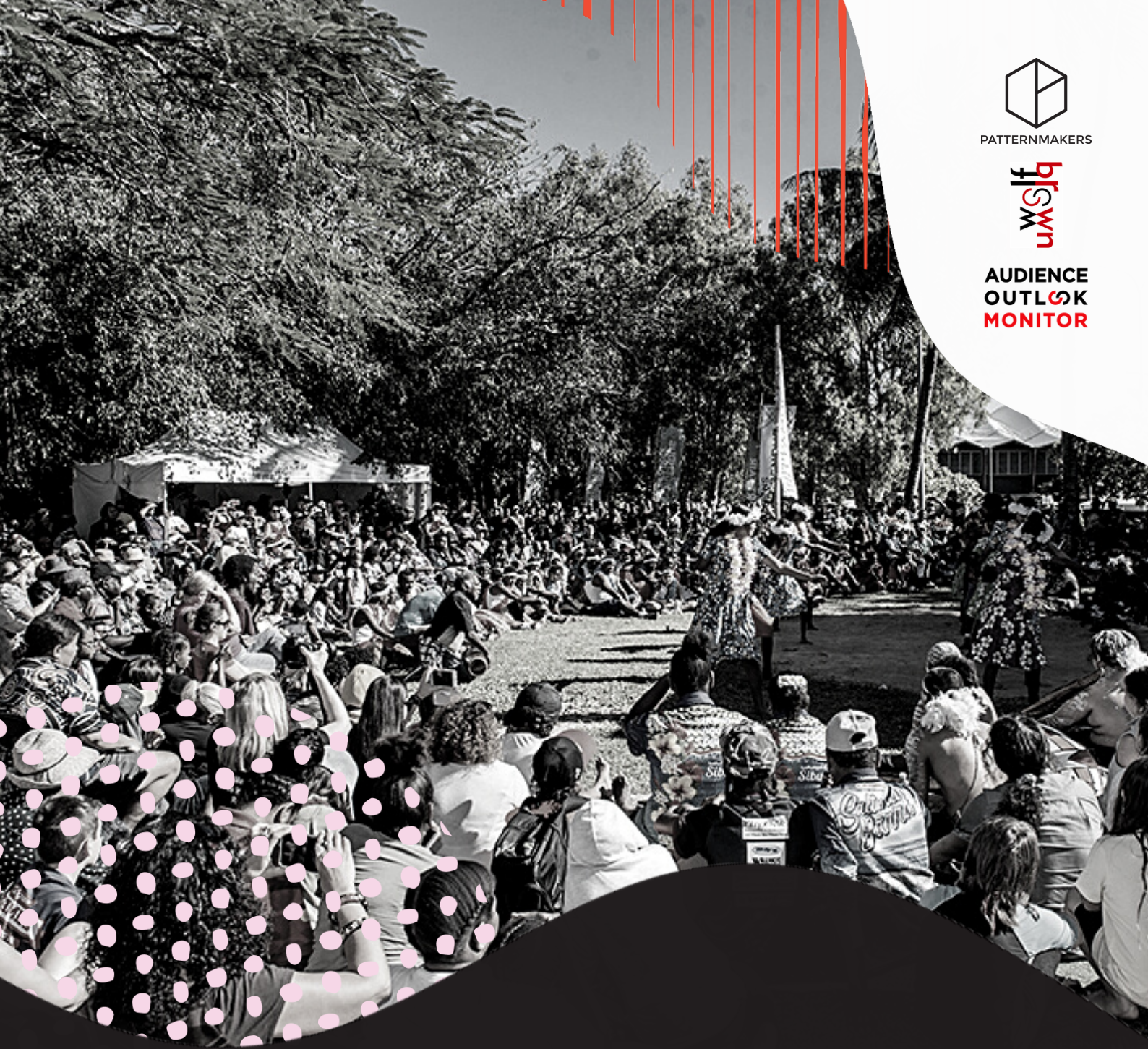




PATTERNMAKERS



AUDIENCE  
OUTLOOK  
MONITOR



PHASE 2

# Queensland Snapshot

Audience Outlook  
Monitor, July 2020



Queensland  
Government



## Summary

The Phase 2 findings of the Audience Outlook Monitor in Queensland (QLD) indicate an increasingly optimistic outlook about attending arts and cultural events, compared to findings in Phase 1 (May 2020).

QLD audiences are among the most confident nationally to attend cultural venues and events today. 1 in 3 (33%) now say they are ready to attend events when it is permitted, compared to 25% in May 2020, and 22% attended a cultural event of some kind in the fortnight before data collection (July 2020).

Qualitative feedback suggests that even though risks are seen as low, many QLD audiences appreciate the safety measures taken by venues and event organisers to manage the risk of community transmission. Online booking, limiting capacity and clear communication are all helping with reassuring attendees when they return to events.

When presented with a choice, the largest proportion of QLD audiences selected outdoor spaces as their preferred way of attending a cultural event right now. However, some would still prefer to engage in a digital program and avoid even the smallest risk of transmission.

The proportion of audiences participating online has fallen slightly, and QLD audiences are among the least likely nationally to be paying for digital experiences. However, with a majority continuing to engage online (70%), and most of those planning to continue (71%, up from 67% in May), investment in digital distribution remains important.

QLD audiences for First Nations work are strongly engaged online (81%), and they are more likely to make a donation after having an online arts and culture experience (32%, compared to 16% of QLD audiences generally), highlighting a key area for investment.



## Introduction

This Queensland (QLD) Snapshot Report identifies insights from 2,853 survey respondents connected with QLD organisations participating in Phase 2 of the Audience Outlook Monitor.

Beginning in May 2020, the study involves bi-monthly data collection to track how audiences feel about attending arts and culture events in the context of the COVID-19 pandemic.

Each phase involves a cross-sector collaborative survey process involving over 150 arts and culture organisations, including museums, galleries, performing arts organisations and festivals. Participating organisations simultaneously sent a survey to a random sample of their audiences, who had attended a cultural event between January 2018 and May 2020.

Phase 2 results, from over 15,000 respondents, have been combined with Phase 1 data in a freely available dashboard. It's designed to provide insights about all different artforms, types of events and demographic groups in all parts of Australia.

For more information about the study, and to access resources like the dashboard, visit: [www.thepatternmakers.com.au/covid19](http://www.thepatternmakers.com.au/covid19)

Read on for the key Phase 2 findings in QLD.

## Current conditions

### Confidence among QLD audiences has increased since May 2020

Between May and July 2020, the number of confirmed cases of the virus nation-wide fell, and restrictions on events were loosened around Australia.

In QLD, audiences are showing much higher levels of comfort engaging in public activities in Phase 2, compared to Phase 1. The proportion who are at least somewhat comfortable using public transport increased from 51% to 66%, and those who are at least somewhat comfortable to eat at a local restaurant increased from 68% to 93%.

QLD audiences are now among the most confident nationally, showing higher levels of comfort eating at a local restaurant (93%, compared to 88% of audiences nationally), going to a local cinema (76%, compared to 69%) and exercising at a gym (62% compared to 57%).

One person summed it up by saying,

‘Given the current state of COVID-19 in Queensland, I’m not really worried - this might change of course’.

Understanding the conditions in New South Wales (NSW) and Victoria (VIC) may be helpful for arts and cultural organisations in QLD, in terms of planning for a scenario of a new outbreak in future.

## Returning to events

### 1 in 3 QLD audience members are ready to attend cultural events today

Between May and July 2020, the proportion who are ready to attend cultural events ‘as soon as it is permitted’ has increased in QLD (33%, up from 25% in May 2020), and is currently higher than the national average (28%).

QLD audiences are among the most confident currently, but there is still a proportion who say they cannot foresee going out until there is no risk of transmission (10%, stable with 11% in May).

With many arts and cultural venues having re-opened, even in restricted ways, QLD audiences have already started returning to events. 1 in 5 (22%) QLD audience members attended a cultural event of some kind during the fortnight before data collection (8–12 July 2020).

### The majority of QLD audiences are now comfortable to attend a range of cultural venues

Compared with attitudes in May, QLD audiences are feeling higher levels of comfort walking around a museum or gallery (95%, up from 89%), visiting a community art



space (89%, up from 81%) and attending an outdoor festival or concert (73%, up from 62%).

Compared with other states, QLD audiences are among the most confident towards attending venues seating 50 people (88%, compared to 81% nationally), 100 people (78%, compared to 68% nationally), 250 people (63%, compared to 52% nationally) or 500 people (51%, compared to 40% nationally).

When reporting their level of comfort attending various types of outdoor cultural spaces today, QLD audiences are more confident than audiences nationally watching a performance in an amphitheatre (83%, compared to 76% nationally).

### QLD audiences are feeling optimistic about returning to events long-term

Across the country, more people are now saying that they believe the pandemic will affect their attendance long-term. When anticipating their future attendance, the majority of QLD audiences expect to attend the same amount as they did before the pandemic (76%, compared to 80% in May 2020).

QLD audiences for First Nations work are feeling slightly more optimistic long-term, with 9% saying they expect to attend more than before, compared to 5% of QLD audiences generally.

The proportion of QLD audiences overall who expect to attend less than before has increased slightly since May (19%, up from 13%). QLD audiences overall are most similar in their long-term outlook to audiences in states/territories such as the Northern Territory (NT) (18% expect to attend less), and Western Australia (WA) (20% expect to attend less) where concerns about community transmission are lower.

Other states/territories are slightly more cautious at present, such as VIC (23% expect to attend less), the Australian Capital Territory (ACT) (23%) and NSW (22%), where there are concerns about escalating cases of the virus and the return of restrictions.



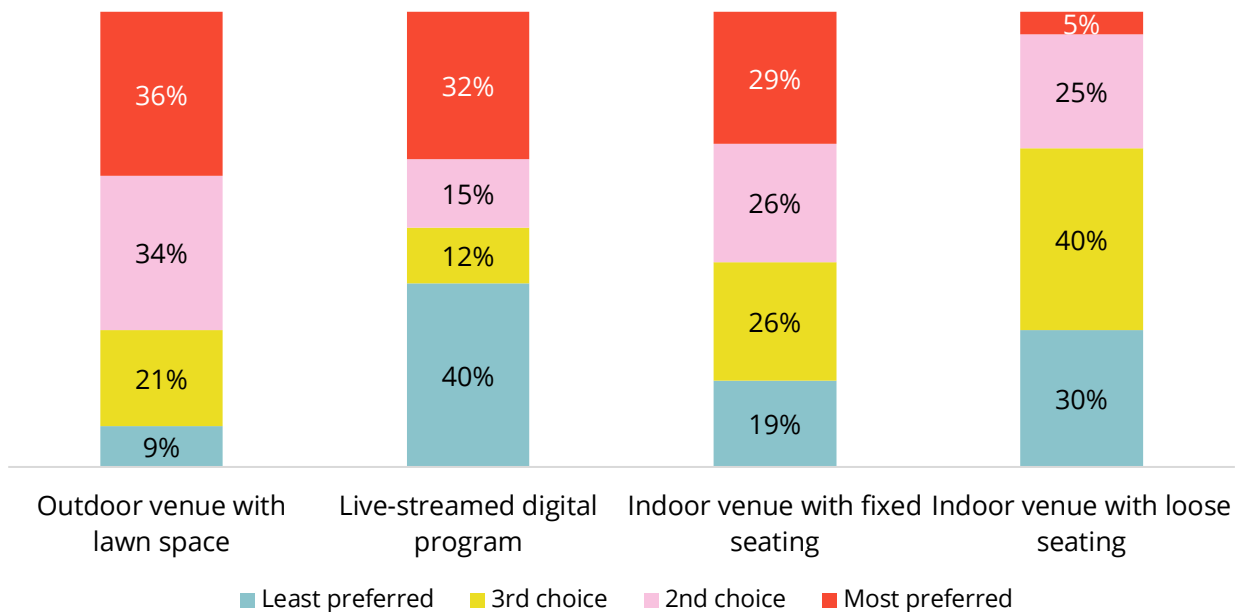
## Audiences express different preferences for attending events right now

For the first time in Phase 2, respondents were invited to rank a number of options for attending cultural events today:

- ▶ An indoor, flat-floor space with loosely placed chairs for 100 people to spread out
- ▶ An indoor hall with fixed seating for up to 100 audience members seated according to current social distancing guidelines
- ▶ An outdoor venue with lawn space only (bring your own blankets or lawn chairs), assuming there is plenty of space for 100 people to spread out
- ▶ A live-streamed digital program that you can watch from home.

The results (Figure 1) show that not everyone agrees on their preferred choice.

**Figure 1: Rank the four options for attending a cultural event today (in order of preference for QLD audiences). n=2,679**



## Many QLD audiences are favourable to outdoor events at present

The largest proportion of QLD audience members selected an outdoor venue as their first preference (36%) and second preference (34%) for attending a cultural event today.

Open-air venues are seen as offering the best 'ventilation', as one person shared, 'I just don't want to be close to people I don't know especially for a lengthy time. Outdoors is better than indoors'.

Another shared a similar sentiment, commenting,

'I'd prefer to avoid the crowd completely, but if I had to attend with other people, I'd prefer an outdoor event. If indoors, I'd prefer to have the seating fixed, rather than having to rely on others to do the right thing'.

## 1 in 3 would prefer a digital program – but this option is polarising

A slightly smaller proportion of QLD audiences (32%) selected digital programs as their preferred choice for attending a cultural event today. Feedback shows that many audience members would rank this as their safest option. One QLD respondent shared,

'I'm immuno-compromised so my preference is for online interaction and no possibility of interaction with people outside my immediate family'.

However, an even greater proportion (40%) of QLD audiences chose this as their least preferred option, indicating that while this option is safest, a large majority of people would prefer to attend an in-person, live event. One South Australian (SA) respondent mentioned,

'I'd feel \*safest\* with the digital option, but I'd be just as \*comfortable\* (and probably happier) getting outside for an event at the moment'.

A common view among QLD respondents is that the low risk of transmission means they are ready for live attendance, provided social distancing is implemented. As one person shared,



‘With no current cases of COVID-19, I’m pretty comfortable with public activities as long as the crowds aren’t huge. I’ve done a lot of live stream and am hungry for other options while we can’.

However, with national results showing that audience sentiment can change rapidly based on community transmission rates, QLD organisations must remain vigilant to mitigate the risk of transmission. Following the approaches taken in VIC and NSW may assist with scenario planning in the event of an outbreak.

### **When attending indoor venues, QLD audiences prefer fixed seating arrangements**

A much greater proportion of QLD audiences selected an indoor hall with fixed seating (29%) as their first preference, compared to an indoor venue with loose seating (5%). A common view is that this arrangement ensures that attendees follow social distancing guidelines. For instance, one person shared,

‘People don’t seem to be very good at self-managing so I would prefer a venue that has fixed seating thus giving the venue operators greater opportunity to ensure its patrons are following the guidelines’.

Another shared a similar view, commenting,

‘Fixed seating is better than none, as some people will invariably fail to follow social distancing guidelines’.

## **Audience experiences**

### **QLD audiences are generally appreciative of safety measures**

Safety measures have helped reassure audiences who have returned to cultural events and venues in QLD recently. One respondent acknowledged that the cinema they attended was taking precautions, despite the low rate of cases,

‘There are limited number of active cases in QLD at the moment, but the cinema had hand sanitiser available [and] appropriate social distancing’.





Amongst most people reflecting on their experiences, there is a general appreciation of procedures implemented by event and/or venue organisers. As one respondent shared,

'The museum staff were welcoming and COVID Safe practices were adhered to. I felt very safe'.

### **Online booking and limiting capacity are helping attendees feel more comfortable**

Recent attendees mentioned timed tickets and capacity limitations as a key factor that made their experience more comfortable. One performance attendee shared,

'They have done their best with the imposition of restrictions. Limited ticket sales, and when one books a seat all surrounding seats are immediately blocked out'.

This was also mentioned in reference to museums and galleries. One recent gallery attendee said,

'We went to [Queensland Art Gallery], you had to reserve free tickets online, this worked well, we had a timed window, and everything went smoothly'.

### **Clear communication will help reassure audiences that safety is a priority for venues**

Several respondents shared that safety guidelines should be adequately communicated by the venue or event organiser. Reflecting on what could be improved about their experience, one shared,

'Individuals still don't take social distancing seriously and there weren't any reminders/hygiene stations available'.

When asked what worked well, one attendee expressed their gratitude for staff who enforce social distancing through verbal communication, commenting,

'[The] courage of attendees/staff to address physical distancing issues. Too many people don't take it seriously enough, and it does take courage to raise it as an issue'.

## Future attendance

### 2 in 5 QLD audience members are making plans to attend cultural events

Compared to 13% in May 2020, 2 in 5 (42%) QLD audience members are making plans to attend an event of any kind. Among those who have made plans, QLD audiences plan to attend a variety of venue types of roughly equal measures, for example, a cinema (20%), a live performance (17%) or a museum or gallery (16%) in future, suggesting that confidence is returning in all artforms.

This proportion is higher among QLD audiences for First Nations work, with 56% making plans, compared to performing arts audiences (43%), cinema audiences (44%) and museum and gallery audiences (46%).

Around the country, the proportion making plans to attend an event of any kind broadly follow consumer confidence about public interaction in general. For instance, the proportion making plans at present is highest in states with no recent cases and high rates of confidence in border controls, such as the NT (66%) and WA (54%).

When paying for arts and culture in future, most anticipate spending the same amount as before the pandemic (75% vs 72% nationally) and 9% planning to spend more than before (consistent with 11% nationally).

QLD audiences for First Nations work are among the most likely to say they will spend more than before (15%), compared to museum and gallery attendees (11%) or performing arts attendees (10%).

### 1 in 4 QLD audiences are purchasing tickets for events in July 2020

Across the country, lead times for purchasing tickets are shorter than they were in May 2020, with the largest proportion of people buying tickets for events less than one month in advance (33%).



QLD audiences are among the most likely to have purchased tickets to an in-person live event recently (13%, compared to 10% nationally).

Ticket buying horizons appear shorter than before, with one-quarter (28%) of QLD audiences purchased tickets less than one month out. This rate is slightly greater among QLD audiences for First Nations work (32%), and slightly lower among library and literature audiences (24%).

Among audiences who spent money on tickets in the fortnight before data collection, the most common price paid was between \$10 and \$25 (24%), followed by \$25–\$50 (14%), \$50–\$100 (8%) and more than \$100 (8%).

## Participating at home

### Since May, QLD audiences are continuing to participate creatively at home

QLD audiences are continuing to engage in creative activities to a similar extent as they did in May 2020. Participation has remained stable in making art and craft (39%, stable with 40% in May), making music (24%, stable with 22%), making videos and doing photography (22%, stable) and creative writing (16%, stable).

QLD audiences for First Nations work are creatively participating to an event greater extent than other QLD audiences, especially making art and craft (44%), making music (32%), making videos and doing photography (31%) and creative writing (26%).

For QLD audiences overall, a slightly smaller proportion are participating in creative activities such as art and craft, compared to other states/territories, such as Tasmania (TAS) (47%), VIC (44%) and ACT (46%). The proportion of QLD audiences participating creatively in art and craft (39%) is most similar to NT (39%) and NSW (38%).

### Engagement in most online activities has decreased slightly

While the proportion of QLD audiences engaging online remains high (70%, stable with 71% in May), there has been a slight drop in certain online activities, such as doing online classes (28%, down from 34% in May), seeing virtual exhibitions (14%, down from 17%) and creating content to share online (6%, down from 9%).



At the time of data collection, QLD audiences are also slightly less engaged online than audiences in VIC (78%), NSW (76%) or ACT (74%), where restrictions on in-person attendance are more stringent by comparison.

Now that in-person offerings have become more available in the state, the rate of online engagement among QLD audiences is similar to states/territories where live events have steadily returned and online participation has partially dropped, such as SA (71%) and WA (68%).

Similar to Phase 1, QLD audiences for First Nations work are the most highly engaged, with 81% participating in online arts and culture during the last fortnight. Compared to QLD audiences overall, this audience is participating in all activities to an even greater extent, including watching pre-recorded performances and events (58% vs 46% for QLD audiences overall), live-streamed events (52% vs 38%), doing online classes (39% vs 28%) and seeing virtual exhibitions (29% vs 14%).

With a strong majority continuing to engage online, and some audiences continuing to be strongly engaged, planning for digital distribution long-term remains important.

### **QLD audiences who participate online, are doing so more frequently – and more plan to continue**

Among the QLD audiences who are engaging online, a greater proportion of QLD audiences say they are more likely to be engaging more frequently than before (50%, up from 32% in May 2020).

Further, QLD audiences for First Nations work are even more likely to be participating online (66%), compared to QLD audiences generally.

Slightly more QLD audience members say they plan to continue participating online post-pandemic (71%, up from 67% in May), confirming the importance of long-term thinking and investment in digital distribution.

Online discovery of new artists and work has remained stable in QLD since May 2020 (28%, compared to 27%), but respondents are now more likely to say that someone they know has discovered something new (15%, up from 11%).

## QLD audiences are among the least likely to be paying for digital offerings

A slightly greater proportion of QLD audiences members are paying for digital offerings right now compared to May (31%, up from 28%).

However, when compared to audiences nationally, QLD audiences are among the least likely have paid for an online experience (31%, compared to 36% of audiences nationally). The proportion that has paid is similar to that of SA (33%) and WA (30%).

QLD audiences are spending more on online arts and cultural experiences, with more people spending over \$50 in the past fortnight, compared to May (39%, up from 34%).

The rate of donation has remained consistent (16% in July and in May), and this is even higher among QLD audiences for First Nations work (32%).

More QLD audiences have purchased a single online experience recently (12%, up from 9%), and this is higher among audiences for First Nations work (23%), suggesting a growing market for pay-per-view digital experiences.

When asked to describe the characteristics of the experience that made it worth paying for, QLD audiences commonly mentioned having access to experiences they wouldn't normally have. As one said,

'Simply access to what has otherwise been inaccessible. Digital attendance is the next best but will never replace the multi-sensory, preferable experience of 'live' attendance...

...That said, digital pre-recording or extended access removes time and place limitations that may otherwise prevent participation which can therefore open opportunities for a wider audience'.

Many QLD audience members highlighted the value in being able to support artists and creatives during the pandemic. For instance, one person said,

'So grateful for the efforts being made by Opera Queensland and others to stay connected and give their artists some outlet in these trying times'.



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One person shared that they were able to donate the value of their unused ticket to support the performers,

‘I simply gave \$100 of the ticket I purchased for the big Beethoven concert which would have been held in August, Brisbane. Sorry not to be part of this intended mighty performance, but grateful to the artists who would have created such a beautiful evening’.



## What's next

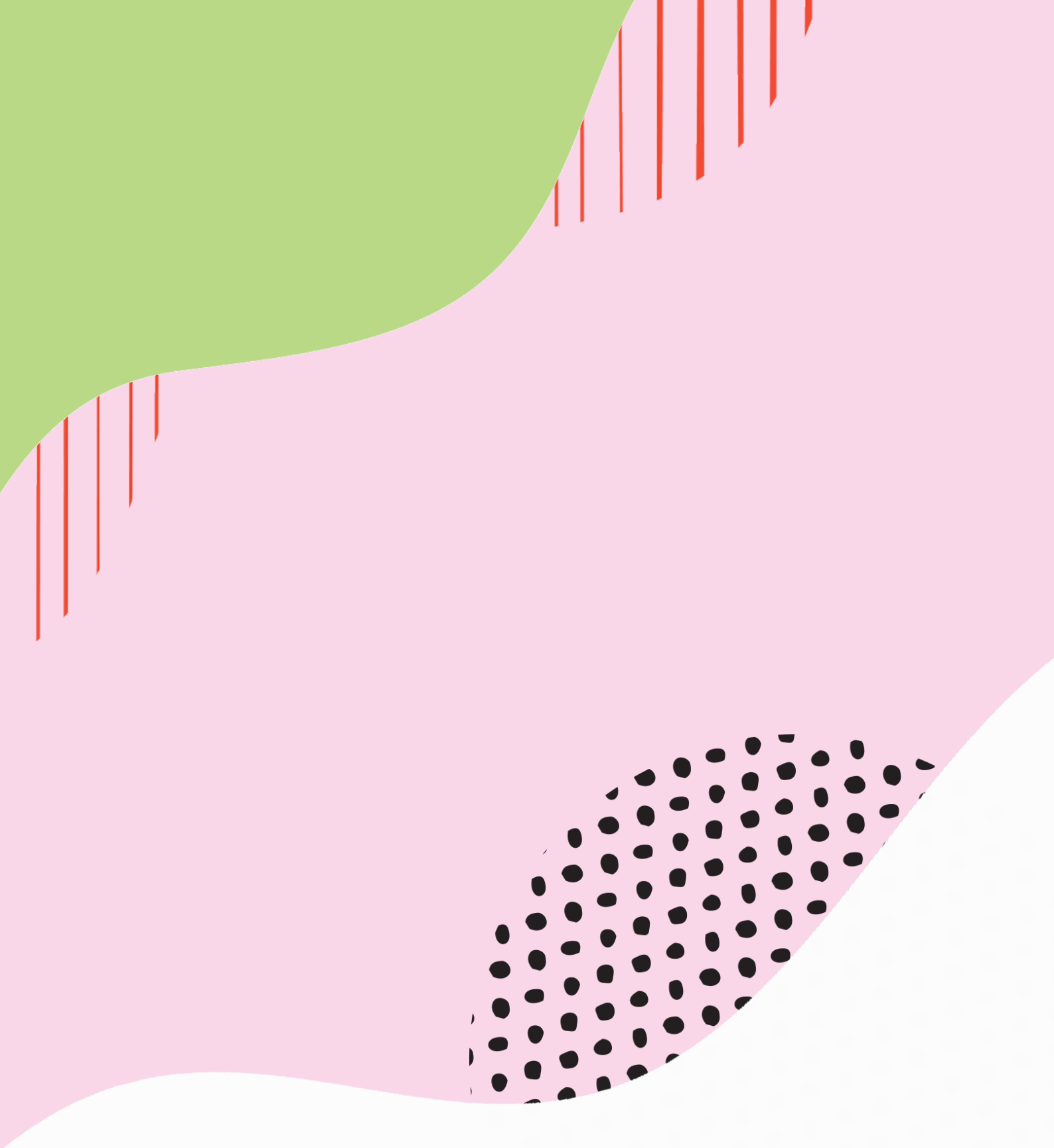
To explore the data in more detail and find out how audiences are responding, visit the study's Australian homepage at: [www.thepatternmakers.com.au/covid19](http://www.thepatternmakers.com.au/covid19)

There, you can access a range of Fact Sheets and 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.

Each month, the researchers release new insights about key regions, artforms and topics. They also provide tips and practical steps you can think about to apply the findings in your work.

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

If you have a question, or an idea to put forward, relating to this study, you can contact [info@thepatternmakers.com.au](mailto:info@thepatternmakers.com.au).



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