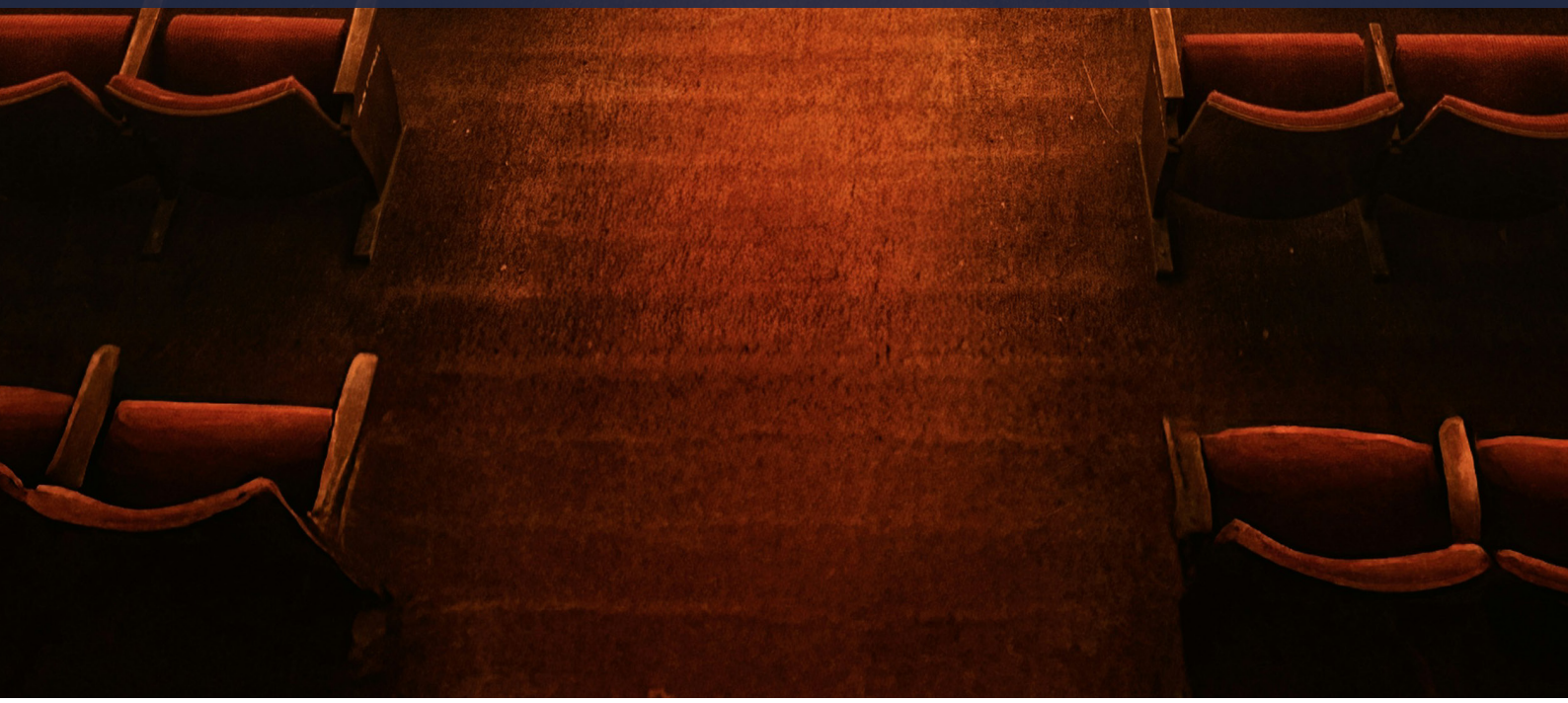
Shifting Seats: Trends in Live Event Attendance and Ticket Buying

MARKET RESEARCH AND ANALYSIS OF PERFORMING ARTS AUDIENCES IN WESTERN AUSTRALIA AND THE CHANGES BETWEEN 2022 AND 2025



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Culture Counts

Acknowledgements

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Report images: *CircuitWest 2025 WA Showcase*, photos by Infinite Productions.

Introduction

In 2025, Culture Counts and CircuitWest surveyed a representative sample of the Western Australian population to better understand their attitudes toward, and engagement with, the performing arts across the calendar year. The research draws on a panel of respondents from across Western Australia, carefully structured to achieve a representative mix by age, gender and regional location.

This report builds upon the *CircuitWest Audience Research Report* released in 2023 (based on survey data collected in late 2022), which reported on audience behaviour, and how engagement may have changed post COVID. Many of the same questions were asked to enable the exploration of changes or trends in behaviour, including questions regarding demographics, arts and cultural attendance motivations, preferred event types, engagement levels and barriers to attendance. In 2025, the survey also asked about people's ticket purchasing behaviours. The key findings of this research are summarised in this report.

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 Creative Industries, Tourism and Sport's *Arts & Culture Monitor*[2], Creative Australia's *National Arts Participation Survey*[3] (2019 and 2022) and the National Endowment for the Arts *General Social Survey*[4] (2016).

62%

Attended a live performing arts event in 2025

+8% compared to 2022

39%

Would like to have attended live arts and culture events more in 2025

-15% compared to 2022

32%

Of respondents are happy with how often they attended live arts and culture events

+8% compared to 2022

9%

Of respondents attend more events than they did pre-COVID

+4% compared to 2022

65%

Cite **cost** as a barrier to attending in-person live events

20%

Cite **lack of time** as a barrier to attending in-person live events

23%

Cite **lack of personal interest** as a barrier to attending in-person live events

19%

Cite **distance** as a barrier to attending in-person live events

54%

Attend arts and cultural events to **have fun/be entertained**

-6% compared to 2022

46%

Attend because they **like arts and cultural events**

-5% compared to 2022

45%

Attend arts and cultural events to **socialise with family or friends**

+3% compared to 2022

1 Creative Australia for the Arts, 2022. *'Audience Outlook Monitor'*.
2 Department of Creative Industries, Tourism and Sport, 2022, *'2022 Arts & Culture Monitor Survey'*.
3 Creative Australia for the Arts, 2019 and 2022. *'National Arts Participation Survey'*.
4 National Endowment for the Arts, 2016. *'General Social Survey'*.

CircuitWest Overview

This research provides a timely snapshot of how Western Australians are engaging with live performing arts in 2025, revealing both renewed momentum and shifting expectations.

A growing proportion of audiences are satisfied with their level of attendance: 32% of respondents reported being happy with how often they attended live events, up from 24% in 2022 and edging back toward the pre pandemic benchmark of 41% recorded in Creative Australia's *2019 National Arts Participation Survey*. At the same time, the proportion of people who would like to attend more has fallen to 39%, down from 54% in 2022, indicating that while barriers persist, the gap between aspiration and attendance is narrowing. Together, these shifts suggest that audience confidence and routine are stabilising, with participation patterns gradually returning to pre COVID norms.

For CircuitWest, working alongside presenters and producers, these findings reinforce the importance of understanding not just who attends, but why they attend, and what prevents them from doing so. Cost has become the most significant barrier, cited by 65% of respondents, with families feeling this pressure most acutely. This underscores the central role affordability now plays in shaping access to live performance.

Beyond barriers, the research highlights a meaningful shift in what audiences value. While fun and entertainment remain important; 54% attend to have fun/to be entertained, 46% because they simply like live events, and 45% to socialise with family or friends - a trio of motivations that strongly reflect CircuitWest's commitment to fostering artistic appreciation, shared experience, and community connection.

These motivations also align with a broader cultural trend; audiences increasingly seek experiences that help them connect - with others and with their own identity. This is especially evident among younger Western Australians, who attend more frequently than older audiences and whose participation is driven as much by social experience as by the artistic content itself.

At the same time, younger audiences are reshaping ticket buying behaviour. Digitally fluent and value conscious, they are more likely to take advantage of digital ticketing channels and purchasing strategies, including signing up for presales, purchasing as soon as tickets are released, waiting for discounts, or relying on resale platforms if their plans change. These patterns represent the sharpest generational divide in the research and challenge traditional assumptions about sales cycles, urgency, and commitment. For presenters and producers, this shift underscores the need for more flexible, adaptive approaches to pricing, communication, and on sale strategies that align with how younger audiences make decisions.

Overall, the research points to an audience base that is stabilising but also redefining what it wants from live performance. Expectations around affordability, social connection, and flexibility are central to participation. For CircuitWest and the wider sector, these insights provide a clear direction: to design touring, programming, and engagement approaches that respond to these emerging patterns and support sustainable audience growth.

Philippa Maughan
Executive Director, CircuitWest

Key Findings

Cost is the biggest barrier to attendance, especially for families

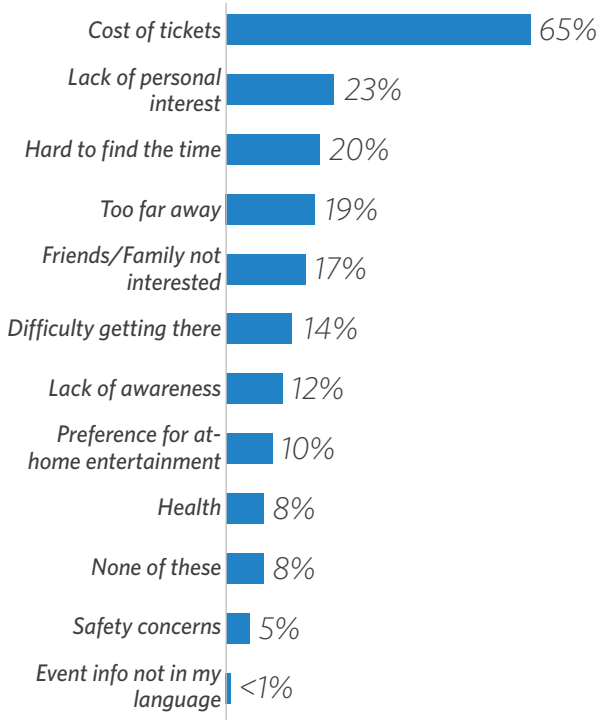
Almost two thirds of all respondents to the survey cited 'cost of tickets/entry' as a factor preventing them from attending live events. It was by far the most common barrier to attendance, with the next most cited option, 'lack of personal interest', only being selected by 23% of respondents.

While this is a universal issue, analysis by personal circumstance shows that this barrier is most strongly felt by families, followed by single people aged between 25 and 64, and couples. Retirees and young singles were less likely to be deterred by cost.

The *2022 CircuitWest Audience Research* survey included a similar question on barriers to attendance. The most frequently chosen response – and the one most closely aligned thematically with the top response in 2025 – was 'financial reasons,' selected by 40% of respondents. Financial pressure is clearly increasing, with more audiences now citing cost as a barrier to attending live events (65%).

BARRIERS TO ATTENDANCE

Are any of the following preventing you from attending in-person live events?



COST AS A BARRIER TO ATTENDANCE - BY PERSONAL CIRCUMSTANCE

Are any of the following preventing you from attending in-person live events?

Cost of tickets/entry

Young people are attending more live events, more often than they were pre-COVID

People aged between 18 to 39 years are attending live arts and cultural events more frequently than those aged over 40, and that many of them are attending more frequently post-COVID.

Survey respondents were asked how frequently they attended live performing arts and culture events over the past 12 months. When looking at the responses by age group, it is evident that the proportion of respondents who had 'not attended', increases significantly with age.

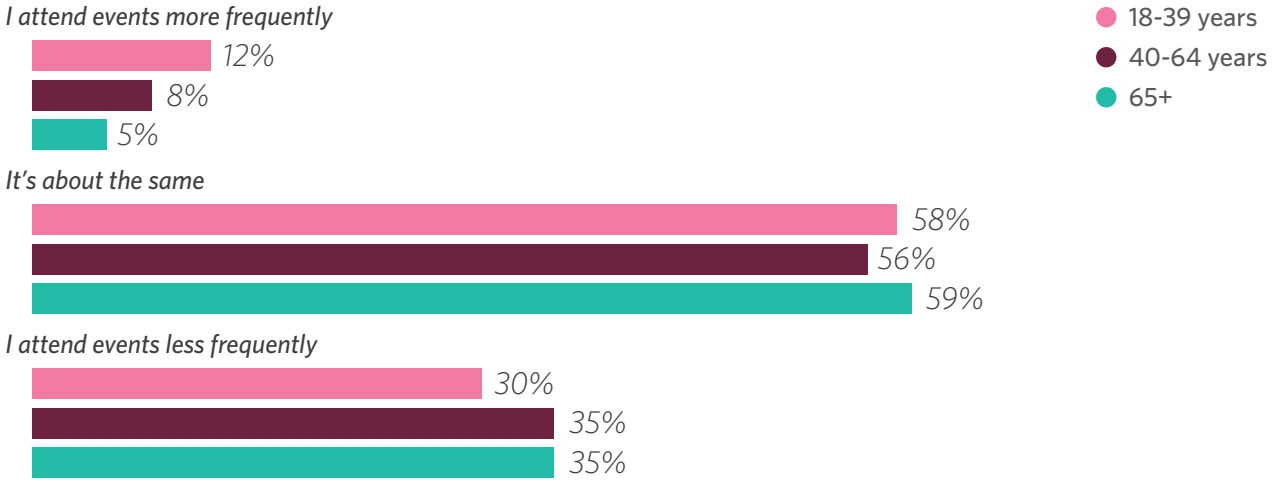
The most noticeable difference when comparing engagement by age groups is that 18 to 39 year olds are much more likely to attend events 'every couple of months' compared to those aged 40 and over.

When asked how their frequency of live arts and cultural attendance has changed since COVID, younger people were more likely to say that they 'attend events more frequently' than older respondents.

Understanding people's genre preferences highlights the sectors where this increase in attendance will be felt more strongly. 'Music' events dominate across all ages, making them the most attended category. Younger people (aged 18 to 39) also favour 'comedy' and 'festivals' – this points to a preference from young people to attend more casual and social events.

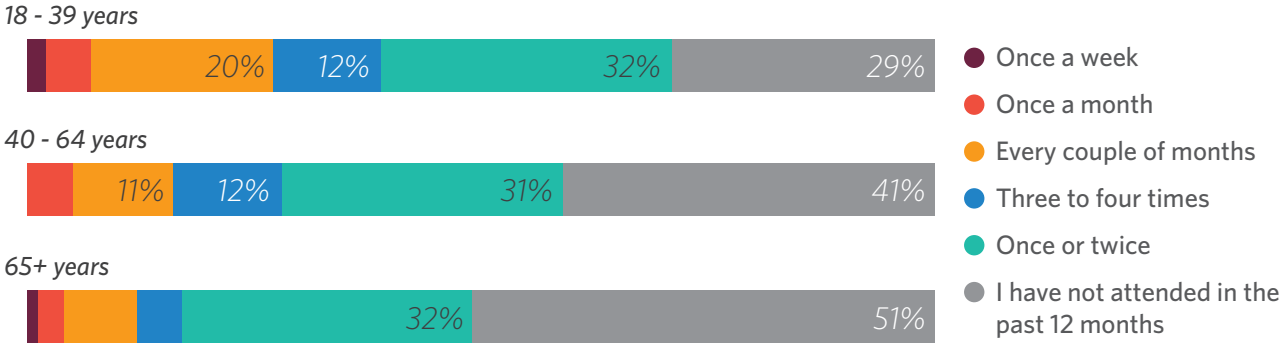
CHANGE IN ATTENDANCE SINCE COVID - BY AGE GROUP

How would you say your frequency of live arts and cultural attendance has changed since COVID?



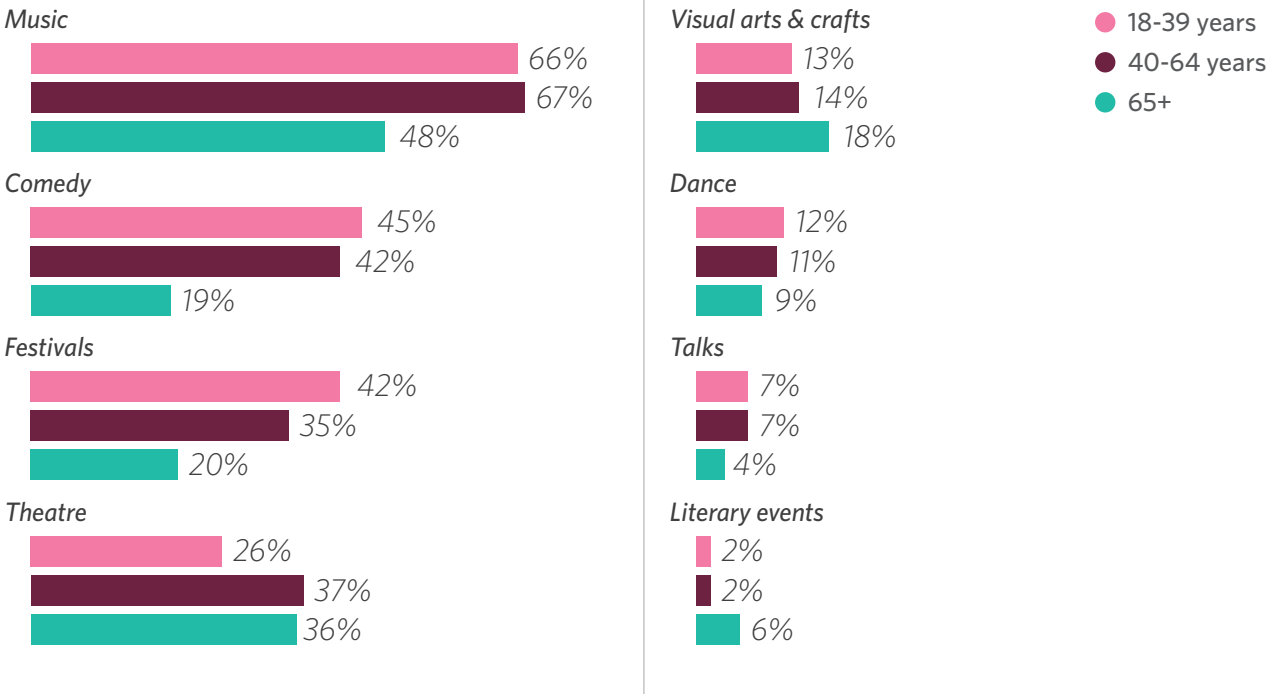
ARTS AND CULTURE ENGAGEMENT - BY AGE GROUP

Approximately, how frequently have you attended live performing arts and cultural events in the past 12 months?



EVENT TYPE PREFERENCE - BY AGE

Which of the following live arts and culture events are you most likely to attend?



Note: The survey also included response options; "I don't attend live events" and "Other", note these have been removed from this visualisation.

Young people are more strategic ticket buyers

This research sought to understand the populations' ticket purchasing behaviours, such as, when they typically buy tickets and if they consider reselling as an option.

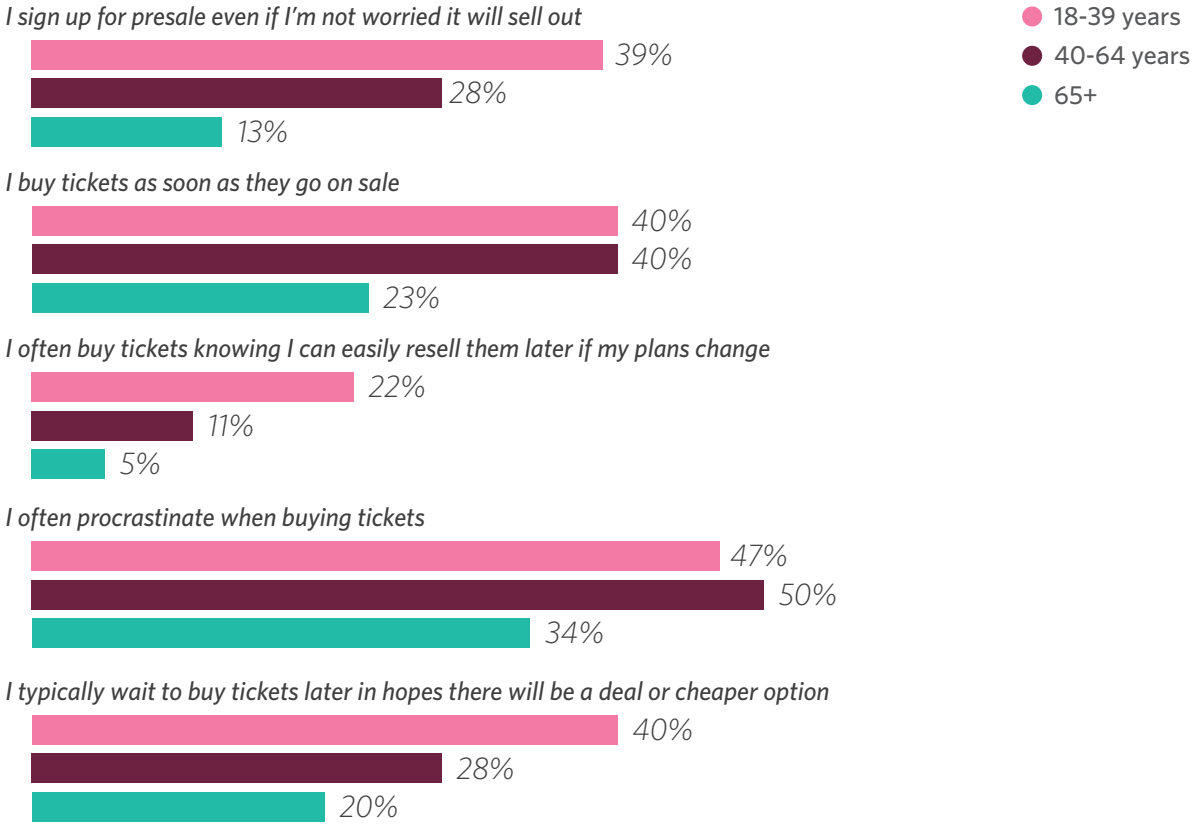
Analysis by age group shows that generational differences are apparent across these ticket purchasing behaviours, with younger people (aged 18 to 39) more likely to consider their strategy when buying tickets. They are the most likely to sign up for presales, to purchase tickets as soon as they go on sale, and to buy with the intention of reselling if plans change. At the same time, they are also highly likely to procrastinate or to wait for a deal. This highlights that younger people are able to use their technical literacy to their advantage, they are savvy buyers and can utilise different platforms to get the best deal.

The resell option is the sharpest generational divide, with the biggest gap between the youngest and oldest age groups. This likely reflects both comfort with digital resale platforms and a different attitude to financial risk when purchasing tickets.

Those aged 40 to 64 have less consistent purchasing behaviours. Notably, this group reports the highest levels of procrastination on buying tickets which suggests lower urgency or a hesitation to commit.

Adults aged 65 and over are the least likely to sign up for presales or consider reselling tickets as an option. They also show lower levels of procrastination compared with the 40 to 64 age bracket. Overall, this points to a more traditional approach to ticket buying that is not as influenced by price or urgency and may simply be based on established preferences.

TICKET PURCHASING BEHAVIOUR - PERCENT AGREE BY AGE GROUP



* *Respondents replied to each statement using a 5-point Likert scale labelled: Strongly Agree, Agree, Neutral, Disagree and Strongly Disagree. For the purpose of this visualisation, the 'Strongly Agree' and 'Agree' responses have been combined to determine overall agreement.*

Satisfaction with attendance frequency is returning to pre-COVID levels

When reflecting on their attendance frequency at live events over the past year, 32% of respondents indicated that they were happy with how often they attend. This figure has grown since the *2022 CircuitWest Audience Research* survey, where 24% of the sample selected this option.

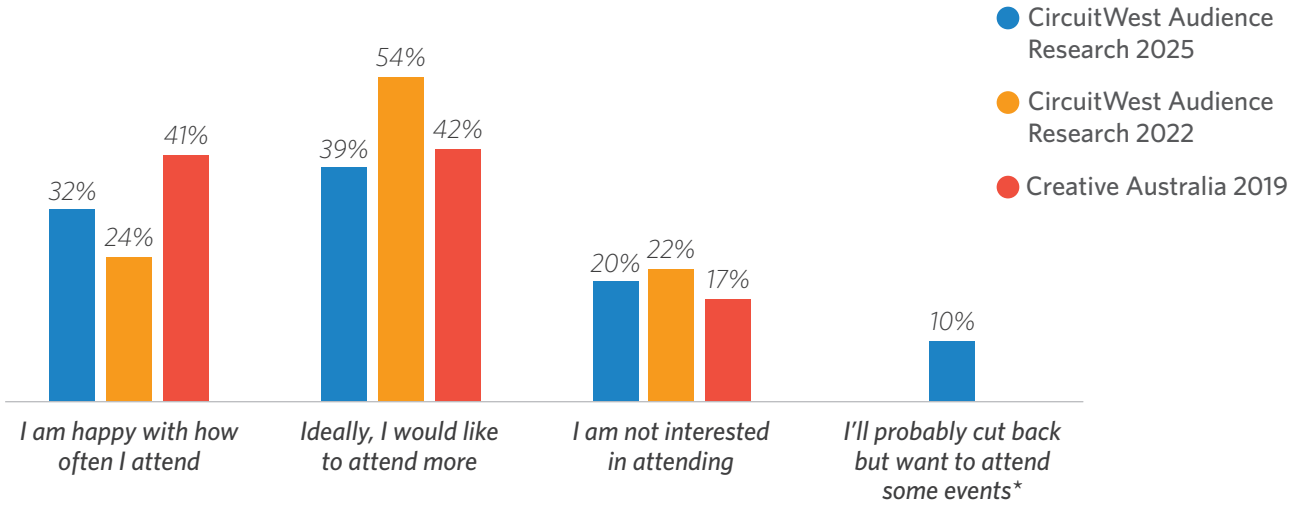
This question was included in the *2022 and 2025 CircuitWest Audience Research* surveys to compare with data collected by Creative Australia in the *National Arts Participation Survey*. In the *2019 National Arts Participation Survey*, it found 41% of respondents were happy with their attendance frequency – so the most recent data appears to be increasing to match the pre-pandemic sentiment.

The growth in this category from 2022 to 2025 coincides with a decrease in the number of people that would ideally like to attend more events (selected by 39% of respondents this year compared to 54% in 2022).

In the *2025 CircuitWest Audience Research* survey, a fourth response option was added, with 10% of respondents indicating that they will "probably cut back but want to attend some events." The introduction of this option may also help explain the decline in the proportion of people who said they would like to attend more events.

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?



* *This option was included as part of the CircuitWest Audience Research 2025 survey and not previously asked.*

People are most likely to attend events with their partner

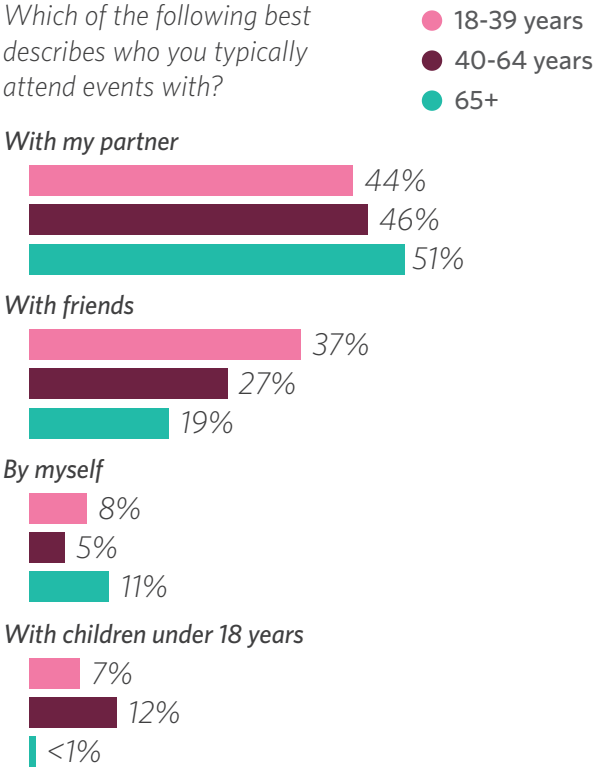
Almost half of the survey respondents identified that they attended events with their partner and 29% typically attend with their friends. A smaller proportion of respondents attend with children under 18 years or alone.

Analysis by age shows that attending events with a partner is the most common choice across all age groups, and that this increases with age. Younger audiences show a more varied social pattern and are much more likely to attend events with friends.

Attendance with children is most prominent among those aged 40 to 64, which is reflective of this cohorts' life stage. Older audiences aged 65 and over are the most likely age group to attend events alone.

ATTENDANCE GROUPS - BY AGE

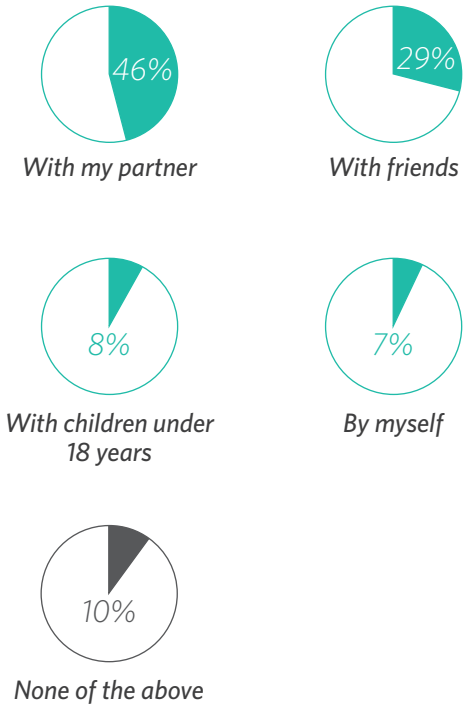
Which of the following best describes who you typically attend events with?



Note: The survey also included the response option, "none of the above" which has not been included in this visualisation.

ATTENDANCE GROUPS*

Which of the following best describes who you typically attend events with?



* *Responses for the 'Attendance Groups' were sourced from the Culture Counts' Question Bank, creating opportunities for benchmarking in the future.*

Audiences are still motivated by 'having fun' but this is shifting

The main motivation for attending arts and cultural events remains, 'to have fun/to be entertained', and this is especially true for younger and family audiences, however less people were motivated by this in 2025. The number of people seeking fun and entertainment at live events has decreased over the years. In the *2022 CircuitWest Audience Research*, 60% attend 'to have fun/to be entertained,' compared to 54% in 2025

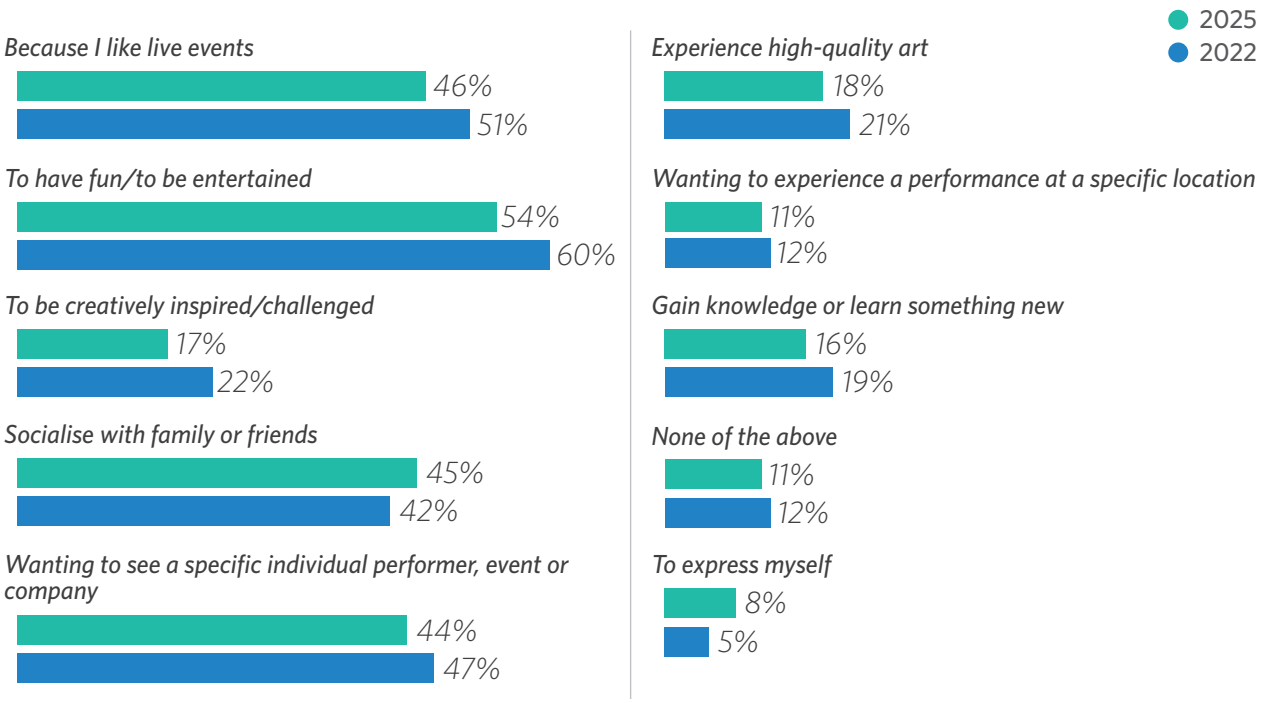
This question was also asked in the *2019 and 2022 Creative Australia's National Arts Participation Survey.* The response options provided in those surveys differed from the CircuitWest research however 'to have fun/be entertained' was available. In the *2019 Creative Australia's National Arts Participation Survey*, 63% said that they attended arts and cultural events for this reason compared to 69% of respondents in the *2022 National Arts Participation Survey* .

This is proving that the 2025 result is a notable decrease from what has been reported previously. People in the 'single (17-24years)' personal circumstance category were the most likely to be motivated by fun and entertainment, followed by couples under 45 years of age and families. The percentage drops significantly for retirees.

In *2022 and 2025 CircuitWest Audience Research,* year-on-year comparison shows that only two motivators have increased. The first motivator is that more people are looking to live events as opportunities to build social connection ('Socialise with family and friends' is 4% points higher in 2025). Second motivator is that while it's a smaller segment, expressing oneself has become more of a motivator for attendance ('To express myself' is 3% points higher in 2025), demonstrating that more people are choosing events that reflect their own identity and values.

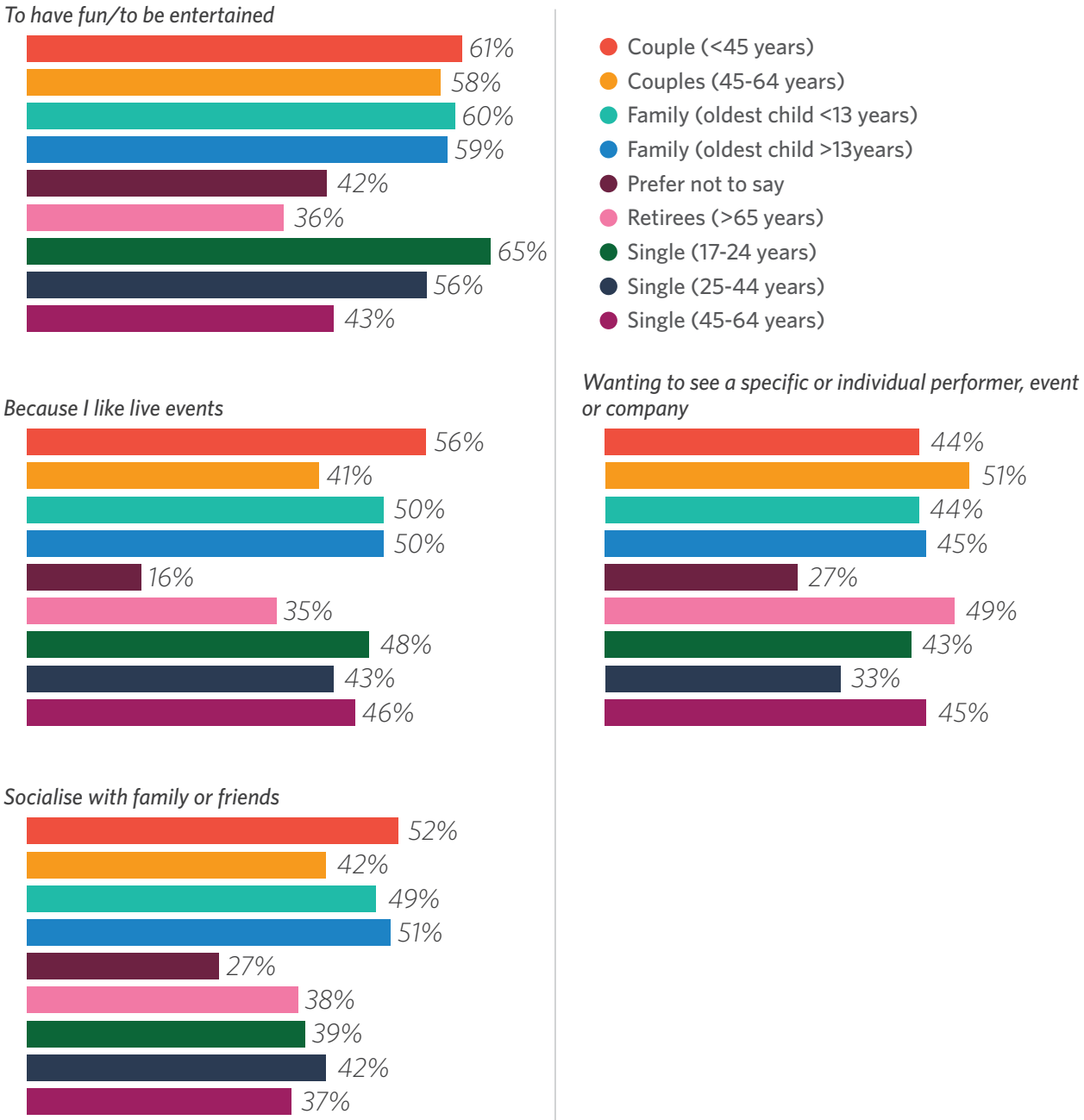
ATTENDANCE MOTIVATIONS - YEAR ON YEAR

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



MOTIVATION TO ATTEND - BY PERSONAL CIRCUMSTANCE

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



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