Changing organisations to diversify arts audiences

SUMMARY OF FINDINGS
FROM NATIONAL SURVEY

2023

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Executive Summary

A team from Deakin University and the University of Sheffield undertook a national survey of Australian arts and cultural organisations, with the aim of identifying strengths and weaknesses in the work needed to diversify audiences. The project is funded by the Ian Potter Foundation and the Australia Council for the Arts. Rather than taking an audience development approach, the project brings an organisational perspective to the 'wicked problem' of engaging new and diverse audiences for the arts and culture. It seeks to shift the social profile of audiences to include more First Nations people, Deaf and Disabled communities, and those from different cultures, age groups, geographic locations, and sexual and gender identities.

The survey examined organisational practice according to a change model made up of eight tasks. Survey data was analysed according to the practice associated with organisations that are Leaders, Adaptors or Avoiders of the work needed to diversify audiences. Findings indicate most organisational practice falls into the Adaptor category – which we describe as organisations that are aware of the need for change but struggle to undertake the work needed to diversify audiences. Adaptor behaviour was most evident in nearly all tasks in the organisational change model.

Leader behaviours (those that embrace change) were most evident in:

> **Task 1**: Recognise the need for change,

> **Task 3**: Research audiences and their barriers to participation, and

> **Task 7**: Undertake evaluation and reflective practice.

Avoider organisations (who block or resist change) were most evident in:

> **Task 2**: Identify target audience,

> **Task 4**: Program in response to a target audience, and

> **Task 6**: Gain broad organisational support for audience diversification.

Some variations in Leader and Avoider behaviour were identified according to artform/creative practice, department, size of organisation, level of seniority, and geographic location. There were, however, no clear types of organisation or roles within organisations that demonstrated conclusive Leader behaviour across all eight tasks.

The survey will be followed by case study investigation of the drivers and inhibitors of organisational change in the arts and cultural sector. This second phase of research will inform sector development resources that encourage change and Leader behaviour in all arts organisations.

Introduction

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Changing the social profile of audiences is a 'wicked problem' in the arts. Policy and funding interventions over many decades have had limited success in attracting new audiences for publicly funded arts and culture. This challenge is found not only in Australia but across all Anglophone countries.[1] Non-dominant cultures such as First Nations people, Deaf and Disabled communities, and those from different cultures, age groups, geographic locations, and sexual and gender identities remain underrepresented in arts audiences.

Expanding the social profile of audiences would result in many benefits. More diverse audiences will assist organisations to:

> share new and distinct stories that represent Australian diversity,

> increase the public value offered through the arts and culture, and

> improve financial sustainability through box office income and new revenue streams.

This project approaches audience diversification from an organisational perspective. Rather than focusing on audience development it considers the impact of organisational practice on audiences. It identifies the changes needed within organisations if they are to attract new audiences.

Reported here are findings of a national survey of Australian arts organisations that identifies strengths and weaknesses in the work needed to diversify audiences. This survey is the first phase in a project funded by the Ian Potter Foundation and the Australia Council for the Arts.
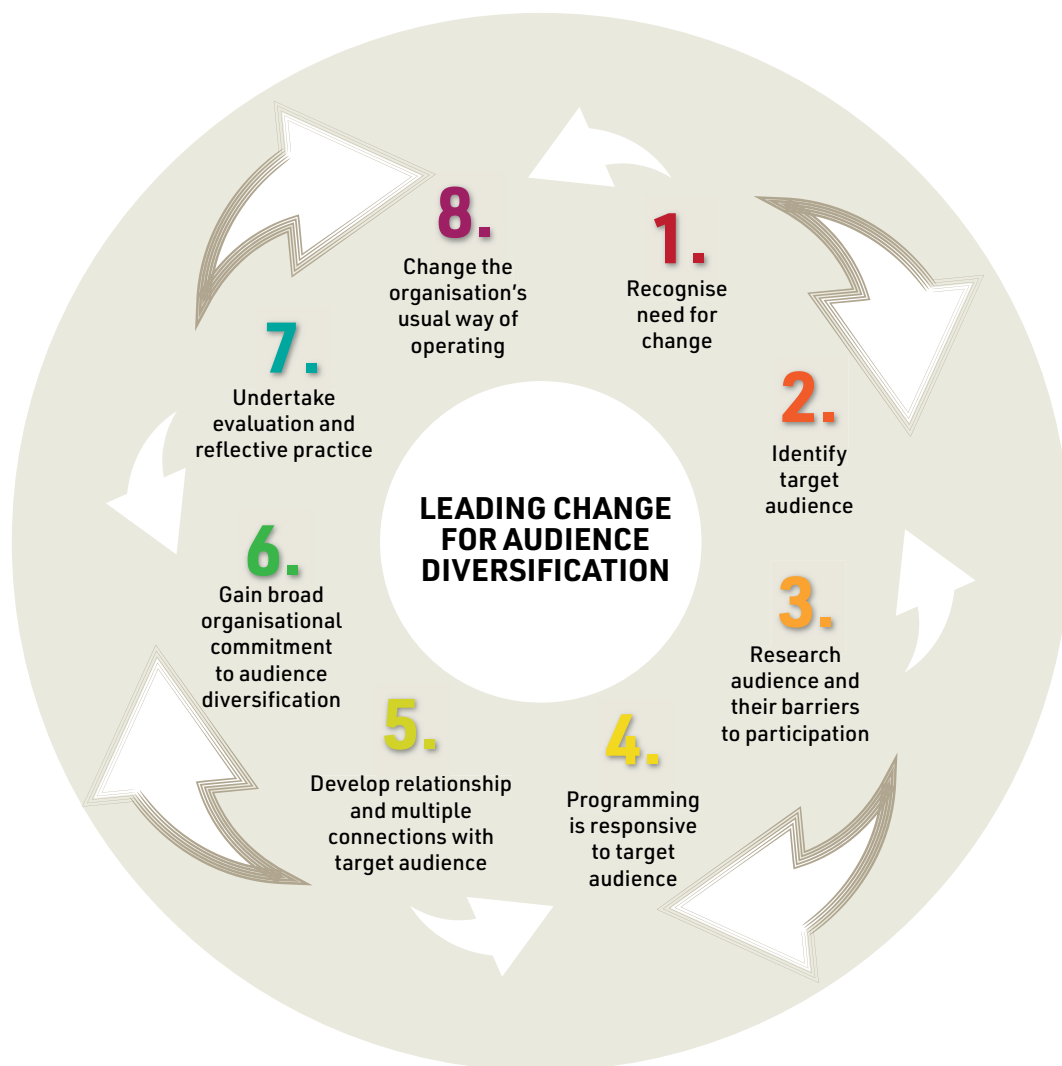
ORGANISATIONAL CHANGE MODEL

Diversifying audiences requires change to the practice of creative organisations. Our research establishes a model for the work arts organisations need to do to change the profile of their audiences. This model identifies eight tasks that lead to more diverse audiences and demonstrates how organisations can be Leaders, Adaptors or Avoiders of this work:

> **LEADERS**: embrace change and are actively programming for new audiences while building networks and connections outside their organisation

> **ADAPTORS**: undertake partial change but have not yet made the changes needed to diversify audiences, focusing instead on programming for known audiences and existing stakeholders

> **AVOIDERS**: ignore or resist change and maintain a commitment to creative production over and above an interest in audiences, prioritising the existing audience to the exclusion of other potential audiences.

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1   Arts Council England, Inc Arts, Creative NZ, Canada Council and LA County Arts have all undertaken research into the lack of diversity.

The cycle diagram shows eight stages arranged in a circle around the central heading:

LEADING CHANGE FOR AUDIENCE DIVERSIFICATION

1. Recognise need for change
2. Identify target audience
3. Research audience and their barriers to participation
4. Programming is responsive to target audience
5. Develop relationship and multiple connections with target audience
6. Gain broad organisational commitment to audience diversification
7. Undertake evaluation and reflective practice
8. Change the organisation's usual way of operating

LEADING CHANGE FOR AUDIENCE DIVERSIFICATION

WORK TO BE DONE	APPROACH TAKEN BY **LEADER** ORGANISATIONS	APPROACH TAKEN BY **ADAPTOR** ORGANISATIONS	APPROACH TAKEN BY **AVOIDER** ORGANISATIONS
TASK 1: Recognise need for change	Need to change the profile of audiences is profound	Desire for change to the profile of audiences is limited	Audiences are perceived to be motivated by the quality of the artistic offering
TASK 2: Identify target audience	Target audience is well defined	Simplistic understanding of the target audience	Target audience is not identified
TASK 3: Research audience and their barriers to participation	Audience research is multifaceted & cross departmental	Audience research handled by the marketing department.	Organisation relies on current assumptions about its audience
TASK 4: Programming is responsive to target audience	Artistic process involves community engagement	'Niche' programming or repurposing of existing program	Business as usual – little or no change to programming
TASK 5: Develop relationship and connections with target audience	Multiple entry points for audiences	Relationship with target audience is limited	Connection with audience chiefly through box office.
TASK 6: Gain broad organisational commitment to audience diversification	Audience diversification is a strategic priority across the organisation	Audience diversification is siloed in one part of the organisation	No strategic commitment to audience diversification
TASK 7: Undertake evaluation and reflective practice	Evaluation of audience development used to drive new practice	Evaluation is used for reporting but not to inform organisational change	Minimal evaluation is undertaken
TASK 8: Change the organisation's usual way of operating	Diversifying audiences means not 'business as usual'	Tokenistic change leading to temporary or short-term outcomes.	No change to organisational practice

Collection of survey data

The team conducted a national survey of arts and cultural organisations in 2022. The survey was informed by previous work with arts and cultural organisations. The research team distributed the survey in partnership with national and state funding bodies (Australia Council for the Arts, Arts ACT, Arts Northern Territory, Arts South Australia, Arts Queensland, Arts Tasmania, Create NSW, Creative Victoria, and Department of Local Government, Sport and Culture WA) and major peak bodies (Arts Access Australia, Australian Museums and Galleries Association, Australian Public Gallery Association, Performing Arts Connections Australia, and Theatre Network Australia).

Arts and cultural organisations were first asked to opt in to the project. A link to an online survey was sent to each organisation to distribute to their team and board.

A total of 184 organisations opted in to the project and 1011 individual survey responses were submitted. Survey responses were received from all publicly funded arts and cultural sectors, and included organisations from all states/ territories along with organisations representing a range of sizes, locations and length of operation. Individuals from a range of organisational departments and various levels of seniority submitted surveys.

An Industry Advisory Group chaired by Wesley Enoch AM provided advice on the design of the survey. The final survey was refined through independent cultural safety and accessibility audits.

Summary of Findings

Evidence of Adaptor behaviour is the predominant finding from this survey. While there is some evidence of Avoider behaviour there was little indication of Leader behaviour in the work needed to diversify arts audiences.

Adaptor behaviour was most evident for all tasks in the organisational change model with the exception of Task 2 (Identify target audience), Task 3 (Research audiences and their barriers to participation) and Task 4 (Program in response to a target audience) where Avoider behaviour was prevalent. Leader behaviour was least evident in all tasks with the exception of Task 1 (Recognise the need for change) where it came second after Adaptor behaviour.

FINDINGS

TASK 1: Recognise the need for change

ORGANISATIONAL CHANGE	LEADER ORGANISATIONS	ADAPTOR ORGANISATIONS	AVOIDER ORGANISATIONS
Recognise need for change	The need to change the profile of audiences is profound	The desire for change to the profile of audiences is limited	Audiences are perceived to be motivated by the quality of the artistic offering
National survey findings	**20%**	**66%**	**15%**

Findings:

LEADERS OF THIS TASK INCLUDE[2]:	AVOIDERS OF THIS TASK INCLUDE:
> Multi-artform (23%) or other organisations (24%) > Small organisations (less than five FTE staff) (24%) > Located in metropolitan/ suburban areas (19%) > Board members (18%) > Upper management (17%) > Marketing/ membership/ fundraising/ development departments (18%)	> Festivals (66%) > Museums/ galleries (58%) > Large organisations (50-99 EFT) (62%) > Artistic delivery departments (50%)

What do Leader organisations do?

> Engage in national and international discussion, and learn about audience diversification

> Subscribe to a range of arts and cultural industry publications, and through an internal discussion of the need for change, provide insights to the team and board.

> Place attention to audience demographics at the centre of their work and are driven by the need to engage new audiences.

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2   See Appendix 2 for a list of the categories used to describe organisations and individual respondents

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TASK 2: Identify target audience

ORGANISATIONAL CHANGE	**LEADER** ORGANISATIONS	**ADAPTOR** ORGANISATIONS	**AVOIDER** ORGANISATIONS
Identify target audience	Target audience is well defined	Simplistic understanding of the target audience	Target audience is not identified
National survey findings	**13%**	**43%**	**44%**

Findings:

LEADERS OF THIS TASK INCLUDE:	**AVOIDERS** OF THIS TASK INCLUDE:
> Multi-artform organisations (26%) > Museums/ galleries (25%) > Technical/ logistic (26%) > Upper management (24%)	> Festivals (34%) > Technical/ logistic (22%) and artistic delivery (20%) departments

What do Leader organisations do?

> Develop a profile or description of new target audiences. (In doing so, they expect people to surprise them and challenge assumptions. They are excited by these challenges.)

> Describe target audiences in detail, acknowledging the diversity and differences within the groups they seek to engage.

Task 3: Research audience and their barriers to participation

ORGANISATIONAL CHANGE	LEADER ORGANISATIONS	ADAPTOR ORGANISATIONS	AVOIDER ORGANISATIONS
Research audience and their barriers to participation	Audience research is multifaceted & cross departmental	Audience research handled by the marketing department	Organisation relies on current assumptions about the audience
National survey findings	**20%**	**39%**	**41%**

Findings:

LEADERS OF THIS TASK INCLUDE:	AVOIDERS OF THIS TASK INCLUDE:
> Museums/ galleries (27%) > Artistic delivery departments (26%)	> Festivals (53%) > Museums/ galleries (48%) (noting also the high number of Leaders) > Artistic/ creative development departments (46%) > Upper artistic (53%) or operational (51%) level staff

What do Leader organisations do?

> Acknowledge and respect that many people are not engaged with the artform and program. Assume responsibility for this situation lies with the sector—not those who don't attend.

> Look outside the organisation for new knowledge and solutions to this problem. Challenge the organisation to be more relevant and accessible to the target audience. Respect their communities and value their priorities.

> Acknowledge the complex barriers to engaging in the arts and look for new and innovative solutions to the challenges audiences face.

TASK 4: Programming is responsive to target audience

ORGANISATIONAL CHANGE	LEADER ORGANISATIONS	ADAPTOR ORGANISATIONS	AVOIDER ORGANISATIONS
Programming is responsive to target audience	Artistic or curatorial process involves community engagement	New 'niche' programming or repurposing of existing program	Business as usual – little or no change to programming
National survey findings	**8%**	**37%**	**55%**

Findings:

This task identifies the behaviour that Australian arts and cultural organisation find challenging, scoring both the highest level of Avoiders (55%) and lowest level of Leaders (8%).

LEADERS OF THIS TASK INCLUDE:	AVOIDERS OF THIS TASK INCLUDE:
Leaders of this task were not evident as a category.	> Orchestras/ opera (76%) > Venues (64%) > Large organisations (50-99 EFT) (67%) > Technical/ logistic (75%) and artistic delivery (70%) departments > Operational level staff (67%)

What do Leader organisations do?

> Ensure their artistic team shares responsibility for audience diversity. Consider the impact of organisational change on every aspect of your programming.
> Invite community representatives to have input into programming decisions and respect the advice given.
> Be willing to share programming control and decision making with people other than an artistic director or curator.

TASK 5: Develop relationship with target audience and build multiple connections

ORGANISATIONAL CHANGE	LEADER ORGANISATIONS	ADAPTOR ORGANISATIONS	AVOIDER ORGANISATIONS
Develop relationship with target audience and build multiple connections	Multiple entry points to the organisation for audiences	Relationship with target audience is limited	Connection with audience is chiefly through box office.
National survey findings	**15%**	**55%**	**30%**

Findings:

LEADERS OF THIS TASK INCLUDE:	AVOIDERS OF THIS TASK INCLUDE:
> Theatre companies (23%) and festivals (22%) > Board/ governance members (21%) > Large (50-99 EFT) (19%) and medium (6-20 EFT) (17%) sized organisations > Regionally or remotely located organisations (19%)	> Orchestra/ operas (40%) and dance companies (39%) > Artistic delivery departments (51%) > Operational level staff (50%)

What do Leader organisations do?

> Work with cultural intermediaries/ brokers who bring different connections or networks. Ensure the organisation is a safe space for these intermediaries.

> Treat the communities they seek to engage with respect and work with them as equals. Allow community advice to influence all aspects of the organisation's operations.

> Look outside their organisational structures for knowledge and ideas needed to engage new and more diverse audiences

TASK 6: Gain broad organisational commitment

ORGANISATIONAL CHANGE	LEADER ORGANISATIONS	ADAPTOR ORGANISATIONS	AVOIDER ORGANISATIONS
Gain broad organisational commitment	Audience diversification is a strategic priority across the organisation	Audience diversification is siloed in one part of the organisation	No strategic commitment to audience diversification
National survey findings	**19%**	**39%**	**43%**

Findings:

LEADERS OF THIS TASK INCLUDE:	AVOIDERS OF THIS TASK INCLUDE:
> Dance companies (25%) and other artforms (24%) > Upper management (33%) > Finance/ administration/ governance/ strategy departments (26%)	> Orchestra/ operas (52%) > Venues (50%) > Artistic delivery and technical/ logistics departments (both 67%) > Organisations located in metropolitan/ suburban areas (48%) > Operational level staff (65%)

What do Leader organisations do?

> Ensure the planning, implementation and evaluation of audience diversification commitments involve team members from across the organisation. Include staff from various departments and levels of seniority in this work as well as board members.

> May establish a cross organisational working group/ steering committee focused on audience diversification. Community stakeholders from outside the organisation may play a valuable role in these working groups/ steering committees.

> Don't limit responsibility for audience diversification within one department or job role. Instead every aspect of the organisation is involved in thinking about audiences and undertaking audience-centric practice.

TASK 7: Undertake evaluation and reflective practice

ORGANISATIONAL CHANGE	LEADER ORGANISATIONS	ADAPTOR ORGANISATIONS	AVOIDER ORGANISATIONS
Undertake evaluation and reflective practice	Evaluation of audience development used to drive new practice	Evaluation is used for reporting but not to inform organisational change	Minimal evaluation is undertaken
National survey findings	**22%**	**54%**	**24%**

Findings:

This task identifies the behaviour that Australian arts and cultural organisation are most likely to undertake, recording both the highest level of Leader organisations (22%) and the second lowest level of Avoiders (24%).

LEADERS OF THIS TASK INCLUDE:	**AVOIDERS** OF THIS TASK INCLUDE:
> Festivals (32%) and dance companies (29%) > Staff in middle management (34%) > Artistic/ creative development departments (31%)	> Venues (39%) > Orchestra/ opera (37%) > Artistic delivery departments (50%) > Organisations located in regional/ remote areas (33%)

What do Leader organisations do?

> Commit to evaluation that is directly aligned with the organisation's audience diversification aims. Use this evaluation in a process of continuous improvement – designing and implementing new projects on the basis of what has been learnt from reflection of previous initiatives.

> Make sure staff and board are aware of the findings of evaluation. Don't use evaluation solely for the purpose of reporting to funding bodies.

> Undertake evaluation and reflective practice in order to learn from this knowledge, not just for reporting or advocacy to funding bodies. Insights gained from evaluation and reflective practice are used to make changes to the way the organisation operates.

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TASK 8: Change the organisation's usual way of operating

ORGANISATIONAL CHANGE	LEADER ORGANISATIONS	ADAPTOR ORGANISATIONS	AVOIDER ORGANISATIONS
Change the organisation's usual way of operating	Diversifying audiences means more than 'business as usual'	Limited change leading to temporary or short-term outcomes.	No change to organisational practice
National survey findings	**15%**	**61%**	**25%**

Findings:

LEADERS OF THIS TASK INCLUDE:	AVOIDERS OF THIS TASK INCLUDE:
> Multi-artform (23%) > Staff at upper artistic levels (23%) > Organisations located in metropolitan/ suburban areas (21%)	> Venues (48%) > Artistic delivery departments (39%) > Located in regional/ remote areas (33%)

What do Leader organisations do?

> Commit to audience diversification work in their strategic and operational plans. Ensure these commitments are implemented rather than remain as an organisational aspiration.

> Make sure new ways of working are directly aligned with the practice needed to diversify audiences and expect this to lead to changes in operations, programming and outcomes.

> Make audience diversification a core priority that drives all decision making and resource allocation. Audience diversification is not only supported but implemented in all operational and strategic commitments.

Next project phase: Community of Practice

The national survey provides a valuable description of work done to diversify arts audiences according to our eight-task organisational change model. It identifies strengths and weaknesses in the current practice of arts and cultural organisations.

The second phase of this project involves working closely with arts organisations and change experts to understand how the change model can be used. Arts and cultural organisations from across Australia will collaborate with a panel of change agents to investigate ways of working differently in order to engage new and diverse audiences.

Insights from this Community of Practice can be used to produce sector development resources that encourage more organisations to undertake the practice needed to diversify audiences.
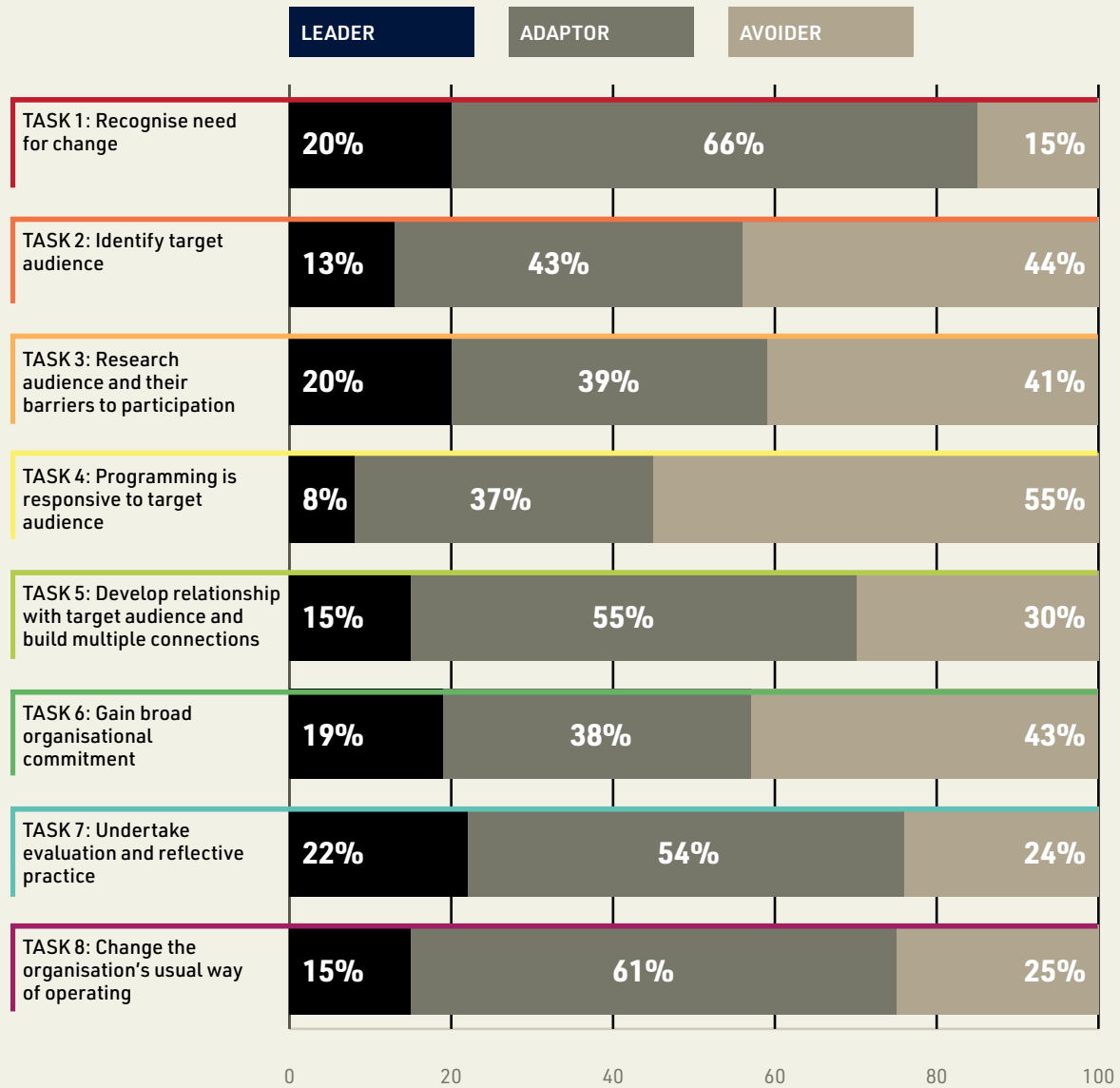
For more information and to follow this research please visit:
Leading Change: Audience Diversification in the Arts (deakin.edu.au)
https://blogs.deakin.edu.au/audience-diversification/

APPENDIX 1:
SUMMARY OF NATIONAL SURVEY FINDINGS

	LEADER	ADAPTOR	AVOIDER

	LEADER	ADAPTOR	AVOIDER
TASK 1: Recognise need for change	20%	66%	15%
TASK 2: Identify target audience	13%	43%	44%
TASK 3: Research audience and their barriers to participation	20%	39%	41%
TASK 4: Programming is responsive to target audience	8%	37%	55%
TASK 5: Develop relationship with target audience and build multiple connections	15%	55%	30%
TASK 6: Gain broad organisational commitment	19%	38%	43%
TASK 7: Undertake evaluation and reflective practice	22%	54%	24%
TASK 8: Change the organisation's usual way of operating	15%	61%	25%

0   20   40   60   80   100

APPENDIX 2:
DESCRIPTIONS OF CATEGORIES USED IN SURVEY

Survey responses were grouped according to characteristics of organisations and individual respondents. These categories were informed by the need for meaningful comparison.

Organisational characteristics

Artform

> Dance
> Festivals
> Galleries and museums [including galleries, museums and visual arts studios]
> Multi-Artform
> Opera and Classical music [including opera company and orchestra/ music ensemble]
> Theatre company
> Venue [including venues that present and/ or produce work]
> Other include the remaining categories [circus/ physical theatre, emerging experimental, community cultural development and literature/ writing]

Size is based on full time equivalent

> 0-5
> 6-20
> 21-49
> 50-99
> 100+

Location

> Capital city/ CBD
> Metropolitan/ suburban
> Regional/ Remote

Individual respondent characteristics

Department

> Artistic/ creative development
> Technical/ logistic
> Artistic delivery [including artistic /creative delivery and education]
> Finance/ admin/ governance/ strategy [including finance/ administration/ governance, strategy/ planning and creative/ administrative/ strategic]
> Marketing/ membership/ fundraising/ development [including marketing, engagement, membership/ subscribers, fundraising/ development, FOH/ ticketing]

Seniority

> Board/ Governance
> Upper artistic/ curatorial (for example, artistic or creative director)
> Upper management (for example, CEO, CFO or general manager)
> Middle management (for example, producer, production manager, director, marketing manager, or ticket office manager)
> Operational (for example, assistant producer, technical coordinator, costume coordinator, artist, or curator)

APPENDIX 3:
INDUSTRY ADVISORY GROUP

Wesley Enoch AM (Chair)
Seb Chan
Catherine Jones
John Nolan
Veronica Pardo
Jamie Lewis
Jeremy Smith
Fayen d'Evie
Peter Ross
Gaelle Melis (2023)
Michelle Ryan (2022)

APPENDIX 4:
PROJECT PARTNERS INVOLVED IN SURVEY DISTRIBUTION

Australia Council for the Arts
Arts ACT
Arts Northern Territory
Arts South Australia
Arts Queensland
Arts Tasmania
Create NSW
Creative Victoria
Department of Local Government, Sport and Culture WA

Arts Access Australia
Australian Museums and Galleries Association
Australian Public Gallery Association
Performing Arts Connections Australia
Theatre Network Australia

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