



JULY 2021

# Queensland Snapshot

Audience Outlook Monitor



Queensland  
Government

## Summary

### **In early July, most QLD audience members had attended a cultural event in-person – but outbreaks continue to complicate attendance**

In early July 2021, 61% of Queensland (QLD) audience members had attended an arts or cultural event in the two weeks prior to data collection (7-11 July 2021). This proportion was down somewhat since March 2021 (69%), with the data collection period following a snap lockdown in Brisbane and other parts of the state (29 June to 3 July 2021).

Another ongoing lockdown began several weeks after data collection (31 July 2021) in response to community transmission of the Delta variant - creating further uncertainty around the viability of in-person attendance.

At the time of data collection, two-thirds of QLD audience members were willing to attend cultural events 'now or as soon as it is permitted' (66%, down from 72% in March 2021) and a further 32% were prepared to attend when reasonably confident the risk of transmission was minimal (up from 26% in March).

### **Key challenges include lockdowns and vaccination rates, but QLD audiences are eager to attend when possible**

Reflecting upon their experiences over the past 4 months, 7 in 10 QLD audience members (71%) stated that their plans to attend arts and cultural events had been affected by lockdowns and restrictions – an experience which many find frustrating and disappointing.

When asked about the factors inhibiting their attendance over the next 12 months, QLD audience members were more conscious of the risk of future lockdowns and cancellations (50%, up from 34% in March 2021) and the risk of contracting or transmitting the virus (36%, up from 21%) than they were four months ago.

However, audience members were empathetic towards the artists affected by lockdowns, and many expressed their intentions to support arts and cultural venues however they can.

Four-fifths (78%) continue to make plans for future attendance, despite the risks, although some say they will opt for local events and make last-minute decisions. Most QLD audience members (78%) expect the amount they spend on arts and

culture events to stay the same, or even increase, over the next 12 months, up slightly from March 2021 (74%) - although some expressed concern about the types and number of events that would be available.

Promisingly, QLD audience members are being vaccinated at high rates, and the majority (87%) believe the vaccine rollout will be successful enough to allow normal activities to resume within 12 months.

In the case of extended outbreaks, QLD arts organisations may look to results from other states to assist with scenario planning. For instance, at the time of data collection a lockdown of Greater Sydney had led to a fall of around 15 percentage points in the proportion who were comfortable attending most venue types in NSW.

## **Around a third of respondents participated online, and 48% expect to continue engaging**

Over one-third (37%) of QLD audiences participated in some form of online arts or cultural activity in early July, down from March 2021 (42%). Despite outbreaks across the country, the data does not show a return to the digital participation boom of the early pandemic, and digital participation rates continue to be lower than in some other states.

When asked what role digital participation plays in their lives when in-person attendance is possible, 48% of QLD audiences say that digital programming plays a small (39%) or substantial (9%) role - confirming the ongoing importance of this area post-lockdown.

3 in 10 QLD audience members (30%) said they paid to access online content in the fortnight before data collection, stable with March 2021 (29%). However, QLD audiences may be increasingly likely to pay greater amounts for works of corresponding quality, with 48% of QLD audiences spending more than \$50 on online content, up from 42% in March.

## Introduction

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

This Queensland (QLD) Snapshot Report outlines key findings from the July 2021 phase of the Audience Outlook Monitor in Australia (Phase 5), based on responses from 1,595 audience members connected with organisations in Queensland.

Launched in May 2020, the study is tracking audience sentiment in relation to the COVID-19 pandemic. Each phase involves a cross-sector collaborative survey process involving 130 arts and culture organisations, including museums, galleries, performing arts organisations and festivals.

On 7 July 2021, participating organisations simultaneously sent the Phase 5 survey to a random sample of their audience – defined as those who had attended an arts or cultural event in person since January 2018. Data collection concluded 4 days later, on 11 July. The data collection period fell between two snap lockdowns in Brisbane and other parts of the state – one dating from 29 June to 3 July, and the other beginning July 31 and ongoing at the time of publication.

Almost 9,000 audience members responded across the country, allowing in-depth comparisons of trends in different jurisdictions (noting that results for Tasmania should be interpreted with caution due to a small sample size in that jurisdiction). An asterisk is used to denote small sample size (\*).

In addition to this Snapshot Report, the July 2021 results are freely accessible in an interactive dashboard. Users can explore the data for different artforms, types of events and demographic groups in all parts of Australia. For more information about the study, and to access resources such as the dashboard, visit:

[www.thepatternmakers.com.au/covid19](http://www.thepatternmakers.com.au/covid19)

Read on for the key July 2021 findings in QLD.

## Current conditions

### Comfort with public activities in QLD has been affected by outbreaks around the country

Although the majority of audience members in QLD remain at least somewhat comfortable participating in public activities, confidence in early July was impacted by recent cases of COVID-19 in the state and ongoing outbreaks elsewhere in the country.

The July 2021 survey saw a decrease in the proportion of audiences at least somewhat comfortable with activities such as eating at a local restaurant (96%, down from 99% in March 2021), going to a local cinema (84%, down from 92%), using public transport (80%, down from 86%), exercising at a gym (64%, down from 78%) or flying domestically on a commercial airline (70%, down from 75%).

QLD audiences were on par with Victorian (VIC) audiences for most public activities, with the exception of flying on a commercial airline, where QLD audiences were more confident (70% at least somewhat comfortable, compared to 63% in VIC).

These results from early July give an indication of how QLD audiences have responded to contained outbreaks. Results from New South Wales (NSW) provide a sense of how audience confidence is affected when outbreaks continue long-term - comfort levels were significantly lower than in QLD, having decreased by around 20 percentage points for all public activities.

## Attending cultural events

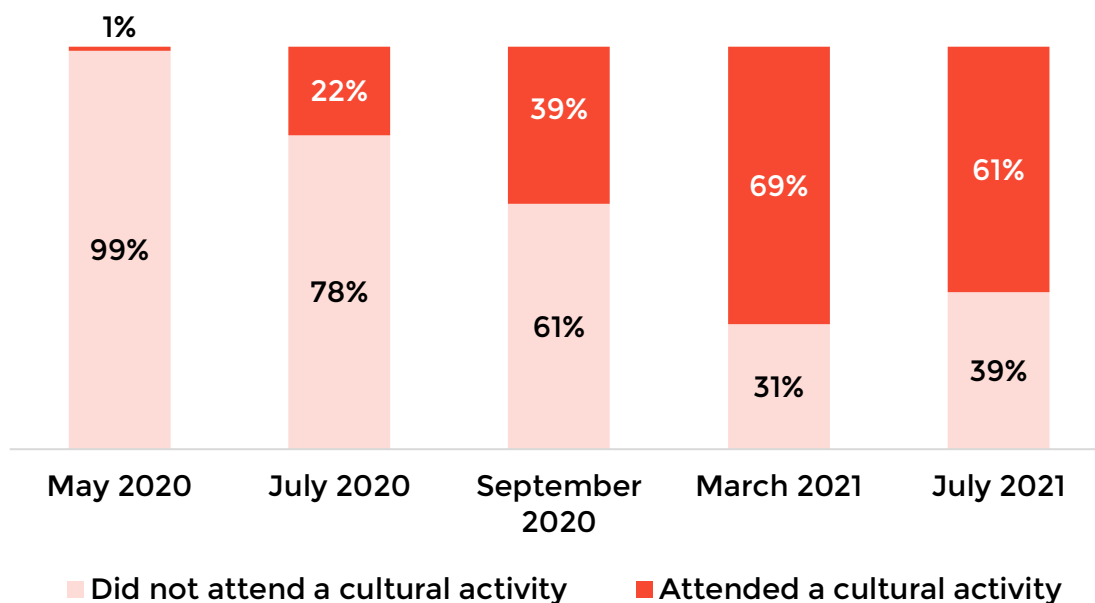
### Live attendance in QLD has been set back slightly since March

Live attendance rates in QLD have been on an upward trend, growing from 22% in July of 2020 to 69% in March 2021 as venues and facilities re-opened - but were set back slightly in the most recent results due to disruption from lockdowns within the State and elsewhere around the country.

In July 2021, 6 in 10 (61%) of QLD audiences had attended an arts or cultural event in the two weeks prior to data collection (7-11 July 2021). (Figure 1). This proportion was above the national average (53%) and greater than other states which also experienced lockdowns or restrictions prior to data collection - including Western Australia (WA) (53%) and VIC (56%).

Attendance rates were higher in regional and remote QLD (67%) compared to the major cities (60%) - with audiences in regional/remote areas less likely to have been in lockdown before the July data collection. This was a reversal of the typical trend in QLD, where metropolitan audiences tend to attend more frequently than audiences in regional/remote areas.

Figure 1: In the past fortnight, did you do a cultural activity in-person (not online)? (QLD) July 2021 (n=1,595)



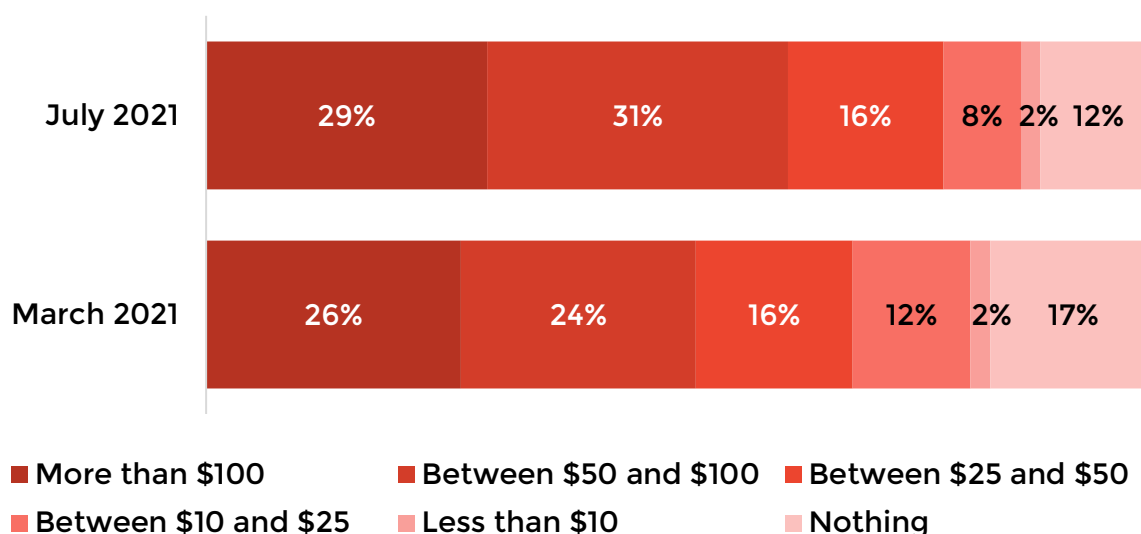
## Despite disruptions to live attendance, 6 in 10 QLD audience members spent over \$50 on tickets to cultural events in early July

Although live attendance has been disrupted by lockdowns in QLD and across the country, 60% of QLD audiences reported that they had spent more than \$50 on tickets to in-person activities in the fortnight before data collection.

This proportion has increased by ten percentage points since March 2021 (when 50% of audiences spent over \$50 on tickets), whilst the proportion of audiences who did not spend any money on tickets to arts events has decreased (12%, down from 17% in March 2021). (Figure 2).

Alongside South Australia (SA), the proportion spending over \$50 in QLD was among the highest in the country.

Figure 2: In the past fortnight, how much did you spend on tickets to in-person live events and activities? (QLD) July 2021 (n=836)



## Comfort at arts venues has declined somewhat since March, but remains high across the majority of venue types

Audience confidence has been affected by the lockdowns and outbreaks across the country, with comfort down from March 2021 across most venue types.

However, the proportion of audiences at least somewhat comfortable at most venues remains high, including community art spaces or studios (92% at least somewhat comfortable, down from 97% in March 2021), large theatres or concert halls (90%, down from 93%) and outdoor festivals or concerts (89%, down from 92%). Comfort is stable at and museums or galleries (96% at least somewhat comfortable, stable with 98%).

A smaller proportion of audiences are at least somewhat comfortable at comedy clubs or live music venues (51%, down from 59% in March), and hands-on exhibits at interactive museums (53%, down from 60%).

Across jurisdictions, QLD audiences were more comfortable at arts venues than audiences in NSW, where Sydney is in lockdown due to an ongoing outbreak, and the Australian Capital Territory (ACT). QLD audiences are most similar to VIC audiences in their attitudes towards most venues, but are somewhat more comfortable with large theatres or concert halls (90% at least somewhat comfortable, compared to 85% in VIC) and less comfortable with comedy clubs or live music venues (51% at least somewhat comfortable, compared to 56% in VIC).

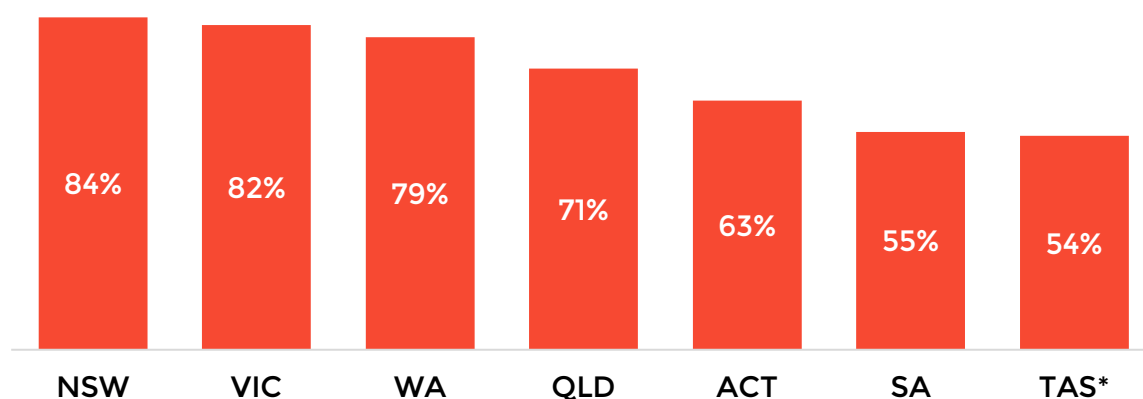
The proportion of QLD audiences who are willing to attend cultural events 'now or as soon as it is permitted' has decreased somewhat since March 2021 (66%, down from 72% in March 2021), but remains the majority. A further 32% state they will attend when reasonably confident the risk of transmission is minimal (up from 26% in March), and only 2% cannot foresee going out until there is no risk (stable with 2% in March).

## Impact of lockdowns and restrictions

### 7 in 10 QLD audience members have had their plans affected by lockdowns and restrictions

7 in 10 QLD audience members (71%) stated that their plans to attend arts and cultural events had been affected by lockdowns and restrictions in the four months leading up to data collection (7-11 July 2021). This proportion was around the national average (76%) – higher than SA (55%) and the ACT (63%), but lower than NSW (84%) and VIC (82%), where extended lockdowns saw audiences impacted to the greatest extent. (Figure 3).

Figure 3: In the past four months, have your plans to attend in-person arts and cultural events been affected by lockdowns/restrictions? July 2021 (n=2,160)



When asked how they had been impacted by lockdowns, the majority of QLD respondents said that they lived in an area affected by lockdown/restrictions (62%), the event or venue was in an affected area (60%) or the artist they were planning to see was affected by lockdown/restrictions (58%). In a less common scenario, some QLD audiences chose not to attend the event due to the risk of travel delays or quarantine (11%).



Some QLD audience members highlighted the flow-on impacts of lockdowns in other states, with one reporting,

'I had a trip to Sydney planned for Hamilton with friends from Melbourne this week. They got locked down, then I couldn't travel from Queensland when Sydney locked down. Even if we could according to one state, another said no. It caused a lot of worry and panic.'

These proportions were most similar to other states which had been locked down prior to data collection, such as VIC, NSW and WA. They were least similar to states/territories which had not experienced significant outbreaks, such as SA and the ACT, where attendance was more likely to be inhibited by the risks related to travel rather than being locked down oneself.

QLD audiences in regional or remote areas were also less likely to live in lockdown-affected areas themselves (27%, compared to 69% of metropolitan audiences), but more likely to say that risk of travel delays or quarantine had affected their plans (18%, compared to 9% of metropolitan audiences).

Comments from these audience members suggested that travelling from regional areas to attend events can be especially challenging in the pandemic context. One audience member stated,

'I live in rural QLD and a trip to see a show involves travel and accommodation. I have only been to ONE event at QPAC in last 18 months due to the risks of losing money on travel, accommodation and tickets as a result of COVID changes.'

## Risk of lockdowns and virus transmission are increasingly cited as barriers to attendance for QLD audiences

In March 2021, QLD audiences were asked 'Can you tell us if anything is preventing you from attending in-person arts and culture events as you used to in the past?'

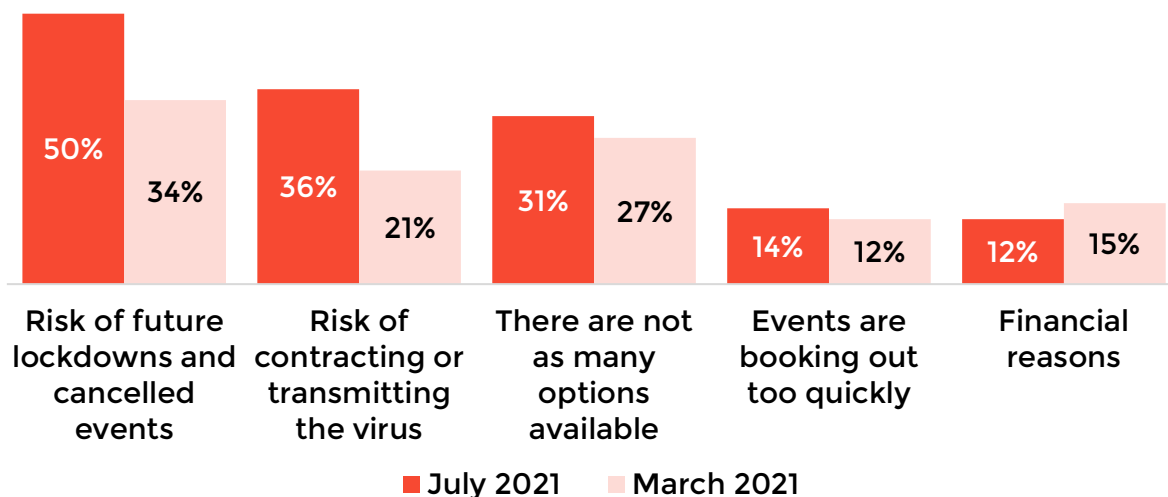
In July 2021, they were asked whether similar factors would affect their attendance over the next 12 months. In the coming year, QLD audiences are more likely to be deterred from attending by the risk of future lockdowns and cancellations (50%, up from 34% in March 2021) and the risk of contracting or transmitting the virus (36%, up from 21%). (Figure 4). A number of circumstantial factors may have increased the salience of these barriers for QLD audiences - including the snap lockdown in parts of QLD shortly prior to data collection and the presence of the highly infectious Delta strain in the Australian community.



A third of QLD audiences also cited the fact that there are not as many options available (31%, up from 27% in March 2021). Some less common barriers included the fact that events are booking out too quickly (14%, stable with 12% in March 2021) and financial reasons (12%, down from 15%).

QLD audiences were more likely to cite the risk of lockdowns as a barrier to attendance than audiences in SA (46%) and TAS\* (37%), but less likely than audiences in VIC (55%) and NSW (54%). They were less likely to cite the risk of virus transmission than audiences in NSW (46%), where an ongoing outbreak of the Delta strain is taking place.

Figure 4: 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) July 2021 (n=1,576)



## Lockdowns and cancellations are frustrating for QLD audiences, but they are empathetic towards the artists affected

Audience responses suggest that repeated cancellations are frustrating and disappointing – with the uncertainty around the viability of future events and disruption to regular attendance being difficult for some. One audience member from QLD shared,

‘These activities are my downtime, my outlet for relieving stress – it has impacted my mental status as I can't get to do what I love in my spare time.’

Another said,

‘It's really frustrating, for all involved. It impacts our lives in a big way, because there's no reliability in scheduling anymore, and as a patron as well as artist I've experienced both sides and it's exhausting.’

Some QLD audience members suggest that repeated lockdowns have made them more wary of booking events in the future – and it may take time to rebuild their confidence. One stated,

‘I am reluctant to book anything at all - be it travel, holidays or events - as the past 18 months have seen so many of our plans cancelled. We will wait now - it is too risky to plan ahead.’

Another said,

‘[Lockdowns] have impacted my ability to purchase tickets as I now think “Well, that will probably be cancelled.” It's really hard to be looking forward to something, have tickets and it's cancelled within hours, days of you going.’

As a positive sign, however, many QLD audience members emphasised that their own disappointment was nothing compared to the stress, frustration and financial strain faced by artists and venues when events are cancelled. They expressed a desire to support the sector at this time, and a willingness to accept necessary interruptions to attendance. One stated,

‘Clearly such experiences are often very disappointing, but the best approach is to remain flexible, adaptable, expect that your plans might have to change and find positive ways to approach the changes.’

Another said,

‘[We have to] roll with punches... COVID is here and the arts have to survive... so get out there and buy a ticket in the hope it goes ahead. Keep supporting the arts despite the inconvenience.’

## Nearly four-fifths of QLD audiences made future plans to attend an event in the fortnight before data collection

Despite the disruptions and uncertainty caused by recent lockdowns across the country, the majority (78%) of QLD audiences continue to make firm plans to attend arts and cultural events in the future (stable with 79% in March 2021).



Audiences in QLD were among the most likely in the country to make future plans in early July, along with SA (85%) and VIC (76%).

The kinds of cultural events QLD audiences planned to attend in July were consistent with March 2021, with the largest proportion of audiences planning to attend a live performance (58%), visit a museum or gallery (38%) or visit a cinema (30%).

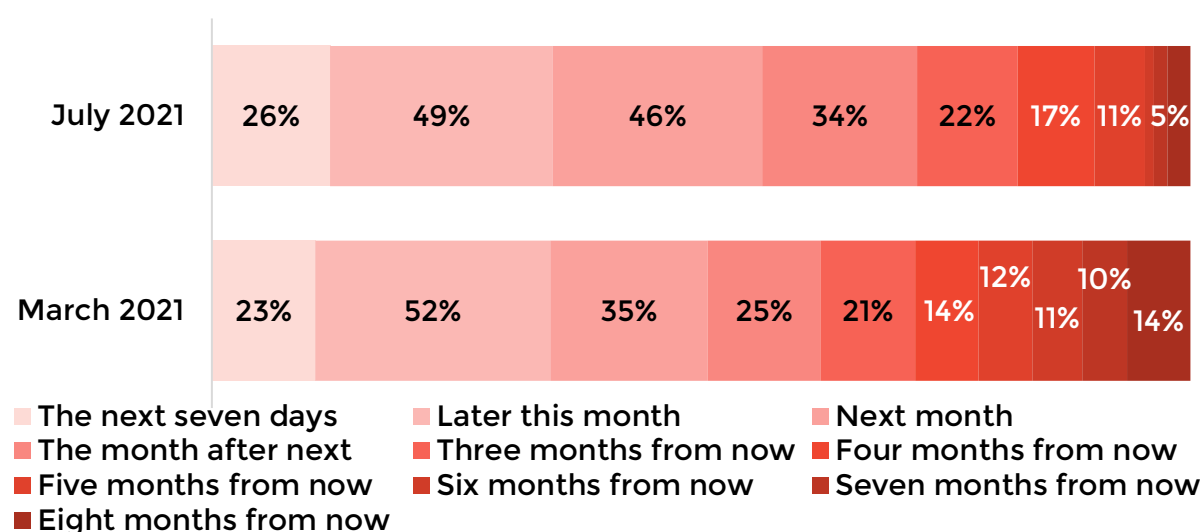
## QLD audiences are increasingly looking to book events 1–4 months from now

Although the proportion of audiences making future plans to attend cultural events is consistent with March 2021, the latest findings suggest that QLD audiences may have changed their approach to booking events in the future.

In July 2021, QLD audiences were slightly less likely to book tickets for events later this month (49%, down from 52% in March), but were significantly more likely to book events next month (46%, up from 35%), the month after next (34%, up from 25%) or four months from now (17%, up from 14%). At the same time, they were also less likely to book tickets for events six months from now (2%, down from 11% in March), seven months from now (3%, down from 10%) or eight months from now or thereafter (5%, down from 14%) (Figure 5).

Likely reflecting what’s available, this 1-4 month period may also represent a ‘sweet spot’ for QLD audiences between the uncertainty of the present – where outbreaks continue across the country – and the unpredictability of the future.

Figure 5: In the past fortnight, did you purchase tickets for one or more live shows or performances that are scheduled for...? (QLD) July (n=641) and March 2021 (n=973)



## Some audience members deal with uncertainty by making last-minute bookings and keeping it local

QLD audiences were also slightly more likely to have booked tickets for events in the next seven days (26%) compared to March (23%).

Comments from QLD audiences revealed that some audience members were making a habit of booking events last-minute to avoid having plans cancelled or changed. One QLD audience member stated,

‘I tend to leave it to the last minute to book anything. To avoid disappointment and loss of money.’

Another said,

‘I accept that risk of cancellations is now just part of learning to live with COVID. Sometimes it means I don't book tickets until last minute, as I may be waiting to assess risk.’

Other audience members have suggested that restrictions on interstate and international travel, and the possibility of future lockdowns or border closures, have led them to preference events in their local area. One stated,

‘I am unlikely to make bookings outside my local area (Regional QLD).’

## Building confidence

### The option to reschedule or refund tickets is giving QLD audiences the confidence to make bookings

When faced with event cancellations, the majority of QLD audience members said that they rescheduled or rebooked the event (63%). Around 3 in 10 (27%) requested a refund, while 15% donated the value of the unused tickets.

Many QLD audience members suggested the presence of simple, stress-free protocols for refunding or rescheduling tickets were giving them the confidence to continue making bookings. One said,

‘As I'm yet to run into any issues with venues etc. refusing to refund or reschedule bookings, I'm still very happy to continue to book things in advance as I'm reasonably confident we'll be able to work out a solution if the event is cancelled.’

Another said,

‘I think it's great how flexible venues are being, if you know things will be rescheduled or you have a choice for a refund it's not as concerning to make plans for the future.’

Some audience members expressed satisfaction as to how specific QLD venues had handled cancellations and reschedules. One audience member reported,

‘QPAC has been great at communicating options when scheduled events were affected.’

## Audiences will be reassured by clear communication from venues around rebooking and refunds

Some audience members did report issues arising from cancellations – including the fact that rescheduled events can be hard to manage. One audience member shared,

‘There was confusion over the rescheduling of an event and the dates changed a number of times so I just asked for a refund. It was too much bother.’

Another said,

‘Very disappointed. Show was rescheduled but I can't attend on those dates, so requested refund.’

Other audience members suggested that they were concerned with losing money as a result of cancelled events – revealing an opportunity for presenters to reassure and encourage audiences by informing them of policies for reschedules or refunds in advance. One audience member said,

‘[Cancellations] have made me stop from booking a ticket to a show that am wanting to see as I don't want to lose my money.’

One audience member called for,

‘Explicit information regarding refunds in the event of a lockdown. There seems to be an ad hoc approach to this. I have \$400 in limbo for a concert from November 2020 that has been rescheduled to February 2022 with no offer of a refund at all. Other venues such as HOTA on the Gold Coast have been fantastic with refunds.’

## Most QLD audiences want to see check-ins, improved ventilation and mandatory mask policies at arts venues

Despite setbacks in audience comfort, certain COVID-safety measures like mandatory check-ins, improved ventilation and mask-wearing will improve the confidence of QLD audiences.

When asked to what extent a list of safety measures would encourage or discourage QLD audiences to attend an event, the largest proportions said they would be encouraged by the presence of check-in procedures (86%) and improvements to ventilation systems (80%).

Almost two-thirds of QLD audiences (62%) also reported that they would be encouraged by requiring audiences to wear masks inside venues, though 17% reported they would find this measure discouraging. One QLD audience member reported,

'I hate wearing masks at all but realise they are necessary at this time. Having to wear a mask is the biggest factor when deciding whether to attend a performance or not.'

Across jurisdictions, QLD audiences were somewhere in the middle in terms of their approach to mask-wearing – less in favour of mandatory masks than audiences in NSW (77% encouraged, 9% discouraged) and the ACT (69% encouraged, 14% discouraged), but more in favour than audiences in SA (52% encouraged, 21% discouraged) and WA (51% encouraged, 23% discouraged).

Over half (63%) of QLD audience members said that they would be encouraged by limiting venue seating capacity to 75% and/or limiting capacity to allow 2 square metres per person (54%).

QLD audiences were less in favour of taking temperatures at the entrance to venues – although 45% of audience members would be encouraged by the presence of this procedure, more than half felt neutral (36%) or negative (19%) about it.

## QLD audiences want to be informed in advance of COVID-safe policies — and want to see them in practice

In addition to the above measures, QLD audiences stressed the importance of knowing the venue's COVID-safety protocols in advance so they can make informed decisions. One said,

'[Venues should] have their COVID-safe plan available on the website. Particularly interested in controlling airborne particles when singing is involved.'

Another said,

'Advertise what you're doing to ensure everyone's safety!'

Others emphasised that they wanted to see these protocols observed and consistently put into practice. One said,

'[I want to see] full detail of their COVID-19 Plan, and evidence that they actually follow it. I have attended cultural organisations this year and found the Plan clearly not working, not monitored adequately.'

## QLD audiences prefer venues with fixed seating — whether they are indoor or outdoor

Looking ahead, QLD audiences were asked to rank their preferences for attending events over summer among a list of four different venue types. The largest proportion selected indoor venue with fixed seating (51%) as their first preference, followed by an outdoor venue with fixed seating (34%) – while less than one in five (17%) preferred an outdoor venue where audiences were free to walk around.

One audience member stated,

'I believe there is more risk of virus transmission when people are freely walking around. It would be hard to regulate the social distancing outdoors.'

Some responses were motivated by factors other than virus transmission – such as weather, or the quality of the experience. One audience member stated,

'I would prefer to attend air-conditioned venues in summer as Brisbane is hot and sweaty.'



Another said,

‘So much of the experience is lost when in an outdoor setting... too much other interference with sound and the form is lost to the elements.’

## Planning for future attendance

### QLD audiences want to see a continuation of pre-pandemic programming, though some are looking for light-hearted events

When asked about the types of arts and cultural content that they would be attracted to over the next year, the overwhelming majority agreed that they wanted to see the same kinds of events they used to attend pre-pandemic (94% in July 2021, stable with 93% May 2020).

QLD audiences were less likely than in May 2020 to agree that they wanted to see ‘works that make sense of the pandemic’ (9% down from 21%), and more likely to be attracted to ‘light-hearted programs’ (36%, up from 24% in May 2020). One QLD audience member shared,

‘[I want to see] primarily orchestral, light and cheery works.’

### 8 in 10 of QLD audiences expect to spend the same amount or more on cultural events, up slightly from March

When asked about their projected spending over the next 12 months, almost 8 in 10 (78%) of QLD audiences said they would spend the same amount or more on arts and culture activities, compared to before the health crisis started. This proportion is up slightly from March 2021 (74%) – however, there remains uncertainty about the kinds of events that will be viable in the current climate.

The proportion of QLD audiences who planned to spend more or the same was similar to SA (78%) and WA (78%), and slightly higher than that of audiences in VIC (73%), NSW (72%) and the ACT (68%).

Of the 11% of QLD audiences who expected their spending to increase, many attributed this change to a desire to catch up on lost time and re-engage with QLD’s cultural offerings. Others expressed a desire to support artists, venues and the sector after recent disruptions.

One QLD audience member said,

‘You don't know what you've lost until it's gone. The arts have suffered such a devastating blow the past 18 months they need our financial support more than ever.’

One stated,

‘I want to support the arts and especially QPAC and Queensland Ballet.’

## 1 in 5 QLD audience members expect to spend less in the coming year, for both personal and pandemic-related reasons

However, 22% of QLD audiences suggested that they expected their spending over the next 12 months to be less than before the pandemic began.

When asked the reason for this change, some audience members cited personal circumstances such as finances, or ageing. Others suggested that the recent outbreaks across the country had shaken their confidence and led to greater health anxiety, or that restrictions and lack of opportunity had made them likely to attend fewer events. One stated,

‘The bar seems higher to attend an event - feels like a risk so reward also needs to increase.’

Another said,

‘I am a huge supporter of the arts. However over the last 18 months I've had 2 plays, 1 musical, 4 live bands and 2 music festivals cancelled or postponed. So I think I'll wait for the dust to settle.’

## Vaccination outlook

### Vaccination is a key decision factor for many QLD audience members

Many QLD audience members see the vaccination rollout as a key factor in their decisions to attend cultural events. When asked what was the most essential information cultural organisations could provide to help them decide whether or not to attend an event, many QLD respondents referred to vaccination in their responses. One stated,

‘It's more about when vaccines are available, not about venues.’

Some have suggested they won't return to events until vaccination rates are higher, with one commenting,

'At my age and with the chronic health issues I have, I will need to be fully vaccinated before I venture into an anyways confined space with numbers of other folk for the duration of any type of performance.'

Another said,

'I will not be attending events until 90% of the population is vaccinated.'

## **QLD arts audiences are more likely to be vaccinated against COVID-19 than the general population**

QLD arts audiences are more likely to have been vaccinated relative to the general population – which may help encourage those audience members who are looking for high vaccination rates before they return to regular attendance.

Almost all (93%) of QLD respondents aged 75 and over had been at least partially vaccinated, compared to 73% of Australians over 70 in the general population, based on figures from the Australian Government Department of Health (<https://www.health.gov.au/initiatives-and-programs/covid-19-vaccines/australias-covid-19-vaccine-rollout>).

Three-quarters (75%) of QLD respondents aged between 55 and 64 had been at least partially vaccinated, compared to around half of the general population.

One-quarter (25%) of QLD respondents under 35 had been at least partially vaccinated, compared to approximately 10% of the general population. Of the two-thirds of audiences under 35 who were not vaccinated, 95% stated that they would probably or definitely get vaccinated when it became available.

## **Most QLD audiences are confident the vaccination effort will be successful in helping things return to normal**

Promisingly, most QLD audiences (87%) are at least somewhat confident that the vaccination effort will ultimately be successful in allowing normal activities to resume within a year.

This proportion has decreased slightly since March 2021, when 91% of QLD audiences were at least somewhat confident.

QLD audiences were the among the most confident around the country, alongside NSW (89%) and SA (87%). Audiences in the ACT were the least confident, with four-fifths (81%) at least somewhat confident.

## Online participation

### Almost 4 in 10 of QLD audiences engaged in arts and culture experiences online

Over a third (37%) of QLD audiences were participating in digital arts and cultural experiences in early July, down from 42% in March 2021.

The participation rate in QLD was similar to that of audiences in SA (37%) and WA (40%), but lower than states such as NSW (50%) and VIC (47%), where digital participation rates have generally been higher throughout the pandemic.

In terms of the types of online experiences, QLD audiences were most likely to have watched a pre-recorded video of a performance (20%, down from 23% in March 2021), participated in an online class or tutorial (16%, down from 20%) or watched a live streamed performance (14%, stable with 16%) in the two weeks prior to data collection.

### 1 in 2 QLD audiences see an ongoing role for digital participation in their lives

In July 2021, audiences were asked, 'When venues are open and it's possible to attend in-person cultural experiences, what role do online arts events/experiences play in your life?'

Around half (48%) of QLD audiences say that digital programming plays a small (39%) or substantial (9%) role, confirming the ongoing importance of this area post-lockdown.

This proportion was similar to SA (47%) and WA (48%) and lower than NSW (57%) and VIC (56%), which generally see higher proportions of audiences online outside of lockdown periods.

For the QLD audience members who expected to continue engaging with online arts and culture in the long-term, convenience, comfort, accessibility and safety were seen as key advantages. One audience member stated,

'I have a busy work and study schedule, so if I can't find time to see something live, I like having the option to purchase a ticket and watch a professional recording. Especially when a risk of lockdown and community transmission may still exist for some time.'

Another said,

‘I don't go out as much as I used to - catching Covid has never really worried me - I just find it all too much effort now to go to live entertainments. I suspect I am not the only one who has turned inwards.’

## Digital programming can open up access for regional and interstate attendees

Many audiences commented on the accessibility and availability benefits of digital programming, which has the ability to transcend physical distances – allowing QLD audiences to participate in interstate events or regional/remote audiences to access intercity programming. One audience member stated,

‘As a regional supporter it is great to see online what I couldn't travel to see in person e.g. QT play readings, STC theatre, National Theatre plays and conversations.’

Another stated,

‘I live in Townsville so it has been great to do on-line activities from other states e.g. writers/book club, artist talks.’

While another said that online engagement provided,

‘Access to plays that take time to arrive in Brisbane. It's great to see show I wouldn't have seen otherwise. I think it is undoubtedly useful for people in rural communities but also people with severe disabilities.’

## Most QLD audiences tune in alone, but shared viewing can be a way to connect during lockdowns and border closures

When asked how they participated in a digital event or experience, the majority of QLD audiences suggested they tuned in alone (68%), while 28% watched with other members of their household.

A further 10% gathered in public to watch a live-streamed event with an audience. One in ten (9%) audience members tuned in as part of an in-person gathering of friends and family, while another 7% connected online with friends and family who were tuning in elsewhere.

Some QLD audience members commented that digital content offered them a way to connect, both with people in their households and without, during lockdowns and border closures. One reported,



‘Since March 2020 my husband and I have enrolled in drawing workshops offered by the public galleries, and an online "book chat reading group" with family that has continued on a regular basis.’

Another said,

‘[I have participated in] interstate festival/concerts; musicals such as the Andrew Lloyd Weber series. Some family members are disabled, and online opportunities have been great for them.’

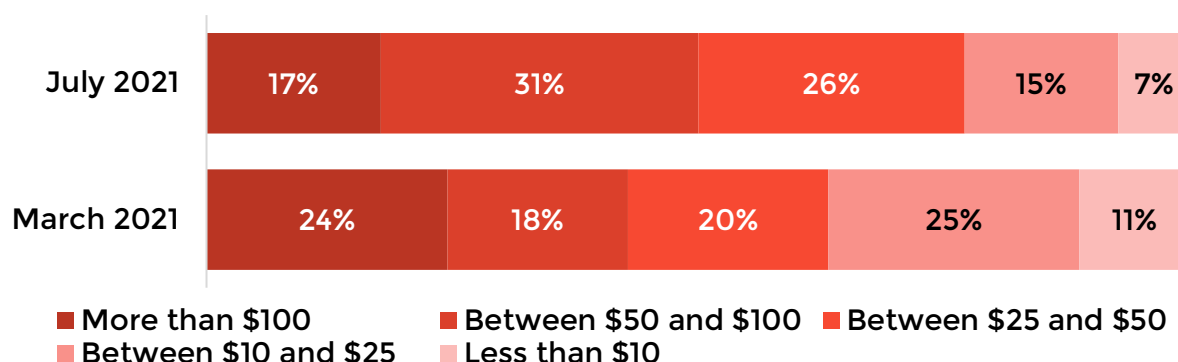
### 3 in 10 QLD audiences are paying to access online content

In the fortnight before data collection (7–11 July), 3 in 10 (30%) QLD audience members had paid to access online content (stable with 29% in March 2021). QLD audiences were around the national average (33%) for spending on digital programming – and were more likely to have paid for online content than audiences in WA (23%) or SA (27%), but less likely than audiences in TAS (42%) or VIC (47%).

Participation in most forms of paid online experiences was consistent with March 2021, including one-off pay-per-view arrangements (12%, stable with 14%), subscribing to seasons with a digital component (6%, stable with 8%) and subscribing to online platforms (6%, stable with 4%). The proportion of QLD audience members who made a donation as an expression of gratitude for an online experience had increased slightly (13%, up from 9%).

Of the audience members in QLD who participated online in the last fortnight, around half (48%) spent over \$50. This number had increased from March 2021 (42%), although the proportion spending over \$100 was smaller (17%, down from 24% in March). (Figure 6). Overall, a greater proportion of QLD audiences appear to be prepared to spend more on quality digital works.

Figure 6: Can you share with us your total spending on online arts & culture experiences in the past fortnight? (QLD) July 2021 (n=127) and March 2021 (n=105)



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## What's next

To explore the data in more detail and find out how audiences for different artforms are responding, visit the study's Australian homepage at: [www.thepatternmakers.com.au/covid19](http://www.thepatternmakers.com.au/covid19)

There, you can read about the story so far and 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).

## Acknowledgment

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