



Audience Outlook Monitor

# How cultural audiences in QLD are impacted by rising inflation

Queensland Snapshot Report – April 2023



Queensland  
Government

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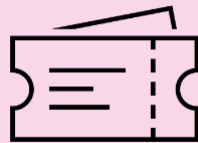
# QLD audiences on the economic outlook

Some continue to spend, others make careful choices, as data collected in April 2023 from 202 past attendees shows inflationary pressures impact QLD audiences in different ways.



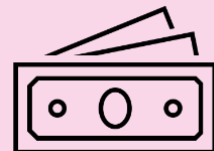
1 in 3

34% of QLD audiences say they are **worse off** than they were a year ago, and 56% say they are in the **same position**, with a mixed picture across the market.



56%

The proportion in QLD spending over \$50 on tickets to in-person cultural events has fallen from 65% in August and October 2022 to 71% in April 2023, with the outlook uncertain.



#1

Financial reasons are the **top barrier to attending**, and many QLD attendees are looking for free/cheap things to do (53%), staying close to home (43%) and taking longer to make decisions (48%).

## Key national segments



With concerns about the virus fading, Australian audiences **over 55** are now attending and spending more: 40% spent more than \$100 in the past fortnight, compared to 37% in August 2022.



**Families** are facing higher housing costs, and now factor in ticket prices to a greater degree. Parents are the most likely to prefer a different day, time or location to previously.



Despite being early returners to cultural events, **under 35s** feel most negative about their financial prospects, and across Australia are actively looking for low-cost attendance opportunities.

## Key findings: April 2023

# Though QLD audiences are the most likely nationally to say they are financially stable at the moment, their spending habits are changing

- ▶ Increasing interest rates and cost-of-living pressures are impacting consumer confidence around the country. This 'Pulse Check' explores how QLD arts audiences are responding to changing economic conditions, based on data from 202 past attendees.
- ▶ Consumer sentiment in QLD has declined over the past 12 months, with the [Westpac-Melbourne Institute](#) calculating the Consumer Sentiment Index (CSI) in QLD to be at 83.5 in April 2023, down from 96.4 in April 2022.
- ▶ Around 1 in 3 (34%) QLD audience members surveyed say they are 'worse off' financially compared to one year ago and 1 in 10 (8%) are 'better off'. 5 in 10 (56%) are 'the same' – the highest proportion of any state/territory, compared to a national average of 51%.
- ▶ While 7 in 10 (69%) attended a cultural event in the fortnight before data collection (19-23 April), down slightly from October (72%) and August 2022 (73%), attendance preferences and behaviours are changing.
- ▶ Almost half (47%) said their frequency of attendance has decreased in past 6 months – and a similar proportion say their overall spending on arts and culture has decreased (46%).
- ▶ Average spending levels are decreasing, with 56% of those attending in the past fortnight spending over \$50 or more, down from 65% in both October 2022 and August 2022. However, averages should be interpreted with caution, as some segments are actually spending more, and others less. Jump to the National Segments for a breakdown of who in Australia is impacted differently.

# Financial reasons are the top barrier to attendance, and QLD audiences are weighing up factors like price, location and overall value – particularly when travelling to events

- ▶ As COVID-related concerns decline in prevalence, **financial reasons** are the top barrier to attendance, affecting more than a third of QLD past attendees (36%).
- ▶ The location of events is also impacting 30% of QLD attendees **more than usual**, and 43% say they are opting for events closer to home. With [half of QLD's population living outside Greater Brisbane](#), some segments may be **more disadvantaged by travel costs** than others.
- ▶ When asked about their cultural spending over the past 6 months, sizeable numbers in QLD say the **price they are willing to pay** to attend (31%) has **decreased**.
- ▶ When reflecting on the most recent event they attended, 4 in 10 QLD audience members said that **price influenced them 'more than usual'** (38%) compared to pre-pandemic – consistent with audiences generally (39%).
- ▶ Around half are looking for **free and cheap** things to attend (53%), and qualitative data shows that smaller and local acts, as well as 'tried and true' performances are factoring into decisions being made by some QLD audiences.
- ▶ Many QLD attendees are **'splurging'** and **'saving'** to different **degrees** – and some are doing both, opting to splash out on events that are important to them while making savings elsewhere.
- ▶ Some QLD audiences say they have **decreased spending** on donations (33%) and subscriptions/memberships (26%) – though many who engage in these forms of support say they plan to continue, acknowledging tough conditions for artists and a desire to show their support in tough times.

# QLD audiences want to see a vibrant and diverse arts landscape, with different events suited to different segments

- ▶ Consistent with trends at the national level, many in QLD are **taking longer to make decisions** about attending (48%), and **last-minute ticket-buying** appears to stay for the time being.
- ▶ Qualitative data suggests that **logistical considerations in scheduling events will be important** for catering to a range of audiences. One said, 'More shows north of Brisbane - I've moved an hour north of Brisvegas and that plays a huge part in what I go to see.'
- ▶ Responses confirm **enduring appetites for new** (48%) and **uplifting** (70%) cultural experiences over the next 12 months. However, many QLD audiences are also drawn to **events with great reviews** (49%) and **challenging** arts experiences (33%), suggesting there is appetite for diverse and vibrant arts landscape.
- ▶ When asked to share what they've attended recently and why they prioritised those things, some common themes include a **desire to support artists and organisations** they value, wanting to be uplifted and having a social experience.
- ▶ **Economic conditions are complex and affect every household differently.** However, looking at the trends in [three key national audience segments](#) can assist with understanding some of the differences and identifying practical implications (overleaf).
- ▶ With an uncertain outlook, and the possibility of a recession, it's wise to stay flexible and consider how **strategies and tactics can be adjusted** as conditions change.

## Opportunities

As conditions continue to change, opportunities exist in terms of programming, marketing and ticketing. However, the right solutions will look different for every organisation. The ideas outlined below are put forward to get you thinking, and any action should be considered in terms of what's right for you and your audience.

### **Programs featuring diverse topics and different price points are likely to reach the broadest audiences**

- ❑ Review the state and national arts and culture policies, and explore opportunities for your organisation to stay ahead of the curve in diverse programming, community engagement and partnerships
- ❑ Keep in mind audiences' desire for fun, uplifting events in the post-pandemic era, but don't forget sizeable numbers are wanting new, topical and/or challenging things – some audiences have expressed wariness of commercialisation or softening of the cultural activities they love at the expense of creative innovation
- ❑ Review the price points of your offerings and consider how audiences in different segments will assess value for money
- ❑ Research the demographic shifts affecting your area and explore as a team how behaviours like working from home, commuting and travel are changing.
- ❑ Keep on top of transport options to your area, such as public transport schedules and initiatives, and consider these when scheduling events
- ❑ Consider programming earlier event options/matinees to encourage attendance among cost-conscious parents or outer metro/regional audiences who might catch public transport or drive but want to avoid travel rush or late-night travel
- ❑ Looking ahead, consider the right frequency and volume of events for the economic conditions. It might be helpful to plan for different scenarios such as a fast rebound or prolonged recession.

## Clear and helpful marketing campaigns can help get indecisive audiences over the line

- ❑ Look at ways to take pressure off audiences by specifying instructions on how to get to and from events, on your websites, newsletters or pre-event emails
- ❑ Consider researching and promoting any [money-saving transport initiatives](#), to encourage regional or outer metro attendance at inner city events, or metropolitan attendance at regional or outer metro events
- ❑ Consider creating and promoting itineraries for a 'night out' based on different budgets, e.g., suggested transport, pre-show drink destinations and post-show dinner destinations
- ❑ Take time to get digital marketing right, and wherever possible, tailor the words, imagery and channel based on things like prior attendance, postcode, age, family status or income (sometimes reaching a smaller group with the right campaign will deliver better engagement than a broad campaign to a bigger group)
- ❑ Where one event ticks various boxes, consider A/B marketing tactics to communicate the same event to different segments in different ways – for example, highlight the 'challenging, topical' content of a show in an email to over 55s, while featuring any 'big name artists' in an email to under 55s.

## Ticketing initiatives to support more price sensitive audiences are important, but last-minute discounting may not be the answer

- ❑ Look at ways of rewarding early bookers with earlybird discounts or newsletter subscriber pre-sales, rather than resorting to last minute 'panic' discounting
- ❑ Consider offering cheaper ticket prices for young audiences and if already in place, reviewing age limits – i.e., given the current conditions, under 35 may be more appropriate than under 30 or under 25, and some artforms may have a case to extend this to under 40s



- ❑ Consider offering group discounts or family ticket offers (e.g., 2 adults, 2 kids or 1 adult, 3 kids) to relieve cost pressures from price sensitive parents and caregivers, and encourage group bookings
- ❑ Review the approach to booking fees and consider a per ticket fee or a scaled offer e.g., percentage of total purchase instead of a set per transaction fee, which has a higher impact on single ticket purchasers
- ❑ Clearly communicate where booking fee money is going and consider investigating a payments solution like [ArtsPay](#), as some audiences are put off by high booking fees, but many are keen to support the arts and artists.

## **With some arts audiences doing well financially and others struggling, it might be time to introduce alternative payment models**

- ❑ Investigate ways to facilitate 'pay it forward' tickets, where people in more comfortable financial positions can purchase or subsidise tickets for people more affected by cost-of-living pressures
- ❑ If feasible, options to pay in instalments could take the pressure off audiences splashing out big purchases, and encourage more to book in advance
- ❑ For lower cost events, consider a 'pay what you want' model with a small pre-purchase deposit to encourage more risk taking from audiences to see something new, topical or challenging, but avoiding risks around no-shows.

## Introduction

### **This April 2023 ‘Pulse Check’ asked 202 QLD past attendees of cultural events about their response to cost-of-living pressures**

This Queensland (QLD) Snapshot Report outlines key findings from the April 2023 ‘Pulse Check’ phase of the Audience Outlook Monitor in Australia, based on data collected from 202 audience members living in QLD.

The ‘Pulse Check’ survey is a short, targeted questionnaire developed between the October 2022, Phase 8, and the upcoming August 2023, Phase 9, of the Audience Outlook Monitor. It is designed to ‘take the temperature’ of audiences in response to heightened cost of living pressures.

After three years of the pandemic, the [Australian Bureau of Statistics \(ABS\)](#) reports that over the twelve months to the March 2023 quarter, the consumer price index (CPI) rose 7%. Interest rate rises are impacting households and consumer confidence around the country.

On 19 April 2023, Patternmakers sent the ‘Pulse Check’ survey to 8,000 past respondents from previous phases of the study, who opted-in to be contacted about future research on this topic. The survey closed on 23 April 2023.

This report compares the new results with data collected previously in March 2022 (Phase 7), August 2022 (‘Pulse Check’) and October 2022, to examine how things are changing over time – and identify opportunities for programming, marketing and strategy in the current conditions. Where relevant, the QLD results are compared to those in other states/territories, noting that results for the Northern Territory (NT) and Tasmania (TAS) are not reported separately due to small sample sizes in those areas.

## Consumer confidence

### 1 in 3 QLD audiences feel their household is financially 'worse off' than they were a year ago

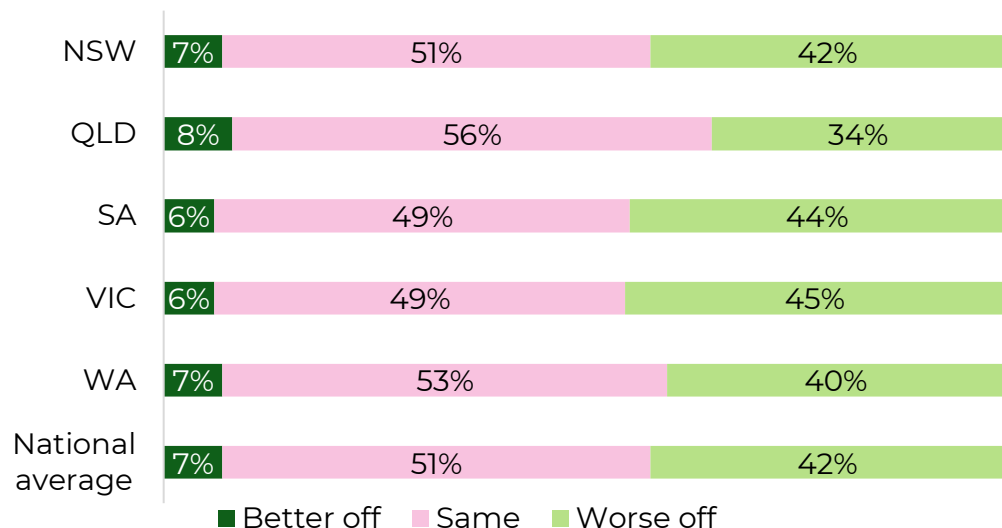
With economic pressures taking root in the post-pandemic period, households around the country are feeling the effects of the rising cost of living and interest rate increases. The [Westpac – Melbourne Institute](#) calculates that consumer sentiment among QLD residents in April 2023 was at 83.5 on the Consumer Sentiment Index (CSI), down from 96.4 in April 2022 and 119.1 in April 2021.

The April Pulse Check survey aimed to measure aspects of consumer confidence among Australian attendees of arts and cultural events.

In April 2023, audiences were asked 'Would you say that you (and any family living with you) are better off or worse off financially than you were a year ago?'. On average, 1 in 3 QLD audience members said they are 'worse off' (34%), 8% said they are 'better off' – consistent with the national average.

The results vary slightly between states. QLD audiences are the most likely to say they are the 'same' (56%) or 'better off' (8%) of any state. VIC and SA are the least likely to say they are the 'same' (both 49%) or 'better off' (both 6%).

Figure 1: Proportion of audiences who say they are financially worse off, the same, and better off, compared to one year ago, by state (n=1,315).



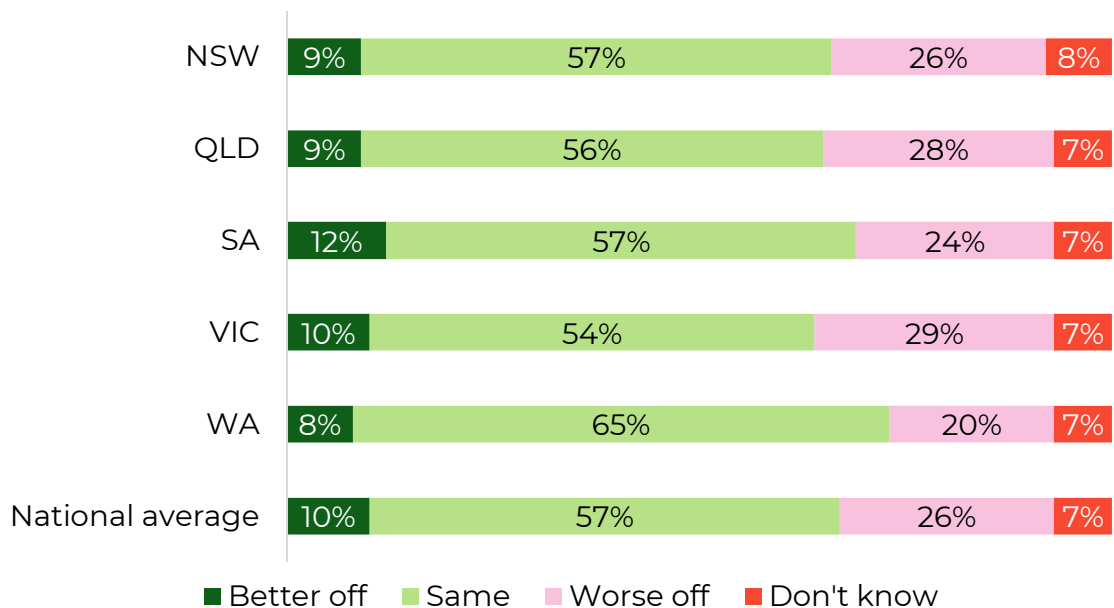
## While many are optimistic the economy will stabilise, 2 in 5 QLD audiences feel that there will be ‘bad times’ ahead

Looking ahead, when asked, ‘Do you think that a year from now you (and any family living with you) will be better off financially, or worse off, or just about the same as now?’, the majority of QLD audiences expect they will be in the same position (56%) while 3 in 10 (28%) expect to be worse off. One in 10 (9%) expect they’ll be ‘better off’ and 7% ‘don’t know’ (Figure 2).

The outlook is relatively similar across the country, with most audiences expecting their situation will be the ‘same’. This is slightly highest in WA (65% said ‘same’), where the CSI is trending the most positively at the moment.

When it comes to economic/business conditions in the country, more than half of QLD audiences said they thought the outlook was uncertain (55%), while 2 in 5 (36%) said the country will have ‘bad times’ ahead. Only 5% expect the country will have ‘good times’ ahead.

Figure 2: Proportion of audiences who say that in a year from now, they expect to be financially worse off, the same, and better off, compared to one year ago, by state (n=1,315).



“

**‘Prices of events, especially theatre etc. have certainly increased in line with other economic costs these cultural organisations are facing. Whilst this has only affected my attendance slightly, it does impact on my decision to take other people to shows. I like to take my young teen nieces to productions, but the number has decreased as costs for 3 tix can be more than \$500 in some cases.’**

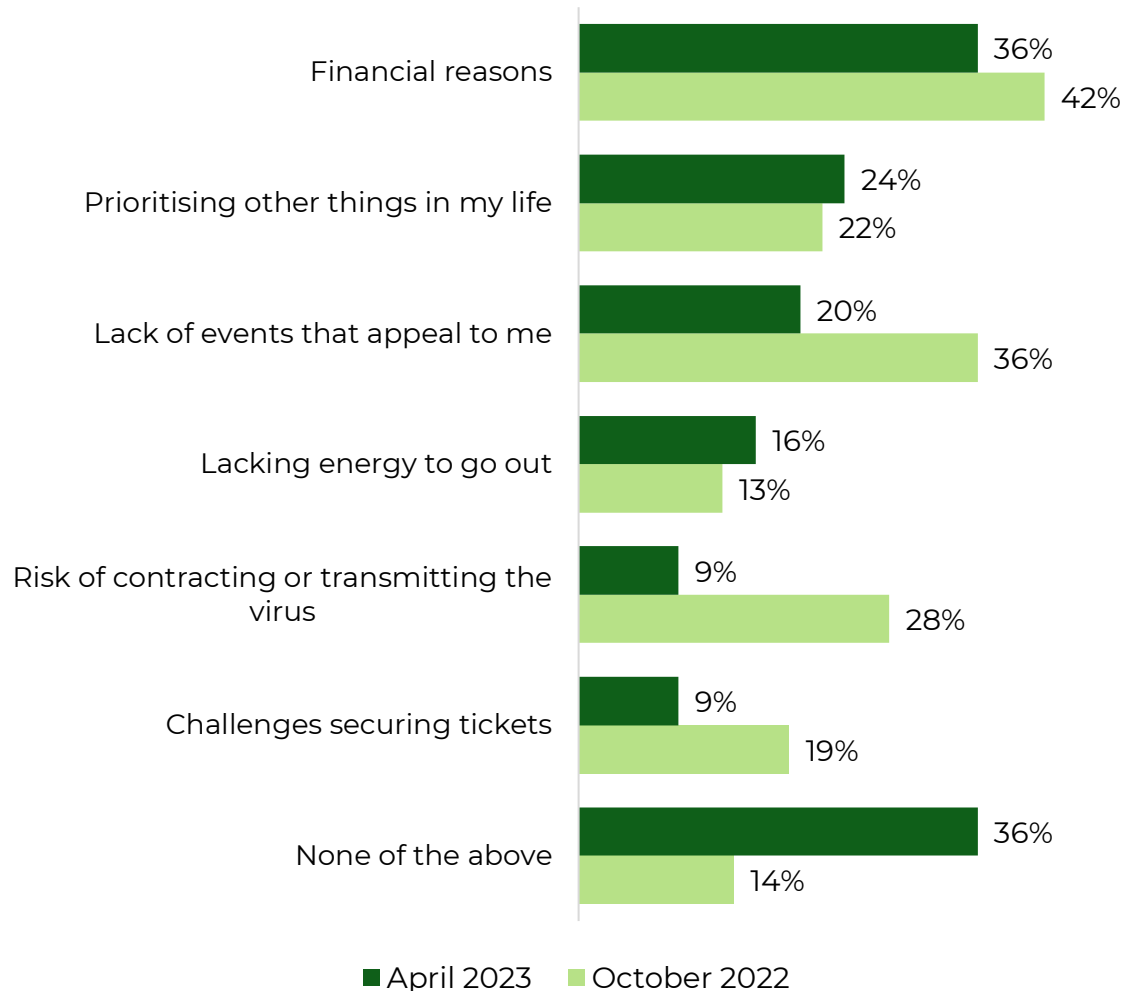
QLD audience member, April 2023

## Attendance outlook

### Financial reasons are the top barrier to attendance, affecting 4 in 10 QLD audience members

Although declining slightly since the October 2022 results (42%), the April 2023 results show that among QLD audiences, financial reasons remain the most prevalent barrier to attendance (36%) – higher than August (25%) and March 2022 (22%).

Figure 3: Can you tell us if anything is preventing you from attending in-person arts and culture events as you used to in the past? (Select up to three). QLD audiences (n=202).



## Most QLD audiences continue to attend events amid cost-of living pressures, but their behaviour and spending have changed

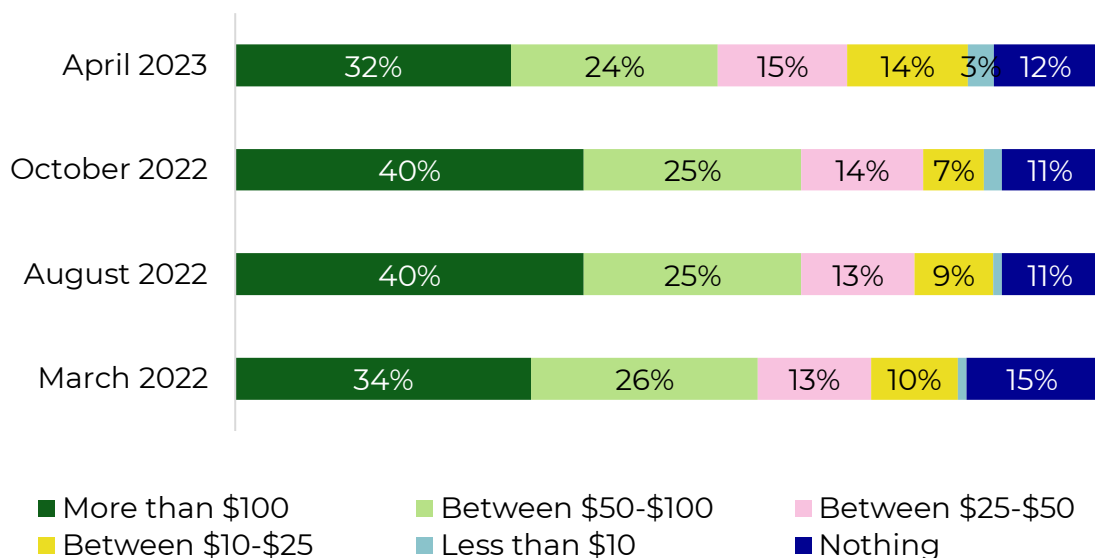
Around 7 in 10 QLD audience members (69%) say they attended a cultural activity in the two weeks prior to data collection, down slightly from October 2022 (72%) and August 2022 (73%).

QLD audiences reported having attended a wide variety of activities two weeks prior to data collection, including live performances (41%), cinemas (31%) and museums or galleries (25%).

However, they are currently the least likely of any state to have attended a cultural event recently. Meanwhile, audiences in VIC are the most likely (81%).

Spending levels are not increasing. In April 2023, the proportion that spent \$50 or more on tickets to live events and cultural events was 56%, down from 65% in both October 2022 and August 2022.

Figure 4: In the past fortnight, how much did you spend on tickets to in person live events and cultural activities? QLD audiences, March 2022 to April 2023 (n=290)



Many QLD audiences are conscious of saving money amid cost-of-living pressures. One said,

‘I have tried not to impact my support of the arts, but looking at my current financial position, and having had some unexpected

other expenditure, I am increasingly having to resist my natural urges to attend events, otherwise I am going to be in serious financial trouble.'

However, many are eager to continue immersing themselves in arts and culture in the face of strained budgets. One QLD respondent said,

'Funnily enough, while the cost-of-living has increased and the world becomes more unsure, I've tended to lean towards the arts for answers, comfort and joy. I'm looking for well-priced concerts, but I've definitely attended more concerts and lectures since my financial situation was decreased.'

Several respondents commented that they are committed to supporting artists and causes they know and love, as one said,

'Queensland Symphony Orchestra, subscription concert. I subscribe to a full series every year and have done so for nearly 60 years. If I cannot attend because I'm travelling overseas, I give my ticket away so that there will not be an empty seat facing the performers.'

Another said,

'Diwali Day, all multi-cultural activities with [my] carer; love the colours and smells and joy of the community – and my money goes further and stays with the locals.'

Another said,

'Live theatre performance. Metro Arts and Qld Theatre; Loyalty. Commitment to support artists.'



“

‘Funnily enough, while the cost of living has increased and the world becomes more unsure, I've tended to lean towards the arts for answers, comfort and joy. I'm looking for well-priced concerts, but I've definitely attended more concerts and lectures since my financial situation was decreased.’

QLD audience member, April 2023

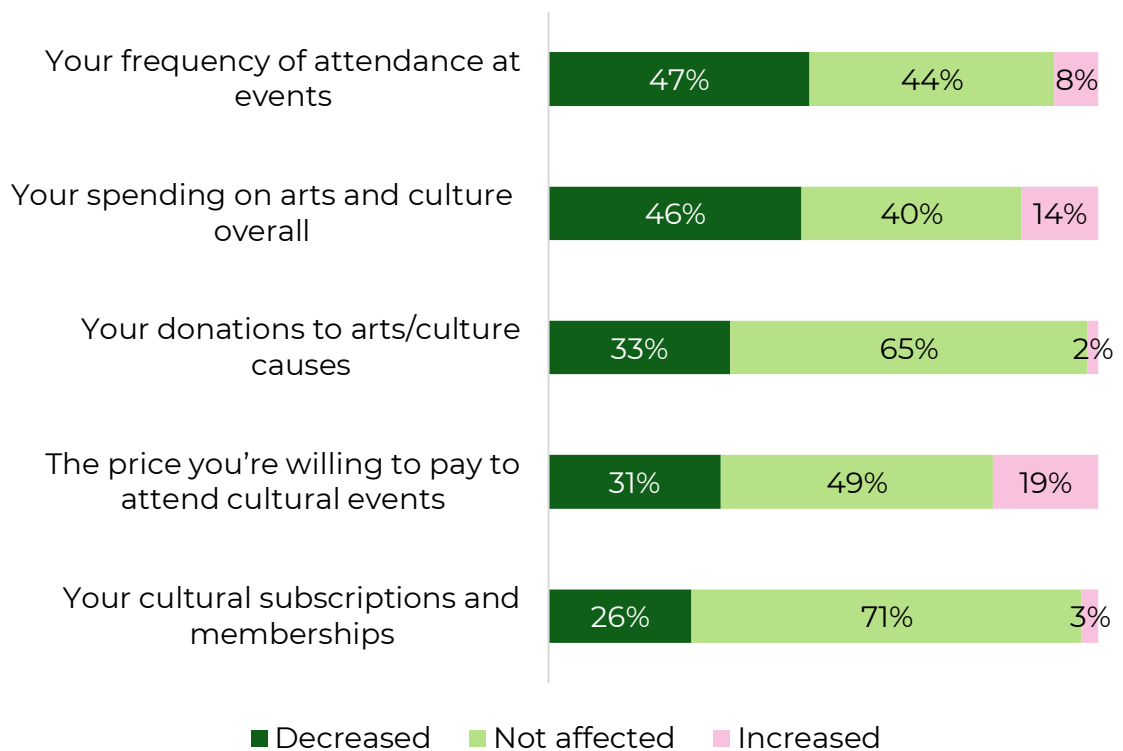
## Almost half say their frequency of attendance (47%) and overall spending (46%) at arts events has decreased in the past 6 months

Respondents were asked to indicate the extent to which their arts and cultural spending has been affected by economic conditions, and in what ways.

From the list of options, QLD audiences were the most likely to say their frequency of attendance at events (47%) and overall spending (46%) has decreased in the past 6 months.

Among behaviours that are most likely to have remained steady, around 6 in 10 QLD audiences said that their subscriptions and memberships (71%) donations to arts and cultural causes (65%) and have not been affected.

Figure 5: In the past 6 months, have the following things increased, decreased, or not been affected? QLD audiences (n=202)



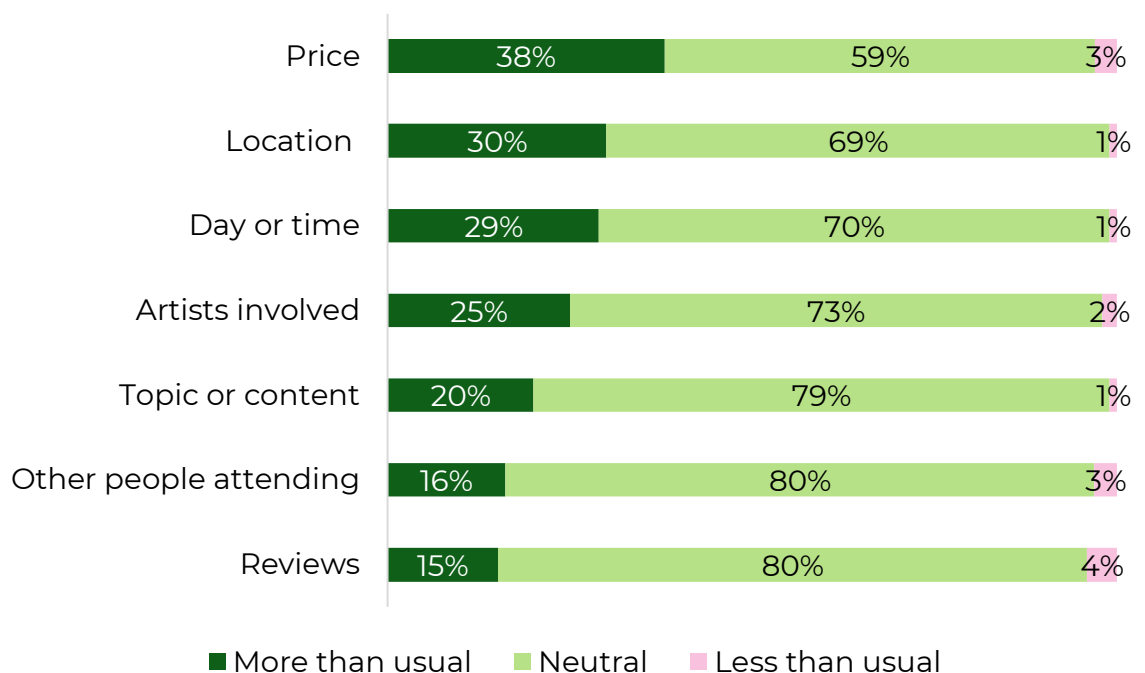
## 4 in 10 (38%) QLD attendees say they are affected by the price of arts events more than usual at the moment

Respondents were asked the extent to which their attendance decisions have been influenced by a range of factors, compared to pre-pandemic times.

From a list of options, QLD audiences were most likely to say that price influenced them 'more than usual' compared to pre-pandemic times (38%). This was followed by the location of cultural events (30%), the day or time (29%) and the artists involved (25%).

Reviews were the least likely factor to influence audience attendance decisions (15% said this is affecting them 'more than usual').

Figure 6: Compared to how you approached attending prior to the pandemic, to what extent were you more or less influenced by...QLD audiences (n=138)



Increases in ticket prices, compounded by other financial pressures, have made decision-making around attending cultural events challenging for some.

One QLD audience member said,

'Prices of events, especially theatre etc. have certainly increased in line with other economic costs these cultural organisations are facing. Whilst this has only affected my attendance slightly, it does impact on my decision to take other people to shows. I like to take my young teen nieces to productions, but the number has decreased as costs for 3 tix can be more than \$500 in some cases.'

Another mentioned that in an effort to ensure value for money, they're less willing to take a risk on a show they're unfamiliar with,

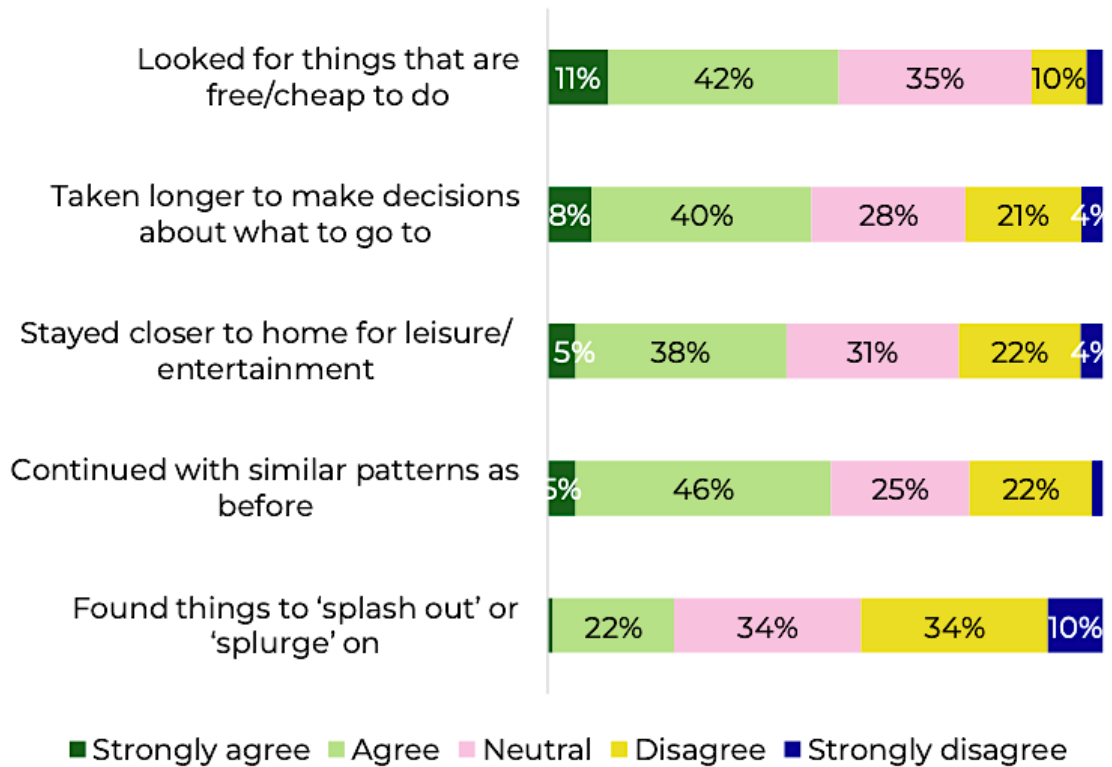
'Some shows are just too expensive by the time you factor in parking costs and fuel to get there. I am still prepared to pay for shows that really grab me but less inclined to see an unfamiliar show if I don't know the performers, or the production company. I'm looking for discounted cinema and theatre tickets in order to afford to go out. Have not been to a restaurant (other than for birthday or celebration of a major occasion) for over a year.'

## **Half of QLD audiences are looking for free/cheap things (53%), or taking longer to make decisions about what to attend (48%)**

Audiences were asked about the behaviour they've engaged in over the past 6 months, in light of their financial situation. From a list of options, QLD audiences are the most likely to say they have 'looked for things that are free/cheap to do' (53% 'strongly agree' or 'agree') and least likely to be finding things to 'splash out' or 'splurge on' (23% 'strongly agree' or 'agree') (Figure 7).

Audiences are also taking longer to make decisions about attending (48%) – consistent with trends observed in previous phases of data collection around last-minute ticket buying.

Figure 7: Given my financial situation, in the past 6 months, I have...QLD audiences (n=201)



## Audiences remain eager to attend – and are simply more selective about what they can fit within their budget

However, several QLD respondents shared that despite costs increasing, they continue to prioritise the cultural events they can attend within their budget. One said,

'I've attended local fairs and music events that were free or inexpensive and close to home. For example, a local school in Yeronga had a fair that we attended. It was close, easy to get to, inexpensive, outdoors, and a nice way to spend the time.'

Although some are not personally affected, they remain sensitive to the financial circumstances of those who they attend with. One said,

'I can't imagine how families afford to attend major shows. It can be easily \$300 just for tix for an hour show. I have reduced taking my nieces and nephews to shows due to cost. And always

conscious of asking my retired parents to shows that are \$150+ tix if they are not well known and tested shows.'

## The rising cost of travel – particularly for those outside of metro areas – disadvantages some segments

As shown in Figure 6, a significant proportion of QLD audiences (30%) say the 'location' of events is affecting their decision making more than usual – and many QLD audience members are opting to stay closer to home (43%).

With [half of QLD's population living outside Greater Brisbane](#), transport to and from cultural events can be a barrier for those living in regional and remote areas of the state. One said,

'Loving local acts. My main decision to not attend events far from home is accommodation prices have skyrocketed.'

Further, as [the state with the fastest growing population](#), logistical considerations in scheduling events will be important for catering to a range of audiences. One QLD audience member shared,

'Having Arts/Cultural events closer to home have become more of a priority for us as an older couple, given that we are on a fixed income. Transport and cost of tickets become a major factor in deciding whether to attend an event or not.'

Some would like to see more cultural activities happening in their region, as one audience member suggested,

'More shows north of Brisbane - I've moved an hour north of Brisvegas and that plays a huge part in what I go to see.'

Another suggested,

'Ensure regional touring to make arts and culture more accessible than just the big cities.'

Metropolitan-based arts companies, such as in Brisbane and the Gold Coast, noticing a decline in outer metro or regional visitors may wish to increase promotion of any money-saving transport or parking initiatives, or take some of the pressure off attendees by specifying

instructions on how to arrive on their websites, newsletters, or pre-event emails.

## Other lifestyle changes continue to impact attendance for 1 in 4 QLD audiences

Other factors, such as behavioural and habitual changes are a reason for not attending and may continue to impact the sector's recovery.

One-quarter (24%) of QLD respondents say they are prioritising other things in their life right now, consistent with findings in October 2022 (22%).

Qualitative data suggests that for some audience members, arts and culture not being as much of a priority in their lives anymore, due to lifestyle factors such as work and family commitments, travel and health. One mentioned,

'I have had a baby. No longer have time to go out. But will return in a couple of years.'

Another said,

'Having children severely curtails my ability to attend events. I am a working mother and always exhausted.'

Others are finding that their habits have evolved – with one mentioning being no longer able to attend with a loved one:

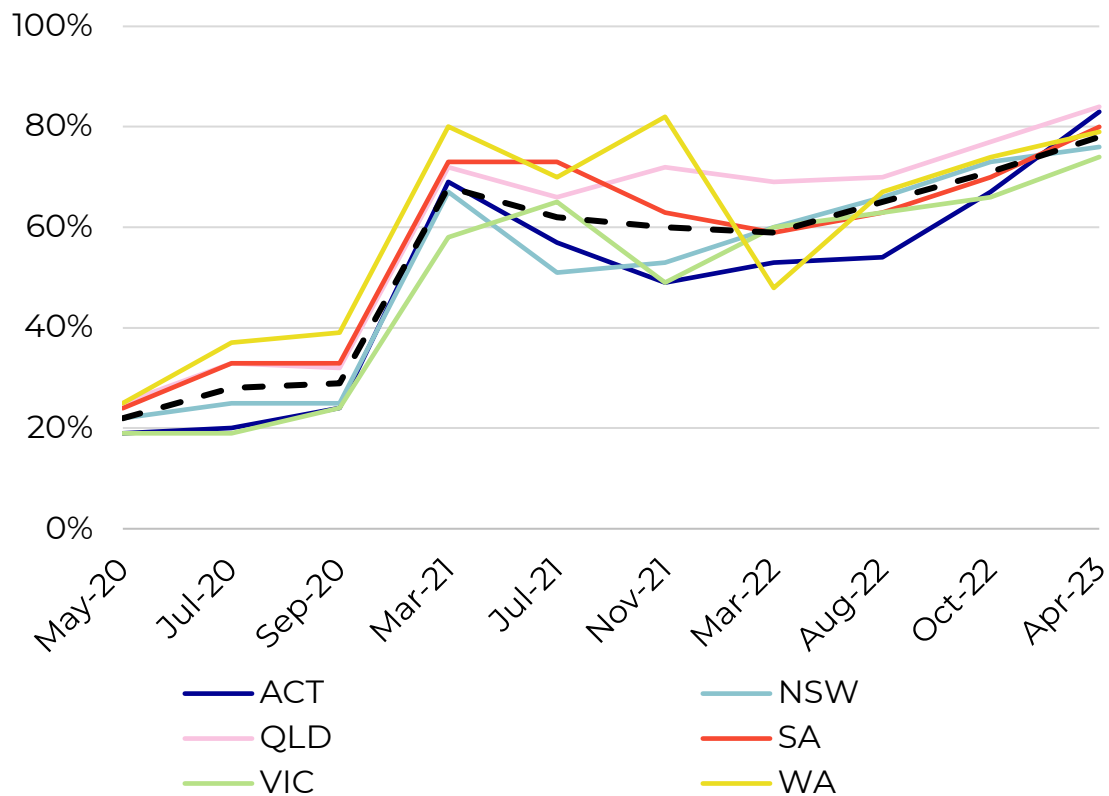
'My husband has passed away and I don't go out any longer in the evenings. I do go to matinees and daytime performances although it is not very enjoyable going alone.'

## QLD audiences are the most confident attending cultural events - though 2 in 10 cite a lack of energy

As we learn to live with COVID-19 in the community, fears surrounding contracting and transmitting the virus continue to decline. In April 2023, just 9% selected the risk of contracting or transmitting the virus as a barrier to attendance, down from 28% in October 2022.

8 in 10 (84%) QLD audiences said they are ready to attend ‘now or whenever permitted,’ the highest of any state or territory (compared to a national average of 78%) – and one in 5 have some level of caution, saying they will attend when reasonably confident that the risk of transmission is minimal (16%, down from 22%).

Figure 8: Proportion of audiences who are ‘ready to attend now or whenever permitted’, May 2020 to April 2023, by state/territory (n=1,311).



However, the long-term effects of the pandemic may be continuing to impact some audiences’ stamina for attending, and 16% say they lack energy to go out (up slightly from 13% in October 2022). The results are similar proportion of audiences under 35 (9%) as audiences over 75 (8%) – suggesting the trend is not limited to age group.

Despite the numerous complex barriers to attendance cited by many, a quickly growing proportion say they are not currently facing any barriers to attending – almost 4 in 10 (36%) in April 2023, up from 14% in October 2022. One respondent said,

‘I am fortunate to own my home and be as financially secure as possible so being a lover of theatre, galleries and cinema, and in good health, my attendance at cultural events is frequent.’



## Looking ahead

### Qualitative data suggests last-minute ticket buying remains a trend for 2023

Previous rounds of the study revealed a trend of last-minute ticket buying. In August 2022, 27% of QLD audience members were most likely to have been booking for events within the next seven days (17%) or the next 2-3 weeks (37%), and qualitative data in October 2022 highlighted the ongoing prevalence of the trend.

Likewise, qualitative data suggests the trend has continued into April 2023, and it could be here to stay a while yet.

Financial pressures may cause some audiences to hesitate before making bookings in advance, with some opting for rush tickets and last-minute offers.

One QLD audience member said,

‘For cultural events you need to book so far in advance in order to get a good seat. I have seen events, but they were for when I was not in Brisbane.’

Another mentioned,

‘[I have been] purchasing less expensive tickets (B reserve instead of A or premium) and more mindful of what to attend. [I’m] still attending theatre, but last-second booking after missing 4 shows from World Science Festival due to having COVID (\$200+).’

### 7 in 10 QLD audience members say they will be attracted to fun, uplifting things in the coming year – and 48% want to try new things they haven’t experienced before

Audiences were queried about the types of cultural activities they’ll be most attracted to over the next 12 months.

From a list of options, QLD audiences are most likely to agree that they’ll be attracted to fun, uplifting things (70%), and half (48%) say they

will be seeking new things they haven't experienced before (Figure 9). One QLD audience members said,

'I'm keen to be uplifted and given a laugh with my entertainment.'

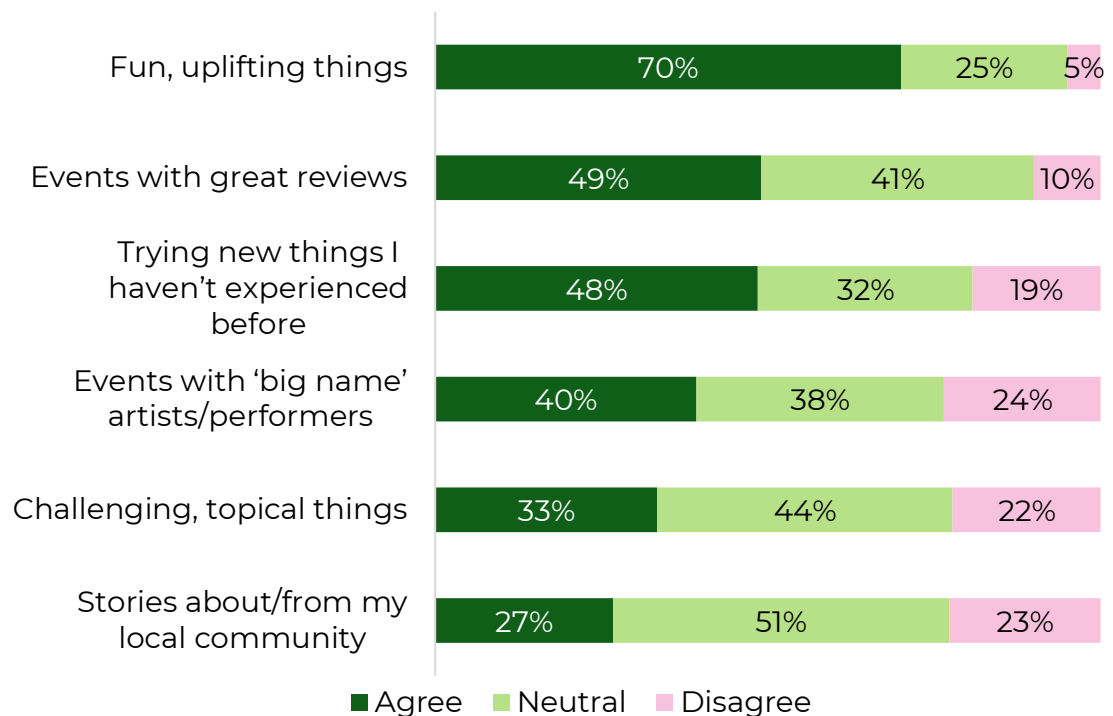
Another said,

'People will attend quality offerings. It seems as though cultural organisations are focusing on challenging us and forget that if we are paying good money, we want to be uplifted.'

However, there is also a strong appetite for challenging, topical things (33% in QLD agree), suggesting that diverse programming remains key to attracting different types of audience members. Another audience member shared,

'Continue being courageous in doing what they love and bringing it to us - their audience.'

Figure 9: In the coming year, I'll be most attracted to ... QLD audiences (n=201)



Another half say they'll be attracted to events with great reviews (49%) and 40% will be drawn to events with 'big name' artists. Some QLD audience members noted that, in light of smaller budgets, they may be

relying on the familiar, or more well-known works when making decisions to attend. One said,

'I'm not buying tickets for shows I don't know much about for tickets over \$100.'

Another said,

'Well-known, tried and true performances will interest me. Not spending hard-earned money on edgy / new productions.'

## **There may be an opportunity to review ticketing models to help address financial barriers**

In April 2023, audiences were asked, 'Do you have any suggestions for how artists or cultural organisations could address your needs and interests best, moving forward?'

Some QLD audience members shared their appreciation for artists and cultural organisations experiencing financial hardship – while acknowledging their own struggles. One said,

'Just to say I appreciate how it must be difficult for artists and art organisations too. Since retiring I am living on a fixed income which has been eaten into over the last couple of years by the rising prices of food and fuel, so I just have to choose carefully what I can support.'

Some made practical suggestions for addressing financial barriers in the current climate such as reviewing ticketing models to improve access for younger audiences, as one said,

'Modifying 'Youth' subsidies - there is a lot of inconsistency across various organisations – some are still at around 25 years of age; others are up to 35. I think the ones that go up to 35 are much more reflective of the current demographics regarding young people's engagement with the arts – particularly in a time when other financial priorities like housing affordability are becoming increasingly harder to achieve within this age bracket.'

Another mentioned that the added cost of drinks at events heightens barriers for some attendees – suggesting:

‘Love live music and a few drinks but it seems to be increasing in price a lot quicker than wages. Drink prices don't allow you to enjoy the event as much.’

## **Some QLD audiences have an appetite for smaller, affordable events to supplement larger, more expensive events**

Although there is appetite for larger, more expensive events, some QLD respondents encouraged arts organisations to invest in works of a smaller scale – enabling support for local talent, flexibility in touring and affordability for attendees. One said,

‘Travel with small elite groups to regional areas and utilise local groups to support and encourage teaching a wider audience.’

One mentioned smaller outdoor events that align with local values and interests, commenting,

‘Smaller open-air events, unique content, theme around other things happening, be environmentally sustainable, support local.’

Another encouraged more

‘Smaller events in local venues. A local cafe is hosting 2 hours of [jazz] when they can secure a band on a Sunday 4-6pm & charging \$10pp. Easy to get to, not a lot of time out of my day, I can go on my own & chat to others. Everyone loves to support local.’

Another said,

‘More smaller and personal performances are needed to help communities reconnect with each other.’

There is a case to balance large scale productions with smaller events. One suggested,

‘Get more funding. Embrace inclusivity. Think small scale and economical productions as well as more costly events.’

## After the uncertainty of the pandemic era, expectations of clear communication around events may be heightened

Some QLD respondents advocated for better communication around ticketing policies to improve confidence in their spending decisions. One said,

‘Clearer ticket purchase terms & conditions especially relating to COVID infection for me or my immediate family. Whether or not masks will be recommended. Whether or not unwell people will be discouraged from attending.’

Another suggested reviewing the booking process for subscribers, commenting,

‘Make online booking simpler, especially for series subscriptions. I did not renew one series this year because I would have had to nominate each concert separately and have a different seat for each concert! I prefer to have my one preferred seat for a series rather than chopping and changing seats from one concert to the next!’

Some QLD respondents made suggestions for increasing awareness about what’s on. One mentioned they feel they are open to discovering something new – but fear they may be missing out:

‘Biggest challenge is knowing about [cultural events] other than the usual activities on offer. I sign up for e-mails or set reminders to check on the usual ones, but don't go looking for beyond these, whereas I've no doubt, I would enjoy some of these unknowns.’

## National audience segments

Inflationary pressures are experienced differently across the population. Three key audience segments are presented below, based on April 2023 data analysed at the national level. For more detail about these three demographic segments, head to the [National Key Findings](#).

Older and bolder	Family frugality	Young and restless
Arts audiences aged 55+	Arts audiences aged 35-55 with children living at home	Arts audiences under 35
<ul style="list-style-type: none"> <li>▶ After several years shaped by virus concerns and mask-wearing, older audiences are now enjoying higher attendance levels and spending.</li> <li>▶ As the most likely audiences to experience no barriers to attending right now, this group is open to a range of experiences and are the most likely to seek out challenging, topical works in the next 12 months.</li> <li>▶ Email is the top way they find out about events, so consider ways to continually improve your databases and eDMs.</li> </ul>	<ul style="list-style-type: none"> <li>▶ Rising housing costs are affecting families more than households without children, and audiences with kids at home have reduced their arts spending more than others.</li> <li>▶ High numbers are staying closer to home, looking for free/cheap things to do and taking longer to commit, as they weigh up costs for 3 or more people.</li> <li>▶ Families see the arts as important for their children – and many are prioritising it within their budget.</li> <li>▶ For Kids and Family shows, consider a pricing and promotion strategy tailored to this group (they're the most likely group to find out about events on Facebook!).</li> </ul>	<ul style="list-style-type: none"> <li>▶ Despite being eager to get out and about, young people are attending at slightly lower levels than they did 12 months ago and are spending less too.</li> <li>▶ They're facing financial barriers at twice the rate of their parents' generations – and feel more down about their economic future.</li> <li>▶ They're eager to connect socially, attend fun/uplifting events and try new things they haven't experienced before, but may need support to attend.</li> <li>▶ Some are looking with keen eyes for student or youth discounts – and ways to cover the costs of travel and eating out.</li> </ul>

## What's next

To read about the story so far, visit the study's Australian homepage at: [www.thepatternmakers.com.au/covid19](http://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](mailto:info@thepatternmakers.com.au).

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