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Audiences in big cities



Audiences in Big Cities

Context

Inner-city dwellers have historically had greater participation rates, but the pandemic has slowed the growth of Australia's biggest cities

- ▶ In big cities, audiences are spoiled for choice. Museums, performing arts centres and artist studios are within easy reach, often helped by reliable public transport. A high concentration of activities means audiences have a diverse range to choose from, and word travels fast to large numbers of people.
- ▶ Attendance rates are traditionally higher: prior to the pandemic, data from the [Australian Consortium for Social and Political Research Incorporated's \(ACSPRI\) 2019 Australian Survey of Social Attitudes \(AuSSA\)](#) showed that inner-city dwellers were more likely to participate in arts and cultural activities (78%), compared to those living in outer suburbs (70%) or regional areas (54%).
- ▶ But the pandemic disrupted our behaviours, and big cities were hit harder with lockdowns and border closures. According to the ABS, there was [population growth in regions](#) at the expense of capital cities.
- ▶ Regional migration has since stabilised, and big cities will continue to grow long-term. However, the pandemic has left its mark, with Australians reassessing where they wanted to live and work.

With more city residents working from home, the composition of CBDs is changing

- ▶ Uptake of [remote work has stabilised at 20-25%](#), which is much higher than the pre-pandemic levels of 2-8%. With shifts towards more working-at-home arrangements, foot traffic in major cities is lower, and for the moment, vacancy rates remain high in some commercial properties.
- ▶ In terms of growth, [not all Australian regions are equally affected](#). Population growth in big cities like Melbourne and Sydney has been driven by international migration, while Brisbane and Adelaide are attracting inter-region moves. [Young people between 20-40 are most likely to move](#) for tertiary studies and job opportunities.
- ▶ Attendances at cultural venues and events in big cities has been rebuilding – and in 2023, [arts attendance reached its highest point since the pandemic began](#).
- ▶ However, cities are different places today, and both residents and visitors to cities are feeling the pressure of the housing crisis, changing expectations around commuting, climate risks and rising costs of travel and leisure.

Attendance at arts events in 2023

More people are attending arts events more often in big cities in 2023, but resident arts organisations are competing in a congested market

- ▶ In August 2023, 85% of big city audiences said they attended at least one kind of cultural event in the fortnight before data collection.
- ▶ Three-quarters (77%) of arts audiences living in a big city said they attend performing arts events at least once a month or more. This compares with 63% of audiences in outer suburbs and 52% in the regions.
- ▶ Museum/gallery attendance is also more frequent amongst big city arts audiences: 38% attend a gallery or museum at least once a month, compared to outer suburbs (27%) and regional audiences (29%).
- ▶ When asked about their recent attendance, big city audiences were more likely to say they've attended most artforms, with attendance rates to live performances, museums and galleries, festivals, and lectures and workshops, all higher in big cities than other areas.
- ▶ However, there is also more competition for audiences in big cities. Benchmarking from 52 organisations shows that organisations in big cities have been slower to rebuild their audiences compared to those in other areas. On how they've succeeded, one organisation said, 'Collaborative approach to running events, either through partner events or a united program helped cut through some of the noise that came from the overabundance of events taking place post-COVID.' (Producer, Sydney NSW)

Inflationary pressures

Big city audiences are spending more on the arts, but with more options available, they're more likely to turn to reviews to choose the right event

- ▶ Arts audiences living in big cities are spending more on tickets to in-person live events and cultural activities: 7 in 10 (69%) spent more than \$50 the fortnight before data collection, compared to 65% of outer suburb audiences and 57% of regional audiences.
- ▶ Audiences in big cities are feeling more optimistic about their financial situation right now, with 49% reporting their financial situation is the 'same' and 9% say they are 'better off' compared to a year ago – slightly higher rates than audiences in outer suburbs and regional areas. 43% of audiences in big cities are feeling 'worse off,' slightly lower than those in outer suburbs (46%) and regional areas (47%).

- ▶ Big city audiences are feeling less pessimistic about their future finances, with 22% expecting to be worse off in the coming year, compared to 25% in outer suburbs and 26% in the regions. However, although big city audiences are more stable financially (and less pessimistic about their future finances) than those in outer suburbs and regional areas, many are being selective about what they attend right now.
- ▶ Due to financial reasons, in the past 6 months over half (53%) have looked for free/cheap things to do – and likely would have found ample options. As one big city dweller said, ‘There are many local things you can do that have little cost.’ (Yokine, WA). Another said, ‘When I’m considering attending an arts event but am undecided, I am usually swayed to go if I can get a discount ticket.’ (South Yarra, VIC)
- ▶ Two-thirds (65%) of audiences from big cities say they’ll be attracted to events with great reviews in the coming year, with audiences wanting to choose the ‘right’ event that will give them the best value for money – particularly in the congested market.

Participating online

Digital access is strong in big cities, and audiences are more likely to be paying for online arts and culture experiences

- ▶ In terms of participating in online or digital arts experiences, 40% of big city dwellers reported engaging in online arts offerings in the fortnight prior to data collection. This is comparable to the 40% of regional audiences and 37% of outer suburbs audiences who had participated in an online or digital arts and cultural experience recently.
- ▶ Online arts participation looks different between groups in big cities. One person said, ‘I listen to podcasts from the Sydney Writers’ Festival’ (Marrickville, NSW). Another said, ‘As a visual artist, I am regularly viewing commercial art exhibitions online, particularly those from interstate galleries which I wouldn’t be able to see in person.’ (Potts Point, NSW).
- ▶ Digital fatigue is also a factor for audiences participating in arts and cultural experiences online. One participant said, ‘I spend all day on the computer for work so the last thing I would choose to do when relaxing at home is watching it there too!’ (North Perth, WA)
- ▶ Audiences in big cities were more likely to be paying for online arts and culture experiences (35%) compared to those in outer suburbs (26%) or regional areas (24%). Those paying are most likely to be purchasing single online experiences (16%), subscribing to platforms to access content on-demand (11%) and making donations (10%), while fewer are subscribing to programs/seasons which include the online experience (6%).
- ▶ Access issues such as digital proficiency and having the right technology for the desired experience are key barriers to participation. One audience member said they ‘lacked expertise in setting up their devices’ (Balmain, NSW). Another said, ‘I feel like I

would fully benefit from and willing to try experiencing digital art through a quality VR headset product. However, I don't own one at the moment so prefer to experience it in person.' (South Plympton, SA).

- ▶ Among those paying, big city audiences spent more on digital experiences than audiences from other areas, with 26% of online big city audiences spending more than \$100 in the fortnight before data collection. This compares to 16% of outer suburbs audiences and 20% of regional online audiences.
- ▶ More than half of big city audiences say that online arts events and experiences are playing a role in their lives (54%), either a small (44%) or substantial role (10%), while 46% say they play no role.

Cultural tourism and touring

Big cities are drawing people from outer suburban and regional areas for events, but fewer are travelling in the opposite direction

- ▶ When big city audiences were asked where they went to attend recent events, 76% said they stayed in their local area. Most of those who travelled outside their local area went to another big city (65%), followed by outer suburbs (21%), or a town or small city (10%). Smaller proportions travelled to a country village or rural area (3%), or a place in the country, bush or outback (1%).
- ▶ Meanwhile, of the audiences living in outer suburbs and the regions who travelled outside their local areas for their latest live art or cultural activity, 69% reported travelling into the city for the experience.
- ▶ Audiences attending arts and cultural activities in big cities (both locals and visitors) were more likely to attend live performances (70%) than those travelling to other locations, such as outer suburbs (62%), or a town or small city (57%).
- ▶ In comparison, audiences attending arts and cultural activities in the outer suburbs were most likely to attend a cinema (59%), and audiences living in the regions were most likely to attend a live performance (53%), visit a museum or gallery (51%), or attend a fair/festival (40%).

Programming preferences

Big city audiences are in the mood for fun, uplifting events, though there is a stronger market for challenging works in cities relative to other areas

- ▶ When it comes to programming, audiences in big cities continue to put fun and uplifting events at the top of their lists, as an antidote to tough times, with 74% saying they'll be attracted to these events in the coming year. One big city audience member said, 'Cost of living and needing experiences that lift us up from the day to

day more than ever. This could mean fun emotionally uplifting events or thoughtful intellectually uplifting events.’ (Brunswick East, VIC)

- ▶ However, big city audiences are showing a greater appetite for challenging, topical content in the next 12 months (52%), compared to audiences living in outer suburbs and regional areas (both 41%). One said, ‘While "entertainment" as such should always be a key element when seeking to put bums on seats, this should never come at the cost of ignoring the other end of the body, i.e. the brain. Theatre should always challenge its audience, even if it does so while they are laughing.’ (Glebe, NSW)
- ▶ Meanwhile, 58% said they’ll be most attracted to trying new things they haven’t experienced before, slightly higher compared to outer suburbs audiences (54%) and audiences in the regions (53%). One audience member shared, ‘The challenge of new work is exciting and what I personally look for, across all arts and cultural experiences. Recycling a proven formula or an encore performance of a show takes that away from an event and downgrades the experiences. Arts organisations and artists should be supported to be bold.’ (Daglish, WA)

Some city audiences say they prefer earlier performance times than before, and some visitors to the city want to avoid travelling at night, but Friday nights could be making a comeback

- ▶ More CBD workers worked from home during the pandemic compared to the wider community, linked to higher proportions of people employed in professional services working in Australia’s CBDs.
- ▶ Foot traffic in Sydney’s CBD is increasing, with data collected at CBD train stations showing that it has returned to 70% of pre-pandemic levels – and is on a positive trajectory as people resume working in and venturing into the city.
- ▶ The work week looks different today, but commuting patterns are still resettling as employers grapple with policies to motivate staff coming back into offices. One recent survey found that 42% of Australian employers are insisting on workers increasing their number of in-office days each week amidst hybrid working arrangements.
- ▶ The Transport Opinion Survey conducted by the University of Sydney’s Institute of Transport and Logistics Studies found that in VIC, Thursdays and Fridays had become popular to work in the office, for social reasons, while in NSW, Thursday was the most popular day to be in the office.
- ▶ Some audiences say they no longer want to stay out late on weeknights and want more early-evening or weekend matinee options. One audience member said, ‘More daytime events as I can’t park in the city and trains are not safe at night.’ (Hurstville, NSW).



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- ▶ Another respondent said, 'I look for daytime activities that are pram friendly.' (Sydney, NSW). Another said, 'Post-COVID, I have found I am more reluctant to have a late night. I much prefer daytime events or matinees.' (Griffith, ACT).

Ticketing and marketing behaviour

Online channels are playing an important role across Australia to help connect arts and cultural activities to their audiences

- ▶ Three-quarters (76%) of arts audiences living in big cities found out about the most recent cultural activity or event they attended via an online channel. Online activities are similarly important for outer suburbs arts audiences (75%) and regional audiences (75%) as a key awareness channel to find out about what's on.
- ▶ Finding out about events is complex, and channels are fragmented across all geographic areas. However, there are some channels that are more commonly used by big city audiences compared to outer suburbs and regional audiences, including:
 - Emails from arts organisations (47% of big city audiences, relative to 46% of outer suburb and 43% of regional audiences)
 - Websites (42%, relative to 40% and 34% respectively)
 - Word of mouth (37%, relative to 34% and 35% respectively)
 - Instagram (12%, relative to 10% and 8% respectively).
- ▶ Meanwhile, Facebook, radio/TV and brochures/flyers are all in greater use by regional audiences.
- ▶ Big city audiences are much more likely to have purchased a subscription or membership for a cultural organisation this year (51%), compared to those in outer suburbs (41%) and the regions (29%). One person explained that because they visit a museum often, the membership makes it 'Financially beneficial. Gives us opportunities and info about events close to home. Good for an impulse outing or entry late in the day.' (North Fitzroy, VIC)

Understanding the mood

- ▶ Around the world, big cities have changed dramatically since COVID. [According to Jones Lang LaSalle](#), 'A shift to hybrid working, fluctuating visitor numbers, aging real estate and competition from emerging submarkets continue to weigh on the short-term outlook for many Central Business Districts (CBDs).'
- ▶ In Australia, city-dwellers are still recovering from the experience of long lockdowns, and some still feel like they are 'making up for lost time' after the pandemic, particularly in Melbourne and Sydney.
- ▶ Around the country people are drawn to fun and uplifting events – and continue to prioritise things that make them feel good, or help them connect socially, particularly in light of economic difficulties and global events.

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- ▶ Artists and cultural organisations have an important role to play in revitalising cities, however attracting audiences from outer suburbs and regional areas is likely to get harder in the short term, with inflationary pressure continuing to put strain on already higher costs associated with the travel and time it takes to journey into cities.
 - ▶ Work is underway in CBDs across Australia to bring people into cities again – including from regional and outer metro areas. There are exciting initiatives taking place, like [Victoria's regional travel cap](#), and in [Sydney changes to the planning system](#) to enable a faster and cheaper process for small bars and pubs to operate outdoor dining.
 - ▶ These changes have CBDs repositioning themselves as '[Central Social Districts](#)', with NSW Minister for Cities Rob Stokes saying, 'While our CBDs won't ever be the same again, they will be better. More inclusive, more dynamic, more walkable, more experiential, and more inventive. Basically, more fun.'

Melbourne, VIC and ACMI



Key examples

Melbourne, VIC and ACMI

- ▶ Melbourne's population growth fell by 1.2 per cent in 2020–21 as overseas migration ground to a halt and thousands of residents moved interstate during lockdowns. But Melbourne is still on track to overtake Sydney as the nation's largest city by 2031-32 (a touch later than previously projected).
- ▶ The latest data set affirms what we know already — Melbourne (Victoria's lockdown-struck capital) was hit harder than any other Australian city during the pandemic. With extended closures and working-from-home arrangements in the CBD, audiences had longer to wait to return to the city and its venues.
- ▶ Audience recovery following lockdowns was then hit by cost-of-living pressures, and so Melbournians, along with many across the country, started facing new barriers to attending arts and cultural events. One audience member said, 'The economic environment is limiting spend. There needs to be more consideration for free or low cost events.' (South Yarra, VIC)
- ▶ ACMI is a museum of screen culture based in the City of Melbourne, VIC. ACMI presents a range of free and paid exhibitions each year. Connecting young and future audiences to ACMI's Melbourne Winter Masterpiece exhibition, Goddess: Power, Glamour, Rebellion when it opened in April 2023 – at the crux of the interest rate hikes and a period of economic recovery and pressures on family budgets – presented a challenge.
- ▶ Through onsite observation and audience data, ACMI was noticing students were facing barriers to entry. Dr Indigo Holcombe-James - Strategic Research Lead at ACMI said, 'We noticed students were coming into ACMI, but they weren't visiting Goddess, they were going to our free exhibitions. It was evident that ticket pricing was prohibitive.'
- ▶ Tickets to the blockbuster exhibition for students were originally priced at \$24. ACMI introduced a \$10 student ticket, providing a meaningful discount to young people who were feeling financial barriers the most, and resulting in a substantial visitation increase. Student ticket sales more than doubled over the exhibition run, resulting in an increase of 136%. Responsive pricing to meet the changing needs of audiences is an important way to look after existing communities as well as open doors to first-timers.

Adelaide, SA and Adelaide Fringe



Adelaide, SA and Adelaide Fringe

- ▶ Adelaide is Australia's fifth largest city, with a resident population of around 1,400,000. Between 2021 and 2041, the population for the City of Adelaide is forecast to increase by 21,052 persons (82.53% growth), at an average annual change of 3.05%.
- ▶ The city has less suburban sprawl than other larger Australian cities, with shorter commute times and idyllic surrounding landscapes making it an appealing destination. According to McCrindle, Adelaide has seen a natural increase, net overseas migration, and net interstate migration since 2021 (the tripple green light for population growth).
- ▶ While its seven-day lockdown was minimal compared to other cities, such as Melbourne and Sydney, the combined effects of the virus spread, restricted travel, border closures and event cancellations had a detrimental impact on the state's arts and culture sector.
- ▶ Adelaide Fringe is the largest arts festival in Australia, and second largest in the world. In 2019, the festival had sold 828,563 tickets and was originally aiming to hit the 1 million mark by 2024. However, due to the challenges posed by the pandemic, progress was hindered, resulting in a decrease to 623,667 ticket sales in 2021. Undeterred by this setback, the Adelaide Fringe team lead by CEO Heather Croall rallied and initiated a 'mission to 1 million campaign', setting an ambitious target of achieving 1 million ticket sales for the 2023 festival.
- ▶ Due to the late-buying ticket trend, which is particularly detrimental for festivals and live performances, Ella Huisman, Executive Director of Adelaide Fringe, described seeing the slow uptake of tickets as 'everyone's worst nightmare.'
- ▶ Rising to the challenge, Adelaide Fringe implemented a strategy involving a sponsored flash sale one month out from the event, granting audiences discounted access to tickets, with the sponsor covering the price difference. This approach rewarded early ticket buyers without diminishing the artists' box office returns. Tickets for the 2023 Adelaide Fringe generally cost around \$35.25 on average, and with plenty of free events to attend, this strategy allowed for more affordable options.
- ▶ Strategic email marketing and database maintenance ensured the right people were getting the right information. Ella said, 'It's great to say you've got 500,000 subscribers, but if they're not actually engaging, it's expensive to have them on your system; your open rates aren't as good, and you're wasting time sending messaging to people that aren't interested.'
- ▶ Additionally, tweaking the web experience for customers was crucial. Ella said, 'We've spent a lot of time and energy to make our platforms really intuitive, focusing on user journey and making the experience of buying a ticket on our website seamless to create a higher box office return for artists.'

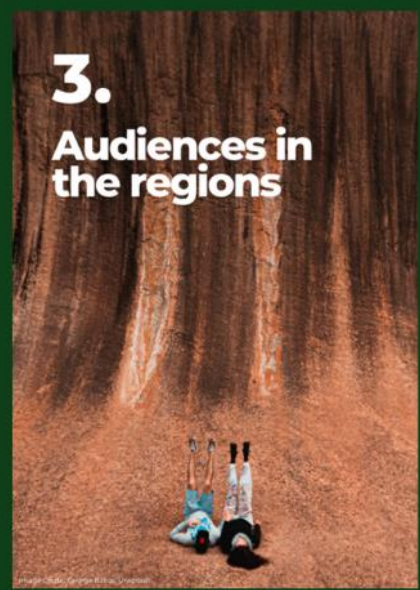
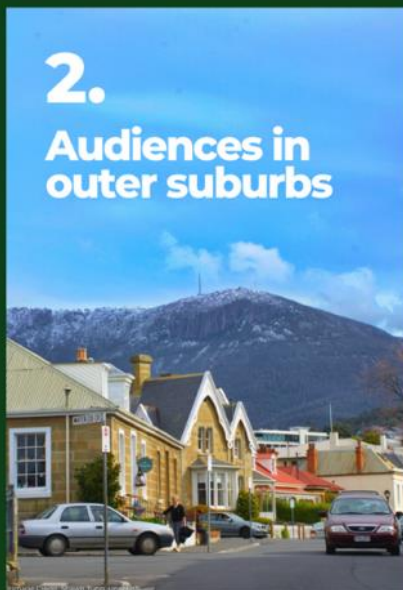


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- ▶ On the final night of the festival, at 10 pm, Ella and her team, who had dedicatedly analysed ticketing data and consistently refreshed dashboards throughout the campaign, witnessed the momentous occasion as ticket sales crossed the highly anticipated 1,000,000 mark.

Tips for connecting with audiences in big cities

- ❑ Keep fun, uplifting, connective and escapist events on the agenda for 2024 and 2025, and support challenging content with additional engagement programs.
- ❑ To attract audiences in from outer-suburbs and regional areas, give them plenty of notice. Despite the trend towards last minute commitments, some audiences are considering their options (and logistics) well in advance.
- ❑ Last-minute events and offers can be targeted to 'hyper-local' audiences, people likely to be in the area for another reason, and those with easy public transport connections.
- ❑ Stay abreast of urban regeneration projects that aim to increase foot traffic and spending in your local area and find ways for your organisation to be part of positive change.
- ❑ Use email, web and Instagram to connect with big city audiences – and explore ways to amplify word of mouth and social reviews. Recommendations from trusted sources are powerful right now.

City lights to red dirt:



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