



PATTERNMAKERS



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Queensland Snapshot

Audience Outlook Monitor



Queensland
Government

Executive Summary

QLD audiences are attending in high numbers, but confidence may fluctuate as conditions change

- ▶ Data from 1,515 past attendees of Queensland (QLD) arts organisations suggests that confidence levels will be changing rapidly as we approach the end of 2021.
- ▶ Current attendance rates are high (76%) and in early November most QLD audiences said they were ready to attend whenever permitted (73%).
- ▶ While most audience members (83%) were actively making plans to attend cultural events, these plans were more likely to be concentrated in the short-term. Many audience members are conscious that relaxed border restrictions could lead to a rise in cases - with QLD passing its first reopening milestone on 14 November 2021.
- ▶ Unlike the outbreak-affected states of NSW, ACT, and VIC, which have had more time to grow used to 'living with the virus', QLD audiences are anxious about the prospect of widespread community circulation and news of new variants could challenge confidence.
- ▶ QLD arts audiences are getting vaccinated at a faster rate than the state-wide population, reaching 92% fully vaccinated in November. Most audiences are at least somewhat confident that vaccination will allow 'normal' events to resume (91%, up from 87% in July), and uptake of booster shots will help maintain confidence (3% have already had one booster shot).
- ▶ When QLD audiences were presented with a 'COVID-normal' scenario of 90%+ vaccination coverage and open borders, they indicated that comfort levels could fall slightly for venues like museums and galleries (-11%) and outdoor events (-7%), but increase for venues like comedy clubs and live music venues (+8%).

COVID-safety will be critical for maintaining confidence as QLD opens its borders

- ▶ Compared to the mid-year results (July 2021), QLD audiences are less likely to be inhibited from attending cultural events in future by the risk of lockdowns (40%, down from 50%) and more likely to be concerned with risks of transmission (45%, up from 35%).
- ▶ The results confirm that COVID-safety measures will play a pivotal role in stabilising confidence as QLD opens its borders and Australia faces the prospect of new variants.
- ▶ Most arts audiences are likely to be in favour of QLD's new vaccine passport policies for arts venues such as live music venues, theatres, festivals and government-owned galleries - with 69% encouraged by proof of vaccine requirements and only 13% discouraged.

- ▶ In fact, some audiences say these measures would need to be in place for them to consider attending. 2 in 5 won't attend some cultural spaces unless proof of vaccination is required, including large theatres and concert halls (44%) and outdoor events (41%).
- ▶ Despite recent changes to mask mandates in QLD, with masks no longer required at most indoor venues, 6 in 10 (61%) are encouraged by requiring audiences over 12 to wear masks, and 44% of QLD audiences would need mask mandates to be in place to attend a large theatre or concert hall.

Audiences want to show loyalty, and are 'looking local' to support the recovery effort

- ▶ QLD organisations have cultivated audience loyalty over the difficult past two years - with pandemic hardship highlighting the importance of arts and culture.
- ▶ The outlook for loyalty programs is more positive in 2022, with half of audiences (49%) indicating they are at least somewhat likely to purchase a subscription or membership for next year.
- ▶ As people weigh up the risks of attending amid further uncertainty, 80% of QLD audiences agree that they'll be attracted to events in their local area over the next year.
- ▶ An increasing number of audiences say they will be interested in 'light-hearted programs' (43%, up from 35% in July) - with some seeking escapism and uplift after the cumulative impacts of the pandemic.

QLD audiences are increasingly likely to see online arts and culture playing a long-term role in their lives

- ▶ After several quarters of declining online participation, digital engagement has increased slightly for QLD audiences - from 37% in July 2021 to 42% in November.
- ▶ Despite reports of 'screen fatigue', overall QLD audiences are significantly more likely to see an ongoing role for digital arts experiences in their lives (69%) compared to July (47%).
- ▶ Audiences can be divided into three groups for the purposes of marketing digital arts experiences: 'digital devotees,' the 21% of audiences who see a substantial role for digital in their lives, 'selective but supportive' audiences, the 48% who see a small role, and 'tired of tech' audiences, the 31% of audiences who see no role at all outside of lockdown.
- ▶ Many audiences support hybrid models that offer greater flexibility and accessibility as we transition to a 'COVID-normal' Australia. When asked if they would attend a digital program in place of a cancelled live event, 28% of QLD audiences said they would be likely to attend.
- ▶ It is clear that digital marketing and online experiences are playing a key role in keeping audiences engaged with arts organisations as uncertainty continues.

Introduction

This report summarises insights from over 1,500 audience members in Queensland

This Queensland (QLD) Snapshot Report outlines key findings from the November 2021 phase of the Audience Outlook Monitor in Australia (Phase 6), based on data collected from 1,515 audience members connected with organisations in Queensland.

Launched in May 2020, the study is tracking audience sentiment in relation to the COVID-19 pandemic. Each phase involves a cross-sector collaborative survey process involving over 100 arts and culture organisations, including museums, galleries, performing arts organisations and festivals.

On 3 November 2021, participating organisations simultaneously sent the Phase 6 survey to a random sample of their audience – defined as those who had attended an arts or cultural event in person since January 2018.

This report compares new results with data collected previously in July 2021 (Phase 5) and October 2021 (Pulse Check), to examine how things are changing over time.

In addition to this Snapshot Report, the November 2021 results are accessible in a free interactive dashboard. Users can explore the data for different artforms, types of events and demographic groups in all parts of Australia. For more information about the study, and to access resources such as the dashboard, visit: www.thepatternmakers.com.au/covid19.

Terminology

At the time of data collection (3–7 November 2021), outbreak conditions varied significantly by jurisdiction: New South Wales (NSW), Victoria (VIC) and Australian Capital Territory (ACT) were transitioning out of extended lockdowns, while in the rest of the country, audiences were enjoying minimal restrictions.

The three outbreak-affected states/territories of NSW, VIC and ACT (referred to in this report as **'outbreak-affected states'**) share similar trends – and are grouped together, where relevant, for reporting purposes. However, it should be noted that ACT audiences tend to be slightly less tolerant of risks than audiences in NSW and VIC.

States/territories across the **'rest of Australia/rest of the country'** – QLD, South Australia (SA), Western Australia (WA), Northern Territory (NT) and Tasmania (TAS) – also share many similarities, with border closures helping to suppress the virus and minimise risks for audiences. These jurisdictions are also grouped together in places –

noting that confidence levels in WA tend to be higher than in SA and QLD, where border restrictions were beginning to lift at the time of publication.

Read on for the key November 2021 findings in QLD.

Current conditions

Vaccination rates among arts audiences in QLD continue to climb

As of 7 November 2021, 92% of QLD arts audiences say they are now fully vaccinated (up from 83% of QLD audiences in October) with another 3% partially vaccinated (down from 11%) – as shown in Figure 1. Among those fully vaccinated, 3% have had a booster shot.

The proportion fully vaccinated has increased significantly since July 2021, when 23% of audiences were fully vaccinated and 49% had received their first dose.

QLD arts audiences continue to take up opportunities to be vaccinated faster than the state-wide population – with around 75% fully vaccinated at the time of this report's publication.

Of the 5% of audiences who are not vaccinated, 1% say they probably or definitely will get vaccinated, suggesting that vaccine supply issues have now largely been addressed for those audiences participating in the study. Around 4% say they will probably or definitely not get the COVID-19 vaccine.

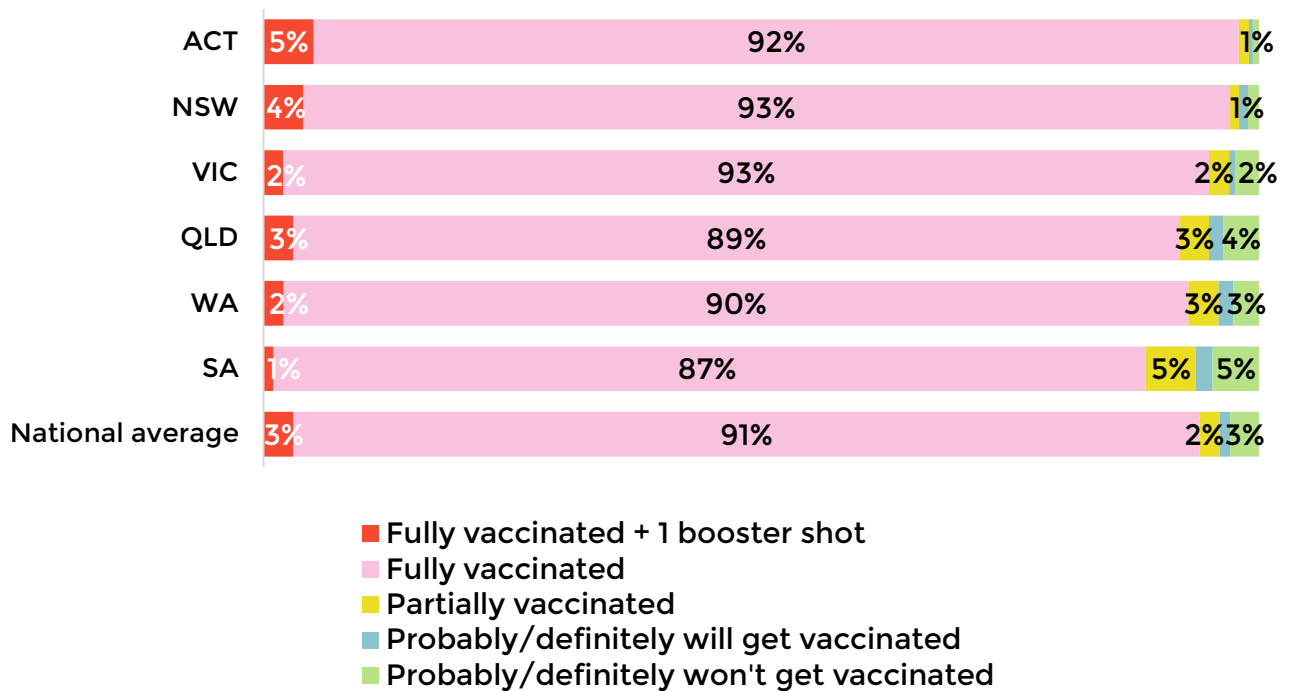
Shortly after data collection, QLD joined other states in introducing vaccine requirements for a number of cultural venues, including live music venues, concerts, theatres, cinemas, festivals and government-owned galleries and museums. These restrictions will come into effect when QLD reaches a vaccination rate of 80% (estimated to be 17 December). These restrictions [reportedly saw vaccine uptake increase by 16% in the week they were announced](#) – and may further influence the decisions of audience members.¹

Vaccination rates vary by state, with uptake in QLD lower than that in outbreak-affected states like the ACT and NSW (97% fully vaccinated) but leading among the rest of the country, along with WA (92% fully vaccinated) and ahead of SA (88% fully vaccinated).

¹ “Queensland's COVID-19 vaccinations rise after restrictions for the unvaccinated announced, no new cases recorded,” ABC News, 16 Nov 2021, from: <https://www.abc.net.au/news/2021-11-16/qld-coronavirus-covid-vaccination/100621222>

Vaccination rates also increase with age, with 97% of QLD audiences aged 75+ fully or partially vaccinated, compared to 88% of audiences under 35 and 89% of audiences aged between 35 and 54.

Figure 1: Proportion of audiences who are vaccinated, November 2021, by state/territory (n=7,484)



QLD audiences are increasingly optimistic that vaccination will allow normal activities to resume

Compared to July 2021, QLD audiences are more confident that vaccination will allow normal activities to resume within a year. 2 in 5 (41%, up from 28% in July) are very confident in the vaccine effort, and only 9% (down from 13%) are not confident at all.

However, confidence in the success of the vaccination program tends to be lower than in the outbreak-affected states of NSW (47% very confident), VIC (45% very confident) and the ACT (45% very confident) – where vaccine rates are higher and audiences have had longer to acclimatise to the idea of a ‘COVID-normal’ world.

In QLD, which has seen contained outbreaks of a shorter duration, audiences are somewhat more uncertain – particularly where the opening of borders is concerned. One audience member said,

‘In QLD we are complacent – vaccination rates need to rise for community safety. We WILL have a surge in cases once our borders are open.’



Audience comfort in QLD is consistent with pre-Delta levels, but changing conditions may have an impact

Audience comfort in QLD is in something of a state of flux right now. Although audiences mostly feel safe and comfortable at present, confidence is likely to be impacted by risk factors like the opening of interstate and international borders.

After disruptions caused by countrywide outbreaks of the Delta strain in July, QLD audience confidence has returned to pre-Delta levels, and the majority of audiences are ready to go ‘now or as soon as it is permitted’ (73%, similar to 72% in March).

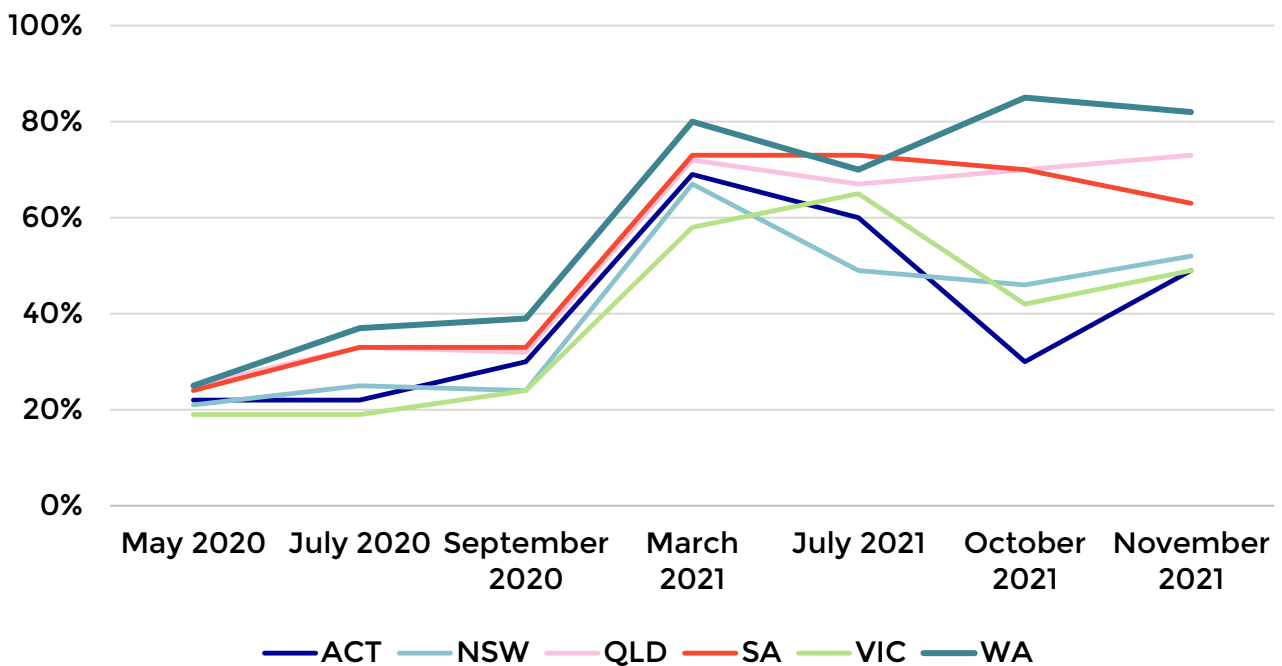
However, with QLD passing its first reopening milestone and opening its borders to fully vaccinated travellers, subject to home quarantine, on November 14th, audience comfort is likely to continue to waver. One QLD audience member said,

‘Once the borders reopen, my level of caution will definitely be increased.’

Another said,

‘It has been proven that international and interstate border restrictions have kept QLD relatively safe from COVID-19. Opening up puts us at risk when we’re out enjoying our city.’

Figure 2: Proportion of audiences who are ‘ready to attend now or as soon as permitted’, by state/territory, May 2020 to November 2021 (n=7,637)



QLD audiences are equally, if not more, comfortable with arts attendance than other public activities

In a positive sign for arts and cultural venues, QLD audiences are equally, if not more, likely to be 'very comfortable' with arts attendance than with many other public activities.

The majority of QLD audiences feel very comfortable at museums and galleries (79%), outdoor events with fixed seating (79%), community art spaces (66%) and large theatres and concert halls (65%). There are only a few venues where less than two-thirds of audience members feel comfortable: outdoor events without fixed seating (51%), comedy clubs/live music venues (29%) and hands on exhibits (26%).

By contrast, while most QLD audience members feel very comfortable eating at a local restaurant or bar (81%) or going to a local cinema (65%), only around half are very comfortable exercising at a gym (46%), attending a sporting event (48%), using public transport (53%). Even smaller numbers feel very comfortable flying domestically on a commercial airline (37%).

Live attendance

Attendance patterns are normal right now, but booking behaviours suggest QLD audiences are uncertain about the future

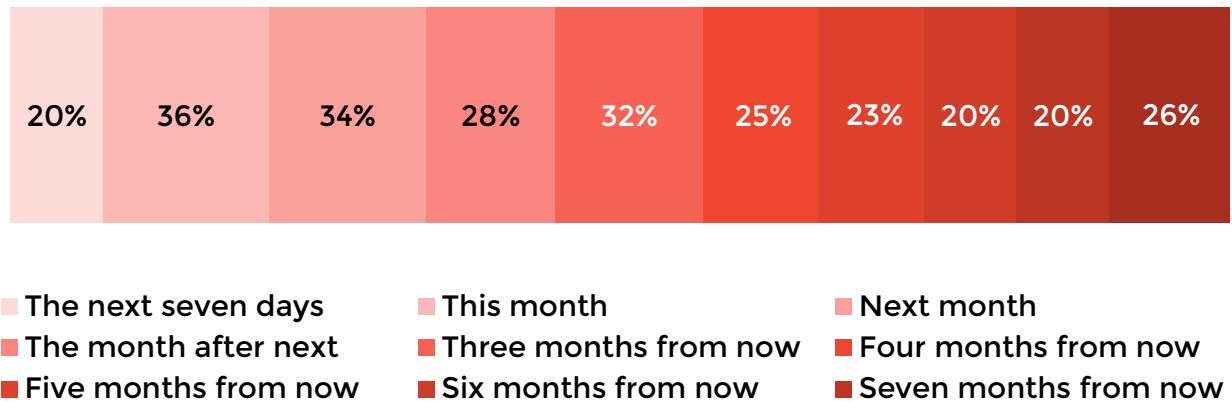
When asked about their attendance behaviours in the fortnight before data collection, 76% of QLD audiences reported they had attended an in-person arts or cultural event. This proportion is higher than pre-Delta levels, with 69% of QLD audiences attending in March.

In a promising sign for attendance, 8 in 10 (83%) of QLD audiences also reported making plans for in-person attendance in the future.

However, most of these plans are in the short-to-mid-term, with most bookings for events this month (36%), December (34%), January (28%) or February (32%) – as shown in Figure 3.

Relatively fewer bookings are made in the long term – which may reflect the availability of events, but could also suggest that audiences are more uncertain about attendance in the far future. Compared to the earlier months, smaller proportions of QLD audiences are booking for March (25%), April (23%), May (20%), June (20%) and July (26%).

Figure 3: In the past fortnight, did you purchase tickets for one or more live shows or performances that are scheduled for...? QLD (n=632)



Audiences are cautious of the risk of transmitting the virus or being a close contact and needing to isolate

When asked what would prevent them from attending arts and cultural events in the next year, QLD audiences were most likely to name the risk of contracting or transmitting the virus (45%, up from 35% in July 2021) as their primary concern, as shown in Figure 4.

Given that the prospect of attending events while cases are active in the community is a new one for many QLD audiences, audiences are understandably wary about the risks arising from virus circulation.

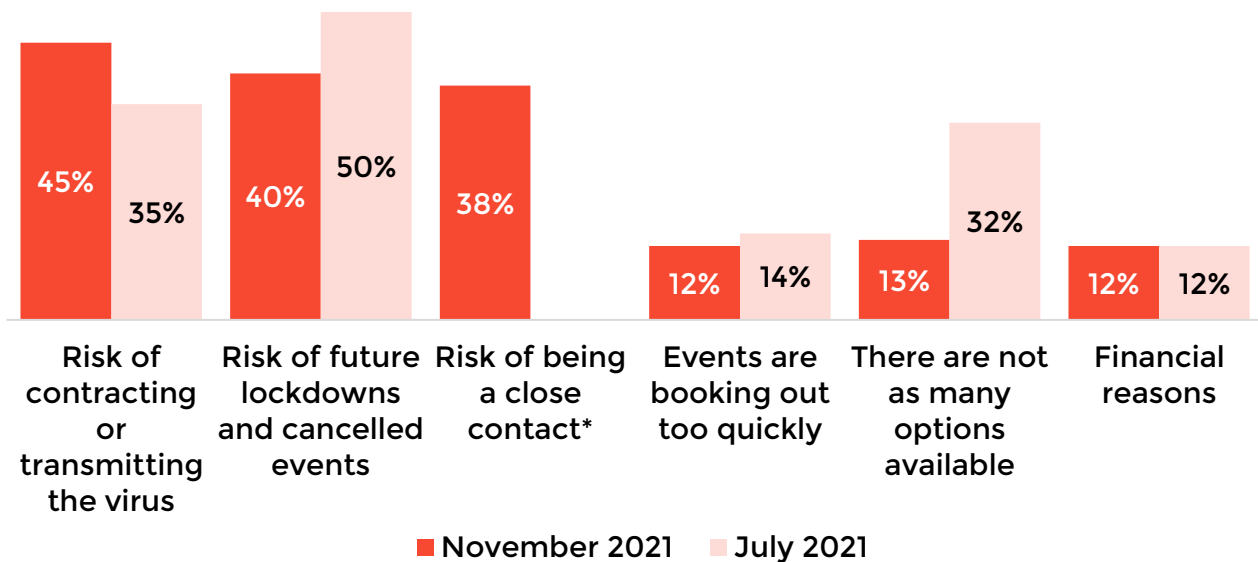
One audience member said they were unlikely to attend 'if there was a sharp rise in the number of COVID cases in the city', while another said they will be 'cautious about large crowds.'

Another 4 in 10 QLD audience members (38%) were concerned with the risk of being a close contact and needing to isolate. One audience member shared a particular concern about venturing far from home, saying,

'I'm happy to lockdown in my own home, but I don't want to get caught in another location and have to isolate there.'

While still a major barrier to attendance, the risk of lockdowns and cancelled events has decreased in importance since July (40% in November, down from 50%). Audiences were also much less likely to report being prevented from attending because there were 'not as many options available' – only 13% of audiences as opposed to 32% in July.

Figure 4: Proportion of QLD audiences who say these factors will prevent them from attending in-person arts and culture events as they used to in the past, July 2021 (n=1,586) and November 2021 (n=1,472)



*Option introduced in Phase 6 - no historical comparison available

Outlook for comfort levels

Conditions in QLD are changing rapidly, and will continue to do so over the next few months, when borders open and vaccine mandates are introduced for various arts venues. To understand how readiness to attend may change, audiences were asked to consider a hypothetical 'COVID-normal' scenario for attending events in which the following conditions were in place:

- ▶ interstate and international borders are open
- ▶ at least 90% of the population over 12 is vaccinated
- ▶ proof of vaccination or a negative test result is required at entry
- ▶ seated venues are operating at 100% capacity

Reaching 'COVID-normal' will dramatically improve comfort to attend live music and use interactive exhibits

Responses to the 'COVID-normal' scenario were mixed, with high vaccine coverage competing with risk factors like the opening of borders and removal of capacity limits.

On the one hand, many audience members anticipate that a scenario like this would see QLD exposed to unprecedented levels of the virus.

One said,

‘I foresee that when this occurs COVID-19 will obviously be much more prevalent in QLD. Whilst I am vaccinated, this will still lower my comfort level.’

Others, however, felt that the hypothetical 90%+ vaccination rate, which is significantly higher than QLD’s existing coverage, would give them the confidence to attend. One said,

‘Vaccination rates will influence my decision and comfort level far more than other attempts at preventative measures such as masks and capacity restrictions.’

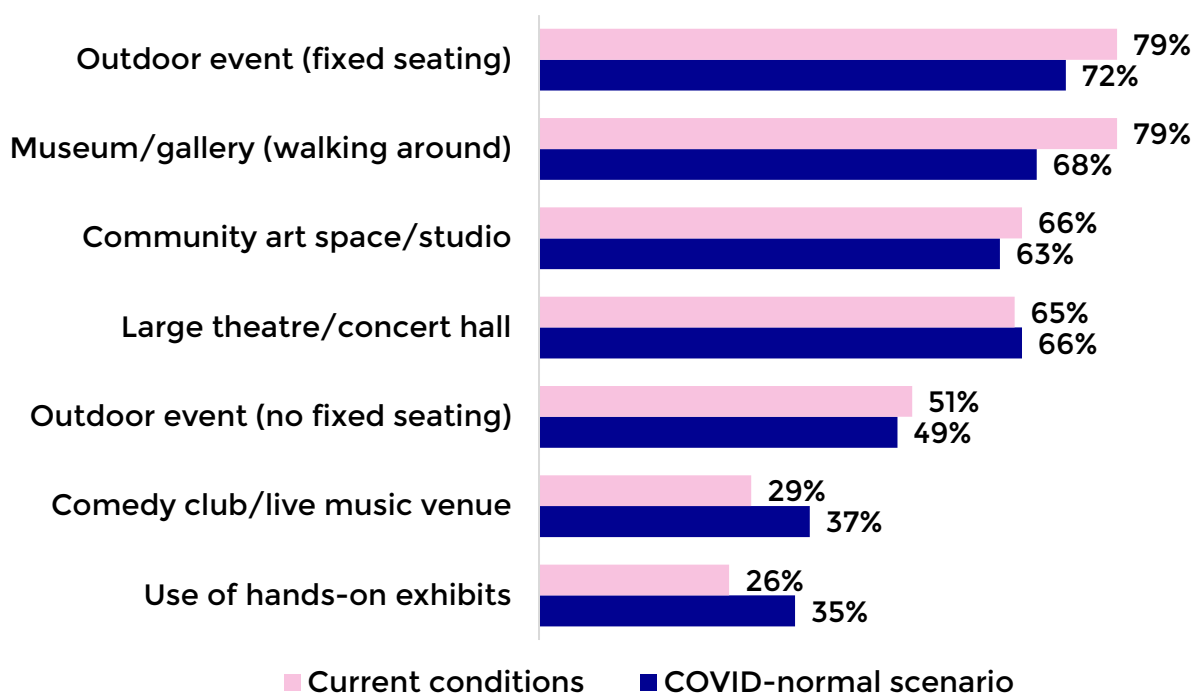
Another said,

‘With the above all in place, there is no reason not to feel comfortable. What more do we need?’

On average, comfort decreased for previously ‘high-comfort’ venues like museums/galleries (-11% very comfortable) and outdoor events with fixed seating (-7%), but remained relatively stable for large theatres and concert halls (+1%), community art spaces (-3%) and outdoor events without fixed seating (-2%) – as shown in Figure 5.

In contrast, comfort increased for ‘low-comfort’ venues like comedy clubs and live music venues (+8%) and hands-on exhibits (+9%). This data suggests that reaching ‘COVID-normal’ will be hugely beneficial for QLD’s contemporary music sector and other forms of attendance such as participatory and interactive events.

Figure 5: Proportion of QLD audiences 'very comfortable' attending selected cultural venues in current conditions and COVID-normal scenario, November 2021 (n=1,479)



Some audience members expressed that they had difficulty imagining how they would feel in this scenario, given that they have not faced high cases of COVID-19 before – and that their behaviour would be contingent on case numbers or the extent of the virus. One QLD audience member said,

'I'm not going to be comfortable until I see what happens with case numbers in that scenario. If they spike I'm staying home!'

Another said,

'No change to my level of comfort now or in the foreseeable future. Although this may vary depending on whether COVID cases were to increase once borders open. Currently I see no risk.'

Some audience members remain uncertain about how the vaccination effort will proceed in the long term

While high vaccination coverage is an important aspect of this 'COVID-normal' scenario for most QLD audiences, some are conscious of factors that could complicate the vaccination effort – such as the risk of new variants, breakthrough infections, or complications caused by existing health vulnerabilities. One said,

‘While somewhat confident, I don't believe vaccination is the total panacea to ending the pandemic. I believe we will still need sharp strict lockdowns, mandated mask wearing as additional pieces to combating the pandemic or outbreaks of COVID.’

While one said,

‘We know too little still about COVID and any future variants and the duration of effectiveness of the current vaccines to be able to say with accuracy what the future holds. Already we have seen people make hopeful predictions about "over in a year", "80% of adults will give us herd immunity", "kids don't seem to get it", all of which have been shown to be untrue overseas.’

Some audiences are adopting a ‘wait and see’ approach, saying,

‘It is an evolving situation, nobody has a crystal ball. Taking it bit by bit at the moment.’

Another said,

‘We will need at least the next 12 months for the vaccination effort to make a difference. The opening of borders (domestically and internationally) will also impact resumption to normal.’

COVID-safety

The most widely encouraging COVID-safety measures are check-ins and proof of vaccination

With a degree of uncertainty persisting, it is clear that COVID-safety will be critical for maintaining confidence.

When asked about a list of potential COVID-safety measures at cultural venues, most QLD audiences say they would feel encouraged to attend by the majority of safety measures. Their feedback confirms the role of COVID-safety in the recovery process.

The largest proportion of audiences said they would be encouraged by requiring check-ins upon arrival (81%, down from 86% in October) – as shown in Figure 6.

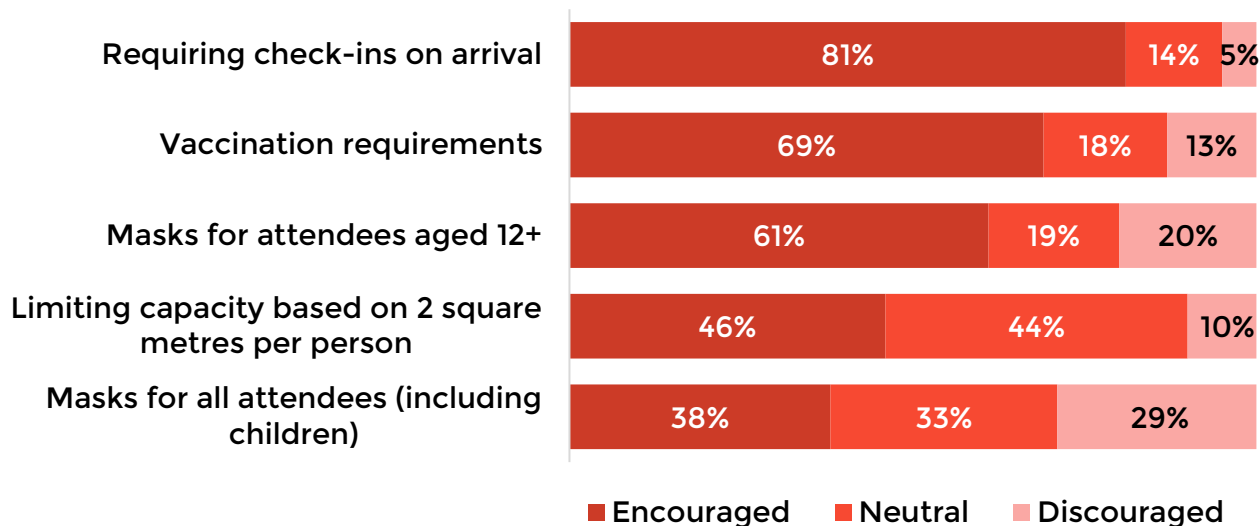
The next most widely encouraging COVID-safety measure was proof of vaccination required at entry (69%). Support for this measure had increased slightly since October, up from 66%.

In spite of the debate surrounding vaccine passports, only 13% of audiences (up from 10% in October) say this measure would discourage them from attending – a positive sign considering the upcoming implementation of vaccine passports at many QLD arts

venues. This proportion was slightly higher than in outbreak-affected states like NSW (5%) and the ACT (6%), but on par with SA (13%).

Audiences feel more neutral about social distancing guidelines, with 46% saying they feel encouraged by limiting capacity based on 2 square metres per person and another 44% feeling neutral.

Figure 6: How much would each of the following steps discourage or encourage you to attend? QLD audiences, November 2021 (n=1,479)



QLD audiences are mostly in favour of mask mandates, and recent changes to mask-wearing rules are likely to make some audiences apprehensive

Significant proportions feel encouraged by mandating face masks for people aged 12 and over (61%, down from 63% in October), while 1 in 5 (20%) would be discouraged.

Some audience members say that mask-wearing detracts from their enjoyment of the event, with one saying,

'I'm very sensitive to touch and have very sensitive skin (unable to wear jewellery, certain fabrics, etc.) so wearing a mask is like torture. I avoid going out not because of the virus, but because I have to wear a mask.'

After reaching its 80% first-dose vaccination target, QLD removed mask requirements at most indoor venues on 10 November, shortly after data collection – a change which is likely to make some audiences apprehensive.

When asked about what measures absolutely need to be in place for them to attend a large theatre or concert hall, almost half of QLD audiences say the requirement to wear a mask (44%). Another 27% would need mask mandates to be in place to attend

an outdoor event, and the removal this of requirement could present a challenge to confidence levels. One audience member said,

‘I’m comfortable in a theatre if people are generally wearing a mask – I was surprised at how comfortable and happy I was in the Lyric Theatre in Brisbane with a full house, but everyone was wearing a mask.’

Another said,

‘I would not attend any event in Brisbane without a mask for another 12 months minimum indoor or outdoor.’

Mask mandates for children continue to be polarising among QLD arts audiences

While the majority of QLD audiences would feel encouraged by mask mandates for people aged 12 and over – with some even considering the removal of mask mandates a ‘dealbreaker’ for attendance – when enforced for all children, audiences are polarised.

Around a third of QLD audiences (38%) are encouraged by masks for all ages and 3 in 10 (29%) would find masks for all ages including children discouraging – the largest proportion discouraged by any COVID-safety measure. One-third (33%) feel neutral about this measure.

The proportion discouraged by masks for all ages has increased from 23% in October.

QLD parents were, understandably, the most likely to take issue with this measure, with 40% saying it would discourage them from attending.

Around half of QLD audiences won’t attend indoor venues unless proof of vaccination is required at entry

When asked whether any COVID-safety measures absolutely need to be in place to attend a large theatre or concert hall, the largest proportion of QLD audiences said check-ins (72%) and fixed seating arrangements (54%) – as shown in Figure 7.

Almost half (44%) of audiences won’t attend without proof of vaccination requirements – and are likely to be in favour of recent policy changes to mandate vaccine passports at many arts venues.

One audience member said,

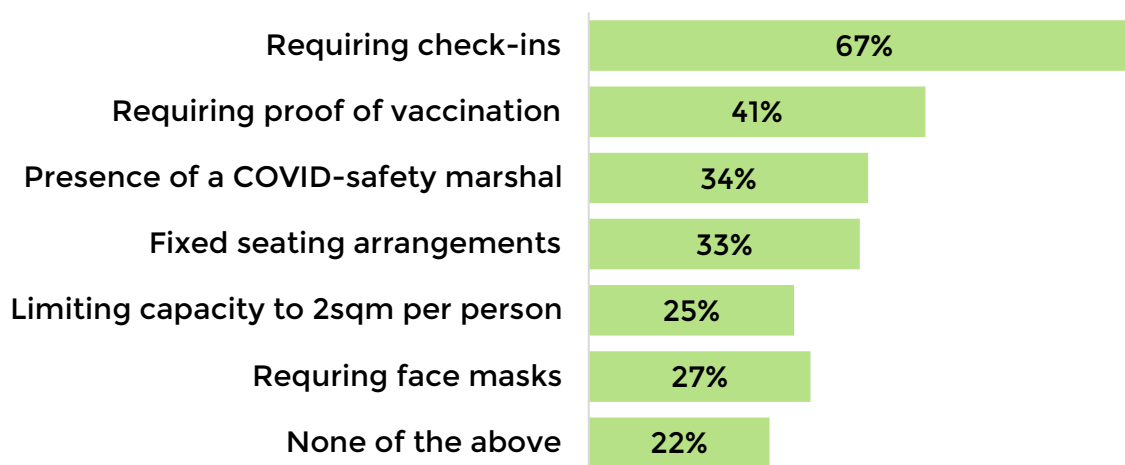
‘I would feel much more confident in a room of people who are vaccinated and doing the right thing by checking in where they go. I absolutely do not want to



The presence of a COVID-safety marshal was equally important at large theatres (35%) and outdoor events (34%), signalling that audiences want to see the rules observed at all venue types. One QLD audience member said,

‘I am delighted by the suggestion of having a COVID-safety marshal to assist with compliance. Asking people to wear masks and check in is meaningless without people willing to actively enforce rules, and (hopefully) turn away anyone obviously ill. This would be VERY reassuring to me.’

Figure 8: Would any of the following measures absolutely need to be in place for you to attend an outdoor event today? (select multiple) QLD audiences, November 2021 (n=1,479)



Some other measures were considered less crucial when attending outdoor venues, relative to a large theatre/concert hall – such as requiring face masks (27%, compared to 44% at theatres) and fixed seating (33%, compared to 54%).

Air circulation and the freedom to move around plays a key role for some audiences’ decisions, and many perceive outdoor venues to be safer than indoor venues. One QLD audience member said,

‘My view is that outdoors an individual has the chance to distance themselves and take on their own duty of care/responsibility. Whereas indoors we still need to have our own duty of care but if a venue packs a lot of people into their space then they also need to take health measures such as check in etc. for their patrons.’

Some QLD audiences see rapid testing as an additional or alternative measure to proof of vaccination

Qualitative data suggests that audiences are starting to see rapid antigen testing as an important complement to COVID-safety measures like vaccine passports. One audience member says,

‘It should be proof of vaccination AND a negative test – people seem to think that vaccination stops them from spreading the virus. As someone who has health issues, is fully vaxxed and keen to get out and about, people's ignorance and attitude is what is holding me back from feeling safe.’

Furthermore, although the proportion of QLD audiences who would be discouraged by proof of vaccination requirements is small (13%), some of them have suggested that in time, proof of a negative test result could be a way of ‘splitting the difference’ and allowing unvaccinated patrons to attend. One QLD audience member said,

‘Proof of a negative test must be an option. Do not lock out the unvaccinated.’

As rapid tests become more widely available, it is likely they can be introduced as an alternative or additional measure, similar to policies in Europe and North America.

However, some audience members are worried about the reliability of rapid antigen tests, and suggest they need to be used in conjunction with other measures. One QLD audience member said,

‘Testing depends on the test – the rapid tests being brought in are not as reliable, so depending on them increases risk. Continuing with all measures to reduce exposure & prevent serious illness is really important.’

Buyer behaviour

8 in 10 audience members say they'll be attracted to events in their local area in the next 12 months – with ‘local loyalty’ being both a response to pandemic hardship and a way to alleviate risk

When asked to what extent audiences would be attracted to events in their local area in the next 12 months, 8 in 10 (80%) of QLD audience members agreed that they would be looking local – while only 2% disagreed. As one audience member reported,

‘Hyper local is so important now.’

Some audience members suggested that restrictions on travel had made them more aware of and connected to arts and culture in their local area, with one QLD audience member stating,

‘COVID lockdown made me feel more parochial and I love what some local theatres have done to help us appreciate our own local spaces.’

Another said,

‘I would attend more events in my local area because before the pandemic we would often go to shows way further outside of where we lived, but I think the pandemic has taught us that we need to appreciate our surrounding area and environment more.’

A desire to support local acts and venues after a long period of hardship was also a factor, with one QLD audience member saying,

‘I think it is important to support organisations and artists blossoming in my local area, rather than always believing I need to venture outside of my community for valuable cultural experiences.’

Others say that local events feel ‘safer’ – from both the risks of virus transmission, and complications arising from cancellation.

One said,

‘I’m still a bit wary of booking for subscriptions in 2022 for interstate performers, having had them all cancelled for 2 years and been asked to donate the tickets back. Booked more concerts for local orchestra instead.’

Another said,

‘Events in my local area are more likely to attract me than those I’ll have to travel on public transport to reach. In addition, my suburb (Kenmore) has over 92% of the local eligible population vaccinated with 1st shot – among the highest in Qld. So I feel more safe about attending very local events.’

Some QLD audiences are looking for uplifting events – and most say they’re not drawn to works that explore the pandemic just yet

When asked to share their preference for the types of arts and cultural content they would engage with over the next year, the majority of QLD audiences said they were interested in seeing the same kinds of events they used to attend, pre-pandemic (91%, down from 94% in July).

Though in the minority, the proportion of audiences who say they will prefer ‘light-hearted programs’ has been steadily increasing since May of last year – with 43% of audiences now agreeing with this statement (compared to 35% in July 2021). Some audience members suggested that the cumulative impacts of the pandemic have left them seeking escapism and uplift, with one saying,

‘Definitely keen for light-hearted, uplifting content. The world is too stressful as it is, I’d like more comedy/light drama than anything too heavy and dark.’

Another said,

‘I don’t necessarily prefer more light hearted things but my stomach for darker things has decreased. That said, I know people who have gone the other way.’

The proportion of QLD audiences likely to seek ‘works that make sense of the pandemic’ remains low (12%, up from 9% in July), with 43% disagreeing that they will be attracted to these kinds of works. When explaining their answers, some expressed ‘pandemic fatigue’ and/or an aversion to didactic works, for example:

‘Do I want to see events to do with the pandemic? No! It’s time to move on and get fresh insights, fresh visions, new life, new experiences.’

And one saying,

‘I am keen to return to the cultural events that I used to enjoy pre-pandemic. I don’t wish to experience specifically designed ‘pandemic themed’ events. Good art, music and literature always makes sense of the world as we experience it without works being designed for specific purposes.’

Consistent with the [Visions for Culture](http://www.thepatternmakers.com.au/visions-for-culture-analysis) (www.thepatternmakers.com.au/visions-for-culture-analysis) in late 2020, this data confirms that many audiences see a role for the arts in the recovery process – and will turn to trusted organisations for connection, joy and healing.

There are some positive signs for subscriptions and memberships, with audiences wanting to keep supporting artists

When asked whether they were going to purchase a subscription or membership in 2022, around half (49%) of QLD audiences said they were likely, pointing to an opportunity area for further investigation.

Audiences mentioned wanting to support arts organisations and performers – with some suggesting that they’ve become loyal to certain organisations because of how they have handled the difficulties of the pandemic.

One said,

‘I subscribe to QSO & Southern Cross Soloists both of whom perform at QPAC and I've been pleased with how the venue & those organisations have handled the pandemic.’

A smaller number (37%) of QLD audience members said they were unlikely to subscribe next year. Some audiences say they are not in a financial position to do so, while others are waiting on the uncertainty of the present moment to clear. One said,

‘It is hard to make decisions in November when we have no idea whether performances will include overseas performers and what the rules regarding COVID are likely to be going into the future – by the 2nd quarter of the year we will know in Queensland where we are headed.’

Over the course of the pandemic, the proportion of arts audiences purchasing subscriptions and memberships has fallen. As expected, a smaller proportion of audiences said they purchased a subscription or membership for the 2021 season (45%), compared to the 2020 season (49%).

Around 2 in 10 (17%) QLD audience members have already made a donation to an arts or cultural organisation for the 2021/22 financial year – a slightly smaller proportion than those who donated in the 2020/21 financial year (22%), though more than half of the fundraising year remains.

Online participation

2 in 5 QLD audience members are participating in online arts and culture experiences, with participation rates up from July

In the first half of 2021, participation in online arts and cultural activities trended downwards after an early pandemic ‘boom’ in 2020 – with many QLD audience members reporting ‘screen fatigue’ and an eagerness to return to regular, in-person attendance.

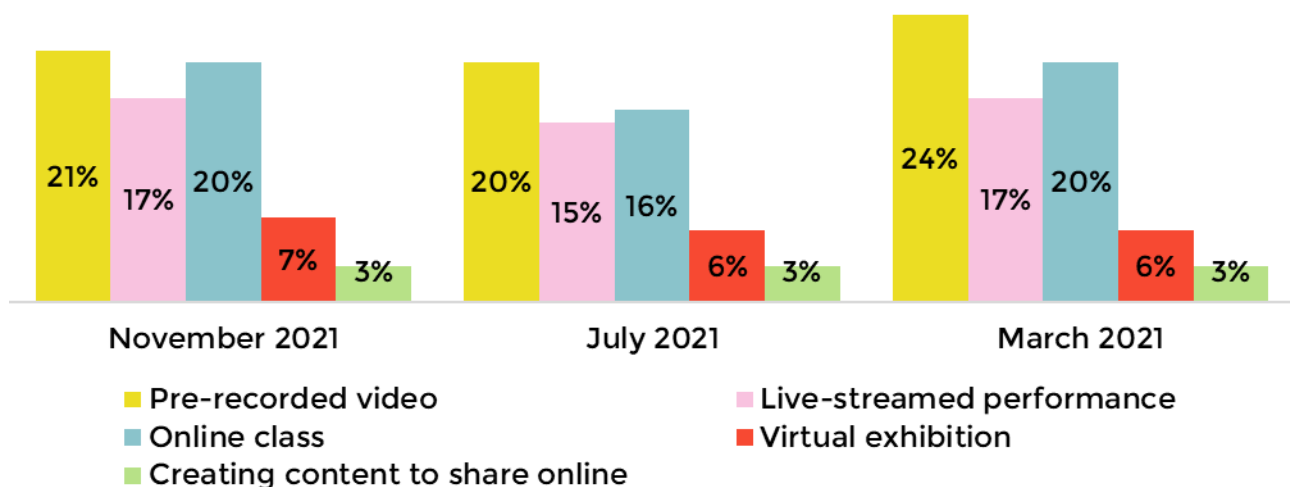
Surprisingly, however, November saw an uptick in online participation, with 42% of QLD audiences (up from 37% in July) participating in an arts or cultural activity in the fortnight before data collection, as shown in Figure 9.

Specifically, the proportion participating in online courses has increased since July 2021 (20%, up from 16%). Participation in other activities is consistent, such as watching pre-recorded video (21%, stable with 20%), watching live streams (17%, stable with 15%),

attending virtual exhibitions (7%, stable with 6%) and creating content to share online (3%, stable).

QLD was slightly below the national average for online participation (48%, up from 44% in July) – with outbreak-affected states like NSW and VIC more likely to engage with digital programming, particularly during prolonged outbreaks.

Figure 9: During the past fortnight, have you participated in any of the following online or digital arts & culture experiences? (select all that apply) QLD audiences, November 2021 (n=1,481)



3 in 10 QLD audiences would be happy to attend a digital alternative to a cancelled event

In November 2021, audiences were asked ‘In the case of a future live event being cancelled due to COVID-19, how likely would you be to attend a digital program featuring elements of the planned event?’

Half of QLD audiences say they are unlikely to attend a digital program (50%), though a significant proportion say they are likely (28%) – while 23% are neutral.

QLD audiences were some of the least likely to say they were interested in attending a digital alternative, along with audiences in WA (30%) and SA (28%). Audiences in outbreak-affected states like NSW (38%) and the ACT (38%) were more likely.

Those who were likely to seek out digital alternatives suggested that they could be a way to avoid disappointment in the event of cancellations. One QLD audience member said,

‘We have been disappointed when shows have been cancelled so having an online option would be good.’

These audience members tended to agree that digital options were preferable to missing out altogether, saying,

‘If I couldn't attend the 2022 QB Season that I have booked for in person, I would watch it digitally. Also, my partner and I were extremely sad not to be able to attend the European Masters exhibition, and we would have loved to be able to experience that online and would have been happy to pay the entrance free for that!’

And,

‘How WONDERFUL it would be for example to see a live performance of Aida even, if online. I absolutely support this idea.’

However, some QLD audience members had caveats – for example, some felt that a digital alternative would need to be offered at a different price point, saying,

‘It would have to be discounted.’

Others said they would want the digital alternative to be as close to the live experience as possible, saying,

‘Depends on whether the experience would be the same if it were virtual.’

Another said,

‘It would have to be of some quality. For example, if a theatre performance or an opera were cancelled then the digital program would have to have substantial elements of the original event or be as close to the original as possible.’

Some respondents advocate for hybrid models, saying they would appreciate the flexibility of a digital option. One said,

‘I have friends who can't get out often (caring responsibilities). Having so much online content in last 12 months has allowed them to host people at their home to participate in events they previously haven't been able to. I suspect there is a role for online, perhaps recorded/on-demand option available for purchase to compliment the live run.’

A greater proportion of QLD audiences see an ongoing role for digital in their lives – and digital spending has increased slightly

Overall, the proportion of QLD audiences who see a role for digital arts experiences in their lives outside of lockdown has increased since this sentiment was first measured in July 2021.

A larger proportion of QLD audiences now see a ‘substantial role’ for digital arts experiences in their lives (21%, up from 9% in July 2021), or even a ‘small role’ (48%, up from 38%). The proportion who sees ‘no role’ declined between July and November (31%, down from 53%).

Some QLD audience members suggested that digital could have a role to play while borders remain closed, saying,

‘During the pandemic and closure of the theatres, we’ve subscribed and watched 2 digital plays from the MTC at home in Brisbane. This is something I would be very interested in doing on a regular basis especially if airline travel between states is compromised. It gives us a chance to see different theatre companies/actors at work.’

Furthermore, in November, 33% of QLD audiences participating in online arts and culture paid for an experience, increasing from 29% in July 2021. Audiences were most likely to purchase a single, pay-per-view experience (14%) or make a donation for something seen online (11%).

Marketing of digital experiences can be targeted to three groups

QLD audiences were asked about the role that digital arts experiences play in their lives outside of lockdown. Based on their responses, QLD audiences can be divided into three groups:




- ▶ **Digital devotees** are the 21% of QLD audiences who see a ‘substantial role’ for digital experiences in their lives. They can be expected to show deeper and more dedicated engagement. Half (50%) participated in arts and cultural activities online in the fortnight before data collection – and on average are more averse to attending in-person right now. Half (50%) are paying for online experiences and half of those (53%) spent more than \$50 in the past fortnight.
- ▶ **Tired of tech** audience members are the 31% who see ‘no role’ for digital in their lives and are generally more eager to return to in-person attendance. Some report






being 'screen-fatigued' and others say that after trying digital events, they just aren't that interested. However, during stay-at-home orders, some may still be willing to participate online in the absence of in-person alternatives.

- ▶ **Selective but supportive** audience members are the 48% that see a 'small role' for digital in their lives. They feel favourably about online offerings but will generally only participate in the right events and under the right conditions. They are likely to favour digital events that are more convenient, more accessible or less risky than in-person alternatives. Around half (49% in November 2021) participated in the fortnight before data collection, while around 3 in 10 (28%) paid to access online content.

Table 1: Key segments for digital audiences, QLD audiences (n=1,431)

	Digital devotees 	Supportive but selective 	Tired of tech 
Proportion of audiences	21%	48%	31%
When live attendance is possible, the role of digital in their lives is...	Substantial	Small	None
Online participation rate	50%	49%	21%
Live stream participation	24%	19%	7%
Most interested in	Quality, high-production digital programming	Hybrid events	Live performance
Spending behaviours	50% online are paying for experiences	28% online are paying for experiences	12% online are paying for experiences
Demographic features	<ul style="list-style-type: none"> • More likely to be in an outbreak-affected state • More likely to have a disability (7%) • More likely to earn income 	<ul style="list-style-type: none"> • More likely to be a parent (19%) 	<ul style="list-style-type: none"> • More likely to live in a regional/remote area (23%)



	Digital devotees 	Supportive but selective 	Tired of tech 
Proportion of audiences	21%	48%	31%
Other arts behaviours	<p>performing art (13%)</p> <ul style="list-style-type: none"> • More likely to attend a digital alternative to a cancelled event (39%) • Typically attend performing arts very frequently (84% attend once a month or more) • Most likely to be donors to arts organisations (40%) 	<ul style="list-style-type: none"> • Typically attend performing arts frequently (70% attend once a month or more) 	<ul style="list-style-type: none"> • Most unlikely to attend a digital alternative to a cancelled event (71%) • Least likely to be donors to arts organisations (26%) • Typically attend performing arts less frequently (34% attend a couple of times per year or less)

What's next

To read about the story so far, visit the study's Australian homepage at: www.thepatternmakers.com.au/covid19.

There, you can also access a dynamic dashboard, to help you explore the results by location, artform and other variables. Instructions and tips for using the dashboard are available in a short video.

To receive future Snapshot Reports, Fact Sheets and resources in your inbox, as soon as they are available, you can opt in to receive Audience Outlook Monitor news at the link above.

If you have a question, or an idea to put forward, relating to this study, you can contact info@thepatternmakers.com.au.

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