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Audiences in outer suburbs



Audiences in Outer Suburbs

Context

With big cities being the hardest hit by the virus and lockdowns, the nation saw a rapid increase in counter-urbanisation, with many Australians moving away from city centres

- ▶ Since 2020-21, the largest growth areas in the country were outer-suburban areas within Sydney and Melbourne, where population growth in these two major cities was driven by net internal migration gains. Riverstone and Marsden Park in Sydney's outer north-west grew by 7,400 people over 2020-21, while Cranbourne East in Melbourne's south-east grew by 5,000.
- ▶ While big cities have a higher concentration of arts experiences, outer suburbs and city outskirts contribute significantly to Australia's diverse cultural landscape, through community-centric programming, access to wider open spaces, diversity in cultures and identities and greater affordability and accessibility. Larger proportions of families with children live in outer suburbs, compared to proportions in capital cities.
- ▶ Australians are increasingly preferring to live in middle and outer suburbs – or even well-connected regional cities - compared to the inner city, according to a study by the University of South Australia. An existing trend only accelerated by the pandemic, many are motivated by the quality of life offered by suburban neighbourhoods and as the Australian population continues to decentralise, more businesses and services are predicted to follow residents outwards.
- ▶ However, attendance rates in outer suburbs are traditionally lower than inner city populations: 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%).
- ▶ Those living on the city outskirts faced significant financial setbacks during the pandemic, likely to have heightened amidst the current cost-of-living pressures. The National Growth Areas Alliance (NGAA) reported that 1 in 5 Australians in the outer suburbs '[have] been living in "financial survival mode" during the pandemic and [are] more likely to feel stressed, frustrated and anxious than the national average.' More than half reported they struggled to pay at least one major bill, whether it be to meet their energy needs, groceries, rent or personal loans. For those aged 40 and under, the figure jumps to 64%.

Attendance at arts events in 2023

Audiences in outer suburban areas have slightly lower rates of attendance than big city audiences, and are participating less frequently

- ▶ In August 2023, 78% of outer suburbs audiences had attended at least one kind of cultural event in the fortnight prior to data collection, lower than the proportion in big cities (85%) and slightly higher than the proportion in regional areas (74%).
- ▶ Around 6 in 10 (63%) of audience members living in outer suburbs said they attend performing arts at least once a month or more. This is lower than proportions who live in big cities (77%), but higher than regional audiences (52%).
- ▶ Outer suburbs residents are visiting museums and galleries at the lowest rate compared to big city and regional residents, with 27% attending once a month or more, compared to 38% of big city residents and 29% of regional residents.
- ▶ Audiences from outer suburbs are attending a wide range of cultural events and activities, like live performances (52%), and museums or galleries (26%). Smaller proportions are attending lectures, artist talks or workshops (14%) and fairs and festivals (8%).
- ▶ Looking ahead, two-thirds (67%) of outer suburbs residents predict that their current level of attendance will stay the same, while 26% predict it will increase.

Inflationary pressures

Almost half of outer suburban audiences say they are financially worse-off than one year ago, and many are looking for free/cheap things closer to home

- ▶ Audiences in outer suburbs are feeling slightly more pessimistic than optimistic about their financial situation right now. Almost half (46%) say they're worse off than they were a year ago, and 25% expect to be financially worse off in the coming year. Meanwhile, big city audiences are slightly more optimistic: 43% say they are worse off compared to a year ago and 22% expect to be financially worse off in the coming year.
- ▶ Over half (54%) of outer suburbs audiences are looking for things that are free or cheap to do. One parent shared: 'As a family of four, the financial cost of events has become a big factor. So, looking for free/cheap things to do to get the family out is more appealing.' (Ferntree Gully, VIC)
- ▶ Audiences who live in the outer suburbs are spending more than audiences in regions, but less than those audiences living in big cities. Two-thirds (65%) of outer

suburbs audiences spent over \$50 in the fortnight prior to data collection, compared to 69% in big cities and 57% in regions.

- ▶ Half (50%) are taking longer to make decisions about what to go to, given their financial circumstances. One respondent shared: 'I go to whatever I can but am a little more choosy. Sometimes I've already been to similar events so won't repeat and sometimes I'm disappointed at a costly show – so I think carefully what will be the best value for me.' (Hindmarsh, SA)
- ▶ One quarter (27%) are finding things to 'splash out' or 'splurge' on, things they've really got their hearts set on but might be saving elsewhere. One outer suburbs resident shared: 'I take a more considered approach to planning out what events I'd like to attend in the next couple of months. If I'm going to a big stadium concert in the next couple of months, then that will be my only event. Otherwise, I'll do a few cheaper events/performances over a few months. If I suspect an overseas band, I love will announce a big show in Australia then I'll save the money (as I have done with Paramore).' (Sunbury, VIC)
- ▶ Encouraging untapped audiences in the outer suburbs to attend may require some strategic approaches, especially in light of heightened cost-of-living pressures. One respondent shared: 'As known, current financial pressures for people is reducing audience participation. These organisations need to reach out to suburban communities by performing locally, possibly with free taster shows/excerpts and local performances with moderate ticket prices.' (Beverly Hills, NSW)

Participating online

Digital participation rates among outer suburban audiences are lower than in big cities and regional audiences surveyed

- ▶ In terms of online or digital arts experiences, 37% of outer suburbs audiences had participated in an online or digital arts and cultural experience in the fortnight prior to data collection, compared to 40% of big city dwellers and 40% of regional audiences.
- ▶ Outer suburbs audiences have different views about the value of online experiences. One said, 'We enjoy "catching up" and doing things together. Online stuff is usually done solo' (Clarkson, WA). Another said, 'I sit on a computer all day. I'm not interested in being online for my entertainment. I prefer to experience an outing and food with my entertainment' (Collaroy, NSW).
- ▶ Audiences living in outer suburbs and regional areas are less likely to be paying for online arts and cultural experiences, with 26% doing so in outer suburbs and 24% in regional areas, compared to 35% of audiences living in big cities. Outer suburbs audiences who are paying are most likely to be purchasing single online experiences (10%), subscribing to platforms to access content on-demand (9%) and making donations (8%) — while fewer are subscribing to programs/seasons which include the online experience (4%).

- ▶ Access and connectivity issues can prevent some people from engaging. One said they ‘...don't have a computer nor the internet nor a smart phone... can't afford it and really don't need it. I use the computers at my local library for all such communications and I have a land line so that is the sum of my communication facilities.’ (Collaroy, NSW). Another said, ‘Sometimes the internet connection can fail.’ (Vermont South, VIC).
- ▶ Half of outer suburbs residents say online arts events and experiences are playing a small (43%) or substantial (8%) role in their life, while another 49% say they play no role.

Cultural tourism and touring

Outer suburbs audiences are the most likely group to be travelling outside of their local area to experience arts and culture

- ▶ Almost half (45%) of outer suburbs audience members say that due to financial reasons, they have stayed closer to home for leisure/entertainment in the past 6 months. One said, ‘Would love to see more quality performances in the suburbs, as I find travelling into the city a chore nowadays, traffic, parking etc.’ (Frankston, VIC)
- ▶ When thinking about the most recent event they attended, 53% of outer suburbs residents said the venue or event was in their local area. Outer suburbs audiences were the most likely group to be travelling outside of their local area to experience arts and culture, compared to big city or regional residents.
- ▶ Among those travelling outside their local area, intrastate travel to attend events was most common in this group (41%). Smaller proportions said the most recent event they went to was in another state or territory (4%) or in another country (1%).
- ▶ Amongst those outer suburbs residents who travelled outside of their local area to attend, the largest proportion (69%) went to a big city. Audiences are eager to have more opportunities closer to home, as one said, ‘Distance for me is an issue, and there have been more artists doing satellite shows in my community.’ (Kalamunda, WA).
- ▶ Others expressed that they are willing to factor in the costs of transport and accommodation for something they desire: ‘The greatest obstacle to attending city-based functions is the need to travel. I live in the Upper Blue Mountains (NSW) with very limited public transport options. Staying overnight in Sydney is very expensive, but for a good performance I'm prepared to do it providing I can plan well in advance...’ (Blackheath, NSW)
- ▶ Outer suburbs audiences called for the decentralisation of arts experiences, coupled with more variety of options: ‘The outer suburbs need greater diversity in terms of what options are available. Frankston has big shows at the Arts Centre, but I'm sure there would be smaller audiences from all across the Mornington Peninsula who are

looking for a range of different things, particularly things that are more intellectually stimulating as well as just 'entertaining'.' (Frankston, VIC).

Programming preferences

Audiences who live in the outer suburbs are showing interest in a wide range of programming, including new ideas and old favourites

- ▶ Three-quarters (77%) of outer suburbs audiences say they'll be attracted to fun, uplifting things in the coming year – a preference which exists in other areas too. One said, 'I think people need fun, entertaining, uplifting events which can provide relief from everyday worries. They also give me a reason to dress up, feel good about myself, involve friends to go with me, enjoy a single glass of wine or bubbles to make it a special event' (Berwick, VIC).
- ▶ There is also a strong appeal for challenging, topical things (41%), though at a slightly lower rate than in big cities (52%).
- ▶ With some audiences deliberating longer over what to attend and tightening their belts when it comes to spending amidst the cost-of-living crisis, and others saying they're prioritising other things, great reviews are impacting what audiences choose to attend. Two-thirds (64%) of outer suburbs audiences say they'll be attracted to events with great reviews in the coming year.
- ▶ Over half (54%) have an appetite for trying new things they haven't experienced before, with qualitative data suggesting audiences are looking for a balance of more familiar works they love, and new things to fall in love with. One outer suburbs audience member shared: 'Striking a balance between introducing new ideas and content and old favourites. It is especially good to see something 'old" with a new interpretation.' (Nedlands, WA).
- ▶ Significant proportions in the outer suburbs are also attracted to events with 'big name' artists/performers (54%) and stories that are about or from their local community (28%), demonstrating the need for a wide variety of programming to continue stimulating and exciting diverse audiences.
- ▶ The work week looks different today, with more workers in the city on mid-weekdays Tuesday, Wednesday and Thursday, and fewer on Mondays and Fridays. Some audiences say they no longer want to stay out late on weeknights and want more early-evening or weekend matinee options.

Ticketing and marketing behaviour

With budgets under pressure, outer suburban audiences are reviewing the value for money of memberships

- ▶ Significant proportions across Australia are committing to attending arts and cultural events last-minute. Three in 10 (30%) audiences in outer suburbs are booking tickets within a week before the event, compared to 33% in big cities and 30% in regional areas.
- ▶ Audiences in outer suburbs are less likely to have purchased season tickets or memberships to organisations than those in big cities: 41% in outer suburbs hold subscriptions/memberships, compared to 51% in big cities. The proportion holding subscriptions/memberships is even lower in the regions (29%).
- ▶ The most common subscriptions for outer suburbs audiences are to performing arts organisations (31%). Meanwhile, 14% have museum or gallery passes or memberships and 8% subscribe or are members to another type of arts or cultural organisation.
- ▶ Reasons for subscribing or being a member to arts organisations included locking in plans early (26%), supporting the artists or organisation financially (22%), accessing discounted prices (17%), accessing other benefits or privileges (17%) and feeling like part of the organisation's community (13%).
- ▶ Many outer suburbs residents who are subscribers and members referenced wanting to support local arts and culture as a reason for supporting organisations in this way. One said, 'Membership gives ongoing support, helps keep events local and accessible, gives me member benefits such as presale tickets and is usually good value for money' (Mount Barker, SA). Another said, 'I like to keep in touch with the local arts scene' (Kingston, ACT).
- ▶ While a significant proportion said they were likely (16%) or very likely (20%) to purchase subscriptions or memberships next year, it was more common for outer suburbs audiences to say they wouldn't. Half (48%) said they would be unlikely (24%) or very unlikely (24%) to purchase subscriptions or memberships next year.

Online channels like email and websites are playing an important role in outer suburbs to help connect arts and cultural activities to their audiences

- ▶ Three-quarters of big city (76%), outer suburbs (75%), and regional residents (75%) found out about a recent cultural activity or event they attended via a digital channel.
- ▶ Residents in outer suburbs are commonly finding out about events and cultural activities through many channels, including:

- Emails from arts organisations (46% of outer suburbs audiences, relative to 47% of big city audiences and 43% of regional audiences)
- Websites (40%, relative to 42% and 34% respectively)
- Word-of-mouth (34%, relative to 37% and 35% respectively)
- Facebook (20%, relative to 16% and 26% respectively).

Understanding the mood

- ▶ With inflationary pressures continuing to put a strain on already higher costs associated with the travel and time it takes to journey into cities, attracting audiences from outer suburbs is likely to get harder in the short term. In 2023, driving into central Sydney from the Western Suburbs, for instance, 'costs almost twice as much as commuting from east and south of the city', according to [The Guardian](#). Audiences from the outer suburbs may need more incentive to make the effort to travel into the city to attend arts and cultural events.
- ▶ Demand for local arts and cultural experiences will increase as populations and businesses continue to gravitate towards outer suburbs. One outer suburbs audience member said, 'Too many events are in the city or inner suburbs. People out west would attend more events if they didn't have to travel so far.' (Wentworthville, NSW)
- ▶ 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 considering economic difficulties and global events.
- ▶ Work is underway to enhance the liveability of urban growth areas around the country, such as via state government-funded revitalisation precincts and transport projects in [NSW](#) and [VIC](#). There is a case for arts and cultural organisations to stay abreast of relevant updates and invest in ways to align recovery efforts with broader revitalisation strategies.

Western Sydney, NSW and Riverside Theatres Parramatta



Key example:

Western Sydney, NSW and Riverside Theatres Parramatta

- ▶ Greater Western Sydney (GWS) is the fastest-growing and most diverse region of New South Wales. It's home to 2.65 million people, and its population is projected to reach 3 million people by 2036: two-thirds of Sydney's population growth.
- ▶ As of 2021, four in ten (41%) GWS residents were born overseas, coming from 170+ countries and speaking over 100 languages. It is home to Australia's largest urban Aboriginal and/or Torres Strait Islander population, with 2% identifying.
- ▶ The NSW Government plan for Western Sydney has committed billions in support of communities and community infrastructure, from the Multicultural Communities Support Package to delivering the new Powerhouse Museum in Parramatta.
- ▶ Audiences and organisations in GWS appreciate opportunities to experience events from further afield in their local area. When describing what they think arts and cultural organisations should be aware of at the moment, one resident suggested 'Performance moving out of the city. The Riverside Theatres hosting Opera Australia and STC [was] brilliant.' (Mount Druitt, NSW).
- ▶ Another mentioned that shows in GWS can be more affordable than the alternative in the CBD: 'I tend to attend smaller venues that are cheaper. *The Mouse Trap* in a city theatre was over \$120, in the Riverside Theatres in Parramatta it was \$60. An excellent comparable performance.' (Lidcombe, NSW).
- ▶ Riverside Theatres hosts around 750 performances annually and attracts over 180,000 attendances to a program of theatre, music, dance, comedy, cabaret, kids and family, cinema and festivals. It is also a venue for hire, hosts educational programs, and is home to Riverside's National Theatres of Parramatta and FORM Dance Projects.
- ▶ Amy Matthews, Senior Producer – Education & Communities at Riverside Theatres in Parramatta explains, 'It's getting more and more expensive to live in Western Sydney, especially if you have to commute to work. Tolls are a massive, an inequitable mechanism that's really hard on Western Sydney families. Plus, houses and rents are meaning people are moving further and further out.'
- ▶ She said when major companies tour works to Western Sydney, 'We [Western Sydney audiences] are so used to having to travel to get to anything. If there were more good quality offerings in Western Sydney, we'd go. We'd save our money and we'll go, for our one outing of the week.'
- ▶ Qualitative data from audiences in GWS suggests they are not only eager for arts and culture to reach their area, but also to see their community reflected in arts and culture. One resident shared: 'We are passionate about our local communities. There is a stigma about how much of the arts are targeting for inner city and a particular



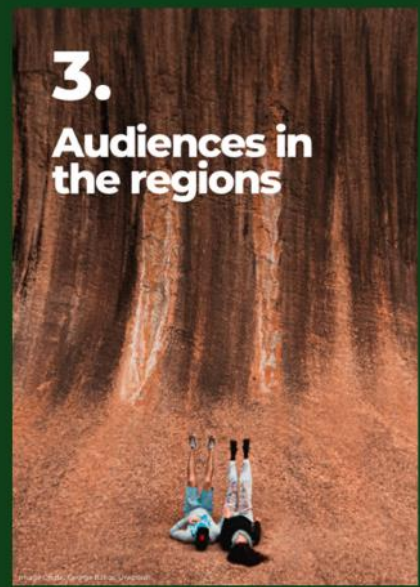
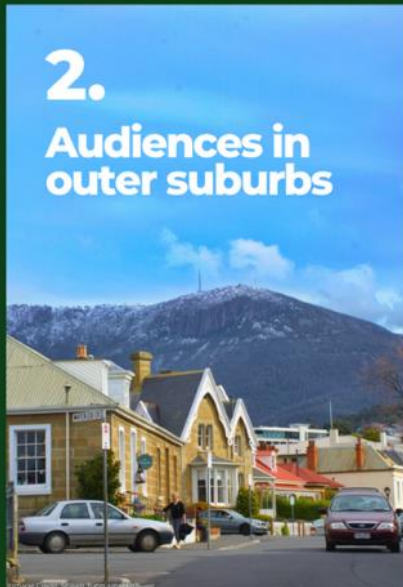
demographic. I would be thrilled to see Greater Western Sydney included in the cultural framework of our state in a prominent way.' (Saint Clair, NSW).

- ▶ In terms of working with different communities, and working with artists from a target community, Amy said, 'It's hard to do unless you work with the right people – there's no point putting it on if it doesn't come from the community. You need to build strong relationships with community leaders and listen to people within the community if you're going to be successful.'
- ▶ When it comes to marketing events, she said clarity of communication around the value of the show is important. 'If you don't have a recognisable title it's about quality of marketing assets, copy, communication, pitching it at the right level. What about that show will make it worthwhile?'

Tips for connecting with audiences in outer suburbs

- ❑ To attract outer suburbs residents into other areas, communicate any travel incentives, cost-saving initiatives, and information about other things happening in the area so the trip feels more worthwhile.
- ❑ To attract audiences in from big cities and regional areas into the outer suburbs, give them plenty of notice. Despite the trend towards last minute commitments, some audiences are considering their options (and logistics) well in advance.
- ❑ Keep fun, uplifting, connective and escapist events on the agenda for 2024 and 2025 and support challenging content with additional engagement and outreach programs.
- ❑ The existence of tolls in some areas means that driving into the city can be expensive. Consider promoting public transport connections and making itinerary suggestions for commuters looking to 'make a day of it.'
- ❑ Explore opportunities to take programs to community hubs in in outer suburbs and develop partnerships with local leaders and organisations who are embedded within community.
- ❑ With fewer audiences from outer suburbs engaging in online arts and culture compared to big cities and regions, it's worth making sure digital offerings and marketing are accessible.
- ❑ Use email, websites and Facebook to connect with outer suburbs audiences – and explore ways to amplify word of mouth and social reviews, with recommendations from trusted sources being especially powerful right now.

City lights to red dirt:



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