PATTERNMAKERS

Audience Outlook Monitor

QLD Audiences 2023+

wolf brown

Queensland Government

Contents

Cover Image Credit: Courtesy of HOTA.

Introduction

This report shares insights from over 1,000 Queensland arts and cultural audience members about their attendance in 2023 and beyond

Launched in May 2020, the Audience Outlook Monitor was established to track audience sentiment in relation to the COVID-19 pandemic. In 2023, it continues to provide insight into the top trends shaping audiences today, including the cost-of-living crisis, global uncertainty and the collective mood.

This Queensland (QLD) Snapshot Report outlines key findings from Phase 9 (August 2023) of the Audience Outlook Monitor in Australia, based on data collected from 1,005 audience members living in QLD.

The main source of data featured in this report is the Audience Outlook Monitor, a cross-sector, collaborative survey involving around 100 arts and culture organisations, including museums, galleries, performing arts organisations and festivals.

For more information about the survey process, and sample sizes, visit the Appendices.

This report compares the latest data with past Audience Outlook Monitor reports, to examine how things are changing over time – and identify opportunities for programming, marketing and strategy in the current conditions.

For questions, contact: info@thepatternmakers.com.au.

1. Attendance trajectories

Image Credit: Courtesy of HOTA.

1. Attendance Trajectories

Attendance rates in QLD continue their recovery since the pandemic, but with challenging year ahead, it's wise to set sights on the right targets.

Key points:

- Attendance in QLD is at its highest point since the pandemic began, and although the recovery process continues, QLD audiences are attending the least frequently of any state at the moment.
- Australia-wide, strategic investment and programming shifts have helped many organisations sustain or increase their capacity in 2022 and 2023, but charting recovery is complex, with mixed attendance results across the market.
- With 67% of QLD audience members expecting their attendance levels will stay the same in the next 12 months, major leaps in attendance appear unlikely.
- It's a good time to rethink what success looks like and adopt the right targets for the conditions.

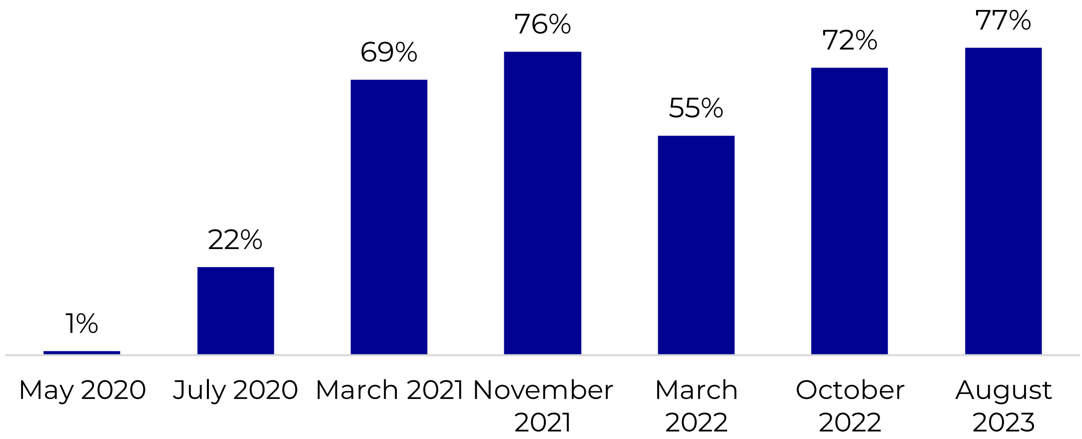
In 2023, attendance amongst QLD audiences is reaching its highest point since 2020, but there's more to the story

As the nation continues its recovery from the pandemic, QLD audiences have gradually returned to attending cultural events in-person, with attendance reaching its highest point in August 2023 since 2020.

Three in four QLD audience members say they attended at least one kind of cultural event in the fortnight prior to data collection (77%), consistent with the national average (79%) and up from 72% in October 2022.

When comparing the results to other states, New South Wales (NSW) audiences were the most likely to have attended a cultural activity in-person in the fortnight prior to data collection (82%), while audiences from Western Australia (WA) and South Australia (SA) were the least likely (both 76%).

Figure 1: Proportion of QLD respondents answering yes to 'In the past fortnight, did you do a cultural activity in-person (not online)?' May 2020 to August 2023 (n=916)



However, this overall participation rate only tells part of the story, with spending levels not growing alongside participation. There are also key differences in how various groups are attending and spending around the country:

- **Young and restless:** Audiences under 35 are attending frequently but spending the least, with concerns about their economic outlook.

- **Family frugality:** Audiences aged 35-54 with children living at home were less likely to have attended a cultural activity in the last fortnight (72% nationally) and are managing pressures on family budgets.
- **Older and bolder:** Audiences over 55 are spending the most on cultural events right now, and their spending is growing.

Although there will always be exceptions, understanding the major differences between these three groups is a helpful starting point, with a summary of these three national segments available in Chapter 4 of this report (Segmented Approaches).

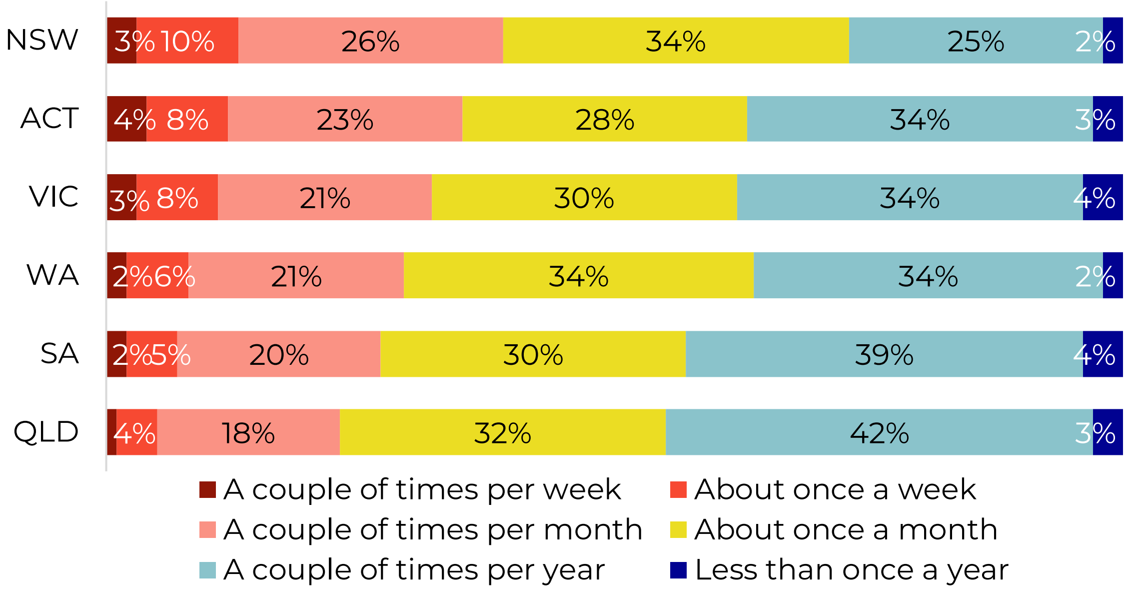
Among QLD audiences, frequency of attendance is growing at performing arts venues and at museums and galleries

Amongst QLD audiences, attendance frequency is growing at performing arts events in August 2023, compared to October 2022. More than half (55%) attended at least once a month in August 2023, up from 45% in October 2022.

However, frequency of attendance is lowest among QLD audiences, relative to other states/territories. For instance, audiences in NSW are, on average, attending performing arts venues the most frequently compared to other states, with 73% attending at least once a month in August 2023.

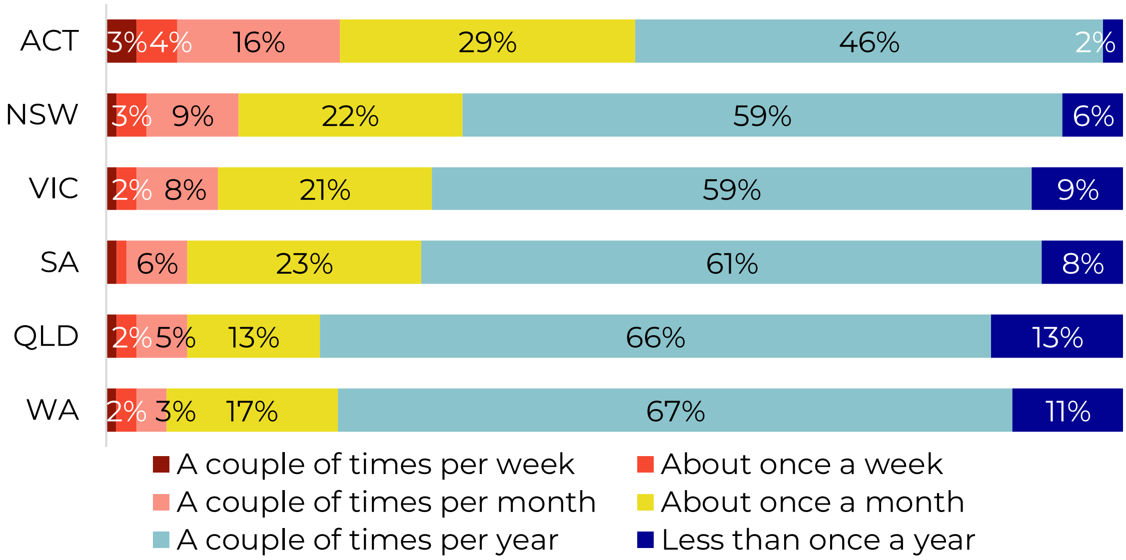
Financial considerations are likely to be playing role in frequency of attendance among QLD audiences – a topic explored more closely in Chapter 2.

Figure 2: Attendance frequency at performing arts events by state or territory, August 2023. (QLD audiences, n=955).



In QLD, frequency of attendance at museums and galleries has also increased in August 2023, with 21% attending at least once a month, up from 17% in October 2022. This is lower relative to other states and territories.

Figure 3: Attendance frequency at museums and galleries by state or territory, August 2023. (QLD audiences, n=2,307).



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Across Australia, there is no one story for how organisations are recovering their audiences after the pandemic, but similar challenges exist

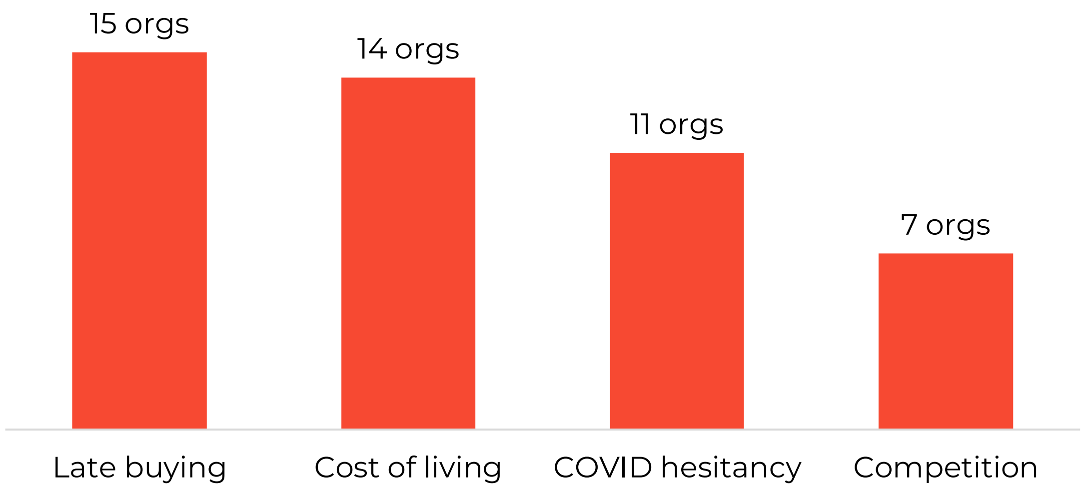
On a national level, although participation rates and frequency are trending in a positive direction, behaviour has not returned to pre-pandemic levels.

Arts organisations participating in the Audience Outlook Monitor were asked to provide attendance figures for 2019 and 2022, to compare how audiences have changed and to what extent the industry has rebuilt its audiences following the pandemic. They were also asked what their biggest challenges and successes have been. The following sections discuss the results at the national level.

52 organisations across the country (including 7 QLD organisations) responded to the benchmarking survey, and their responses confirm the past few years have been challenging, with a range of factors impacting differently across the market. Some organisations have been affected by natural disasters, while others are unscathed. 11 of the organisations were feeling the impact of COVID as their top challenge, while others were feeling different pressures.

While each reported unique circumstances, some shared similar challenges like last-minute ticket buying, cost of living concerns, COVID hesitancy and competition in the market (Figure 4).

Figure 4: Themes mentioned by organisations in response to 'What's been the biggest challenge, in terms of bringing audiences back?' August 2023 (n=39)



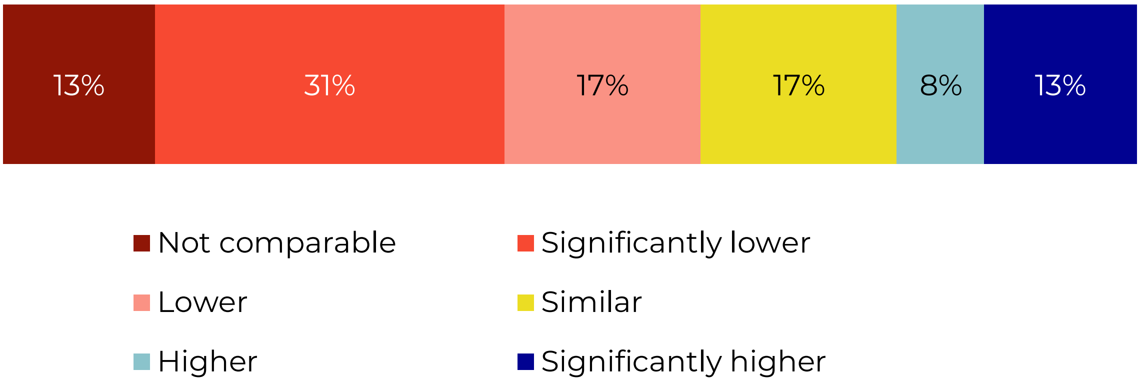
Organisations across Australia are adapting to the new landscape in different ways, and around 4 in 10 have rebuilt their audience to 2019 levels

Amongst the 52 organisations throughout Australia who provided responses about their attendance levels and events for 2019 and 2022, the picture is complex.

Comparisons are not always straightforward, but based on analysis of available data, it appears that around half of all organisations had lower (17%) or significantly lower (31%) audience numbers compared to 2019 (**Figure 5**).

By 2022, some organisations had recovered their audience to similar levels in 2019 (17%) or grown them further (21%), but there is important context for what's behind these numbers.

Figure 5: Quantitative audience recovery in organisations, August 2023 (n=52)



Some organisations are expanding their capacity or adapting their programming to reach new audiences, while others are stabilising or monitoring

Attendance numbers are influenced by changes in programming, capacity, funding and strategic shifts, so it's not always a fair comparison.

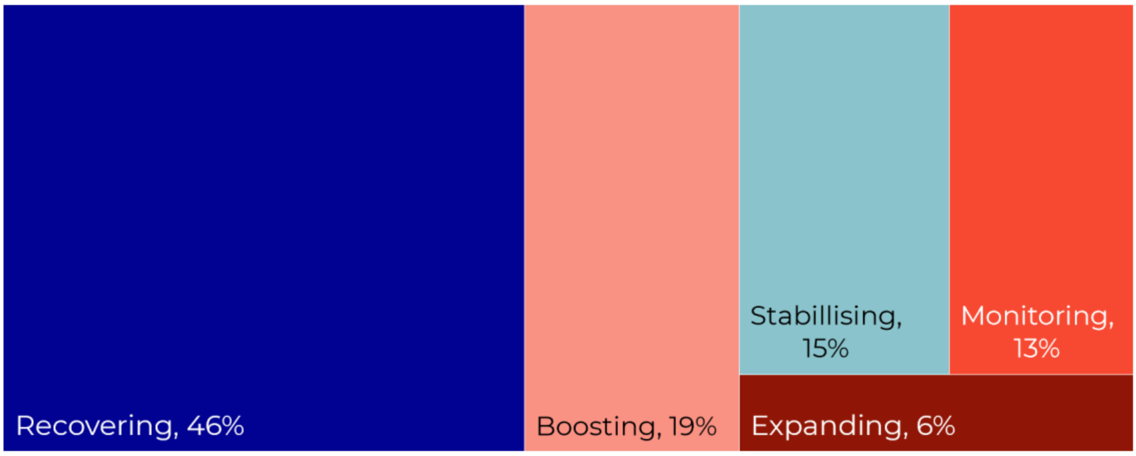
Five different groups of organisations are apparent:

- Expanding organisations (6% of the total) are seeing the most positive trends, and were fortunate to have operations that involved outdoor locations, free/cheap events or confident audience segments during the upheavals
- Boosting organisations (19%) have invested in new ways of working since the pandemic, increasing their capacity and attracting new audiences in the process
- Stabilising organisations (15%) show signs of returning to pre-pandemic levels, without dramatic changes in what they do
- Recovering organisations (46%) had not regained their pre-pandemic audiences by 2022, and the next few years will be important, with strategic work involved
- Monitoring organisations had non-comparable data, either due to inconsistent record-keeping or changes in personnel or ticketing systems and will be monitoring progress differently.

Organisations were placed into these categories by evaluating against the following four elements:

Audience recovery	Events and capacity	Programming	Organisational changes
Is total paid and free attendance higher or lower compared to 2019?	Has the number of events and tickets available changed?	Were there changes in approach to the types or genres of events?	Were there changes in funding or big strategic shifts?

Figure 6: Categories of recovery in organisations, August 2023 (n=52)



Expanding organisations reached much larger audiences, sometimes due to being ‘in the right place at the right time’

Audience recovery	Events and capacity	Programming	Organisational changes
Increased beyond 2019 levels by more than 30%	Similar events and capacity	Benefitted from having outdoor venues, free/cheap events or confident audience segments	Leaning into their core business, and/or undertaking some adaptive work, showing signs of sustainability

6% of organisations were classified as ‘expanding’, demonstrating significantly larger audiences in 2022 relative to 2019 without drastic changes to programming.

One expanding organisation in QLD noted that their core business had benefited from the behavioural changes of audiences in the pandemic, noting that since it 'lends itself to people having freedom to move around freely in the open air, we have had record crowds since 2020.' (Festival, regional QLD).

Boosting organisations gained new audiences by increasing their programming, event capacity or touring

Audience recovery	Events and capacity	Programming	Organisational changes
Increased beyond 2019 levels	More events with more tickets available	'Blockbuster' style programming, and leveraging international acts	Putting the hard work into attracting new audiences

19% of organisations were classified as 'boosting', reporting that activities such as programming blockbuster events, international acts, or (for some key producing organisations) ramping up their own touring have led to strong attendance recovery trajectories.

6 in 10 boosting organisations were performing arts venues, suggesting that some venues may have more ability to leverage audience-building programming opportunities, compared to some other organisation types.

Supply was also a common theme, with all boosting organisations reporting that they've increased the number of paid and/or free events since 2019.

One manifestation of the increased supply generated by boosting organisations is more competition, which some organisations mentioned as a challenge facing them at the moment.

While celebrating a successful recovery, boosting organisations are also having conversations around sustainability, and how to retain the new audiences they have attracted.

Stabilising organisations showed signs of returning to pre-pandemic levels, without dramatic changes in what they do

Audience recovery	Events and capacity	Programming	Organisational changes
Varied – within +/-15% of 2019 levels	Similar to 2019	Similar to 2019	Similar to 2019

15% of organisations were classified as 'stabilising', and based on their numbers and stories, they appear to be serving audiences in similar ways compared to 2019, and at a similar volume.

These organisations have not dramatically increased their capacity or changed their programs, and yet have seen the rebuilding of audiences back up to the levels seen pre-pandemic. 3 in 4 stabilising organisations were producers.

Recovering organisations throughout Australia had not regained their pre-pandemic audiences by 2022, and the next few years will be important

Audience recovery	Events and capacity	Programming	Organisational changes
Attendances in 2022 were significantly lower than 2019 levels	Varied – may be less events, or similar events but with less audiences	Similar to 2019	Similar to 2019

46% of organisations were classified as 'recovering', due to having lower or significantly lower audiences in 2022 relative to 2019.

The 'recovering' classification was more common in medium to large organisations, with 70% large organisations (200+ staff) and 46% of medium (20-199 staff) in this category. 3 of the 4 galleries and museums that responded were 'recovering', whilst one was 'stabilising'.

Across Australia, 30% of recovering organisations mentioned cost of living and 39% mentioned late-buying ticket cycles as a barrier to recovery. One QLD organisation shared,

> ‘A major shift in lead time for pre-purchasing for ticketed events, and slower than average indication of interest to attend for non-ticketed events.’ (GLAM, metropolitan QLD)

A number of the recovering organisations say that so far, 2023 is looking more positive, and in a year’s time, this benchmarking exercise could see them joining the ‘stabilising’ group. In QLD, a recovering organisation shared that their successes in bringing audiences back have been,

> ‘Queensland audiences seem far less concerned with COVID impacts than in other states. We saw a fairly swift return to attending once the government mandates were lifted. Our loyal audiences have been very vocal in their support and appreciation of being able to return to the theatre. In 2022, we also experienced a high number of first-time attendees.’ (Producer, metropolitan QLD)

However, as uncertainty in the market continues, the next few years will be critical in determining the trajectory of attendances and whether there is need for strategic changes.

In QLD, big increases in attendance appear unlikely over the next 12 months, with 2 in 3 predicting their attendance will stay the same

In October 2022, almost half QLD respondents said their current level of attendance would ‘definitely’ or ‘likely’ increase over the following year (46%). In August 2023, that proportion dropped to one-quarter of respondents (26%), while 2 in 3 (67%) said they expect that their current level of attendance at cultural events will stay ‘about the same’.

This trend is consistent throughout the states and territories, with fewer audiences in August 2023 expecting their attendance will likely or definitely increase moving forward, compared to October 2022. On a national level, in August 2023, 66% audiences expect their attendance will stay the same, while 27% expect it will 'definitely' or 'likely' increase.

Inflationary pressures are impacting household budgets, ultimately affecting attendance decisions and frequency – with major changes unlikely for at least 12-18 months. The Reserve Bank of Australia (RBA) predicts inflation to return to the target range by late 2025. This topic covered in depth in the next chapter.

"Queensland audiences seem far less concerned with COVID impacts than in other states. We saw a fairly swift return to attending once the government mandates were lifted.

Our loyal audiences have been very vocal in their support and appreciation of being able to return to the theatre."

Producer
Metropolitan QLD

Things to think about when charting attendance trajectories:

Attendances are moving in a positive direction, but the situation is complex, and growth in attendance volume could be limited in the next 12 months.

Here are some things for QLD organisations to consider:

- ❑ Manage stakeholder expectations around attendance recovery, emphasising that there are many stories of recovery out there and no 'one size fits all' approach
- ❑ Consider investing ways to improve the accuracy and consistency of how attendance is measured and tracked over time, so it can inform your decisions
- ❑ Make space for internal reflection and interpretation of actual attendance data, including what may be behind changes, to build organisational knowledge
- ❑ There is a case to review attendance and engagement targets for the next 12 to 18 months – bearing in mind that economic conditions are limiting growth in attendance and that habits take time to change
- ❑ Ensure that attendance isn't your only measure of success, and consider ways to track engagement and impact
- ❑ Find opportunities to share knowledge with your peers about what's working, what's a struggle and how you're evolving your work around audience needs
- ❑ Consider joining (or forming) cross-organisational working groups and networks around key topics, where there is opportunity to share learnings and push the industry forward
- ❑ Stay abreast of local population changes which present opportunities for building audiences – such as Queensland's population growth and the investment frameworks emerging to address this.

2.

Inflationary pressures and pricing

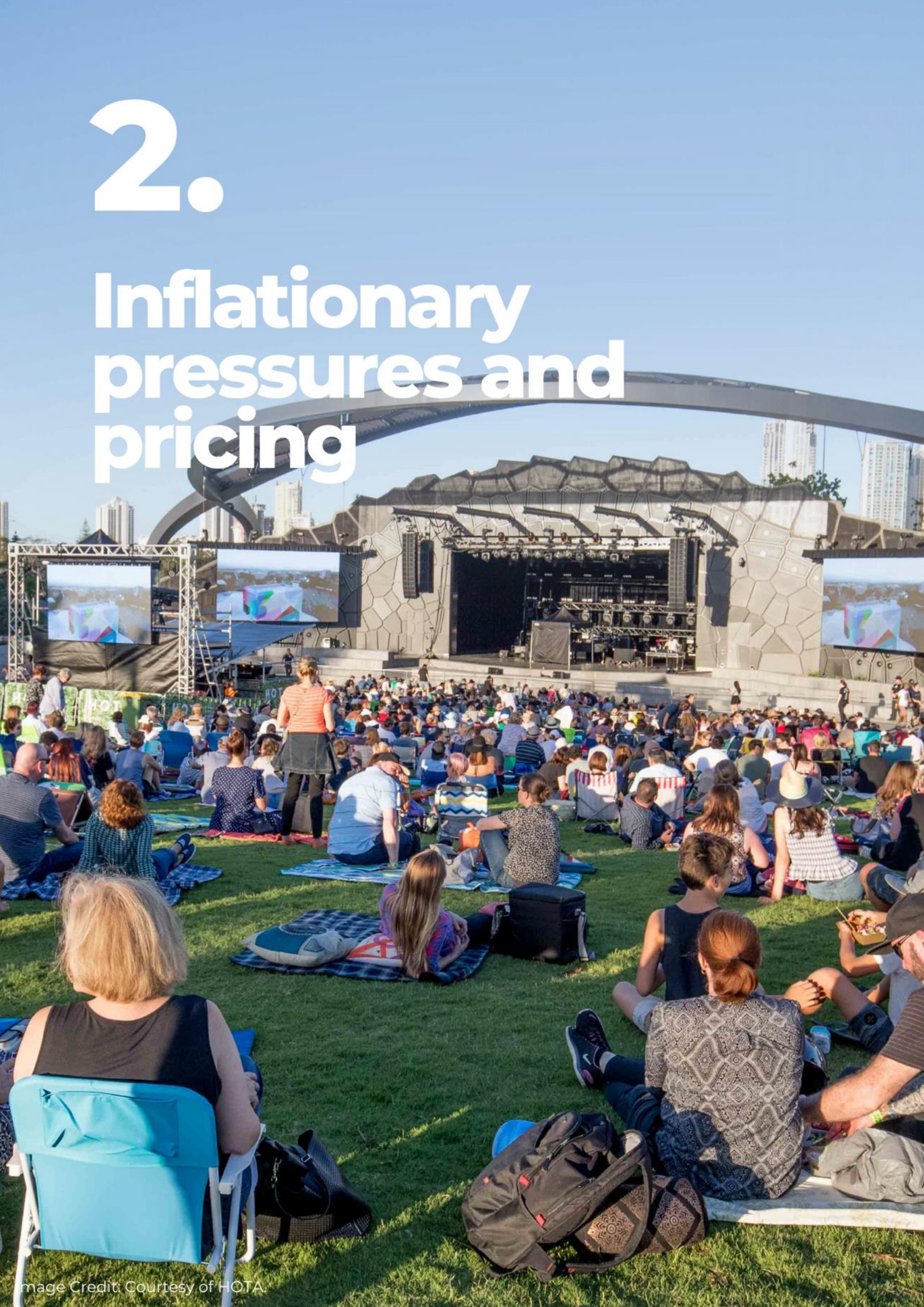


Image Credit: Courtesy of HOTA

2. Inflationary pressures and pricing

Financial barriers are impacting QLD audiences and what they can spend on events, and some segments need targeted thinking to ensure access to arts and culture.

Key points:

- Financial reasons are the top barrier to attendance facing QLD audiences, and inflationary pressures are expected to continue in 2023 and 2024.
- Spending levels at arts and culture events are not growing, as QLD audiences weigh up value for money and take longer to make decisions.
- With younger audiences and families continuing to be the most impacted (as detailed in the Segmented approaches), a key opportunity is developing sustainable strategies for targeting disadvantaged segments.

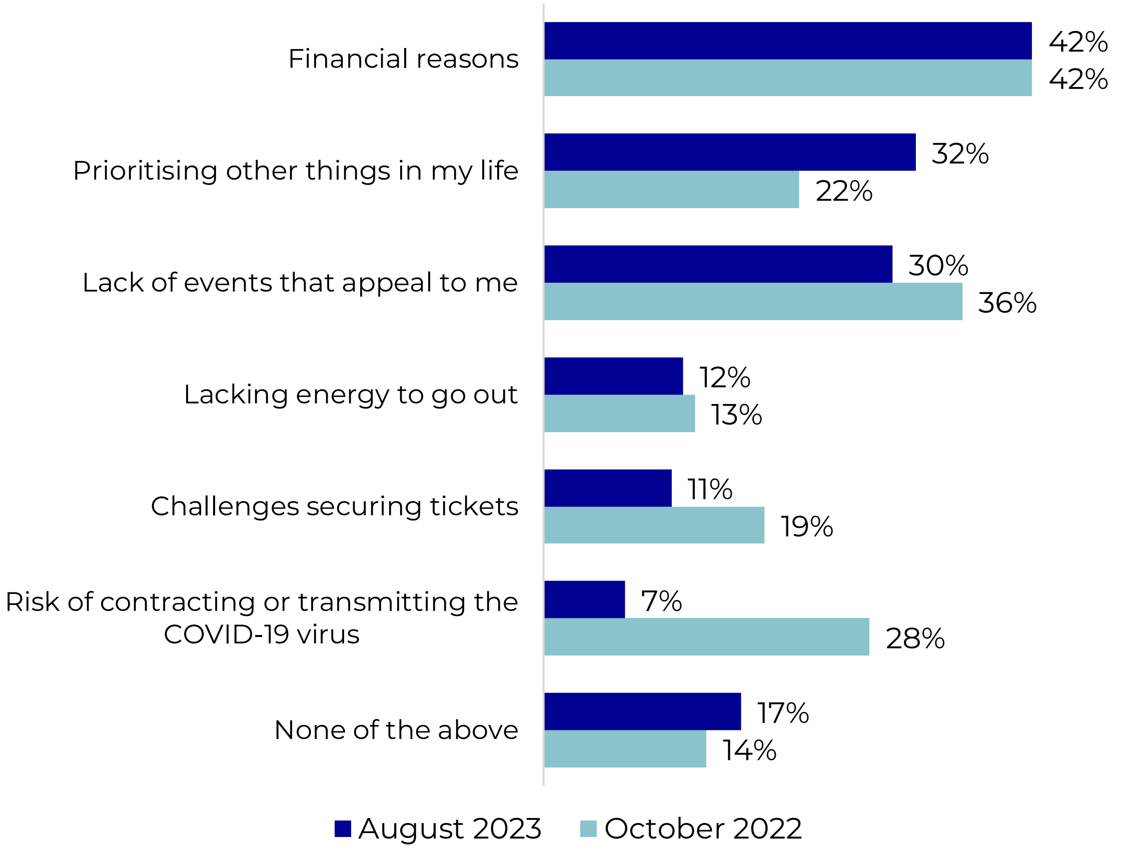
Financial reasons remain the top barrier to attendance, impacting 4 in 10 QLD audience members

Consistent with previous results from October 2022, the August 2023 results show that financial reasons are the most prevalent barrier to attendance facing QLD audiences (42%). This is followed by audiences 'prioritising other things' in their lives (32%) and a perceived lack of appealing events (30%).

Comparing different states and territories, QLD audiences are among the most likely to cite financial barriers, alongside VIC audiences (41%).

After 3 long years of the pandemic, fears of contracting or transmitting COVID have steadily decreased among QLD audiences, with 7% citing it as a barrier to attendance in August 2023, down from 28% in October 2022.

Figure 7: 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, August 2023 (n=997) and October 2022 (n=912).



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QLD audiences are spending less than the national average, and spending levels aren't growing, with consumer confidence remaining low in August 2023

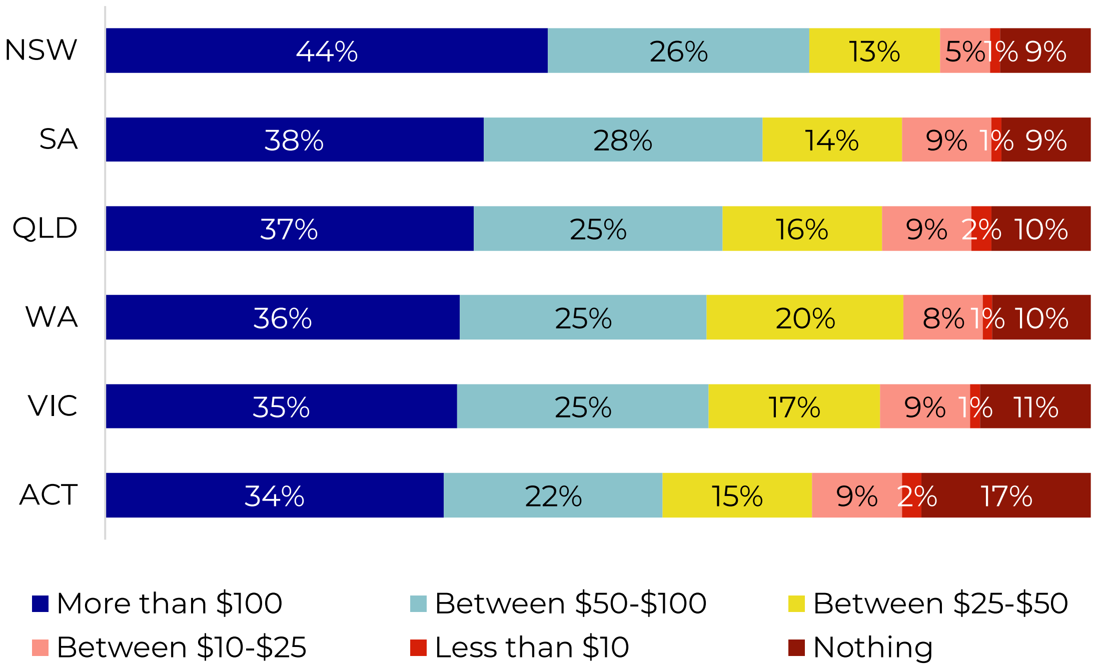
While the proportion of QLD audiences attending in-person cultural events has increased, on average, their spending levels have not increased and remain consistent with spending levels in October 2022. This trend is consistent across the country.

In August 2023, 6 in 10 (62%) of those attending in QLD spent $50 or more on tickets to in-person live events and cultural activities, consistent with spending in October 2022 (65%) (Figure 8). This rate is consistent with national average (64%).

The latest ANZ-Roy Morgan Australian Consumer Confidence survey reported on 8 August 2023 shows that 'confidence has been in very weak territory for 23 consecutive weeks, the longest weak streak on record.' In light of rising interest rates and cost of living increases, Queensland households are re-assessing and tightening their discretionary spending – with economic growth forecasted by the State Government to be forecasted to slow from 3% in 2022-23 to 1.25% in 2023-24.

Spending levels vary slightly between age groups (see Segmented approaches for further information).

Figure 8: In the past fortnight, how much did you spend on tickets to in person live events and cultural activities? By state (QLD audiences, n=758)



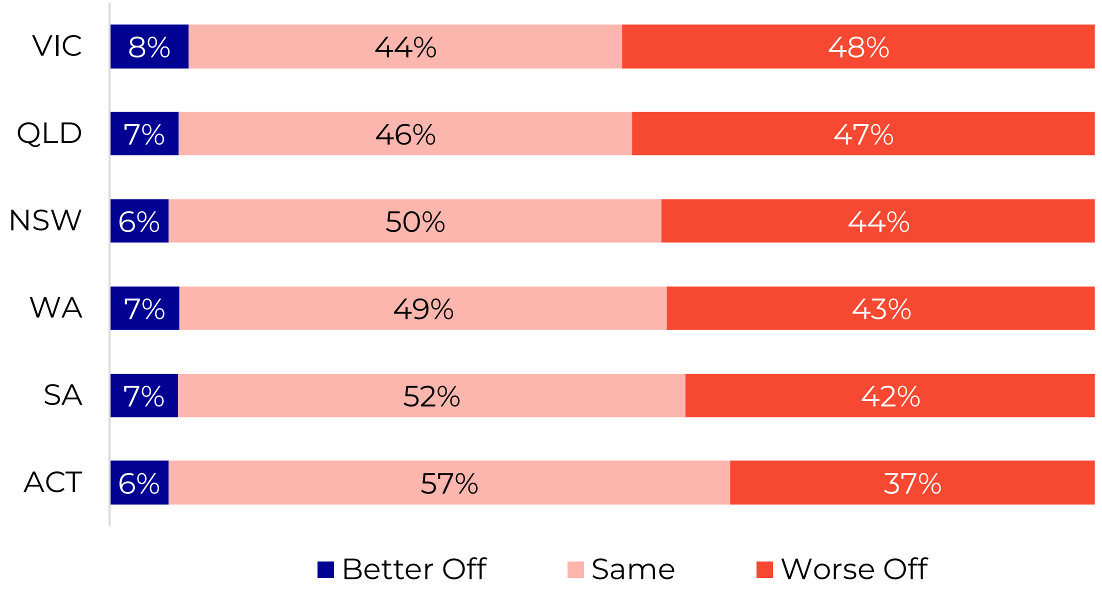
Almost half of QLD audiences said they are financially ‘worse off’ compared to one year ago

In August 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?’.

Overall, almost half of QLD audiences say they are ‘worse off’ (47%), while another 46% say they are the ‘same’ as one year ago. Only 7% overall report that they are ‘better off’ (Figure 9).

Comparing the results by state/territory, QLD audiences were among the most likely to say they are ‘worse off’ now compared to a year ago, along with VIC (48%). Audiences in the ACT (37%) and SA (42%) were least likely to be feeling ‘worse off’ right now.

Figure 9: Would you say that you (and any family living with you) are better off or worse off financially than you were a year ago? By state of respondent, August 2023 (QLD audiences, n=933)



QLD audiences are thinking carefully about how to balance their desire to attend with the costs of attending

Qualitative data from QLD audience members suggests that many are attending cultural activities, but are seeking out options to spend less, for example, through discounted ticketing offers or keeping an eye out for free or low-cost events in their area. One said,

> 'I love the arts. I don't have a lot of money to spend so I choose high quality events that speak to my soul... mostly symphony performances. I attend local and free events when I'm able to.' (Age unknown, QLD)

Parents aged 35-54 mentioned they are changing their spending behaviours when attending events, such limiting the consumption of food and drink at venues. One said,

> 'We used to travel to Brisbane approximately once a month (sometimes more) from the Sunshine Coast, as a family of 4, to see shows at QPAC and have meals there. We have dropped back to a third of the trips and often don't bring the children. We don't eat out there or buy drinks at the venue.' (35-54, QLD)

Many QLD audiences mentioned they are currently deliberating more about what they can justify spending on. For instance, some are opting to prioritise larger, one-off events that really grab their attention – while skipping other events. One said,

> 'I love the Arts but some events are very expensive so we can only afford to choose a few for the year. We would love to be able to do more.' (35-54, QLD)

Despite their love for arts and culture, others are having to re-evaluate or forgo attending altogether, in light of cost-of-living pressures. One shared,

> 'Cost of living pressures makes it harder to justify attending Arts events. Even really big-name events (like St Martins in the Fields) would make it tough to justify. We are very fortunate financially, but still feel the impact of drastically increased mortgages. I love attending live events, but it is just something I have to be selective of in this season.' (35-54, QLD)

Another said,

> 'We only go to things that we REALLY REALLY want to see.' (55-64, QLD)

QLD audiences are feeling more pessimistic than optimistic about their future financial circumstances

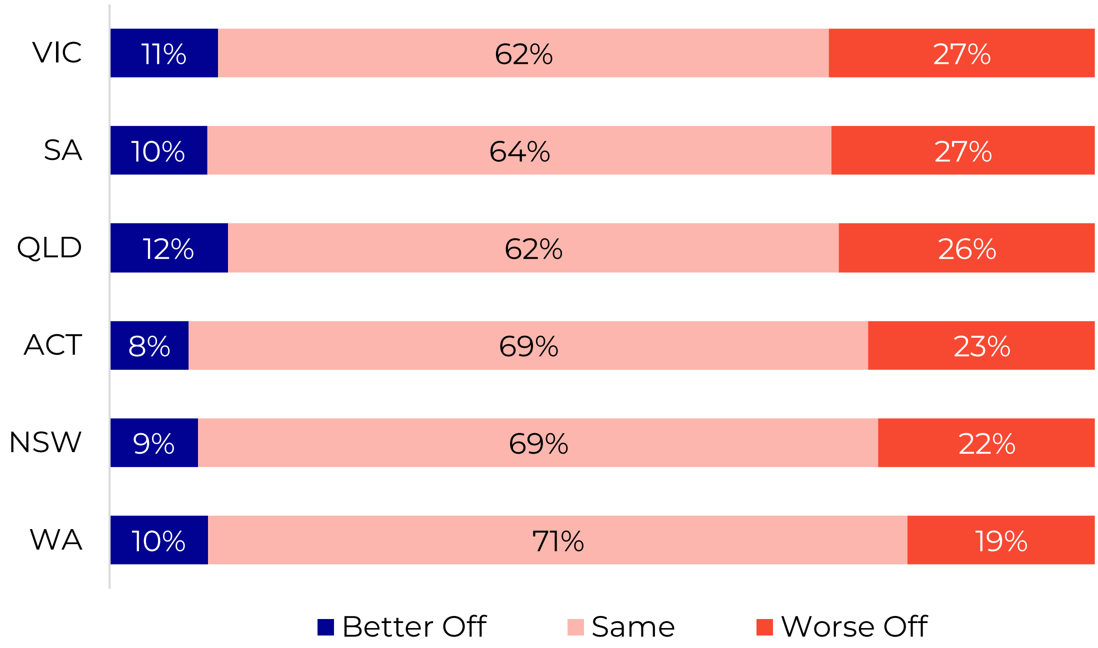
Audiences were also asked: 'Now looking ahead – do you think that a year from now you (and any family living with you) will be better off financially, or worse off, or just the same as now?'.

Six in 10 (62%) QLD audiences say they expect to be in the 'same' financial position a year from now, while 26% expect to be 'worse off'. One in 10 (12%) expect to be 'better off' (Figure 10).

QLD audiences are among the most likely of all states to be feeling that their financial position will be 'worse off' in the coming year, behind VIC and SA (both 27%). Meanwhile, this rate is lowest among WA audiences (19%).

Audiences are impacted differently in terms of their economic outlook, and under 35s and families are the most likely to feel pessimistic at the moment. See the Segmented approaches to read more about these trends at the national level.

Figure 10: Now looking ahead – 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 the same as now? By state, August 2023 (QLD audiences, n=951)



QLD audiences are most likely to be looking for cheap things to do – but half are also 'splashing out' or 'splurging'

Audiences were asked about the ways in which their attendance behaviour has been affected by their financial situation at the moment.

QLD audiences were among the most likely to say they have been 'looking for things that are free/cheap to do' (58% agree or strongly agree) – amongst the highest proportion of all states/territories, behind VIC (59%) (Figure 11). One said,

> 'The price of many events is outweighing my ability to participate, the availability of lower cost seats (even nose bleeds, obscured view) or matinee seatings mean that I may choose one show as opposed to a few at a more reachable level.' (Age unknown, QLD)

However, around half are finding things to ‘splash out’ or ‘splurge’ on (53%) – suggesting that QLD audiences are willing to spend more on things they love while saving elsewhere. Some audiences are opting to miss out on performers they have seen recently – in favour of something else. One said,

> ‘Due to financial considerations, I am more careful with what I choose to buy tickets to. For example, if I will not choose to see an artist or performance if I have seen this artist in the last two years.’ (55-64, QLD)

Another said,

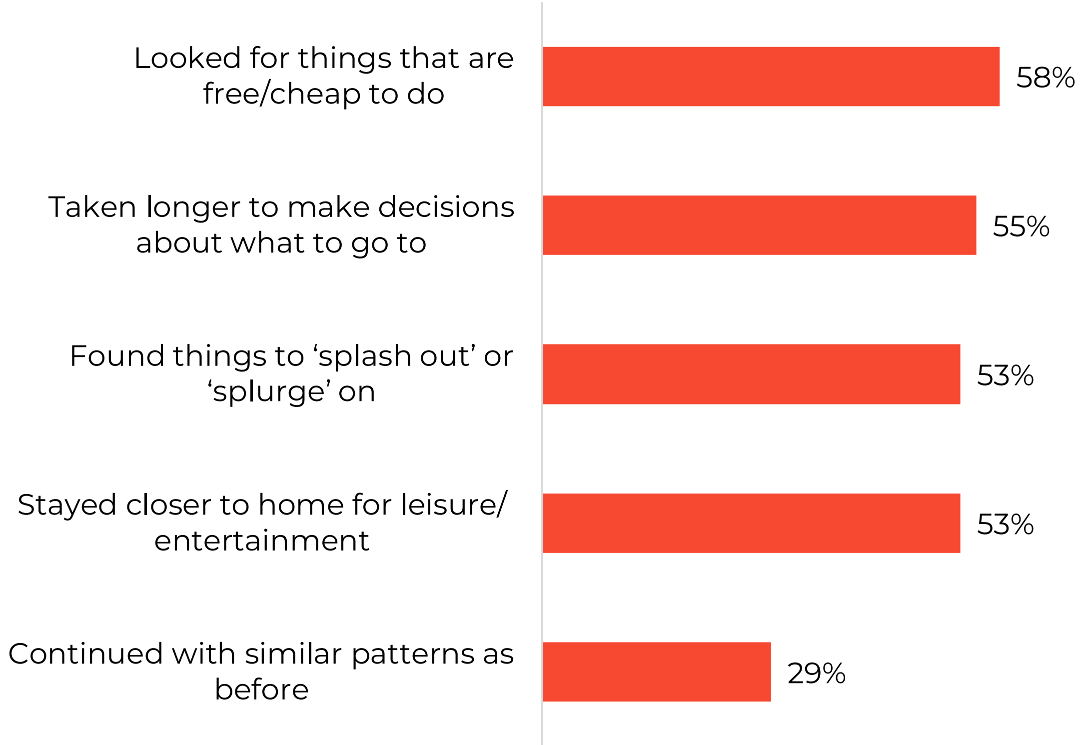
> ‘As a retired person I have to make my budget stretch, therefore I select events at QPAC that are on my bucket list and any ballets/operas/shows that I have previously seen are not attended.’ (55-64, QLD)

With many being less able to attend as frequently as they want to, they are seeking out memorable experiences they could splurge on and are passionate about, as opposed to choosing multiple activities. One said,

> ‘Don't want to spend time and money on the mediocre. Would rather spend big on one special event, like Bolshoi or Royal Ballet. Want to see international stars and companies. QB is good but the travel time often puts us off, especially to drive home so late but we would make the effort for an international performance.’ (55-64, QLD)

Another half are also staying closer to home (53%) and deliberating longer on their decisions to attend (55%) – the highest proportion of any state/territory. QLD audiences are less likely to have continued with similar patterns as before (29%), relative to other behaviours – and this is consistent with the national average (28%).

Figure 11: Given my financial situation, in the past 6 months, I have... (strongly agree and agree). QLD audiences, August 2023 (n=987)



The cost of tickets is only part of the equation, with QLD audiences also factoring in travel costs, parking and food

For many QLD audience members, the additional travel costs are compounding the financial barriers affecting their attendance. For some, accumulative travel costs can be prohibitive, particularly for those needing to travel into the city. One said,

> 'I live about an hour out of Brisbane, so petrol alone let alone parking in the city, adds to the cost of the event I am attending. Say, I can get a concession ticket to something like [a] performance which is typically around $49. Parking in Brisbane typically comes to around $17 or $20. Add another $10 for the petrol which brings the total to around $79 which sometimes the difference between being able to afford electricity, gas and water, as well as food and medication while living on unemployment/student money.' (Under 35, QLD)

Another mentioned the need to make compromises related to their work schedule – alongside weighing up the costs,

> ‘Everything is more expensive. I feel I have to choose very carefully as it's not the cost of tickets but the ancillary costs (travel, food, time off work) that need to be factored in as well.’ (Age unknown, QLD)

Due to the cost of travel, some respondents mentioned they are opting to prioritise local experiences to keep costs down, as one said,

> ‘I do look more into smaller local event centres. The cost adds up when add travel, parking, lunch for the day’. (35-54, QLD)

Younger audiences and families continue to be the most impacted by financial barriers

Across all age groups, financial barriers taking effect; however, among key national audience segments, young people and families are the most impacted at the moment.

Qualitative data shows that under 35s in QLD are eager to attend cultural events but are feeling the pinch in the cost-of-living crisis – ultimately inhibiting their ability to attend. One said,

> ‘Increase in cost of living has significantly influenced my decision whether to buy that $100+ ticket or not. I'm more likely to splurge on popular musicals (e.g., Hamilton) or big-name artists (famous classical musicians) and try not to exceed the budget for these luxuries.’ (Under 35, QLD)

Access to discounted offers is a key decision-making factor for many young people, as one said,

> ‘The presence or absence of heavily discounted student tickets is a major factor in choosing to attend any event.’ (Under 35, QLD)

Meanwhile, responses from parents aged 35-54 echoed similar sentiments, despite many being eager to attend family events. One shared,

> ‘I'm a single parent with two teenage kids. Ticket prices are often prohibitive. “Family” tix are usually 2 adults and 2 kids and don't help us. “Kids” prices are usually for 12 and under, and don't help us. I'd take them to more events if it was more affordable but it's often $100+ for the three of us.’ (35-54, QLD)

Another said,

> ‘I would like to attend more things – but – car rego due, electricity costs increasing, kids school camps coming up, etc. I just can't commit to anything right now.’ (35-54, QLD)

"I love the arts. I don't have a lot of money to spend so I choose high quality events that speak to my soul..."

Audience member
QLD

Things to think about when addressing financial barriers to attendance

QLD audiences in all age groups are feeling the pinch when weighing up the costs of attending cultural events – though some are more disadvantaged than others.

Here are some things for QLD organisations to consider:

- Prioritise discussions around meaningfully building future audiences, and consider whether you have the right strategies in place to meet this generational challenge
- Consider new ways to cross-subsidise events in programs and/or seek funding and partnerships to enable greater discounts and opportunities for financially disadvantaged segments
- Draw on anecdotes about how different segments are affected when assessing the case for funding in grant, partnership and sponsorship applications. One QLD respondent **under 35** said: 'There is a massive contraction going on and saving money is a priority. Even though the arts are a huge part of my life and something I value, I cannot afford this luxury as often at this time.'
- Review the level of discounts offered for younger people and concession pricing in relation to the level of disadvantage they experience – and for families in QLD too
- Try to avoid last-minute ticket discounts and think ahead about strategic offers that can realistically be maintained longer-term, to build consistency, clarity and trust with audiences
- With many QLD audiences deterred by travel costs, consider packaging of tickets with food, drink and travel options, and/or partnerships with local vendors and businesses, where nearby options and offers could be cross promoted to audiences.
- Spread awareness about travel initiatives that could help audiences get to your event, such as Queensland long distance and interstate transport services.

3.

The desire to inspire

Image Credit: Courtesy of HOTA.

3. The desire to inspire

Amidst a challenging outlook, QLD audiences are in the mood for uplifting experiences – requiring organisations to think creatively about affecting meaning and building trust in difficult times.

Key points:

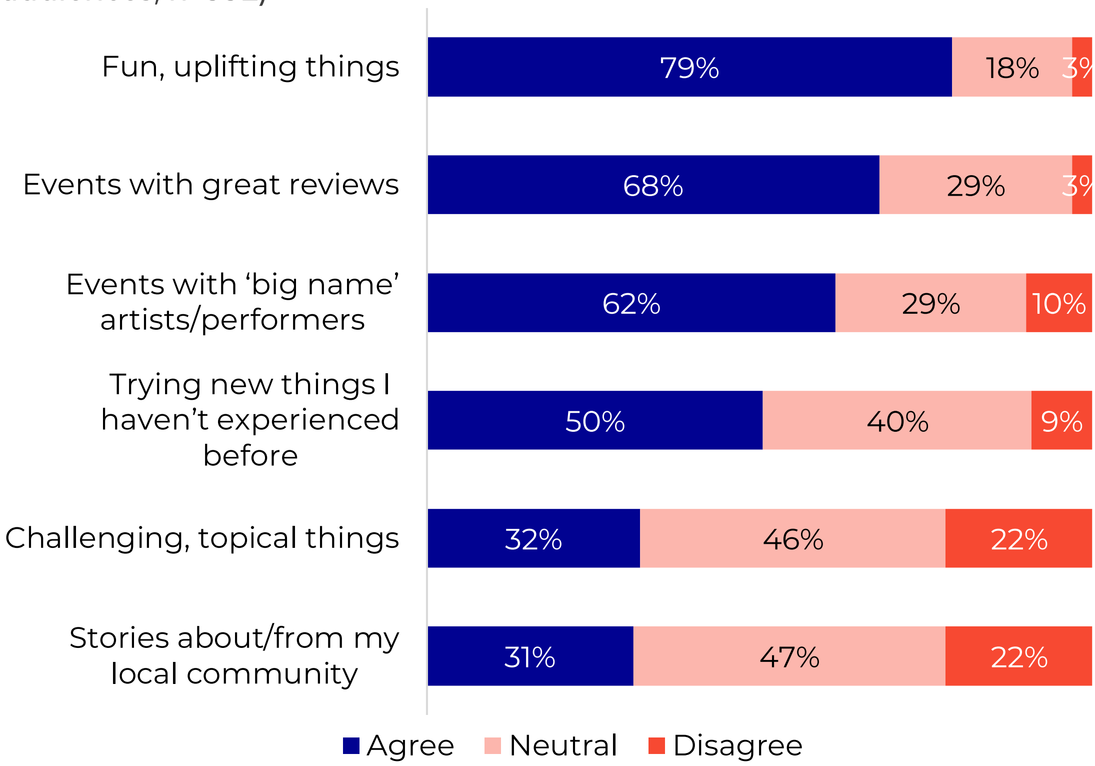
- QLD audiences are finding a wide range of content appealing, though like those around the country, budget pressures are leading some audiences towards ‘safer’ bets or ‘guaranteed fun’.
- High proportions of QLD audiences are seeking out fun, uplifting experiences and events with great reviews to ensure value for money.
- Audiences have an appetite for a vibrant and varied arts scene in QLD and want to ensure it continues to expand.
- Organisations that understand the mood can please crowds today while building trust for tomorrow.

QLD audiences are interested in a wide range of content, though budget pressures are leading some towards 'safer' bets

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

The results show significant appetite amongst QLD audiences for all options tested, including fun, uplifting things (79%), events with great reviews (68%), and 'events with big name artists/performers' (62%).

Figure 12: In the coming year, I'll be most attracted to... August 2023 (QLD audiences, n=992)



Audiences who are affected by cost-of-living crisis and other challenges in the wake of the pandemic report that they are opting to attend events that are a 'safe bet' or provide assured quality. One said,

> 'I remain interested in attending the theatre to see things of interest. The current economic issues prevent me from splurging into or trying new areas.' (55-64, QLD)

Others expressed that they are seeking reprieve from the difficult circumstances facing many Australians. One said,

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> ‘With all the hopelessness floating around, perhaps now is not the time to focus on the dark, but rather the light.’ (Under 35, QLD)

QLD audiences showed a desire for an uplifting, vibrant art scene – and want more people to have access to cultural experiences

In the August 2023 survey, audiences were asked, ‘What else do you think arts and cultural organisations should be aware of about Australian audiences at this time?’

QLD audiences commonly highlighted the value of arts experiences in fostering inclusion, enrichment and escapism – and stressed the importance of widening access to this. One said,

> ‘We are struggling to make ends meet, between housing, fuel costs and general living expenses it is a heightened stress level for many. Art and music soothe us but when faced with paying rent or cooking or attending a gig, sadly it will always lose out.’ (34-54, QLD)

Another said,

> ‘The last few years have been challenging for all. We need to "regroup" as a community. Audiences are looking for every opportunity that will make them feel happy, respected, "part of something" valued and able to share their experience, and have long lasting memories. Let us try to make every event for the artists and the audience to feel this.’ (65-74, QLD)

Audiences under 35 commonly expressed concerns with being ‘priced out’ of arts experiences that they are eager to attend, as one said,

> ‘Give us performances which engage the audience, are relatable, highly entertaining, catered to short attention spans, and most importantly, are highly affordable especially during these difficult financial times. It would be a shame if only the rich can afford to see the arts and culture.’ (Under 35, QLD)

QLD showed appetite for a diverse and uplifting arts scene, which can cater to audiences with different needs and levels of experience. One said,

> ‘I love the seriousness of attending a performance, it makes it special. But I also the light-hearted side. I guess a variety would be beneficial. Perhaps more things for beginners, it's very daunting when your new to that whole [thing]. Most people only go when they are taken by a more seasoned attendee.’ (35-54, QLD)

Audiences value uplifting communal spaces to counteract a challenging reality – and continue to look to the arts to foster this environment. One said,

> ‘We seem to be in a place in our world where much change is colliding at once and we need reasons to have hope, not feel desolate and depressed. Please keep creating positive works that help us to feel like we can collectively find a way through. I understand that some art is about revealing terrible things to highlight them and hopefully effect change, but we seem to be drowning in that in life in general and need plenty of spiritual lifelines to keep afloat. Art and culture play an enormous part in that. Thank you.’ (55-64, QLD)

"The last few years have been challenging for all. We need to "regroup" as a community.

Audiences are looking for every opportunity that will make them feel happy, respected, "part of something" valued and able to share their experience, and have long lasting memories. Let us try to make every event for the artists and the audience to feel this."

Audience member
65-74, QLD

Things to think about when making creative and programming decisions

While audiences are becoming more selective about what they choose to attend, there is strong desire for a wide range of content.

Here are some things for QLD organisations to consider:

- ❑ Events can be ‘fun and uplifting’ while still pushing boundaries – so look for ways to present new, topical and challenging ideas in different ways for audiences
- ❑ With many audiences reliant on ‘reviews’, consider complementary ways to build trust such as reposting audience shares and enabling functionality for audiences to leave reviews or ratings on websites or social media (also a great audience development exercise!)
- ❑ Consider what is working more broadly for Australian audiences in terms of content at the moment, e.g., under 35s are getting behind the uplift and nostalgia of *Barbie,* and the Matilda’s journey in the FIFA Women’s World Cup engaged record-breaking audiences
- ❑ Discuss the right level of investment in strategies for reaching new audiences, and retaining them long-term
- ❑ Sometimes, resources are better spent with targeting a specific group of interest with an event. One audience member said, ‘To keep connected to their specific audiences so they can create more relevant and effective performances to suit their audiences.’ (65-74, QLD)

4.

Three segments to know

Image Credit: Courtesy of HOTA.

4. Three segments to know across Australia

Across Australia, younger audiences, families and older audiences are thinking and behaving very differently in 2023, and organisations must build capacity for new ways of working.

Key points:

- National results demonstrate that local and economic pressures are impacting different generations in different ways. This is available in three key segments, summarised overleaf, and available to read in full in the Audiences 2023+report.
- Differences in mood, entertainment priorities, spending patterns and media consumption present a case for QLD organisations to consider how to create and execute strategies for different segments and build in flexibility to adapt as conditions evolve.

Summary of key segments

Inflationary pressures are experienced differently across the population. Three key audience segments are presented below.

	Young and restless	Family frugality	Older and bolder
	Arts audiences under 35	Arts audiences aged 35-54 with children living at home	Arts audiences aged 55+
Attending cultural events	84%	72%	79%
Feeling pessimistic about the future	28%	29%	22%
Spending $50+ on in-person events	48%	50%	67%
Attracted to fun, uplifting content	85%	88%	72%
Attrracted to challenging, topical things	45%	36%	46%
Seeing a role for digital in their lives	58%	47%	66%
Top awareness channel	Word-of-mouth (54%)	Websites & word-of-mouth (39%)	Email from an arts org (50%)
Top motivator for subscriptions and memberships	Accessing discounted tickets (42%)	Accessing discounted tickets (45%)	Locking in plans early (28%)

Things to think about in serving different segments

The pandemic created social issues that affected different people in different ways. Right now, inflationary pressures are also being experienced differently across different audience segments.

Here are some things for QLD organisations to consider:

- ❑ Consider whether your organisation is across the different trends taking place and has insights to inform tailored approaches
- ❑ Review organisational capacity for targeted approaches since different segments require very different thinking. Consider things like organisational structures, skills needed internally, workflows, data and software needed for successful targeting
- ❑ For those marketing events, reflect on whether the pressures of reaching short-term attendance/sales targets is inhibiting strategic work required for long-term audience development
- ❑ Consider all elements of audience experience in marketing strategy, and look at ways to build trust, loyalty and engagement in the short, medium and long-term
- ❑ Take time to clean, update and tag your database to maximise the potential for targeted campaigns and optimise open rates.

5.

Online trends

Image Credit: Selina Miles, courtesy of HOTA.

5. Online trends

QLD audiences continue to engage online, and in 2023, online content is helping audiences find out about events, discover new artists and participate in digital experiences.

Key points:

- Digital channels are paramount to audience engagement – with 78% of recent QLD attendees finding out about arts and culture events online.
- Preferred platforms look very different across age groups: email marketing is the priority for 55+, while word-of-mouth and socials are key for younger audiences.
- 4 in 10 QLD audiences continue to engage in online arts and culture, and half say digital cultural activities still play a role in their lives, despite the proportion paying for online experiences decreasing.
- It might be time to review online offerings, scrapping what's not working and freeing up resources for more targeted approaches.

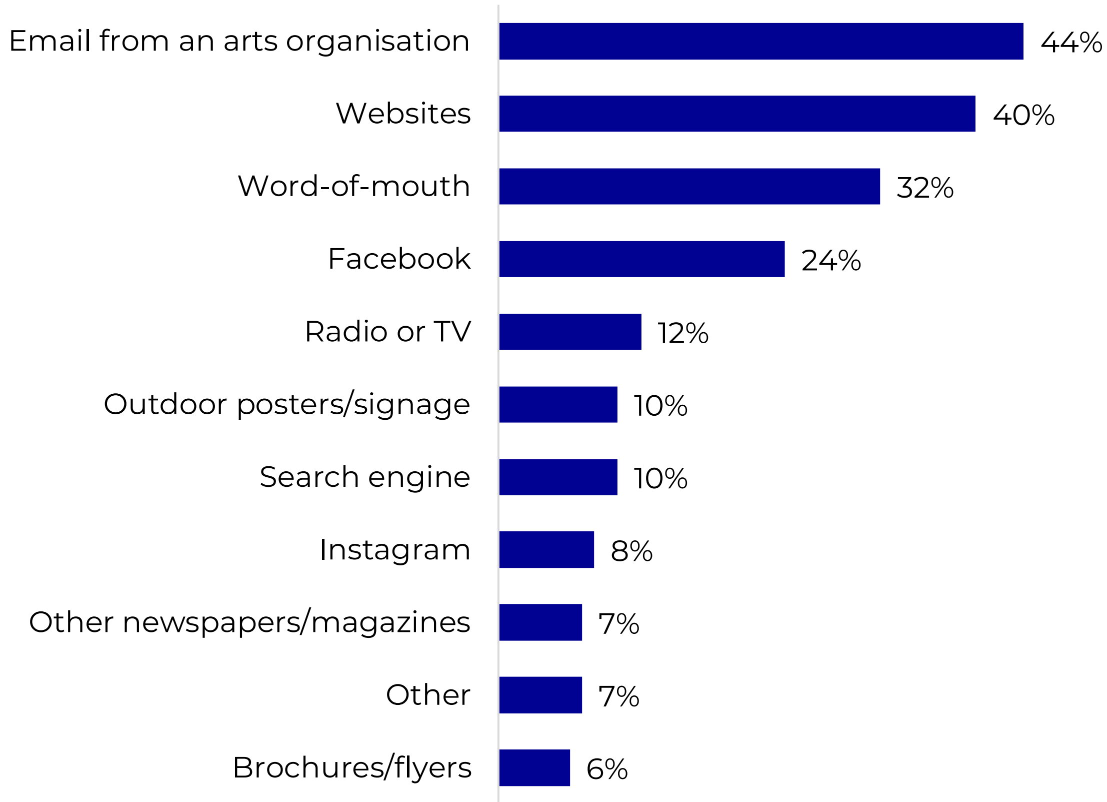
Key channels for QLD audiences are emails from arts organisations, word-of-mouth and websites

When asked how they heard about the most recent event or cultural activity they attended, overall, 8 in 10 QLD audiences cited online channels (78%), consistent with the national results (75%). This includes direct emails from arts organisations (44%) and websites (40%).

A third of QLD audiences are relying on word-of-mouth from friends, family or colleagues (32%) – on par with the national average (35%). Looking at other states, audiences in VIC and WA are currently more likely to be relying on word-of-mouth (both 38%) compared to other states like NSW and QLD (both 32%) for instance.

A sizeable proportion in QLD are relying on Facebook (24%), with fewer using Instagram (8%) to find out about recent events. These figures could be even higher, assuming a proportion of word-of-mouth occurs online.

Figure 13: How did you hear about the most recent event or cultural activity you attended? (Select all that apply). August 2023 (QLD audiences, n=766)



QLD audiences of all age groups are using online channels – and word-of-mouth is key for over half of under 35s

For over 55s in QLD, the dominant awareness channel is emails from arts organisations, followed by websites and word-of-mouth – consistent with national trends (Figure 14).

While audiences are hearing about cultural activities and events via email, some mentioned missing emails or difficulty navigating digital channels – suggesting organisations should employ multiple channels to drive awareness, particularly for older and regional audiences. One said,

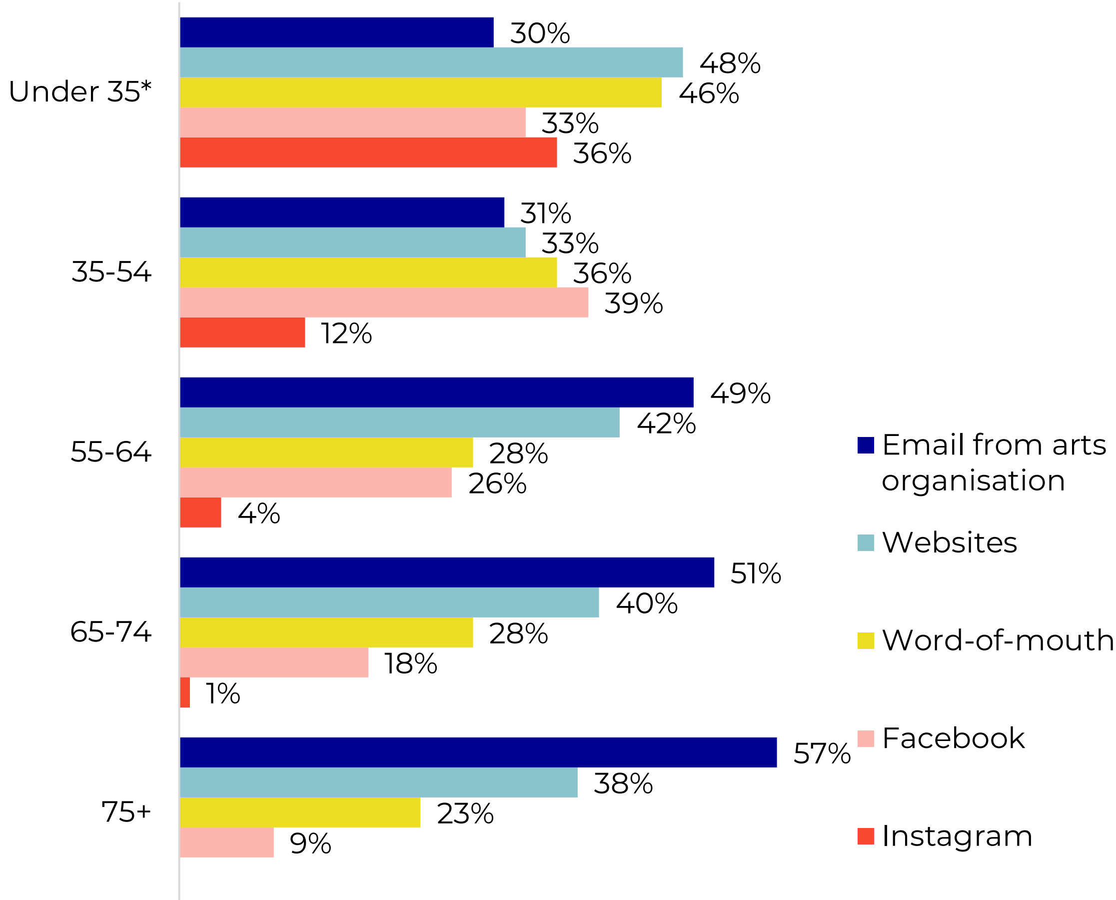
> 'I only watch what I find on You Tube. Too difficult to access something like the Royal Academy of Dance Genee Awards. I am old.' (75+, WA)

Almost half of under 35s (46%) say they heard about a recent arts or cultural activity via word-of-mouth. However, with a small proportion of QLD under 35s represented in the survey (n=61), these results should be interpreted with caution.

With this segment disproportionately facing financial barriers to attending cultural activities and events right now, word-of-mouth from family, friends and colleagues enables possible future attendees to hear reviews around the value and quality of cultural offerings.

Under 35s are also utilising social media channels, like Facebook and Instagram, more frequently compared to older age groups.

Figure 14: How did you hear about the most recent event or cultural activity you attended? (Select all that apply). By age group, August 2023 (QLD audiences, n=766)



Almost 4 in 10 QLD audiences continue to engage in online arts and culture, and half say digital cultural activities still play a role in their lives

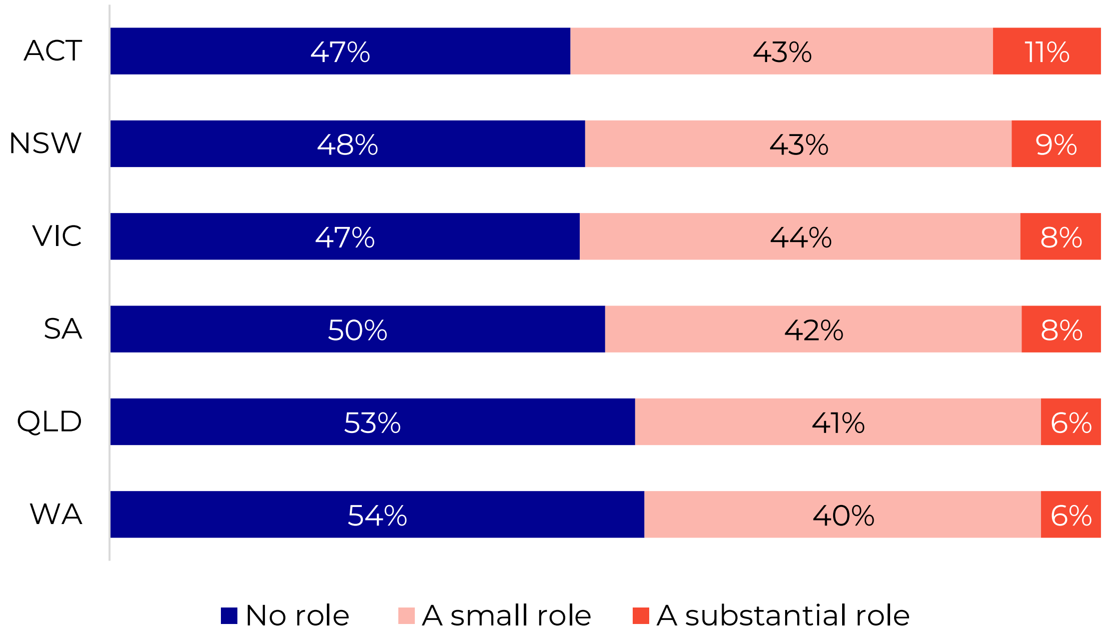
A sizeable number of QLD audiences are currently participating in online or digital arts and culture experiences (37%), consistent with the national rate (39%).

Participation in online arts and culture is relatively consistent across the states and territories. However, while VIC and NSW audiences were the most likely to say they had engaged in arts and cultural activities online in the fortnight prior to data collection (41%), QLD audiences were the least slightly, along with WA audiences (36%).

Respondents were asked what role online arts events/experiences play in their life now that venues are open for in-person attendance. Among QLD audiences, 6% say they play a substantial role (down from 15% in October 2022), and 41% say they play a small role (down from 49%).

When comparing the other states/territories, ACT (54%), VIC and NSW (both 52%) were the most likely to say that online arts and culture are playing a small or substantial role in their lives.

Figure 15: As venues are open and it's possible to attend in-person cultural experiences, what role do online arts events/experiences play in your life? By state or territory of respondent. August 2023 (QLD audiences, n=1,005)



Online spending amongst QLD audiences has decreased since November 2021, with 3 in 10 digital audiences paying for arts experiences

In line with spending levels amongst QLD audiences not increasing overall, the proportion of online audiences paying for digital arts experiences has continued to decline steadily over the past 18 months.

In August 2023, 22% said they paid for an experience in the past fortnight, down slightly from 27% in October 2022, 31% in March 2022 and 32% in November 2021.

QLD audiences who were paying for digital arts and cultural experiences in the fortnight prior to data collection were most likely to be purchasing single experiences (10%) or subscribing to on-demand platforms (8%). Fewer made a donation (4%) or subscribed to programs or seasons that included the experience (3%).

Some QLD audiences feel there is a lack of enriching online experiences – while others face technical barriers

In August 2023, audiences were asked to describe the extent to which they have experienced barriers to participating in online arts and cultural experiences.

Several QLD audience members mentioned that they have faced a limited selection of online experiences – and want to see more variety available – and this was particularly prevalent among younger audiences aged under 35. One said,

> 'Just in terms of what's available. The selection of events and experiences online is still quite small and limited. It would be great if there was more variety.' (Under 35, QLD)

Another mentioned the limited availability of professionally shot film of behind-the-scenes productions,

> 'Some of my particular interests is musicals and plays. I often like to watch pro-shots so that I can admire stage design, costume design, make up/hair and all the work that background characters put into the staging the scene for the central characters of the plot…
>
> …It is very hard to find pro-shots of things due to copyright and a strange belief that watching a pro-shot would discourage somebody from attending a live performance. I think it would be interesting if the arts had a subscription service somewhat like Curiosity Stream, or I suppose Netflix.' (Under 35, QLD)

One suggested expanding online offerings to encompass smaller and independent work,

> ‘There is a major lack of access to independent or smaller performing arts companies work. Most of the online experiences are created by the hegemonic performing arts organisations and are often uninspiring and are not part of the pioneering space of the upcoming generations.’ (Under 35, QLD)

Many audiences mentioned facing technical challenges or set-up limitations as key barriers to engaging in digital arts and culture. These difficulties can inhibit their experiences and deter them from wanting to continue engaging online. One said,

> ‘General interest but my internet speed is not good enough to make any paid performance enjoyable.’ (65-74, QLD)

Some are limited by connection issues in their area, which can diminish their enjoyment of the experience. One said,

> ‘Just technology errors – usually a stable internet connection is difficult for anyone to obtain in my hometown.’ (Under 35, QLD)

While some QLD audiences value opportunities to engage online, others simply prefer live events

Several QLD respondents mentioned that they would consider participating in online arts organisations from within their own home – provided they find a program of interest that is reasonably priced. One said,

> ‘Online arts events/experiences don’t happen often in arts events that I am aware of. I would consider attending them if they were fairly priced and in line with my interests in arts and events. Sometimes it is nice to relax in the comfort of home and enjoy things, the drinks are cheaper at home as well, the coffee is not as good at home.’ (35-54, QLD)

However, a significant number of respondents mentioned that the prospect of in-person events was more appealing than online events, particularly for those already working on screens all day. One said,

> ‘For me, the pleasure of listening to music is being physically there. I work on computers all day so the last thing I want to do is stare at a computer for leisure activities. I love attending concerts in person, no devices, no technology, just good old-school entertainment.’ (Age unknown, QLD)

Some QLD audiences are rather eager to prioritise human connection, and opportunity to feel immersed with an in-person arts experience. One said,

> ‘I don't really have the inclination to participate in the arts online - to me, being in person is central to the overall experience. I want to immerse myself. I'm not a big fan of online media or social media for any purpose, so that includes the arts.’ (35-54, QLD)

Another said,

> ‘I prefer to experience these things in person, as it is about the community and vehicle of bringing friends together and doing something different.’ (Age unknown, QLD)

"The selection of events and experiences online is still quite small and limited.

It would be great if there was more variety."

Audience member
Under 35, QLD

Things to think about when connecting with audiences online

The online space is key when engaging audiences – though the lines get blurry where different types of content and different platforms connect with audiences.

Here are some things for QLD organisations to consider:

- [ ] Compare these insights with your own analytics to reflect on what is right for your audience – and where there could be gaps or opportunities to improve
- [ ] Look at what is not working and what resources could be freed up to focus on priority opportunities
- [ ] QLD audiences are currently looking for fun, energising, social experiences. Ensuring that realistic targets are set for digital experiences and that digital distribution strategies have a long-term horizon will be key
- [ ] Promoting online experiences which are low-cost could help to build audiences in the current financial climate. One QLD respondent shared: 'It once again depends on what events are showing, how much it costs and where it is being shown. We already have our quota of tickets for upcoming shows for 2023.'
- [ ] QLD audiences particularly reliant on word-of-mouth (especially under 35s, who are also using social media at high rates). Leverage this prominence as an awareness channel online, employing strategies that promote the social aspects of events, or encourage sharing
- [ ] Look at your ability to create segmented email campaigns with targeted offers and messaging for different groups (e.g., use email strategically and sparingly with under 35s and instead focus email campaigns on audiences aged 55+).

6.

Late decision-making

Image Credit: Courtesy of HOTA.

6. Late decision-making

Last-minute decision-making persists, with QLD audiences having more choices, taking longer to decide given their financial circumstances and prioritising other things. Organisations need to prepare for new phases in campaigns to reach people at the right time with the right messages.

Key points:

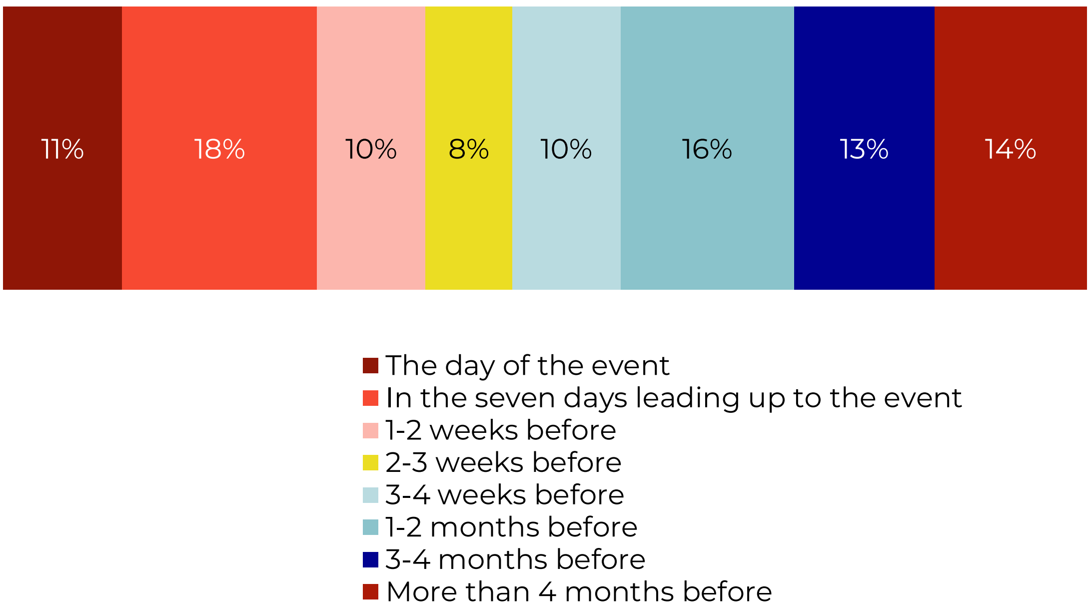
- 4 in 10 QLD audiences are booking less than two weeks out, with 11% on the day of the event.
- Analysis of 'early bookers', 'mid-term bookers' and 'last-minute bookers' shows that last-minute ticket buying is linked with certain behavioural patterns – such as being more likely to rely on word-of-mouth.
- Ticketing initiatives to support more price sensitive audiences are important, but last-minute discounting may not be the answer.

Arts audiences were asked about how far in advance they booked or committed to the most recent event they attended

For the purposes of this report, we have summarised early bookers as those that lock in their tickets more than a month in advance, mid-term bookers as those who commit 1 – 4 weeks in advance, and last-minute bookers as those who book either the week of the event or on the day.

Overall, the last-minute ticket buying trend prevails among QLD audiences: 11% of audiences reported that they booked the last event they attended on the day of the event, and 18% booked in the week leading up to it.

Figure 16: Can you tell us how far in advance you booked or committed to go...? August 2023 (QLD audiences, n=766)



In QLD, qualitative data indicates that key motivations for booking tickets early included wanting to secure particular seats, booking tickets as part of a subscription/membership package, and needing to plan ahead to coordinate travel timings and accommodation.

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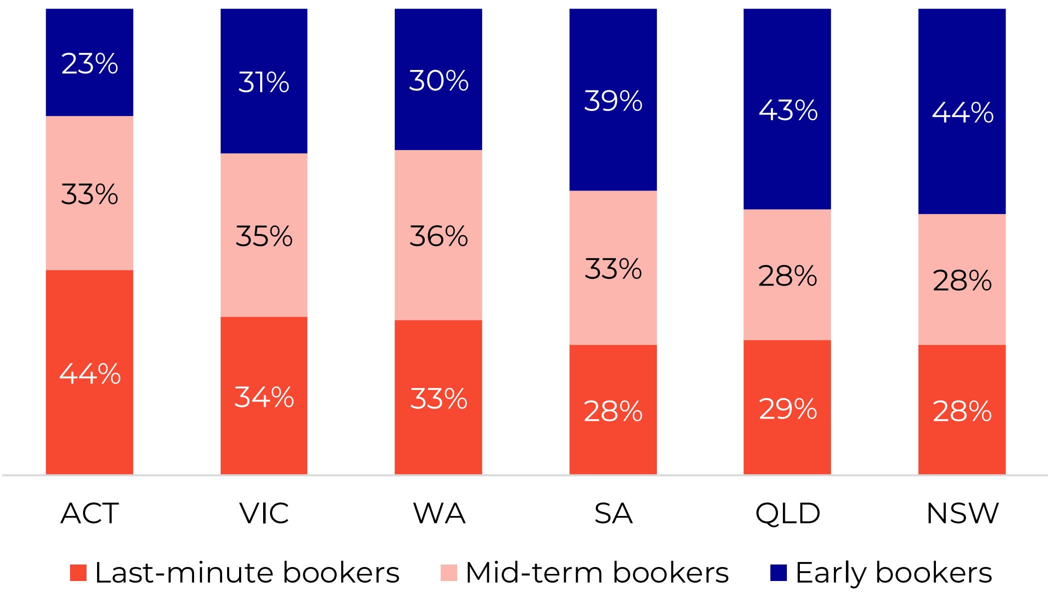
‘Big name’ artists/performers were also strong motivations for securing tickets early. 68% of QLD early bookers agreed that they were attracted to events with ‘big name’ artists/performers, as opposed to 56% of last-minute bookers.

Compared to other states, QLD audiences are most likely to be early bookers (43%) and are among the least likely to be last minute bookers (29%), along with NSW (28%) and SA (28%) audiences. However, last-minute booking is relatively similar across the states and territories.

Figure 17: Can you tell us how far in advance you booked or committed to go...? By state or territory, August 2023. (QLD audiences n=766)



Late bookers described a range of reasons for purchasing last-minute tickets

Four in ten (39%) QLD audience members are committing or booking less than two weeks out, with 11% on the day of the event.

Many QLD early bookers reported feeling ‘better off’ or the ‘same’ financially as they were a year ago (56%), whereas last-minute bookers were less likely to do so (45%).

Half (51%) of early bookers reported spending more than $100 in the past fortnight on in-person live events and cultural activities, compared to 33% of mid-term bookers, and 19% of those booking last-minute.

Qualitative data indicates that several QLD audiences are hesitant to book in advance because they are unsure if they will be able to make it due to illness, work, study commitments and other ad hoc commitments that may arise. One said,

> 'I have a very taxing and busy job and I don't like to commit to something if I don't need to buy tickets far in advance.' (Age unknown, QLD)

Others mentioned that their attendance was a spur of the moment decision, with some mentioning not having children to consider and making the most of free time. One shared,

> 'Had always planned to go but hadn't set a specific date. [I checked] ticket availability and decided we could make it that night. We have no kids so it's easy to make last minute decisions like this.' (Under 35, QLD)

Another mentioned the habit of taking opportunities when friends and family are available,

> 'Never do [book in advance]. Usually hard to organise everyone. Just find something to do if everyone happens to be free that day.' (Age unknown, QLD)

Last-minute bookers typically hear about events via word-of-mouth (47%), while early bookers rely on emails (56%)

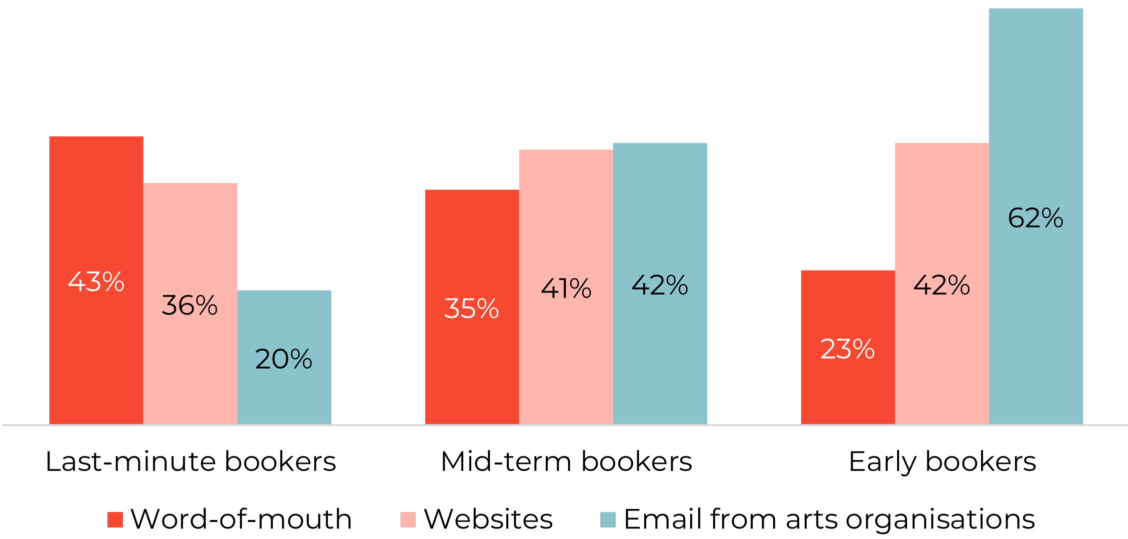
Among early bookers (62%) and mid-term bookers in QLD (42%), emails from arts organisations are the most common means of hearing about cultural events.

Meanwhile, for late bookers in QLD, email is less important, with 20% noting this as their awareness channel for their latest event.

Late bookers were more likely to rely on word-of-mouth recommendations (43%), social media like Facebook (20%) and traditional media channels like radio and TV (19%), or outdoor poster/signage (13%).

Finding out about what's on via websites is important for all types of ticket buyers and is relatively consistent in terms of proportions (Figure 18).

Figure 18: How did you hear about the most recent event or cultural activity you attended? (Select all that apply). By booking purchase timeframe, August 2023 (QLD audiences, n=766)



"Had always planned to go but hadn't set a specific date. [I checked] ticket availability and decided we could make it that night.

We have no kids so it's easy to make last minute decisions like this."

Audience member
Under 35, QLD

Things to think about when catering to different types of ticket-buyers

QLD audiences have different motivations for the timing of their ticket purchases. A significant proportion of last-minute bookers suggests the trend is here to stay, so planning ahead can help to avoid last minute 'panic' discounting.

Here are some things for QLD organisations to consider:

- ❑ Define the different phases of a campaign and review how tactics can change to suit different phases. For instance, what motivates early bookers is unlikely to work for mid-term and late bookers
- ❑ Consider methods of tracking intended attendance, beyond simply tracking ticket purchases e.g. providing opportunities to register interest. A QLD respondent said: 'I knew I would attend but wasn't sure when.'
- ❑ Review ticket prices for young audiences and if youth discounts are already in place, review age limits i.e., under 35 may be more appropriate than under 30 or under 25 given current conditions, and some artforms may have a case to extend this to under 40
- ❑ With some audiences feeling burnt out by cancellations as a result of lockdowns, clearly communicating any flexible exchange policies at point of purchase may help alleviate fears and encourage early booking
- ❑ Consider offering group discounts or family tickets (e.g., 2 adults, 2 kids or 1 adult, 3 kids) to relieve cost pressures on 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. Consider investigating a payments solution like ArtsPay, as some audiences are put off by high booking fees but are keen to support the arts and artists.

7.

Subscriptions and memberships

Image Credit: Courtesy of HOTA.

7. Subscriptions and memberships

Subscribers and members are vital for many arts organisations, but their needs vary dramatically across audience segments – presenting opportunities for QLD organisations to adjust their packages to enhance the appeal for different audiences.

Key points:

- 1 in 4 QLD audiences are members or subscribers – lower than the national average.
- Subscriptions uptake and motivations amongst key segments in QLD differ significantly.
- Older QLD audiences want to show financial support and lock plans in early, while younger audiences are more likely to want access to discounted tickets.
- Opportunities exist for QLD organisations to trial different offers and models, and test different messaging to target the unique needs and interests of different audience segments.

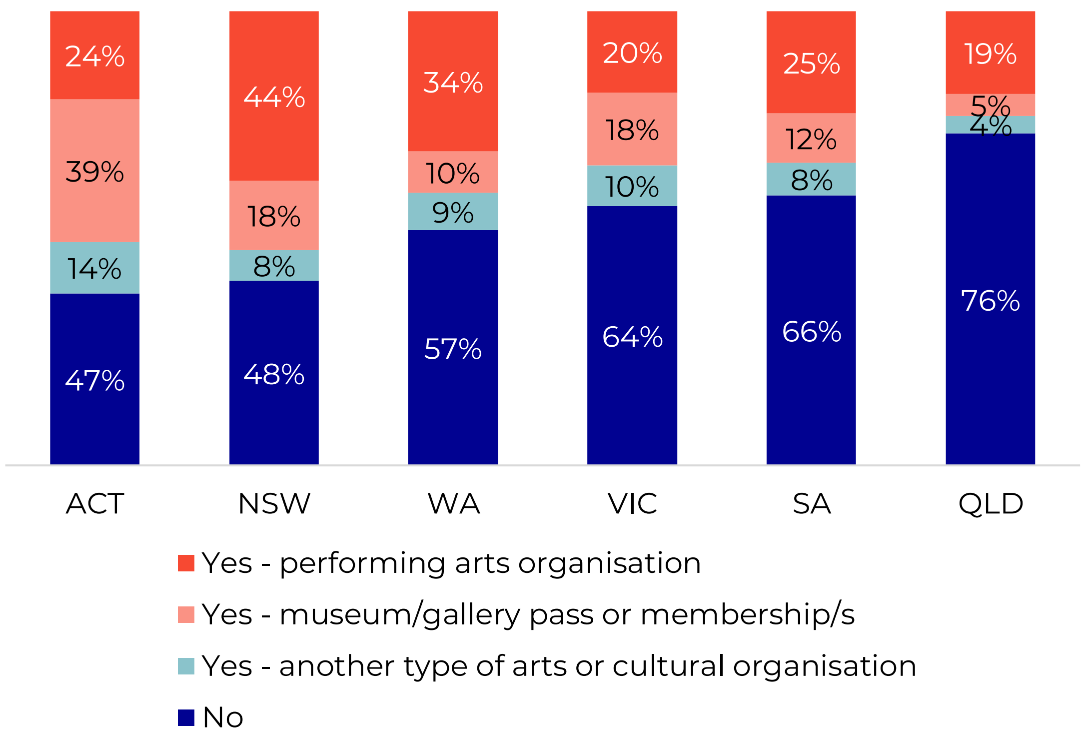
Around 1 in 4 QLD audiences are members or subscribers in 2023 – lower than the national average

Around one quarter (24%) of QLD respondents reported having purchased season tickets or a membership to an organisation this year – almost half the national average of 41%.

Compared to other states, season subscribers and membership rates are lowest in QLD, followed by SA (34%) and VIC (36%) – and highest in the ACT (53%) and NSW (52%).

In QLD, performing arts subscriptions were most common, held by 19% of respondents, followed by a smaller number holding museum/gallery memberships (5%) or another kind of membership, for example, to literary festivals (4%).

Figure 19: Did you purchase a season ticket, subscription or membership? By state or territory of respondent, August 2023 (QLD audiences, n=996)



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Qualitative data highlights that motivations for subscribing are varied between the key age segments in QLD

Qualitative data from older QLD audiences suggests many appreciate that purchasing a subscription or membership forces them to plan ahead – and provides them with greater liberty to purchase seats of their choosing. One said,

> 'Better seating opportunities if purchased season tickets & can plan one year in advance around performances.' (65-74, QLD)

Another said,

> 'Convenience of booking when programmes are known in advance, company loyalty, forcing the attendance that might otherwise be missed or forgotten or thought too much trouble.' (65-74, QLD)

Older QLD audiences are also motivated to show their support for the artists and organisations they love – with several noting they've been loyal subscribers or members for years. One said,

> 'I have supported Qld Ballet since the 1970s and am proud of its growth and expertise. I enjoy watching particular performers progress through the ranks. It is cheaper to buy tickets as a season subscriber.' (65-74, QLD)

Qualitative data from under 35s confirms they are commonly seeking quality and value for money. Perks such as access to discounted tickets are also strong motivators for under 35s in terms of purchasing subscriptions and memberships – and can encourage them to attend productions they haven't seen before. One said,

> 'Student deals were super appealing and encouraged me to go to more than just what directly appealed to me. [I] choose two things I really wanted to see and two things I might not have ended up going to see because of the season ticket deal.' (Under 35, QLD)

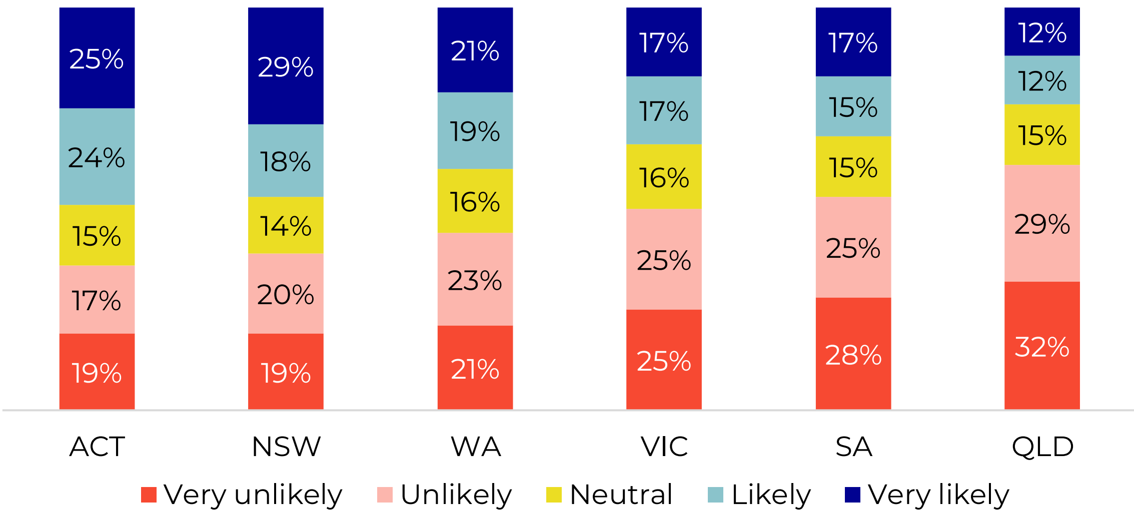
Looking ahead, 1 in 4 QLD audiences say they are likely to purchase a subscription or membership next year

Audiences were asked about the likelihood of them purchasing a subscription or membership next year.

One in four QLD audiences said they would be 'very likely' (12%) or 'likely' (12%) to purchase a subscription or membership for next year – the lowest of any state or territory, followed by SA (32%).

Meanwhile, audiences in ACT (49%) and NSW (47%) were the most likely to say they would purchase a subscription or membership next year.

Figure 20: How likely or unlikely are you to purchase a subscription or membership next year? By state or territory of respondent, August 2023 (QLD audiences, n=1,005)



QLD audiences are conscious of the cost – and many are apprehensive of making the commitment

Audiences were asked: 'Do you have any suggestions about how arts and cultural organisations can improve their subscription and membership programs to suit you better?'

Some QLD audiences suggested a pay-as-you-go model to relieve the financial pressure that comes with purchasing a subscription or membership, especially given the current cost-of-living climate. One said,

> ‘I don't really know, the financial aspect is a barrier, the membership always seems so much in one go - even though it works out better in the long run. Perhaps a monthly subscription? It's also hard to plan a whole year of shows when you don't know where you'll be or what you'll be doing and who'll you'll be able to go with.’ (Under 35, QLD)

Others suggested they would be attracted to flexible offerings, which allow audiences to tailor packages to suit them. One said,

> ‘I like the idea of being able to purchase a suite of tickets, but not necessarily the whole season i.e., 3 ticket packages, 5 ticket packages etc. Inevitably things happen that are unexpected, and I find it difficult to commit to a full set of dates ahead of time. It's likely that I will miss at least one of these dates due to unexpected events.’ (55-64, QLD)

Other audiences shared suggestions for added extras to enhance the perception of value for money. One said,

> ‘Offer a unique reward or benefit programme. For example, a dance company could offer members the opportunity to see the dancers train or rehearse etc.’ (55-64, QLD)

Along with discounted tickets, audiences under 35 commonly showed appeal for cross-artform and cross-venue subscription packages, as one said,

> ‘Memberships where there is a discount on tickets (even if it's smaller), or you can get better seats at a cheaper price (A tickets at the price of B tickets). Memberships where you get access to book tickets in advanced would be good. Memberships across multiple platforms – not just QPAC but also applicable to museums etc.’ (Under 35, QLD)

There is an opportunity to increase awareness of subscriptions and memberships – and how they would appeal to target segments

Other audience members highlighted that that more communication around the benefits of subscriptions and memberships could attract more audiences. For example, clear communication around obtaining a subscription or membership, future programming, exclusive offers, flexibility and discounted prices is helpful. One audience member said,

> 'Be very clear about membership benefits and ensure these are provided. Check in to confirm they are being provided.' (35-54, QLD)

Value for money is important across all ages – and young people struggling financially would benefit from more promotion of existing offerings and incentives related to discounts and lower concession prices.

One mentioned,

> 'I'm not really sure what the benefits of a subscription are.' (Under 35, QLD)

"I like the idea of being able to purchase a suite of tickets, but not necessarily the whole season i.e., 3 ticket packages, 5 ticket packages etc.

Inevitably things happen that are unexpected, and I find it difficult to commit to a full set of dates ahead of time. It's likely that I will miss at least one of these dates due to unexpected events."

Audience member
55-64, QLD

Things to think about when reviewing subscription and membership offers

Here are some things for QLD organisations to consider:

- With subscription/membership behaviours and motivations differing across key segments, it's important to consider whether a single subscription offering can appeal across age groups
- There may be a case to test new and different packages and target them at different age groups and interests. One under 35 QLD respondent suggested: 'Multidisciplinary collaboration across gaming and tech.'
- Messaging of subscription campaigns will work best when tailored to a target age group. For instance, campaigns targeting young people could emphasise discounts and flexibility, whereas campaigns targeted at older audiences might emphasise the benefits of locking plans in early and showing their support
- Increase general awareness around the subscriptions and memberships your organisation offers, including the benefits, discounted offers, possible programming and how it provides value and support for artists and arts organisations
- Flexibility could be an untapped benefit of performing arts subscriptions in the current climate, whereby people can organise changes of dates with no extra charge. One QLD respondent said, 'Many organisations' programs or subscriptions are very limited and not flexible. It feels like an expensive commitment.'
- Payment plans and/or monthly fees could have their place in memberships for younger people and other segments – it's a space worth watching.

About the survey

On 2 August 2023, participating organisations simultaneously sent the Phase 9 survey to a random sample of their audience – defined as those who had attended an arts or cultural event in person since January 2018.

Over 8,800 audience members responded (8,816), from all over Australia: New South Wales (NSW; n=2,560), Victoria (VIC; n= 3,046), Queensland (QLD; n= 1,005), South Australia (SA; n=833), Western Australia (WA; n=988), and the Australian Capital Territory (ACT; n=324). A small number of responses were collected from audiences in Tasmania (TAS; n=26) and the Northern Territory (NT; n=34). These are included in national averages but not reported separately.

What's next

To read about the story so far, visit the study's Australian homepage.

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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Patternmakers acknowledges Aboriginal and Torres Strait Islander peoples as the traditional custodians of our land – Australia. We acknowledge the Gadigal people of the Eora Nation as the traditional custodians of the place where Patternmakers is based, and we pay our respects to Elders past, present, and emerging.

AUDIENCE OUTLOOK MONITOR

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