Holding the House: Have Performing Arts Audiences in WA Changed?

MARKET RESEARCH AND ANALYSIS OF PERFORMING ARTS AUDIENCES IN WESTERN AUSTRALIA AND THE CHANGES BETWEEN 2019 AND 2022

CIRCUITWEST

Culture Counts

Acknowledgements

This report has been prepared by Jordan Gibbs, Kristine Royall and Shannon Pearse of Culture Counts™. We would like to thank Circuitwest and their consortium of partners for their support through the development and delivery of this project.

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Image: *The Bleeding Tree,* Black Swan State Theatre Company. Photo by Daniel J Grant.

Cover image: Photo by Tyler Callahan, courtesy of Unsplash.

Introduction

In December 2022, CircuitWest engaged Culture Counts to conduct research into the Western Australian population's attitudes and engagement with performing arts over the prior 12 months.

The *CircuitWest Audience Research* project was undertaken in collaboration with a cohort of WA-based performing arts organisations who were looking to understand how audience behaviours may have changed in recent years. The research cohort included FRINGE WORLD Festival, Perth Festival, Black Swan State Theatre Company, Spare Parts Puppet Theatre, The Blue Room Theatre and Barking Gecko Theatre.

Importantly, the research was undertaken utilising a panel of respondents from across the state, and sought to provide a representative balance of respondents in terms of age, gender and regionality. The questionnaire asked respondents about their interest and motivation for attending performing arts events, and asked how this may have changed in the past year. The full results of this research project were shared with the research cohort in January 2023. This report provides a brief summary of those results.

The research references and links into a range of other audience research initiatives, including the *Audience Outlook Monitor*[1] led by WolfBrown and Patternmakers, the WA Department of Local Government, Sport and Cultural Industries' *Arts & Culture Monitor*[2], Australia Council's *National Arts Participation Survey*[3] (2019) and the National Endowment for the Arts *General Social Survey*[4] (2016).

In respect to the population of Western Australia, the research reported the following:

54%
Attended a performing arts event in 2022

54%
Would like to have attended arts and culture events more in 2022

5%
Of respondents attend **more** events than they did pre-COVID

54%
Of respondents attend **less** events than they did pre-COVID

40%
Cite ***'financial reasons'*** as a barrier to in-person attendance at arts and culture events

27%
Cite ***'lack of events that appeal to me'*** as a barrier to in-person attendance at arts and culture events

15%
Stopped attending arts and culture events due to COVID and haven't returned

60%
Attend creative, cultural and arts events to **have fun/to be entertained**

42%
Attend creative, cultural and arts events to **socialise with family or friends**

1 Australia Council for the Arts, 2022. *'Audience Outlook Monitor'*.
2 Department of Local Government, Sport and Cultural Industries, 2022, *'2022 Arts & Culture Monitor Survey'*.
3 Australia Council for the Arts, 2022. *'National Arts Participation Survey'*.
4 National Endowment for the Arts, 2016. *'General Social Survey'*.

CircuitWest Overview

Results from the *CircuitWest Audience Research* project demonstrate that overall, live attendance is down. Those who used to attend live events every month (our highly engaged audience), are attending less frequently. Even this small shift in attendance is having devastating effects on box-offices.

When asked about barriers to attend, a large proportion of respondents indicated that COVID was still a factor. Over half of the population want to attend events more, but almost half of the sample cited 'financial reasons' as a barrier to attendance.

Audiences' reasons for attendance haven't changed because of COVID. The primary motivation for live-event attendance was 'to have fun/be entertained' (60%). However, this figure remains stable compared to the 2019 Australia Council's *National Arts Participation Survey* that reported the figure at 64%. In fact, most 'reasons to attend' were at the same level in 2022 as they were in 2019.

Attitudes of audiences appear to be population-wide. When looking at the factors for audience behaviour, prior engagement with an organisation does not appear to be significant. Half the population reportedly attend events for a 'specific' interest, so it stands to reason that the work (rather than the organisation) remains one of the most important factors influencing attendance decisions (Culture Counts found the same thing when looking at dimension research in early 2020[5]).

Overall, the research adds two new pieces of data to the collective intelligence on performing arts audiences.

Nearly two-thirds of the overall sample indicated that they attended creative, cultural and arts events 'to have fun/ to be entertained' (60%), and more than half the sample (51%) said it was because they like live events. 'Wanting to see a specific or individual performer, event or company' (47%) and 'Socialise with family or friends' (42%) were also popular choices. Whilst the industry frequently cites artist inspiration or quality as major driver of attendance, these were only selected by around one in five respondents.

So much research has proven that COVID has been the chief barrier to attendance, and now in the last 12 months, financial reasons have surpassed a fast-declining COVID as a barrier. The industry should consider a focus on new barriers such as reactivating customers who have yet to return after COVID absence that make up 15% of this sample which is a significant number of customers (who are not impacted by fear of the virus) to try and impact low ticket sales declines.

Regards,

Sam Lynch

Executive Director, CircuitWest

5 Culture Counts, 2020. *'Evaluation Snapshot: Culture And The Arts 2016-19 – Technical Appendix'.*

Culture Counts Overview

Thank you to CircuitWest and Sam Lynch for instigating this research. Too often, 'audience research' is conducted under the guise of 'advocacy'— research whose primary purpose is to advocate for the impact and value of the arts, but while doing so, compromises its ability to integrate into the practical operations of arts marketers and administrators who can apply its findings to understand and grow their audiences.

In September 2022, Sam corralled a cohort of arts marketers to talk through the challenges each was facing in their organisation and to unpack the assumptions that influenced their thinking. This dialogue guided the development of a research plan and associated questionnaire that would be distributed to a population panel in December to test these assumptions. The research was deep and specific to each of the organisations. In January, each received a version of the research that was specific to their context but held fascinating insights at the aggregate level that we thought would be valuable to share with the wider sector.

The driving question for the cohort was 'where are our audiences?' This report seeks to provide a short summary of the findings we found in answering that question.

1. Attendance levels for performing arts have not changed significantly in respect to the overall population.
2. In fact, the population appears more interested in growing their engagement and attendance of performing arts event than they did in 2019.
3. The reported motivations to attend events haven't changed significantly in respect to the overall population.
4. Reported barriers to attendance have changed - just not how you think. 'Financial reasons' are the most commonly report barrier (they always were), but it's 'lack of interest' that has seen the largest growth since pre-COVID.
5. The single-ticket buyer has a hugely different arts attendance profile, depending on the kind of organisation that is measuring it.
6. A very small percentage of the population makes up over 30% of ticket sales. This means that even minor changes in attendance behaviour or attitudes at the population level can create major flow-on effects to the health and viability of the sector.

The key idea to stress in this research is that the 'population' and 'your audience' are likely very different. COVID affected the world in many ways, and its shockwaves are still rippling across our industry. For those who wish to guess at what the next turn on this rollercoaster looks like, this report is an attempt to provide some form of guidance.

Regards,

Jordan Gibbs

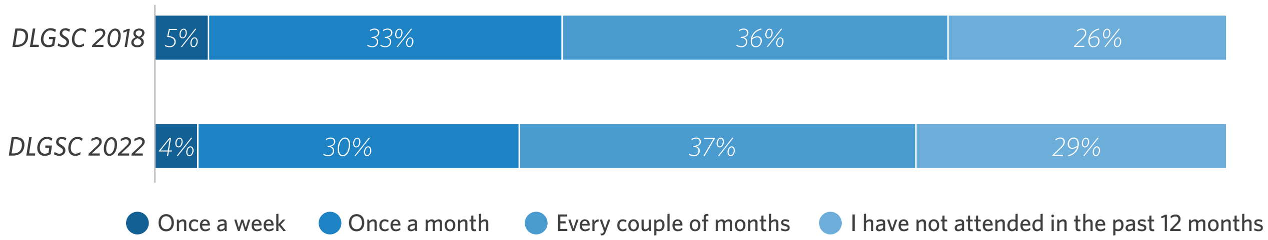
Product Director, Culture Counts

KEY FINDING

Attendance behaviour has not changed drastically at a population level

In 2018, 26% of the WA population said they had not attended an arts and cultural event in 12 months. In 2022, it was 29%[6]. This is only a 3% difference, and yet the industry reports declining ticket sales of up to 30% below expectations[7]. When looking at regular attendance (once a month or more), 39% of the WA population reported regular attendance in 2018, compared to 33% in 2022 – a 6% decrease.

FREQUENCY OF WA ARTS & CULTURAL ATTENDANCE (DLGSC)

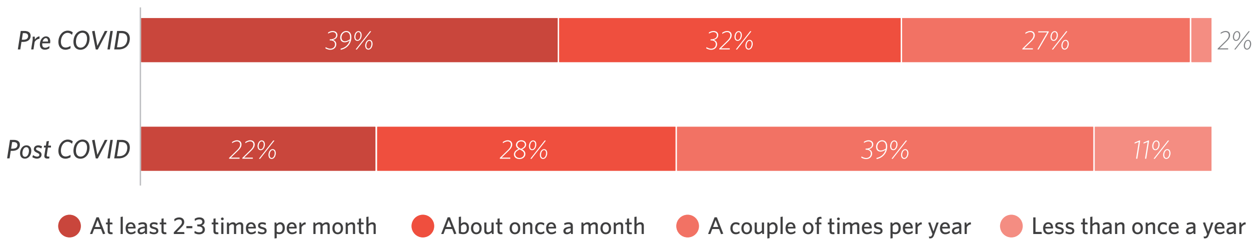


Source: DLGSC 2022, *Arts & Culture Monitor* Survey, Fig 31. Analysis by Culture Counts.

Note: The Arts & Culture Monitor Survey asks the question 'How many times did you attend or participate in arts and cultural activities over summer' and provides six options to choose from. This chart combines responses for 'around 2 or 3 times a month' and 'around once a month' into a single category for 'once a month'. It also combines responses for 'around once every 2 or 3 months' and 'less often' into a single category for 'every couple of months'. It extends the response option of 'not at all in the past 3 months' to 'I have not attended in the past 12 months'. These changes are made to facilitate a comparison with Australia Council research regarding frequency of attendance.

Comparably, the *Audience Outlook Monitor* asked respondents to self-report their change in performing arts attendance. In October 2022, respondents indicated that regular attendance was down from 72% prior to the pandemic to only 50% - a 22% decrease[8].

FREQUENCY OF ATTENDANCE (AUDIENCE OUTLOOK MONITOR)



Source: Audience Outlook Monitor 2022, Fig 1.

Note: The *Audience Outlook Monitor* (Sep 2022) asked respondents to indicate how frequently they attended performing arts events prior to the pandemic and what their frequency of attendance was now.

6 Department of Local Government, Sport and Cultural Industries, 2022, *'2022 Arts & Culture Monitor Survey'*. pp. 20.
7 Burke, K. 2022. *'Australian stages are packed with great shows – so why aren't people booking tickets?'* The Guardian Australia.
8 Audience Outlook Monitor, 2022. *'Live Attendance Update – October 2022'*. Patternmakers.

Why the huge difference between the two sources?

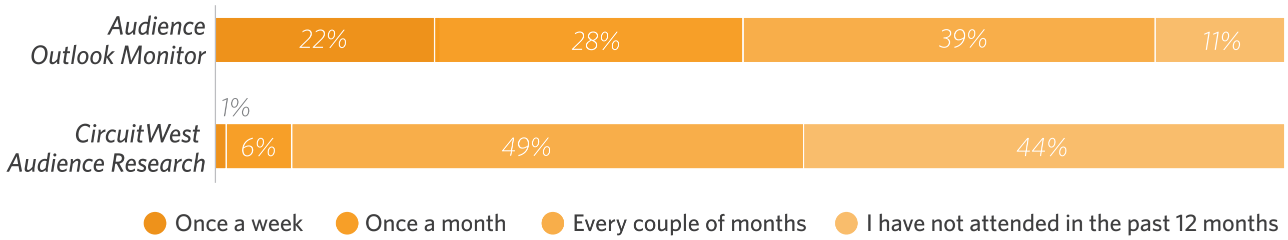
Consider three things:

1. There are methodological differences in the question. Both forms of research ask the question differently, which may affect results. The reported results here represent our attempt to make the data comparable.
2. *The Audience Outlook Monitor* figures represent a self-reported change in attendance, whereas the DLGSC *WA Arts & Culture Monitor* figure represents the difference between two figures captured in 2018 and 2022 respectively.
3. *The Audience Outlook Monitor* is expected to skew towards 'high-engagement' attendees, whereas the DLGSC *WA Arts & Culture Survey* utilises a population panel to control for selection bias. The below chart illustrates the comparison of 'high-engagement' attendee research compared to the population polling conducted as part of the *CircuitWest Audience Research*.

What does this mean? Essentially, that the population hasn't hugely changed its attendance behaviour, but that the small percentage of high-engagement attendees have changed. Population-level results will likely show similar levels of arts engagement as they did prior to the pandemic, but when a small group of high-volume engagers changes their behaviour, overall ticket sales plummet.

Hopefully the next *National Arts Participation Survey* from Australia Council can provide data comparisons for frequency of attendance and live-event attendance to correlate these findings[9].

FREQUENCY OF ATTENDANCE (COMPARISON)



Source: *Audience Outlook Monitor* 2022, Fig 1 and *CircuitWest Audience Research* 2022 (N = 902). Analysis by Culture Counts.

Note: The Audience Outlook Monitor result represents the reported frequency of attendance for performing arts for respondents of the Audience Outlook Monitor (as of October 2022). The CircuitWest result seeks to represents the frequency of attendance for performing arts for the WA Population during 2022 (as of December 2022), asking respondents 'how many times have you attended live performing arts events in the past 12 months'. Legend is adjusted to facilitate comparison between research methods. 'A couple of times per year' includes responses for 'every couple of months', 'three to four times' and 'once or twice'. The major differences between results suggest that the profile of respondents for the Audience Outlook Monitor are significantly more likely to engage with the performing arts on a regular basis than the overall population.

9 Ideally it would be possible to compare frequency of attendance data to the Australia Council's *National Arts Participation Survey* (NAPS) from 2019, however these figures are not publicly available. The NAPS provides a figure for overall arts engagement; however this does not include figure for performing arts engagement specifically. The NAPS 'live arts and cultural engagement' figure of 68% includes visual arts and is therefore not comparable to our figure for paid ticketed attendance for performing arts events of 54%.

KEY FINDING

The population would like to increase engagement and attendance

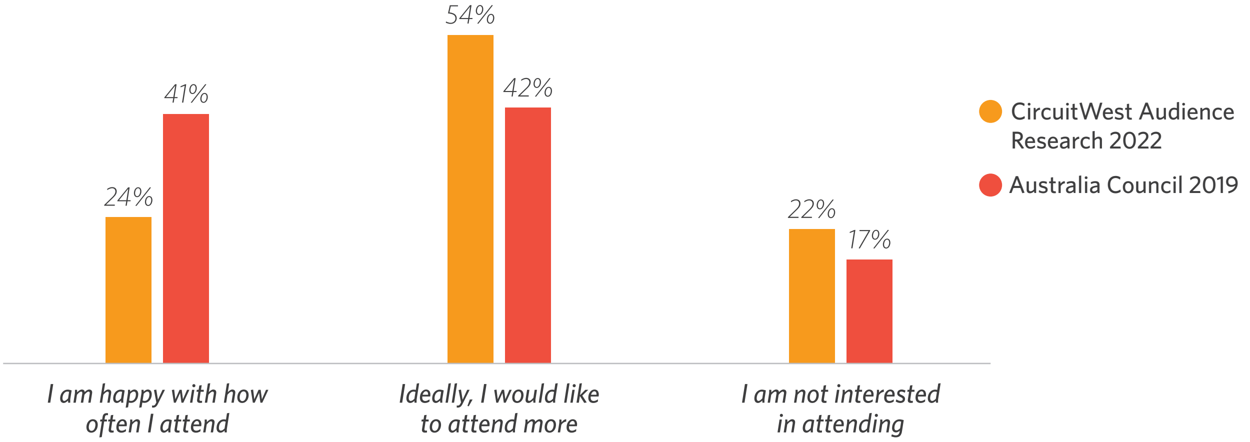
In 2019, 42% of the population said they were interested in increasing their attendance of arts and cultural events[10]. In the 2022 *CircuitWest Audience Research*, we recorded 54% of the population saying they wanted to grow their attendance. This is a 13% increase in population sentiment towards attendance at arts and cultural events.

This is an important finding as it demonstrates that, overall, the population is more interested at attending events than they were prior to COVID. It's likely therefore that where audience research has skewed towards the inclinations of high-engagement attendees, we've failed to understand the shifting population sentiment towards growing engagement.

The following chart compares findings of the recent *CircuitWest Audience Research* against results from the National Arts Participation Survey from 2019.

ATTITUDE TOWARDS INCREASING ENGAGEMENT

Regarding your attendance at live performing arts and cultural events over the past 12 months, which of these statements best applies to you?



Source: National Arts Participation Survey 2019 & CircuitWest Audience Research 2022 (N = 902). Analysis by Culture Counts

Note: The CircuitWest Audience Research asked respondents indicate their attitude towards their engagement in live performing arts events. Data has been benchmarked against the 2019 National Arts Participation Survey results to generate an understanding of behaviour changes pre and post COVID.

10 Australia Council for the Arts, 2019. *'National Arts Participation Survey – Data Tables'.*

Future Islands performing at Perth Festival 2023. Photo by Cam Campbell.

KEY FINDING

Reasons to attend haven't changed significantly at a population level

In 2022, 60% of respondents said they attended arts and cultural events to 'have fun' or 'be entertained'. In 2019 63% of the population said this was a reason for their attendance[11]. This is only a 3% difference. It was the most popular option selected in our research and it was the most population option selected in the 2019 Australia Council research.

This is only a minor difference.

Indeed, the second most common option selected in the 2019 Australia Council research was for 'socialising' (41%), which is consistent with our result in 2022 (40%).

The question for 'reasons for attendance' is normally asked as a multi-choice question. As a point of difference, our version of the question chose to limit respondents to only their **top three choices** – rather than being able to select as many choices as they liked. This change in methodology is why we believe we seen some significant difference when compared to the 2019 data.

For example; 'gaining knowledge' and 'expressing yourself' saw significant differences between 2019 and 2022, which were 12% and 11% lower respectively. Whether this represents a change in the population however is yet to be seen. It's more likely that these changes are related to research methodology; that we limited the number of options to choose and that we included more options to choose from.

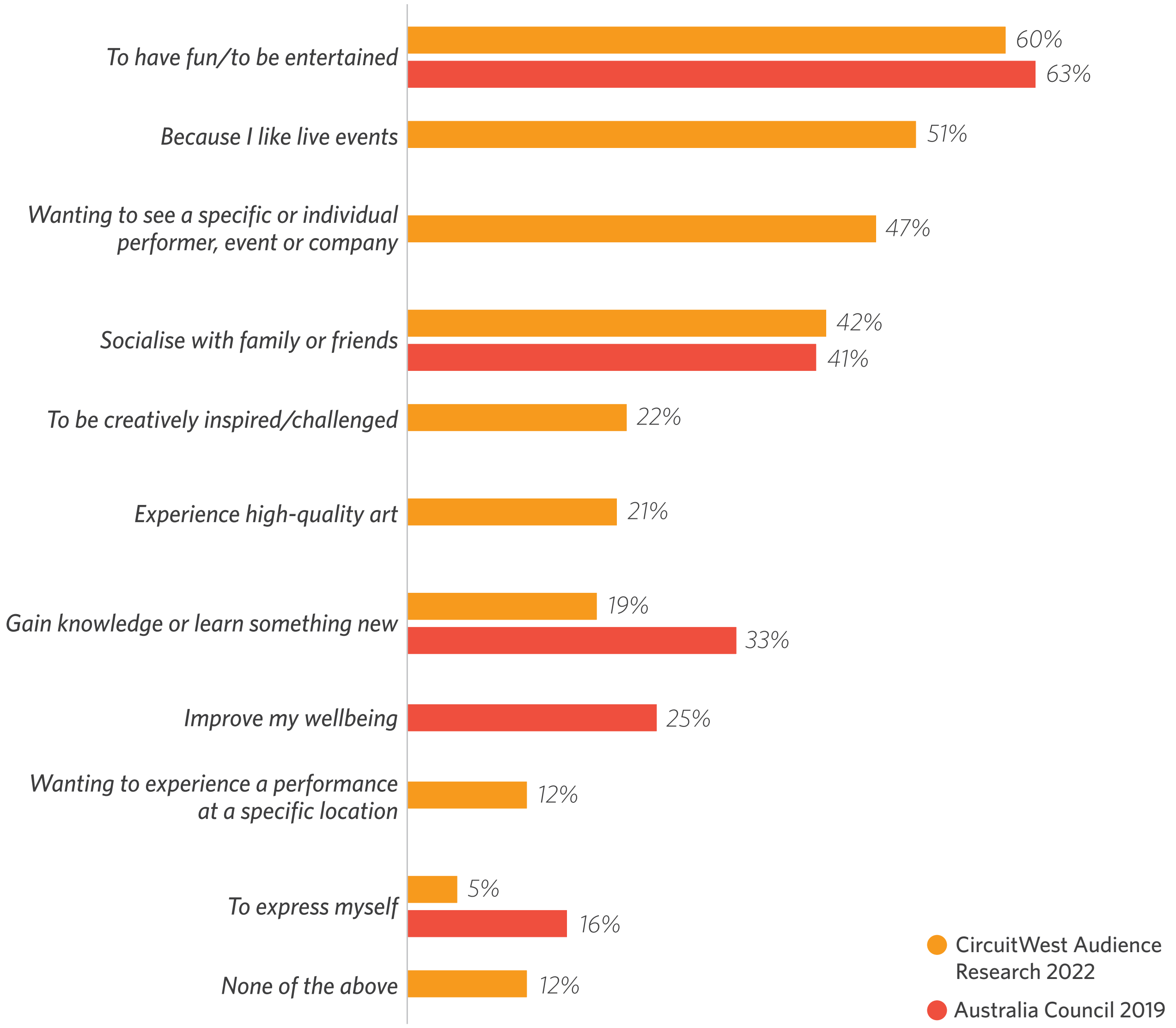
When the Australia Council releases their 2022 research later this year, we should be able to determine if this is an actual change, or whether it more accurately speaks to priorities the population puts on arts and events.

Indeed, other top results found in our research were options were sourced from other research[12] and not asked in the Australia Council 2019 research, such as 'liking live events' (51%) or 'wanting to see a specific artist or events' (47%).

11 Australia Councilfor the Arts, 2019. *'National Arts Participation Survey – Data Tables'*
12 National Endowment for the Arts, 2017. *'Why We Engage: Attending, Creating, and Performing Art'.*

REASONS TO ATTEND

There are many reasons why people may attend creative, cultural and arts events. Which of the following reasons apply to you?



N = 902. Source: *National Arts Participation Survey* 2019 and *Circuitwest Audience Research* 2022 (N = 902). Analysis by Culture Counts
Note: The Circuitwest Audience Research asked respondents to identify their reasons for attending creative, cultural and arts events. Data was captured via a multiple-choice question, with respondents limited to three options. Where possible, data has been benchmarked against the *National Arts Participation Survey* 2019 results to generate an understanding of behaviour changes pre and post COVID.

KEY FINDING

Barriers to attendance have changed, but not how you think...

In 2022, 40% of our respondents' said cost was a barrier to their attendance of arts and cultural events. In 2019, 34% indicated cost was a barrier in the National Arts Participation research[13]. This is only a 6% difference. It's worth noting that the 2022 data only represents a snapshot in time for December 2022, and that the effects of higher inflation is still playing out across the economy. That being said, a 6% increase does not seem to be a major change.

Similarly, 40% of respondents to the *Audience Outlook Monitor* 2022 survey identified cost as a barrier to attendance[14]. Since this cohort represents a highly engaged arts audience, we can't be sure if this represents a change from 'pre-COVID' levels, but it does appear to match the overall population average[15].

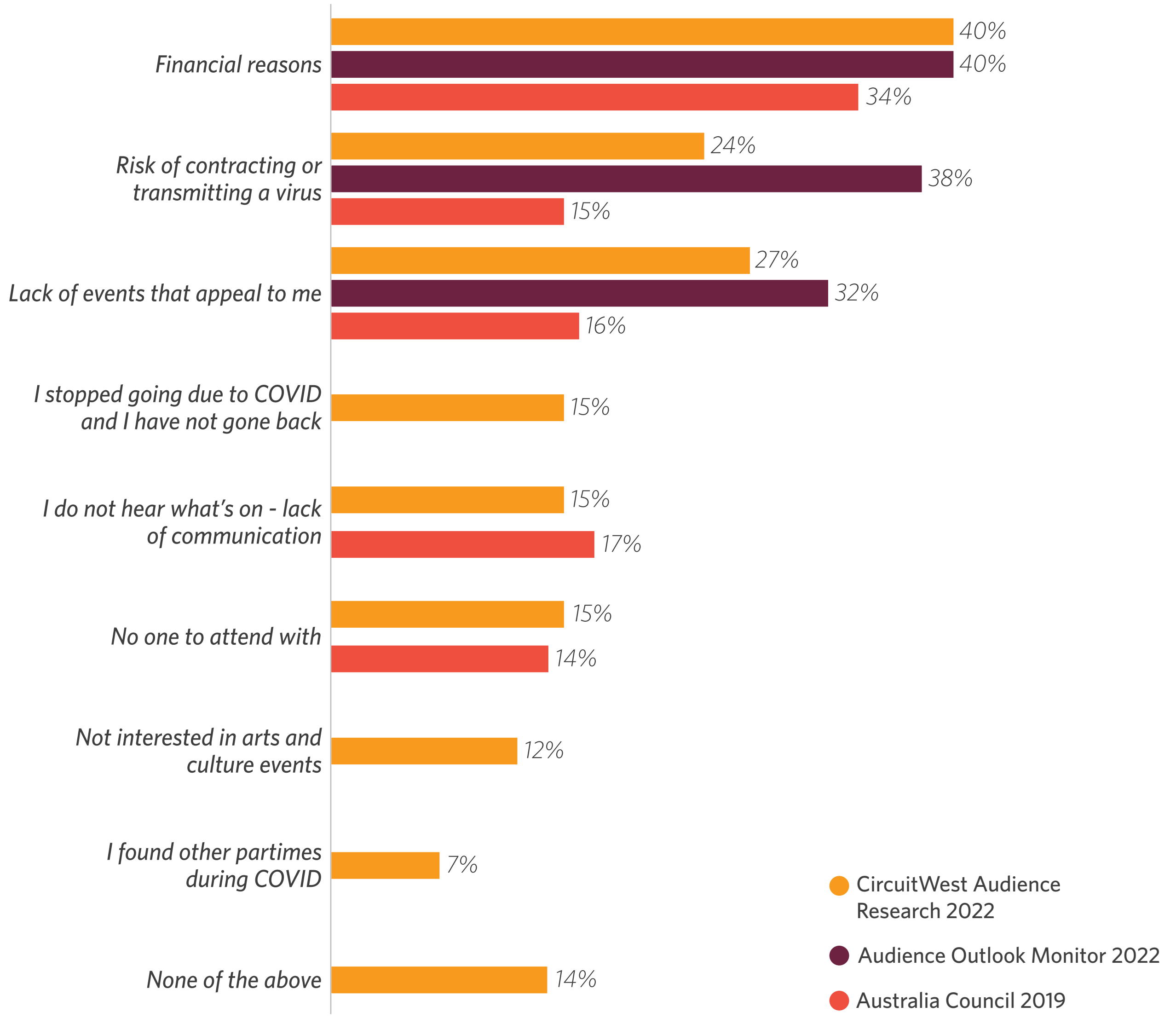
When looking at big changes between 2019 and now, the most significant is in the proportion of respondents that identified 'lack of interest'; both in terms of the overall population (+11%) and also the highly engaged arts audiences of the *Audience Outlook Monitor* (+16%). This is a fascinating finding, coupled with the sizable portion of the population who say that they stopped attending events due to COVID and have yet to return (15%).

Finally, it needs to be understood that health concerns remained high at a population level, even in December 2022. The *Audience Outlook Monitor* reported health concerns at 38% of respondents in October 2022, whereas we reported it as 24% in December. The baseline expectation for 'health concerns' as a barrier of attendance could be considered as 15% of the population, when considered the *National Arts Participation* research in 2019[16].

13 Australia Council for the Arts, 2019. *'National Arts Participation Survey – Data Tables'*
14 Audience Outlook Monitor, 2022. *'Live Attendance Update – October 2022'*. Patternmakers.
15 An April 2023 update reported 38% of respondents reporting 'financial reasons' as a barrier to attendance, a minor change from the October 2022 figure, and consistent with our reported average at the population level.
16 An April 2023 update reported 16% of respondents reporting 'Risk of contracting or transmitting the Virus' as a barrier to attendance.

BARRIERS TO ATTEND

Are any of the following preventing you from attending in-person, live performing arts and culture events?



Source: *National Arts Participation Survey* 2019, *Audience Outlook Monitor* October 2022 and *Circuitwest Audience Research* 2022 (N = 902). Analysis by Culture Counts

Note: The *Circuitwest Audience Research* survey asked respondents to identify any barriers preventing them from attending for attending live performing arts events. Data was captured via a multiple-choice question, with respondents limited to three options. Where possible, data has been benchmarked against the *National Arts Participation Survey* 2019 results and the *Audience Outlook Monitor* from October 2022.

KEY FINDING

The 'single-ticket buyer' represents a hugely different concept depending on what type of arts organisations you are.

Cross-engagement is a major factor for arts organisations, with a general understanding that arts and culture attendees seek out events produced by a range of organisations. Results from the population poll revealed that while some organisations have audiences that are prone to engage with other arts and culture organisation – some did not.

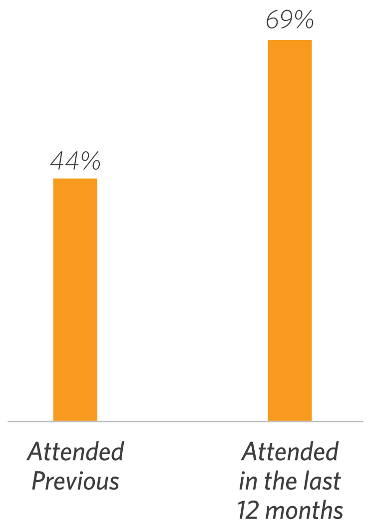
For the six performing arts organisations included in our research, 44% of their previous audiences had only ever engaged with just one other organisation on the list. During the last 12 months, just over two thirds (69%) of respondents had only engaged with just one of the six organisations.

For one organisation in the cohort, 32% of their previous audience had **never attended** an event from any of the other included organisation. For another organisation, this was only 1%. Even when looking at attendance during the 2022 period, the difference between organisation's audiences with the highest and lowest crossover was 37%.

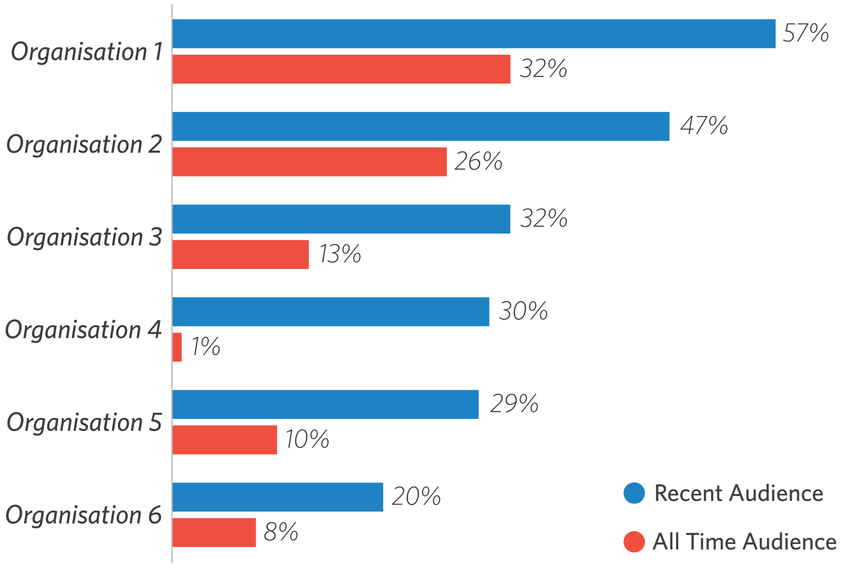
This means that a 'single-ticket buyer' is a vastly different thing from one organisation to another. In some organisations it means the 'single-ticket buyer' is still a highly engaged arts attendee, whereas in others, it might be the only show they attend all year.

There isn't adequate research to understand how the 'single ticket' buyer may have changed over COVID. Given the incredible range and arts-engagement profile the 'single ticket' buyer can represent, this concept would be worth exploring in future studies.

AUDIENCE THAT REPORTED ATTENDANCE AT ONE ORGANISATION



PERCENTAGE OF AUDIENCE THAT REPORTED ATTENDANCE AT ONLY ONE ORGANISATION



Source: *CircuitWest Audience Research* 2022 (N = 902). Analysis by Culture Counts

Note: The *CircuitWest Audience Research* survey asked respondents to identify if they had attended an event from any of the following organisations before or in the last 12 months. Results show the percentage of respondents that only selected one of the organisations (i.e. they did not register attendance with any other listed organisation). Organisation names have been removed for anonymity.

KEY FINDING

Infrequent arts attendees make up the majority of the population, yet only a minority of ticket sales. This mean that minor changes at the population level can still cause major effects to ticket sales.

For one organisation that was part of the research cohort, ticket sales from the past three years were reviewed and categorised based on their responses to the ‘frequency of attendance’ question.

Where our results showed that 78% of the population were infrequent event engagers (either not attending an event in the last 12 months, or only attending once or twice) - these respondents represented 22% of the organisation’s ticket sales. Where we found that 7% of the population were frequent engagers (those that said they attended arts events at least once a month), these respondents represented 30% of the organisation’s ticket sales.

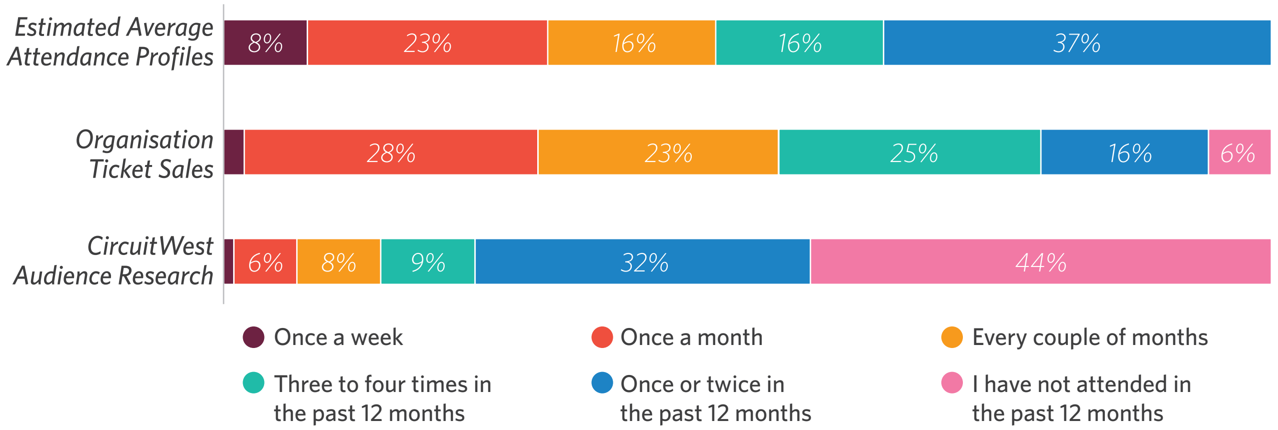
This finding is essential to the ‘pareto principle’; that a small percentage of inputs (i.e. audiences) are responsible for a large percentage of outputs (i.e. ticket sales). If this is the case for one organisation, then it could arguable be the case for many more.

If this trend proved to be commonplace across the sector, this would suggest that even minor changes recorded at the population level could conceivably create major effects to ticket sales across the industry; particularly if those changes disproportionality were seen amongst high-engagement attendees. Indeed, using attendance weightings from the 2019 Australia Council *Audience Data and Advocacy Tools* by Longeran[17], we can estimate the average attendance profile is for any organisation at a national level. While the proportion of irregular attendees increases in this model, this profile still demonstrates the oversizes skew that a relatively minor segment of the population has towards ticket sales.

17 Lonergan, 2019. *‘NAPS Statistical Tools Data Report – Table 7’*. Australia Council for the Arts.

This finding demonstrates that there is significantly more opportunity to understand how frequency of cultural engagement and ticket sales interacts. Given the previous finding that the audience engagement profile of organisations will look very different, this overall average profile is likely to vary significantly for any particular organisation.

TICKET SALES BY FREQUENCY OF ATTENDANCE



Source: *Australia Council Audience Data and Advocacy Tools* 2019 and *CircuitWest Audience Research* 2022 (N = 902). Analysis by Culture Counts.

Culture Counts surveyed a selection of ticket buyers from an organisation over the past three years and asked about their recent attendance at arts and cultural events. Average attendance weightings are applied to the *CircuitWest Audience Research* to estimate what the annual attendance profile for an organisation could look like. Note that since this figure is only for an annual estimate, it will therefore exclude attendees who have not attended in over 12 months.

Where to from here?

The findings from the recent population poll have provided insight into arts and culture audience motivators, barriers and behaviours at the population level.

This research identifies that opt-in audience research can skew towards 'high-frequency' engagement respondents and suggests caution in correlating such research with the broader population without considering this bias within the survey results.

We also identify new opportunities for analysis of national participation data, with a view to identify key-factors of engagement, particularly population motivations for attendance, and suggest that such analysis can support arts and cultural organisations to improve their understanding of audiences and their attendance behaviour.

If you have any feedback or questions regarding this study, you can email **hello@culturecounts.cc.**
We would love to hear your thoughts.

Audience at *Briefs - Dirty Laundry*, at FRINGE WORLD Festival 2023. Photo by Ven Tithing.

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