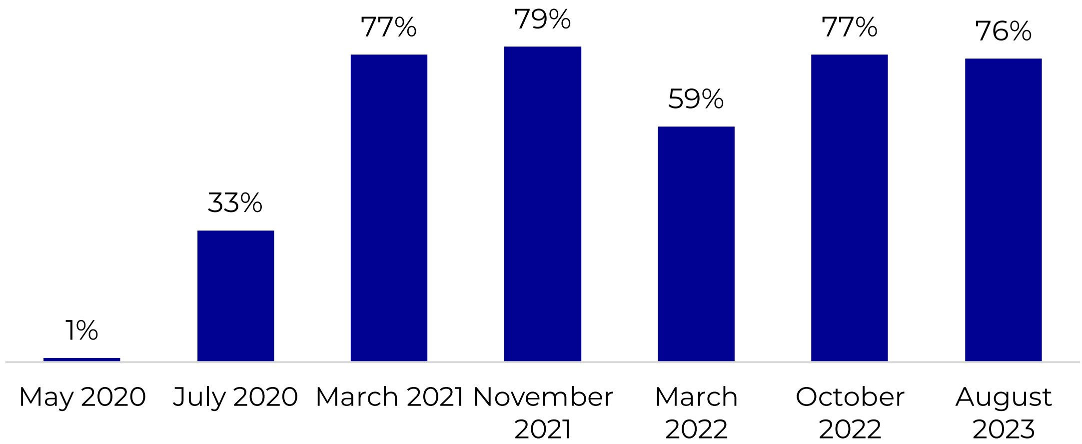
3 in 4 WA audiences are attending arts and cultural events, stable since October 2022, but there's more to the story

As the nation continues its recovery from the pandemic, WA audiences are attending arts and cultural events in high numbers.

Three quarters of WA audiences say they attended at least one kind of cultural event in the fortnight prior to data collection (76%), consistent with the national average (79%) and stable since October 2022 (77%).

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

Figure 1: Proportion of WA respondents answering yes to 'In the past fortnight, did you do a cultural activity in-person (not online)?' May 2020 to August 2023 (n=988)



, 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.
- **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.

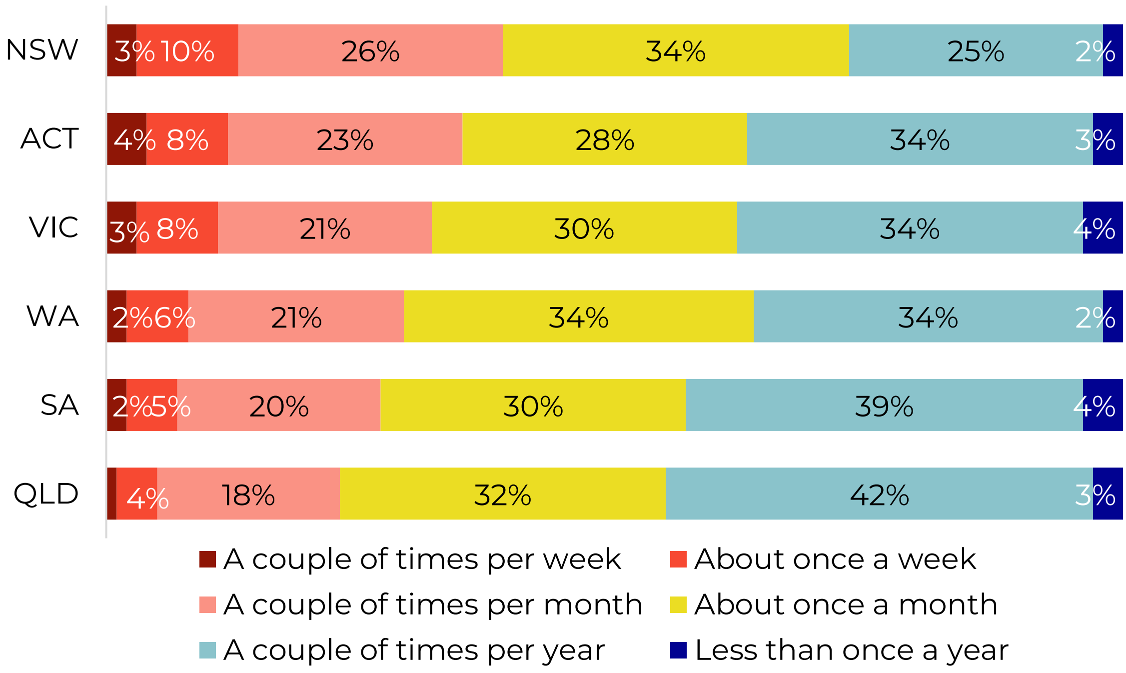
Although there will always be exceptions, understanding the major differences between these three groups is a helpful starting point, with a summary of these three national segments available in Chapter 4 of this report (Segmented Approaches).

Among WA audiences, frequency of attendance is stable at performing arts venues and at museums and galleries

Amongst WA audiences, attendance frequency at performing arts events is stable between October 2022 and August 2023. Almost two-thirds (63%) attended at least once a month in August 2023, relative to 61% in October 2022.

Relative to other states/territories, WA audiences attend performing arts venues quite frequently, only falling behind NSW audiences, where 73% attended at least once a month in August 2023.

Figure 2: Attendance frequency at performing arts events by state or territory, August 2023. (WA audiences, n=948).

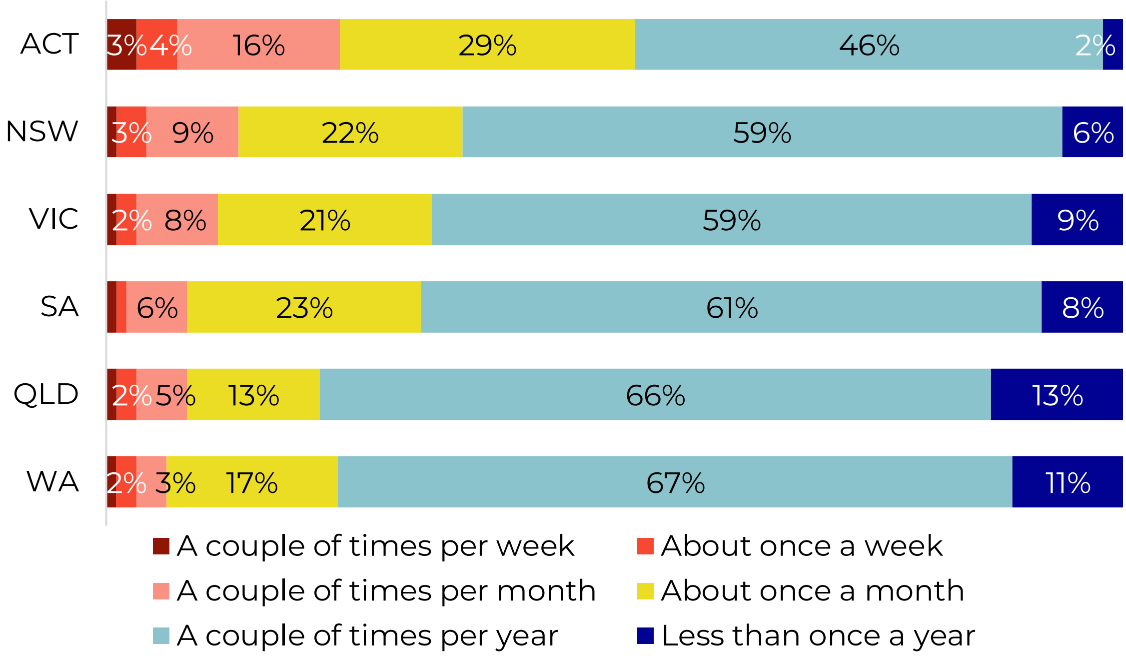


In WA, frequency of attendance at museums and galleries has also increased in August 2023, with 23% attending at least once a month, up

PATTERNMAKERS

from 20% in October 2022. The August 2023 rate is the second lowest of any state/territory, ahead of QLD (21%).

Figure 3: Attendance frequency at museums and galleries by state or territory, August 2023. (WA audiences, n=733).



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

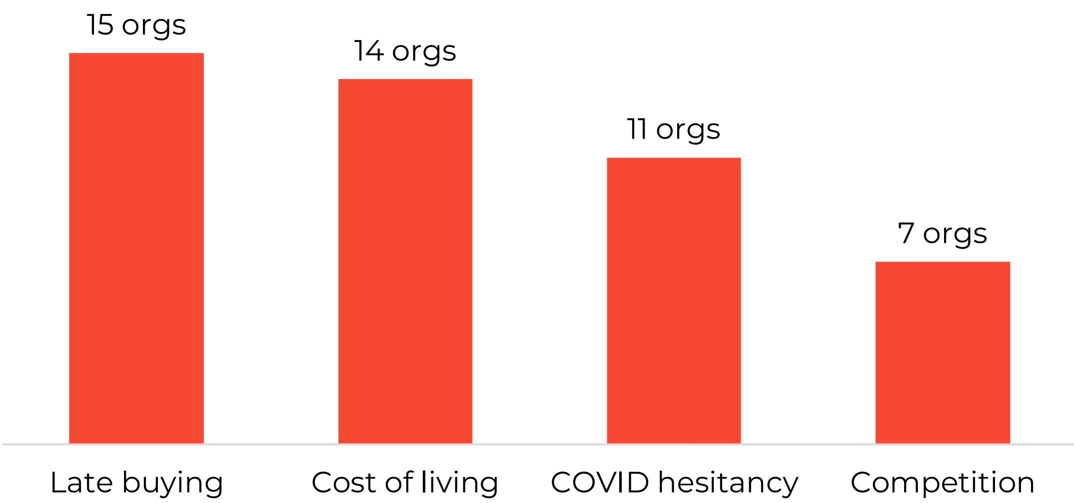
On a national level, although participation rates and frequency are trending in a positive direction, behaviour has not returned to pre-pandemic levels.

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.

There were 52 organisations across the country (including 6 WA organisations) that responded to the benchmarking survey, and their responses confirm that 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 have survived unscathed. Eleven of the organisations felt the impact of COVID as their top challenge, while others felt different pressures.

While each organisation 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)



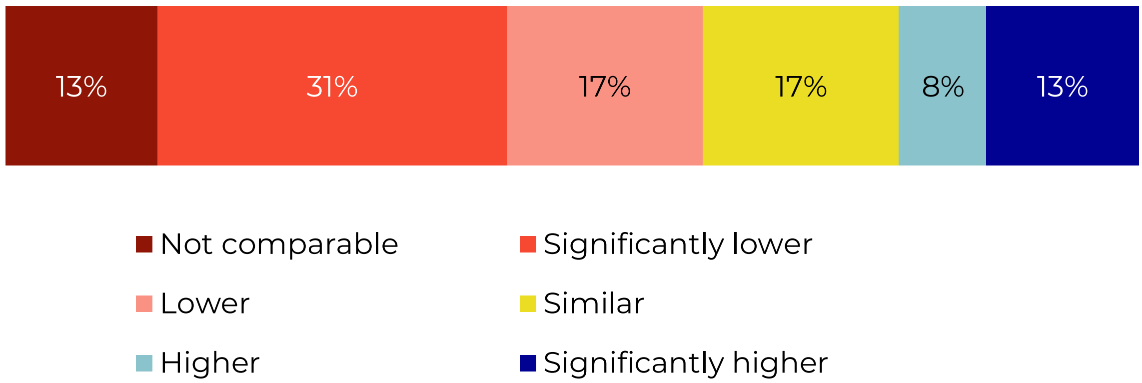
Organisations across Australia are adapting to the new landscape in different ways, and around 4 in 10 have rebuilt their audience to 2019 levels

Amongst the 52 organisations throughout Australia that 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:

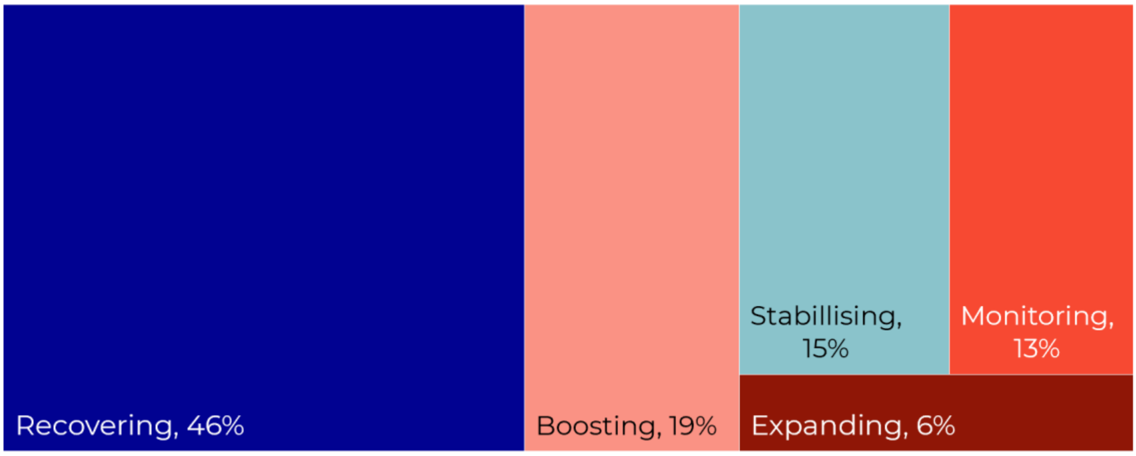
Audience recovery	Events and capacity	Programming	Organisational changes
Is total paid and free attendance higher or lower compared to 2019?	Has the number of events and tickets available changed?	Were there changes in approach to the types or genres of events?	Were there changes in funding or big strategic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

PATTERNMAKERS

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)



PATTERNMAKERS

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.

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

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

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

6 in 10 boosting organisations were performing arts venues, suggesting that some venues may have more ability to leverage audience-building programming opportunities compared to some other organisation types. One boosting organisation in WA noted that they've leant towards less risky crowd favourites in attracting audiences:

> 'Offering exactly what our audiences want rather than taking risks on works where we don't know if we have the audience. For example, we are programming a high volume of tribute acts.' (Venue, outer metropolitan WA)

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

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

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

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

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

These organisations have not dramatically increased their capacity or changed their programs, and yet have seen the rebuilding of audiences back up to pre-pandemic levels. 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. One WA organisation shared,

> 'Extreme late decision making by audiences leading to late booking pattern. Having to rely on [word-of-mouth] to really kick in.' (Producer, metropolitan WA)

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 WA, a recovering organisation shared what their successes have been in bringing audiences back,

> 'In returning to live performances, audiences were reassured of extra safety measures being implemented, swift updates were being made as capacity changes and lockdowns continued to occur, and they were given more flexibility with their tickets, including exchanges, credits and refunds. Having an open line of communication with audience members flexibility with

tickets/subscriptions has improved their confidence in attending events.' (Producer, metropolitan WA)

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 WA, big increases in attendance appear unlikely over the next 12 months, with 7 in 10 predicting their attendance will stay the same

In October 2022, more than half of WA respondents said their current level of attendance would 'definitely' or 'likely' increase over the following year (52%). In August 2023, that proportion dropped to one-quarter of respondents (26%), while 69% said they expect that their current level of attendance at cultural events will stay 'about the same'.

This trend is consistent throughout the states and territories, with fewer audiences in August 2023 expecting their attendance will likely or definitely increase moving forward, compared to October 2022. On a national level, in August 2023, 66% audiences expect their attendance will stay the same, while 27% expect it will 'definitely' or 'likely' increase.

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

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 WA 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
- ❑ With WA having one of the nation's highest population growth rates, stay abreast of investment frameworks to address these changes, which present opportunities for building audiences.

2.

Inflationary pressures and pricing

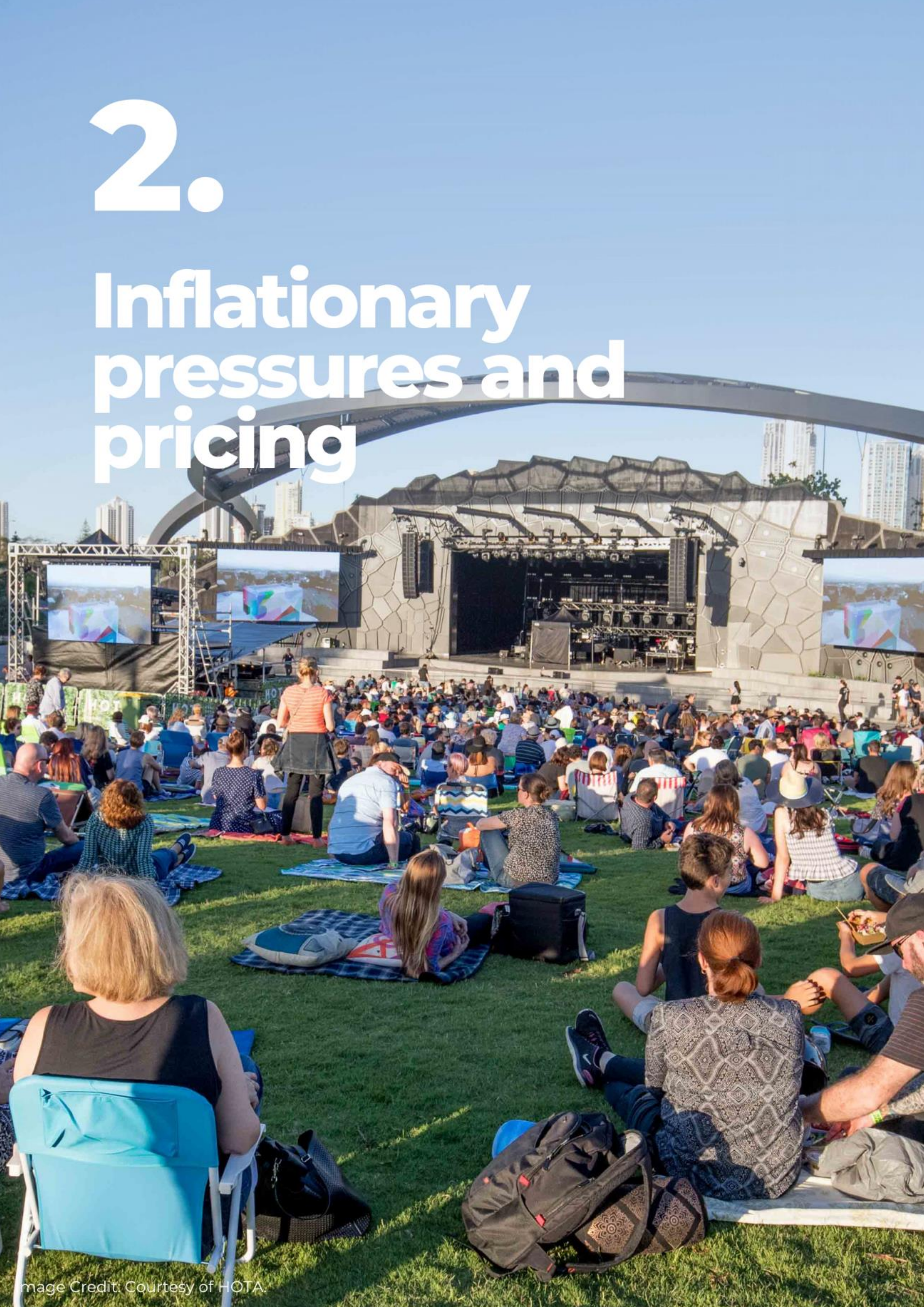


Image Credit: Courtesy of HOTA

2. Inflationary pressures and pricing

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

Key points:

- Financial reasons are the top barrier to attendance facing WA audiences, and inflationary pressures are expected to continue in 2023 and 2024.
- Spending levels at arts and culture events are not increasing, as WA audiences weigh up value for money and take longer to make decisions.
- With younger audiences and families continuing to be the most impacted, as detailed further in Segmented approaches), a key opportunity is developing sustainable strategies for targeting disadvantaged segments.

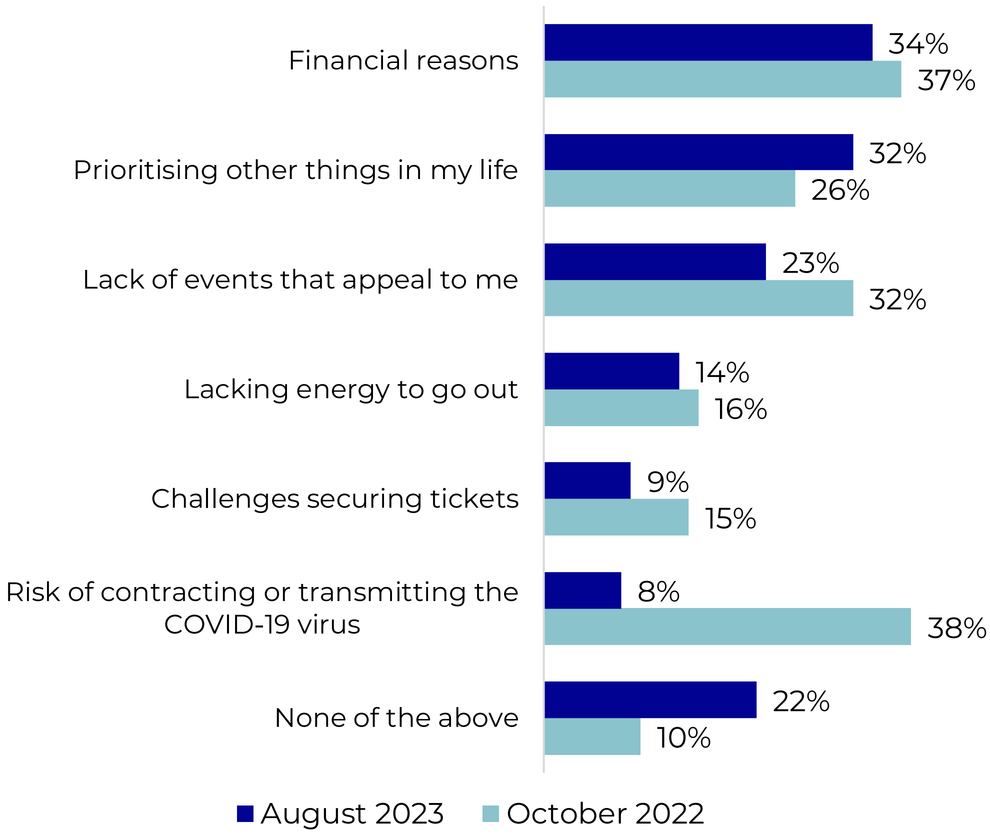
Financial reasons remain the top barrier to attendance, impacting a third of WA audience members

Consistent with previous results from October 2022, the August 2023 results show that 'financial reasons' is the most prevalent barrier to attendance facing WA audiences (34%) – along with audiences 'prioritising other things' in their lives (32%). This is followed by a perceived lack of appealing events (23%).

Comparing different states and territories, WA audiences are among the least likely to cite financial barriers right now, behind ACT audiences (26%).

After three long years of the pandemic, fears of contracting or transmitting COVID have steadily decreased among WA audiences, with 8% citing it as a barrier to attendance in August 2023, down from 38% 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). WA audiences, August 2023 (n=980) and October 2022 (n=499).



In WA, spending levels aren't growing, with consumer confidence remaining low in August 2023

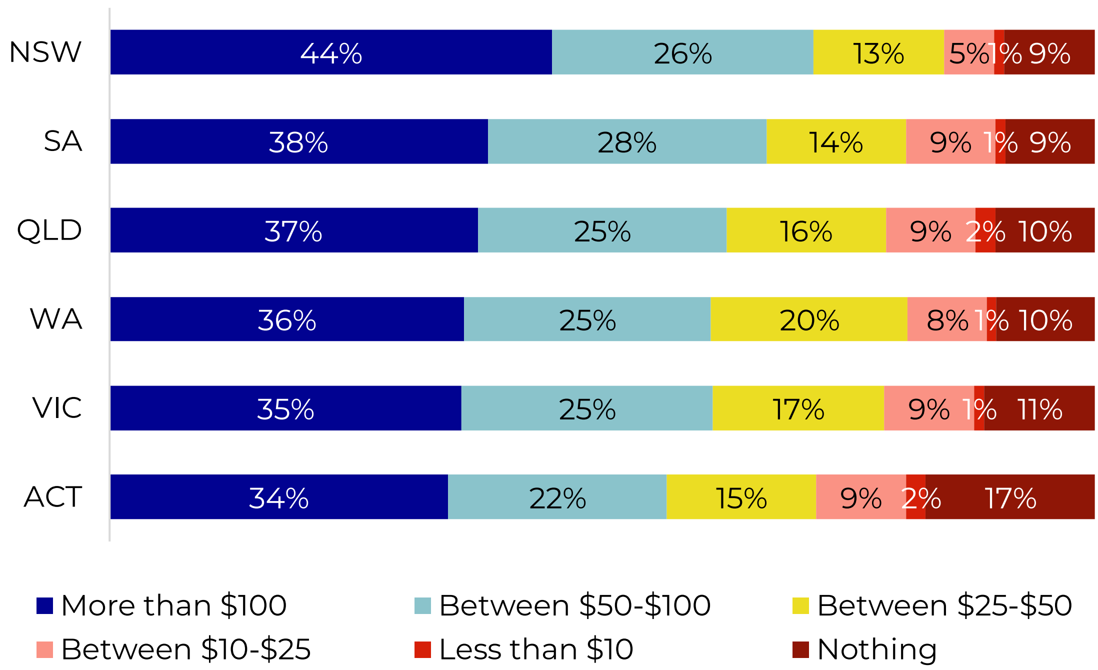
While the proportion of WA audiences attending in-person cultural events has remained steady, their spending levels have also not increased and remain consistent with October 2022. This trend is consistent across the country.

In August 2023, 6 in 10 (61%) of those attending in WA spent $50 or more on tickets to in-person live events and cultural activities, consistent with October 2022 (61%). This rate is slightly below the national average (64%) but higher than the ACT, for instance (56%).

The latest ANZ-Roy Morgan Australian Consumer Confidence survey reported on 8 August 2023 shows that 'confidence has been in very weak territory for 23 consecutive weeks, the longest weak streak on record.'

Spending levels vary slightly between age groups (see Segmented approaches for further information).

Figure 8: In the past fortnight, how much did you spend on tickets to in person live events and cultural activities? By state (WA audiences, n=732)



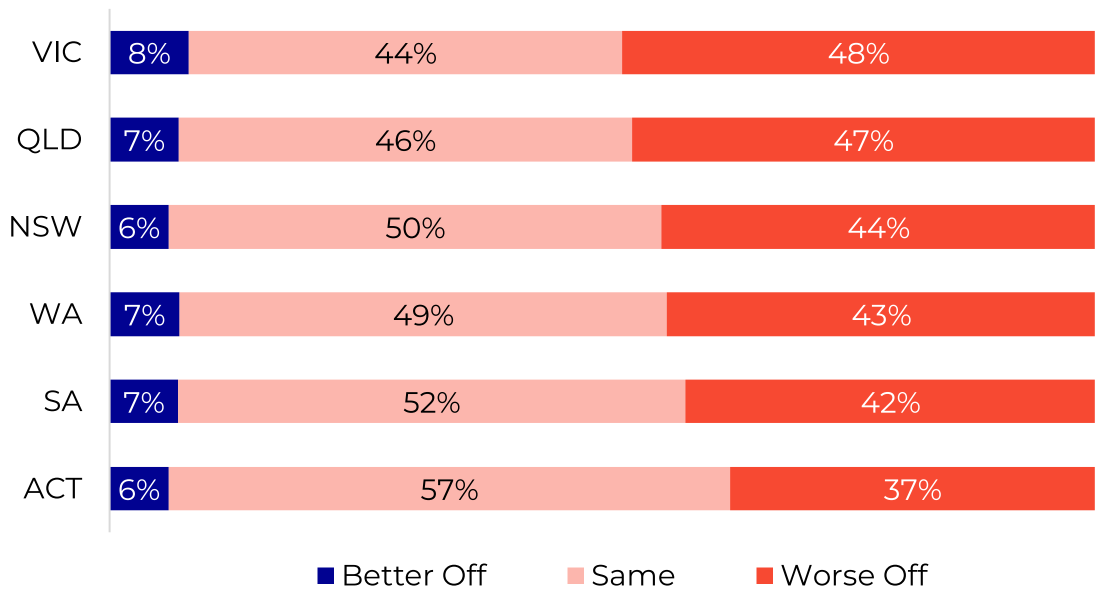
Almost half of WA audiences said they are financially 'worse off' compared to one year ago

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, around 4 in 10 WA audiences say they are 'worse off' (43%), while another half (49%) say they are the 'same' as one year ago. Only 7% overall report that they are 'better off' – on par with national averages.

Comparing the results by state/territory, VIC (48%) and QLD (47%) 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.

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 (WA audiences, n=982)



WA audiences are thinking carefully about how to balance their desire to attend and the costs

Qualitative data from WA 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 don't care about big names. I look for experiences that are easy to get to, there are other things to do in the area, are free or value for money. I would rather an intimate experience than a huge theatre or event.’ (Age unknown, WA)

Some mentioned they are changing their spending behaviours when attending events, such as opting for cheaper seats. One said,

> ‘We now have to choose the cheaper seats to allow the same number of choices as before.’ (65-74, WA)

Many WA audience members mentioned they are currently deliberating more about what they can justify spending on. For instance, some are opting to prioritise larger, one-off events that really grab their attention – while skipping other events. One said,

> ‘I am in a better job than I was 12 months [ago]– I am earning a little bit more money and my health has improved. However, the interest rate rises worry me. As a result, I try to only go to events that I really want to attend.’ (Under 35, WA)

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,

> ‘I am living on a very low income, caring for an adult daughter who lives with me. We both love engaging with arts and cultural events, but our financial restrictions often prevent us from doing so.’ (55-64, WA)

Another said,

> ‘With the inflation, 'being picky' is the word used often. The arts are still a very important part of our live, we just need to choose wisely because splurging is no longer an option.’ (35-54, WA)

WA audiences are slightly more optimistic about their future financial circumstances, compared to other states

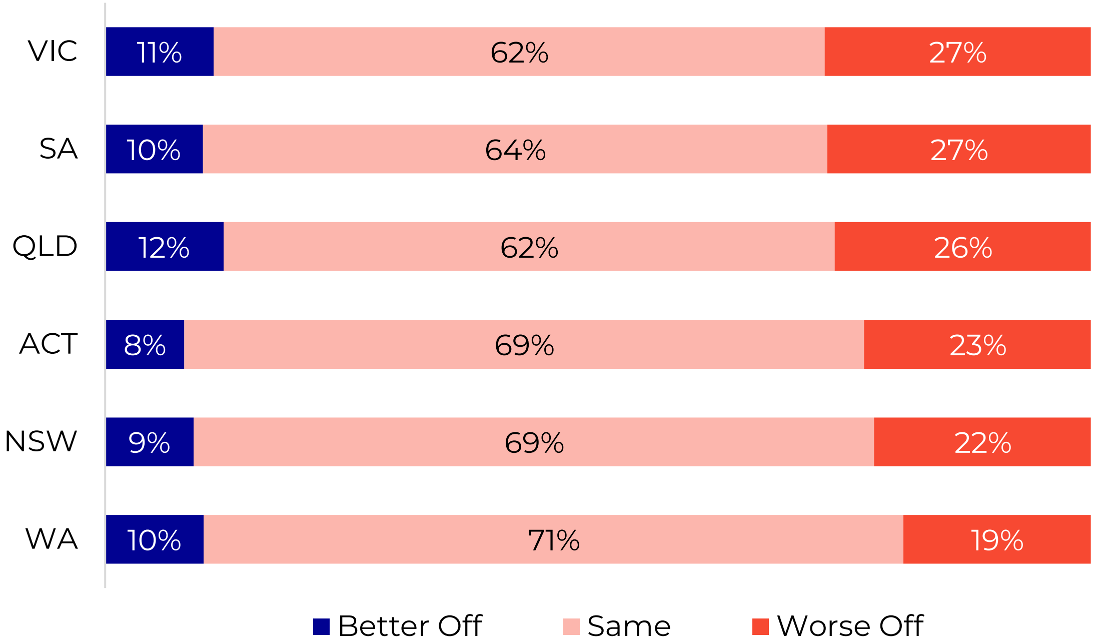
Audiences were also asked: ‘Now looking ahead – do you think that a year from now you (and any family living with you) will be better off financially, or worse off, or just the same as now?’

7 in 10 WA audiences say they expect to be in the ‘same’ financial position a year from now (71%), while 19% expect to be ‘worse off’. One in 10 (10%) expect to be ‘better off’ (Figure 10).

WA audiences are the least likely of all states to be feeling that their financial position will be ‘worse off’ in the coming year – relative to a national average of 24%.

Audiences are impacted differently in terms of their economic outlook, and under 35s and families are the most likely to feel pessimistic at the moment. See the Segmented approaches to read more about these trends at the national level.

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 (WA audiences, n=925)



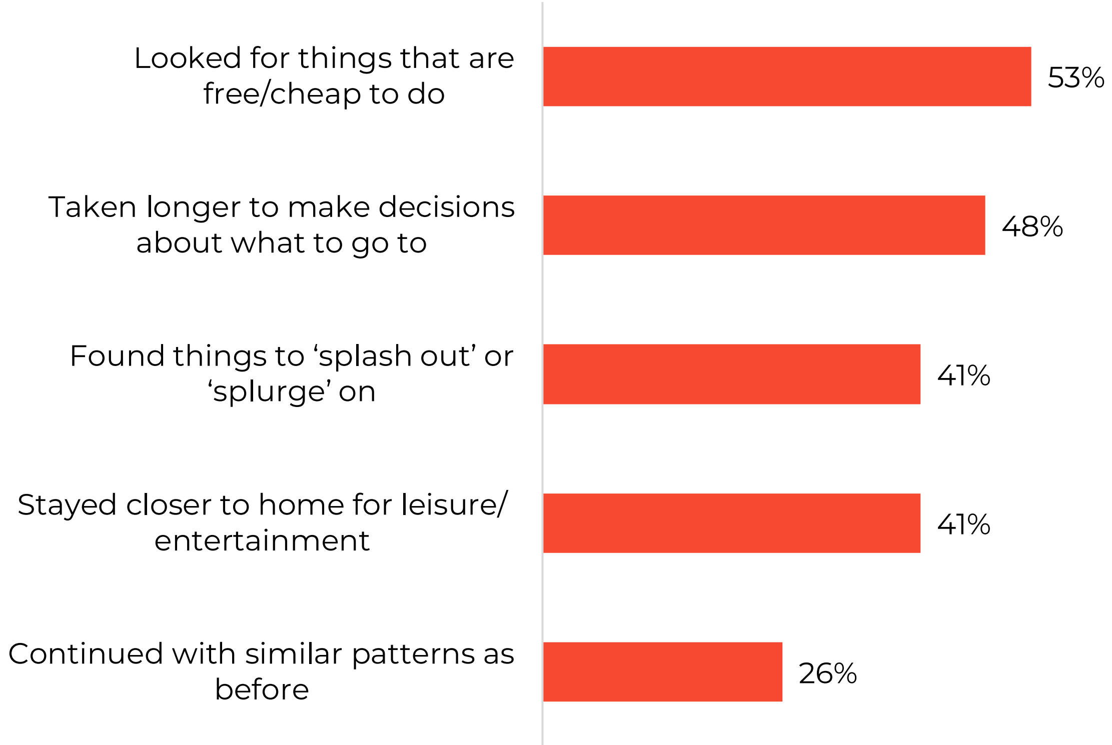
WA audiences are most likely to be looking for cheap things to do – but half are also 'splashing out' or 'splurging'

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

Around half of WA audiences say they have 'looked for things that are free/cheap to do' (53% agree or strongly agree). One WA audience member said,

> 'We are a family of five now paying double what we did a year ago for our mortgage. Buying tickets to events is prohibitive and we don't think anyone should miss out so we look for events we can all go to for free or very little cost.' (35-54, WA)

Figure 11: Given my financial situation, in the past 6 months, I have... (strongly agree and agree). WA audiences, August 2023 (n=976)



However, 4 in 10 are finding things to 'splash out' or 'splurge' on (41%) – suggesting that WA audiences are willing to spend more on things they love while saving elsewhere. One said,

> 'Rather than attend every musical theatre and opera event, I have been a little more picky, and decided to miss a few that I might not be completely interested in, to save on cost.' (35-54, WA)

Another said,

> 'Spending the same kind of budget but attending more local productions rather than fewer big-ticket items/concerts.' (35-54, WA)

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

> 'I have two children and no free baby-sitting. Love classical orchestras, ballet, opera. But practically can only go if I buy 3 tickets. My children love coming to live classical music/ballet, and it's always a special night when we go, but at the moment it can only be twice a year.' (Age unknown, WA)

Another 41% are also staying closer to home and half are deliberating longer on their decisions to attend (48%).

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

For many WA audience members, 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,

> 'Some [of] the tickets are ridiculously high, especially if you have to travel to the city and find accommodation also.' (65-74, WA)

Arts organisations may seek to promote free parking options for attendees at evening events. One audience member said,

> 'Free parking in the City of Perth has definitely encouraged me to come into town more often in the evening. Both from a safety (female) and convenience perspective.' (35-54, WA)

Others mentioned the need to make compromises in terms of dining out before or after a show. One said,

> 'We used to eat out before every show but now we eat at home. We would prefer to spend our smaller available budget on the tickets to support the arts and budget in the area of food and drinks.' (Age unknown, WA)

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

Across all age groups, financial barriers are taking effect; but, among key national audience segments, young people and families are the most impacted at the moment.

Qualitative data shows that under 35s in WA 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,

> ‘Life is just getting more expensive, and the rental crisis is taking its toll, it can be harder to get out and see and do things. Financially but also emotionally when the state of things is so fragile.
>
> But otherwise, I love going to see things and engage with culture and the arts and am open to all kinds of new or different things! It's just I can't afford it as much anymore…’ (Under 35, WA)

Access to discounted offers is a key decision-making factor for many young people, as one said,

> ‘Money is tight so have to pick and choose what I can attend. Given more money I would attend many more events. The $30 for under 30 tickets really help.’ (Under 35, WA)

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

> ‘We'd love to go to more events, as a family of 5 it can be too costly. Once you've paid $150 for tickets then you have to find parking, and the kids want merch or a drink (which we allow as it's a special treat) it's really expensive.’ (35-54, WA)

With discounts and packages deeply valued by parents, one parent highlighted the importance of clear communication about ticketing conditions to minimise confusion around family offerings:

> ‘I have been hit with over pricing at multiple venues, where a family ticket was advertised and then upon arrival with my four children, I was told I needed to purchase extra tickets as the family ticket was only for two children. However, this was not advertised anywhere. The manager who I spoke to then proceeded to charge me for multiple adult tickets when I was the only adult (single mother). I have always tried to bring my children to these cultural activities but the increase in cost from 2 kids and above is too much for me these days with most ticketing directed at the 2+2 family model.’ (35-54, WA)

Things to think about when addressing financial barriers to attendance

WA 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 WA 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 anecdotes about how different segments are affected when assessing the case for funding in grant, partnership and sponsorship applications.
- ❑ Ensure packaged offers for families and groups are clearly articulated at different points of the customer journey, to ensure attendees feel empowered upon making their purchasing decisions.
- ❑ 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 WA.
- ❑ 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 WA 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 transport and parking initiatives that could help audiences get to your event, such as the City of Perth's night-time, weekend and public holiday free parking.

3.

The desire to inspire

Image Credit: Courtesy of HOTA.

3. The desire to inspire

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

Key points:

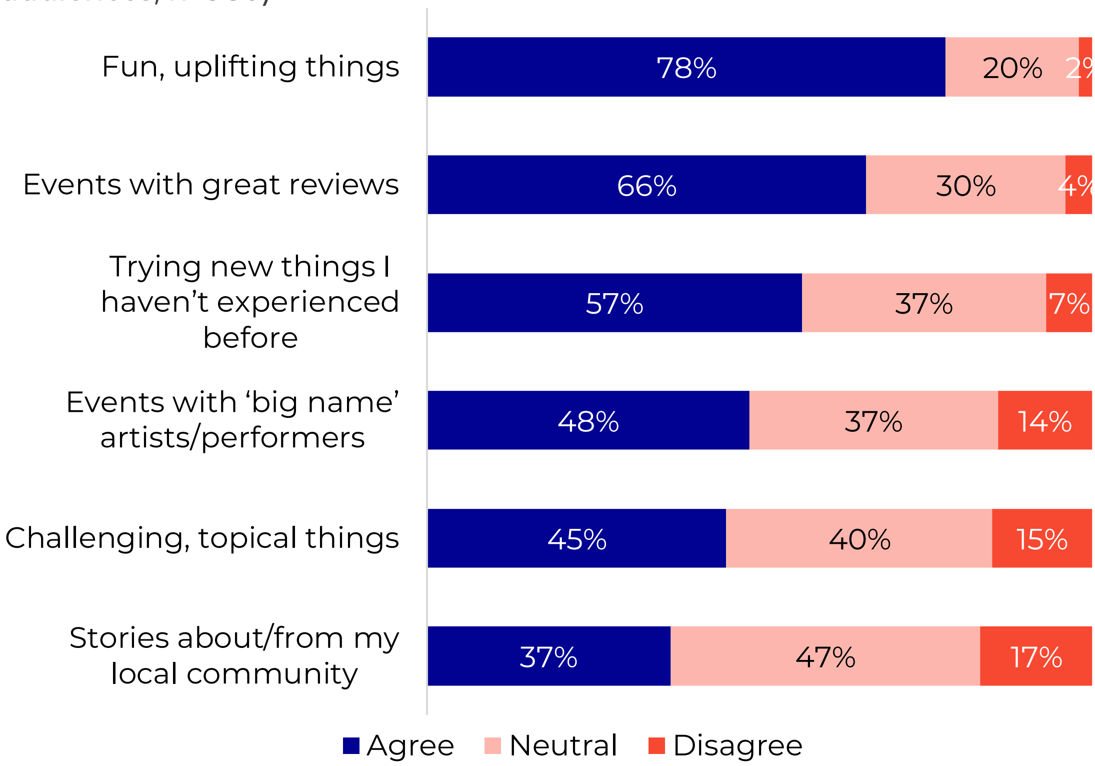
- WA audiences are finding a wide range of content appealing, though like those around the country, budget pressures are leading some audiences towards 'safer' bets or 'guaranteed fun'.
- High proportions of WA audiences are seeking out fun, uplifting experiences and events with great reviews to ensure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

WA 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 WA audiences for all options tested, including fun, uplifting things (78%), events with great reviews (66%), and new things they haven't experienced before (57%).

Figure 12: In the coming year, I'll be most attracted to... August 2023 (WA audiences, n=980)



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

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

WA audiences commonly highlighted the value of arts experiences in fostering inclusion, enrichment and escapism – and stressed the importance of widening access to this. One said,

> 'I am starting to see a wider range of people willing to try new cultural experiences and I hope arts organisations continue to make people from all walks of life comfortable at performances. Inclusion then education.' (35-54, WA)

Audiences mentioned their love for participating in arts and cultural experiences – and some are feeling dismayed by the current financial pressures which are inhibiting attendance. One said,

> 'The Arts are so important to keeping my spirits up and my mental health well. It's really challenging when you can't afford to go to an event every now and again that you know will keep you well.' (Age unknown, WA)

There is appetite for a diverse and vibrant art scene in WA – and many want this to continue expanding

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

> 'Like an increasing number of people, I am desperately concerned about the climate emergency we are experiencing and the very real prospect of environmental and social collapse. This is challenging for artists and arts producers too of course, especially in terms of audience appeal, but I would greatly value more quality content that reflects the terrible realities we are facing.' (65-74, WA)

With 48% seeking 'big name' artists in the coming year, many respondents are eager for international touring and more acts to reach WA – a sentiment commonly shared throughout the pandemic years. One said,

> 'Western Australia is still very much turned to sports almost exclusively. Maybe because nothing reaches our coast. I think there is a terrible lack of international artists coming to us. It is good to support local artists but barring the international ones is terrible. The quality of the foreign artists is just breathtaking, and we should, as before, welcome their enrichment towards us. Not enough arts in WA!' (Age unknown, WA)

Others feel that there is a lack of variety overall – which may not be in keeping with audience demand. One said,

> 'Quality product attracts audiences. WA has a sophisticated performing arts/arts audience keen to access contemporary, challenging and more mainstream entertaining work of quality. We just don't see enough work, and much is of mixed quality.'

Some audiences were vocal about advocating for more government and philanthropic support for the arts in WA, underscoring its importance in boosting morale during tough times. One said,

> 'More government arts funding presented to arts bodies or artists would present cultural events that allow the whole community to experience without too much audience expense or financial commitment [...] Society and its positive psyche would benefit in more ways than one.' (65-74, WA)

Another said,

> 'I want to see the best of the world (e.g., festivals) alongside well-supported local artists. I want local artists to have opportunities to show and develop work, that is well-supported not compromised by a lack of funding or lack of appreciation for what the arts do for a culture / country.' (Age unknown, WA)

Things to think about when making creative and programming decisions

While 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 WA organisations to consider:

- Events can be 'fun and uplifting' while still pushing boundaries – so look for ways to present new, topical and challenging ideas in different ways for audiences
- With many 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!)
- Consider what is working more broadly for Australian audiences in terms of content at the moment, e.g., under 35s are getting behind the uplift and nostalgia of *Barbie,* and the Matilda's journey in the FIFA Women's World Cup is engaging record-breaking audiences
- Discuss the right level of investment in strategies for reaching new audiences, and retaining them long-term
- Sometimes, resources are better spent with targeting a specific group of interest with an event. One WA audience member suggested, 'Keeping the audience in mind. While an esoteric approach may appeal to an audience mature in a particular field, a more general approach may appeal to a wider market.'

4.

Three segments to know

Image Credit: Courtesy of HOTA.

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 have an opportunity to 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 WA 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 WA 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
- ❑ Review your audience database to maximise the potential for targeted campaigns and optimise open rates.

5. Online trends

Image Credit: Selina Miles, courtesy of HOTA.

5. Online trends

WA 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 74% of recent WA 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 younger audiences.
- 1 in 3 WA 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.

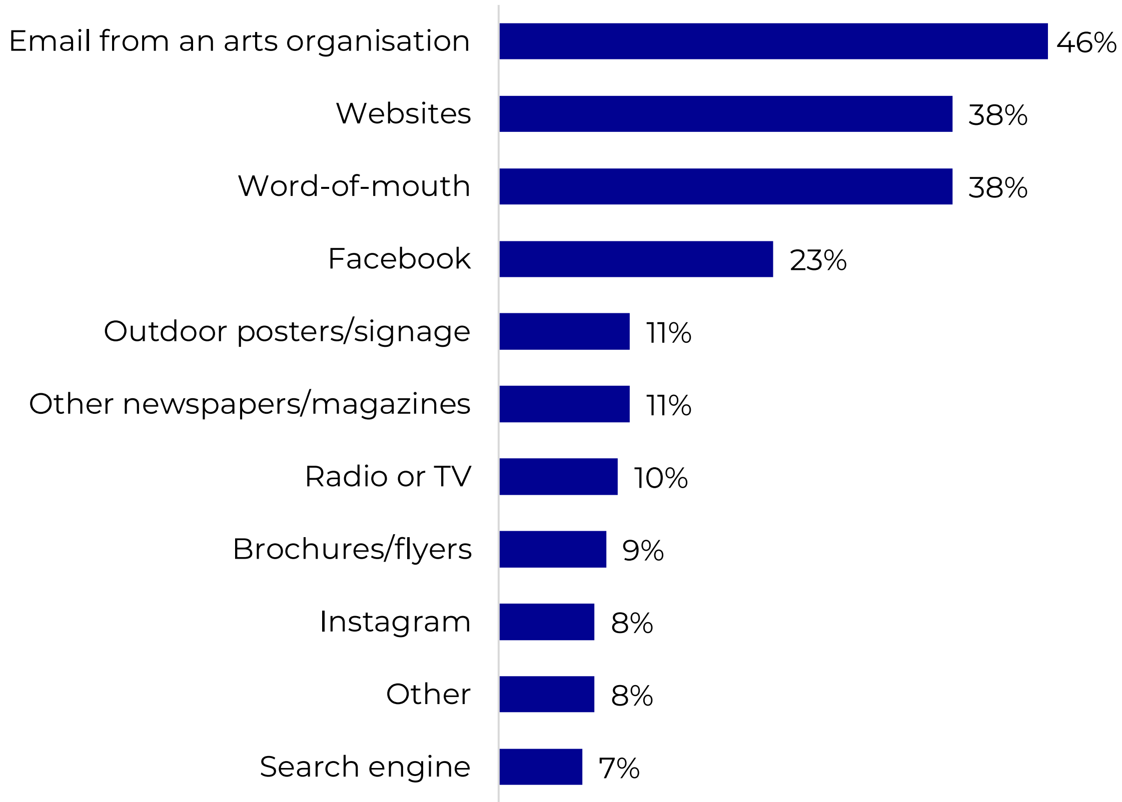
Key channels for WA audiences are emails from arts organisations, word-of-mouth and websites

When asked how they heard about the most recent event or cultural activity they attended, overall, 3 in 4 WA audiences cited online channels (74%), consistent with the national results (75%). This includes direct emails from arts organisations (46%) and websites (38%).

Around 4 in 10 WA audiences are relying on word-of-mouth from friends, family or colleagues (38%) – the highest proportion of any state or territory, along with VIC (38%). Meanwhile, NSW and QLD are the least likely (both 32%).

A sizeable proportion is relying on social media like Facebook (23%), with fewer using Instagram (8%) to find out about recent events. These figures could be even higher, assuming a proportion of word-of-mouth occurs online.

Figure 13: How did you hear about the most recent event or cultural activity you attended? (Select all that apply). August 2023 (WA audiences, n=752)



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

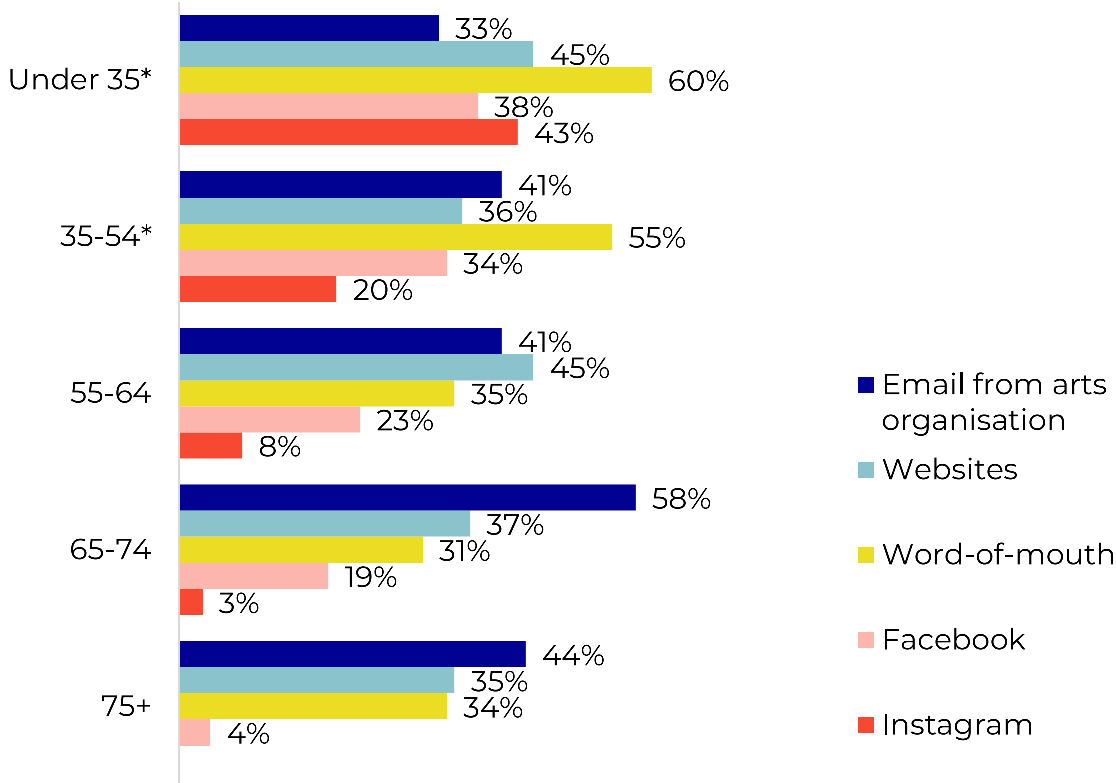
For over 55s in WA, the dominant awareness channel is emails from arts organisations, followed by websites and word-of-mouth – consistent with national trends (Figure 14).

Almost half of under 35s (48%) say they heard about a recent arts or cultural activity via word-of-mouth. There is a small proportion of WA under 35s represented in the survey (n=55), so these results should be interpreted with caution.

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 more likely to be using social media channels like Facebook and Instagram more frequently compared to older age groups.

Figure 14: How did you hear about the most recent event or cultural activity you attended? (Select all that apply). By age group, August 2023 (WA audiences, n=752)



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

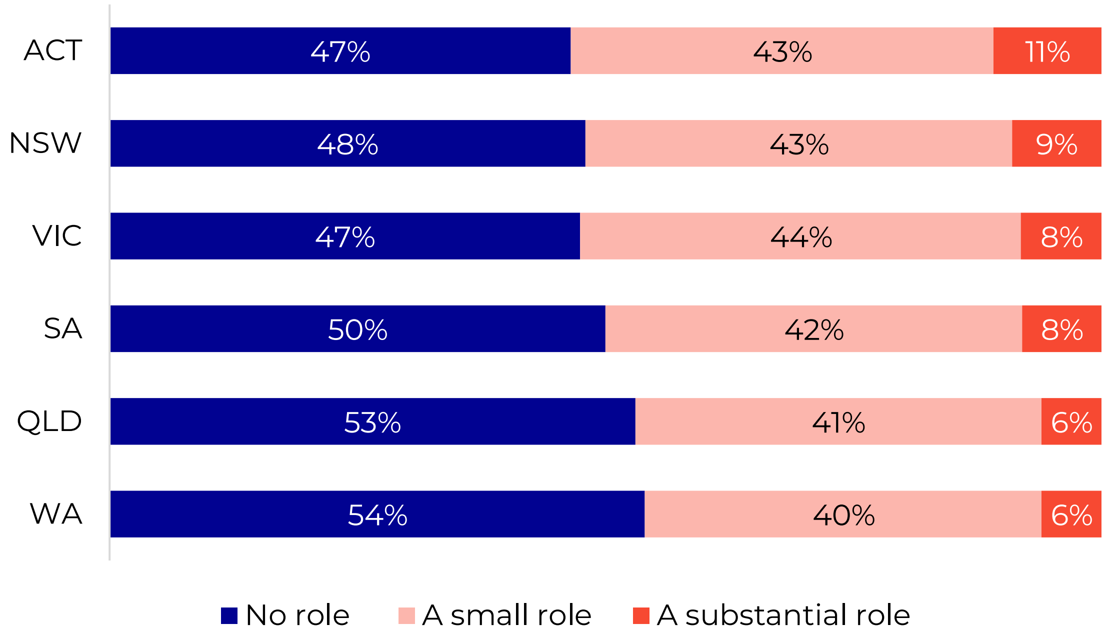
A sizeable number of WA audiences are currently participating in online or digital arts and culture experiences (36%), slightly lower than the national rate (39%).

Participation in online arts and culture is relatively consistent across the states and territories. While VIC and NSW audiences were the most likely to say they had engaged in online arts and cultural activities online in the fortnight prior to data collection (41%), WA audiences were one of the least likely (36%), just behind SA audiences (35%).

Respondents were asked what role online arts events/experiences play in their life now that venues are open for in-person attendance. Among WA audiences, 6% say they play a substantial role (down from 22% in October 2022), and 40% say they play a small role (down from 45%).

When comparing the other states/territories, ACT (54%), VIC and NSW (both 52%) were the most likely to say that online arts and culture are playing a small or substantial role in their lives. WA was the least likely, at 46%.

Figure 15: As venues are open and it's possible to attend in-person cultural experiences, what role do online arts events/experiences play in your life? By state or territory of respondent. August 2023 (WA audiences, n=987)



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

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

In August 2023, 28% said they paid for an experience in the past fortnight, down slightly from 31% in October 2022, and 30% in November 2021.

WA audiences who were paying for digital arts and cultural experiences in the fortnight prior to data collection were most likely to be purchasing single experiences (11%), making a donation (9%) or subscribing to on-demand platforms (7%). Fewer subscribed to programs or seasons that included the experience (5%).

Some WA audiences feel there is a lack of enriching online experiences – while others face technical barriers

In August 2023, audiences were asked to describe the extent to which they have experienced barriers to participating in online arts and cultural experiences.

With a wealth of cultural content available online, WA audiences have found trouble discerning the experiences that are worth paying for, from others. One said,

> 'There is so much available for free online, and I don't feel like any of the paid things are that different in my experience to the free ones. What is the incentive for me to pay for something that is very much the same as what I can find for free?' (35-54, WA)

Many audiences mentioned facing technical challenges and internet connection issues 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 have] difficulty with internet connection at home [and] depend on public access connection via the local library.' (55-64, WA)

For others, the scheduling of live streams is often challenging, as one said,

'Time zone is an issue sometimes in WA, if I can only see it live and not watch later.' (Under 35, WA)

While some WA audiences value opportunities to engage online, others simply prefer live events

Several WA respondents mentioned that they value the option to participate in cultural experiences online – particularly when it can help to address barriers to in-person participation and still provide a sense of connectedness. One audience member commented on a shared digital experience,

> ‘I like live events. But online is helping me access things outside my local area that I would not normally have access to. Also, an online performance of Australian Ballet (Jewels) allowed me to share this performance with my elderly mother who cannot really go to the ballet due to health conditions. Bringing that into her loungeroom was really nice and we could chat about our past experiences of ballet as we watched it.’ (Age unknown, WA)

Many mentioned that the prospect of in-person events was more appealing than online events, especially for those already working on screens all day. One said,

> ‘I love the arts as an outing. I wish more galleries and museums had 'late night' sessions, i.e., open 5-9pm even just once per exhibition or once per month. It is difficult for me to attend things during the day both 'office hours' and on weekends, so sometimes I miss out as there are no available time I could attend/visit.’ (35-54, WA)

Many WA audiences are eager to prioritise human connection and opportunities to feel immersed with an in-person arts experience. One said,

> ‘I live alone. I enjoy being part of an audience. I like to have a glass of wine with other people around. I don't find it fun to sit in front of my computer to watch something. I like the human contact.’ (75+, WA)

One audience member under 35 mentioned the value of experiencing something they aren’t able to access online. One said,

> ‘I don't personally see the value in online events as usually they end up online for free, or I see them on TikTok snippets. I want to go to events for the experience and I feel I don't get that from online events.’ (Under 35, WA)

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 WA 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
- ❑ Look at what is not working and what resources could be freed up to focus on priority opportunities
- ❑ WA audiences are currently looking for fun, energising, social experiences. Ensure that realistic targets are set for digital experiences and that digital distribution strategies have a long-term horizon
- ❑ Promoting online experiences which are low-cost could help to build audiences in the current financial climate
- ❑ WA 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: Courtesy of HOTA.

6. Late decision-making

Last-minute decision-making persists, with WA 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:

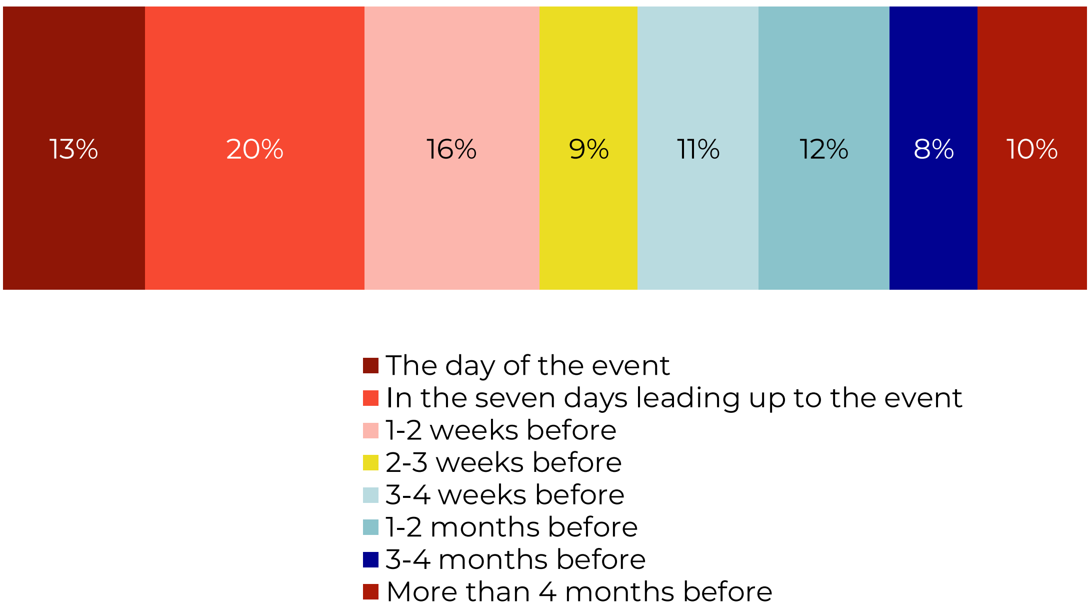
- 4 in 10 WA audiences are booking less than two weeks out, with 11% on the day of the event.
- Analysis of 'early bookers', 'mid-term bookers' and 'last-minute bookers' shows that last-minute ticket buying is linked with certain buying patterns – such as being more likely to rely on word-of-mouth.
- 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 mid-term ticket buying trend prevails among WA audiences: 16% of audiences reported that they booked 1-2 weeks before the last event they attended, 9% booked 2-3 weeks before, and 11% booked 3-4 weeks before.

Figure 16: Can you tell us how far in advance you booked or committed to go...? August 2023 (WA audiences, n=751)

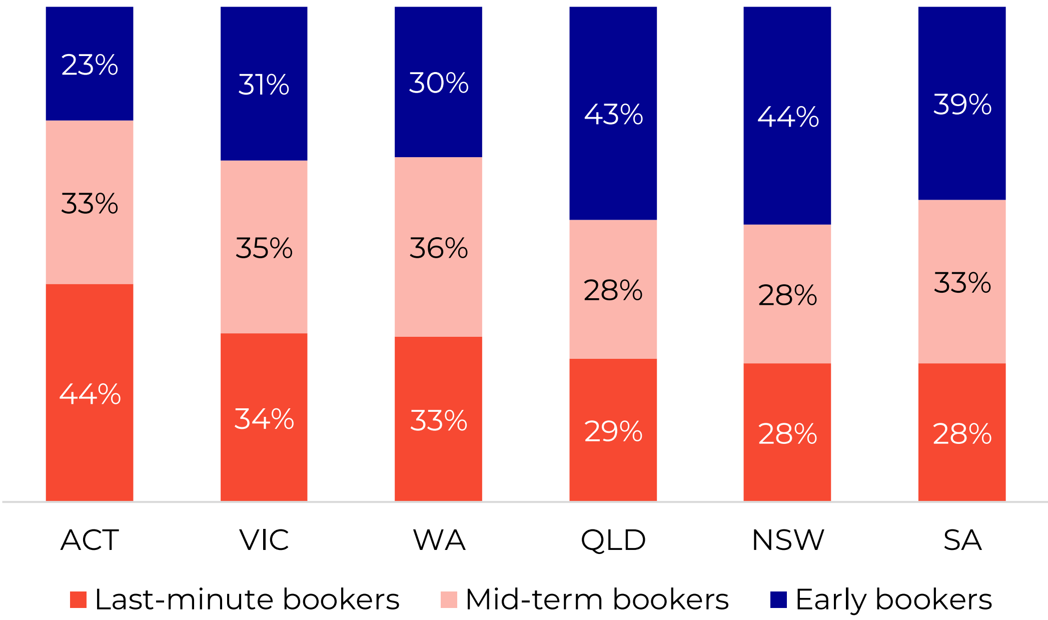


In WA, qualitative data indicates that key motivations for booking tickets earlier on included wanting to secure particular seats, booking tickets as part of a subscription/membership package, the need to plan ahead to coordinate travel timings and accommodation.

Across the country, NSW (28%) and SA (28%) audiences are least likely to be last minute. Last-minute booking is relatively similar across the states and territories.

Meanwhile, audiences from the ACT are the most likely of any state/territory to be last-minute bookers (44%), possibly linked to a higher frequency of gallery attendance in the ACT overall.

Figure 17: Can you tell us how far in advance you booked or committed to go...? By state or territory, August 2023. (WA audiences n=751)



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

Around half of WA audience members (49%) are committing or booking less than two weeks out, with 13% on the day of the event.

Many WA early bookers reported feeling ‘better off’ or the ‘same’ financially as they were a year ago (64%), whereas mid-term (57%) and last-minute bookers (54%) were less likely to do so.

Just over half (53%) 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 23% of last-minute bookers.

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

> ‘I don't like to be committed too far in advance – things are always changing, and I don't want to buy tickets and then miss the event.’ (Age unknown, WA)

Several audience members shared that they had intended to go the event months or weeks prior – but opted to wait until they were certain they could attend. One said,

> ‘I was committed to going a few weeks in advanced, however only bought my ticket at the door as I was unsure if I would have had something conflict.’ (Under 35, WA)

Others mentioned that their attendance was a spur of the moment decision, with some citing word-of-mouth or social media ads as inspiring their attendance. One shared,

> ‘I didn't know it was on and it was a last-minute decision when my friend saw the event pop up on her social media.’ (55-64, WA)

Another said,

> ‘A spur of the moment decision – I did not plan to go that day; everything just fell into place.’ (55-64, WA)

Last-minute bookers in WA typically hear about events via word-of-mouth (44%), while early bookers rely on emails (64%)

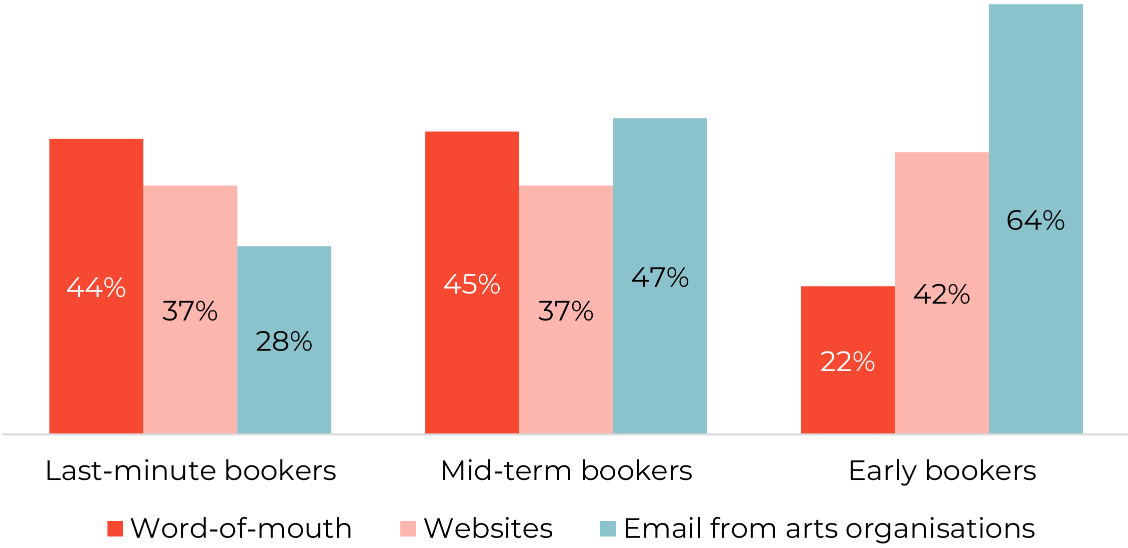
Among early bookers (64%) and mid-term bookers in WA (47%), email from arts organisations is the most common means of hearing about cultural events.

Meanwhile, for late bookers in WA, email is less important, with 28% noting this as their awareness channel for their latest event.

Late bookers were more likely to rely on word-of-mouth recommendations (44%), social media like Facebook (19%) and Instagram (17%) and traditional media channels like radio and TV (18%).

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

Figure 18: How did you hear about the most recent event or cultural activity you attended? (Select all that apply). By booking purchase timeframe, August 2023 (WA audiences, n=751)



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

WA 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 WA organisations to consider:

- Define the different phases of a campaign and review how tactics can change to suit different phases. For instance, what motivates early bookers is unlikely to work for mid-term and late bookers
- Consider methods of tracking intended attendance, beyond simply tracking ticket purchases e.g., providing opportunities to register interest
- Review ticket prices for young audiences and if youth discounts are already in place, review age limits i.e., under 35 may be more appropriate than under 30 or under 25 given current conditions, and some artforms may have a case to extend this to under 40
- With some audiences feeling burnt out by cancellations because 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 parents and caregivers, and encourage group bookings
- Review the approach to booking fees and consider a per ticket fee or a scaled offer. Consider investigating a payments solution like ArtsPay, as some audiences are put off by high booking fees but are keen to support the arts and artists.

7.

Subscriptions and memberships

Image Credit: Courtesy of HOTA.

7. Subscriptions and memberships

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

Key points:

- 4 in 10 WA audiences are members or subscribers – on par with the national average.
- Subscriptions uptake and motivations amongst key segments in WA differ significantly.
- Older WA 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 WA organisations to trial different offers and models, and test different messaging to target the unique needs and interests of different audience segments.

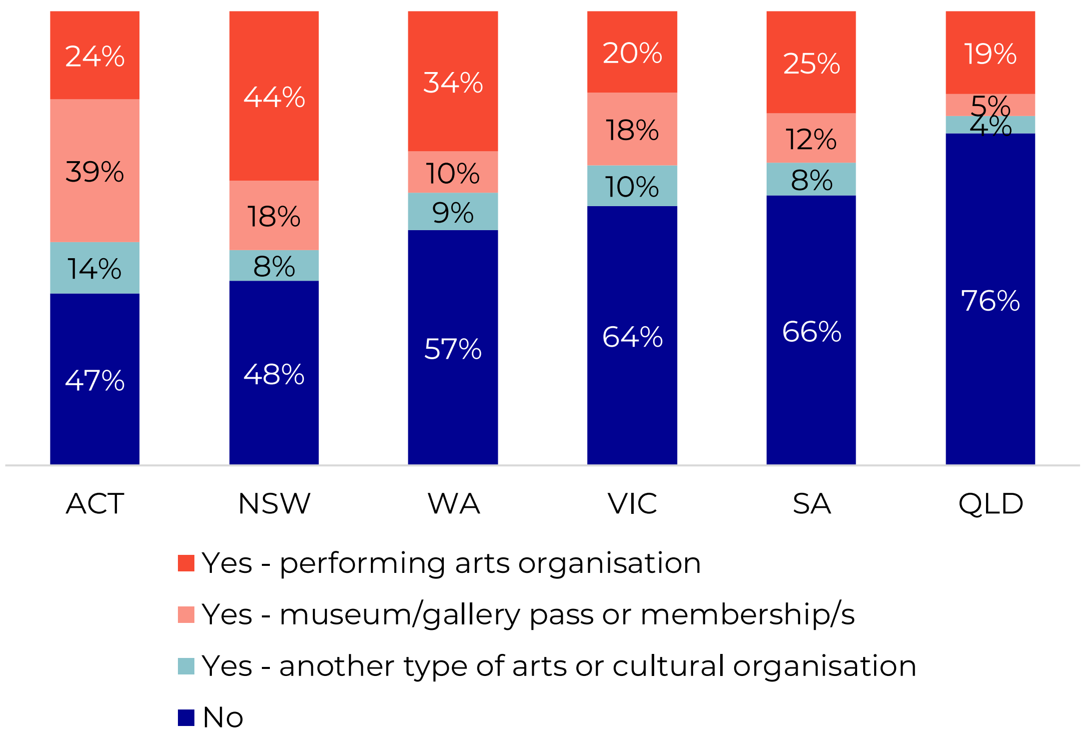
Around 4 in 10 WA audiences are members or subscribers in 2023 – consistent with the national average

Around 4 in 10 (43%) of WA respondents reported having purchased season tickets or a membership to an organisation this year – consistent with the national average of 41%.

Compared to other states, season subscribers and membership rates are lowest in QLD (24%), followed by SA (34%) and VIC (36%) – and highest in the ACT (53%) and NSW (52%).

In WA, performing arts subscriptions were most common, held by 34% of respondents, followed by a smaller number holding museum/gallery memberships (10%) or another kind of membership, for example, to literary festivals (9%).

Figure 19: Did you purchase a season ticket, subscription or membership? By state or territory of respondent, August 2023 (WA audiences, n=983)



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

Qualitative data from older WA audiences suggests that many value that purchasing a subscription or membership forces them to plan ahead – and provides them with greater liberty to select seats. One said,

> 'Guarantee good seats and can plan the trip, maybe to stay over and enjoy more than one cultural experience. Also guarantees support for the company or organisation.' (75+, WA)

Another said,

> 'Ensures we go, plan travel and other commitments around the ticketed events, membership/subscription leads us to form community with other regular 'goers'.' (65-74, WA)

Older WA 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. One said,

> 'Have done so for 30+ years and intend to continue doing this. Support for local companies, personal enjoyment of the arts.' (75+, WA)

Meanwhile, amongst audiences aged under 35, access to discounted tickets and saving money are key motivators to purchasing subscriptions or memberships to organisations. One shared,

> 'I booked a membership for Black Swan Theatre, as with usually attending their shows it made it cheaper in the long run for me.' (Under 35, WA)

Another mentioned they appreciate the flexibility offered by subscription and membership packages:

> 'Flexibility to change dates if work travel schedule changes, additional events, early access to tickets.' (Under 35, WA)

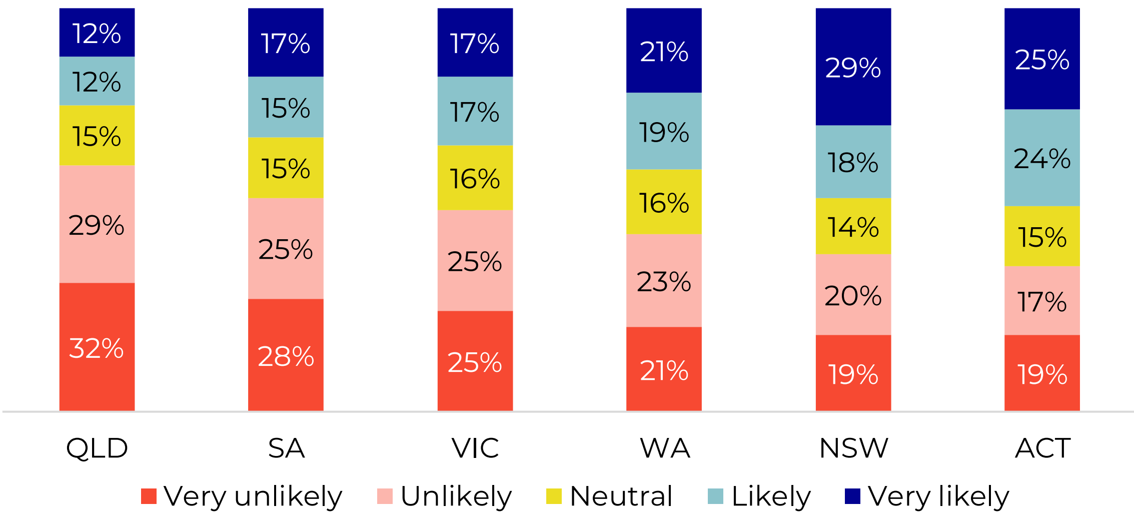
Looking ahead, 4 in 10 WA audiences say they are likely to purchase a subscription or membership next year

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

Four in ten WA audiences said they would be 'very likely' (21%) or 'likely' (19%) to purchase a subscription or membership for next year.

When comparing the states, audiences in ACT (49%) and NSW (47%) were the most likely to say they would purchase a subscription or membership next year – while those in QLD were the least likely (24%).

Figure 20: How likely or unlikely are you to purchase a subscription or membership next year? By state or territory of respondent, August 2023 (WA audiences, n=987)



WA audiences are conscious of the cost – and many are apprehensive of making the commitment

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 WA audiences suggested different payment models to relieve the financial pressure that comes with purchasing a subscription or membership, especially given the current cost-of-living climate. One said,

> ‘Payment plans? Flexibility in how to spend your membership. I don't want to lock a year’s worth of concerts in my diary when I don't know where I will be or what I'll be doing 2 weeks in advance most of the time.’ (35-54, WA)

Other audiences shared suggestions for added extras to enhance the perception of value for money. One said,

> ‘Good membership perks like special seating, having a member's lounge at the venue, offering previews or behind the scenes events to members, having social events for members.’ (35-54, WA)

Several audiences showed appetite for cross-artform and cross-venue subscription packages, as one said,

> ‘I'd love a membership that allows me to choose up to four performances across dance, theatre, lectures, music so I can plan a year's worth of trips to Perth and take family to different types of performance.’ (Age unknown, WA)

Other audience members highlighted that that more communication around the benefits of subscriptions and memberships could attract more audiences. For example, clear communication around obtaining a subscription or membership, future programming, exclusive offers, flexibility and discounted prices might be helpful. One audience member said,

> ‘I'm not from here, so I don't really get the membership culture. It just doesn't seem as flexible as buying the tickets to specific events that interest me…. so, what are the benefits?’ (35-54, WA)

Things to think about when reviewing subscription and membership offers

Here are some things for WA organisations to consider:

- ❑ With subscription/membership behaviours and motivations differing across key segments, it's important to consider whether a single subscription offering can appeal across age groups
- ❑ There may be a case to test new and different packages and target them at different age groups and interests. One under 35 WA respondent suggested: 'I'm a student, perhaps with tickets, there can also be tiered membership pricing structures.'
- ❑ 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
- ❑ Look at ways to simplify the process of acquiring a subscription or membership – many people feel overwhelmed with choice and reducing barriers may incentivise their participation. One WA audience member said, 'I think flexibility is the issue. And the overall admin of having another thing to manage.'
- ❑ 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. One WA respondent said, 'Flexibility in changing dates and performances is very important with competing family agendas.'
- ❑ Payment plans and/or monthly fees could have their place in memberships for younger people and other segments – 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), Victoria (VIC; n= 3,046), Queensland (QLD; n= 1,005), South Australia (SA; n=833), Western Australia (WA; n=988), and the Australian Capital Territory (ACT; n=324). A small number of responses were collected from audiences in Tasmania (TAS; n=26) and the Northern Territory (NT; n=34). These are included in national averages but not reported separately.

What's next

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

There, you can also access a dynamic dashboard to help you explore the results by location, artform and other variables. Instructions and tips for using the dashboard are available in a short video.

To receive future Snapshot Reports, Fact Sheets and resources in your inbox, as soon as they are available, you can opt in to receive Audience Outlook Monitor news at the link above.

If you have a question, or an idea to put forward, relating to this study, you can contact info@thepatternmakers.com.au.

Acknowledgements

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

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

AUDIENCE OUTLOOK MONITOR

PATTERNMAKERS

wolf brown

Made possible with support from:

Australian Government

Creative Australia

NSW Government

Queensland Government

ACT Government

Government of Western Australia Department of Local Government, Sport and Cultural Industries

Government of South Australia Department of the Premier and Cabinet

Creative Victoria