



PATTERNMAKERS



AUDIENCE
OUTLOOK
MONITOR



PHASE 3

Queensland Snapshot

Audience Outlook Monitor,
September 2020



Queensland
Government



Summary

Phase 3 of the Audience Outlook Monitor in Queensland (QLD) reveals that the proportion of QLD audiences that attended a cultural event, of any kind, in the fortnight before data collection (2–6 September) has increased. Two-fifths (39%) of QLD audiences have now returned to cultural events, as more venues and facilities reopen in the state, compared to 22% in July 2020.

Additionally, more QLD audiences are making plans to attend cultural events (51%, up from 42%), particularly to attend a live performance compared to July (26%, up from 17%). There has been a slight increase in the proportion buying tickets (16%, up from 13%) and lead times are short in QLD: around two-thirds (59%) are buying tickets for events less than one month out.

QLD audiences are showing similar levels of caution about most forms of public interaction, such as using public transport (65% stable with 66% in July) and eating at a local restaurant (91%, stable with 93%), suggesting that recent outbreaks in New South Wales (NSW) and Victoria (VIC) mean QLD audiences are staying vigilant.

Venue safety continues to be important. Compared to May 2020, support for face masks has increased (61%, up from 34%), along with temperature checks upon entry (69%, up from 63%). QLD audiences continue to favour outdoor venues and the proportion who rank this as their first preference has increased slightly (40%, up from 36%). However, there is still a sizeable proportion that prefer digital programs right now as some QLD audiences remain cautious about live attendance (29%).

Cultural organisations are continuing to engage QLD audiences via digital offerings. Although participation in online activities has dropped slightly (64%, down from 70% in July), the proportion saying they are participating more frequently than before the pandemic has been consistent (48%, stable with 50% in July).

Among those who are engaging online more frequently, a slightly greater proportion now say they plan to continue, post-pandemic (74%, up from 71%), indicating that long-term digital programming will be important, even while live events resume.



Introduction

This QLD Snapshot Report identifies insights from 2,031 survey respondents connected with QLD organisations participating in Phase 3 of the Audience Outlook Monitor. Where relevant, results from audiences who live within metropolitan QLD postcodes have been compared with results from those located in 'inner regional' and 'outer regional' QLD postcodes, based on the Australian Bureau of Statistics Postcode to Remoteness Area correspondence (<https://www.abs.gov.au/>).

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 around 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 3 results, from over 12,000 respondents, have been combined with Phase 1 and 2 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.

Read on for the key Phase 3 findings for QLD.

Current conditions

QLD audiences remain confident with public interaction – but are staying vigilant

In September 2020, levels of comfort participating in public events vary markedly around Australia, based on rates of community transmission. QLD audiences are appearing to navigate public places with similar levels of confidence, on average, as they did in July 2020.

Most activities are viewed with similar or slightly higher levels of confidence, such as using public transport (65% feel comfortable, stable with 66% in July 2020) and flying domestically on a commercial airline (54%, stable with 52%).

QLD audiences are also exhibiting similar rates of comfort with exercising at a gym or fitness studio (61% feel comfortable, stable with 62% in July) and eating at a local restaurant (91%, stable with 93%), potentially as these settings are sources of community transmission elsewhere in Australia.

Returning to events

2 in 5 QLD audience members have returned to a cultural event recently

The proportion of QLD audience members who attended a cultural event of any kind in the past fortnight has increased from 22% in July to 39% in September, as more venues and facilities reopen.

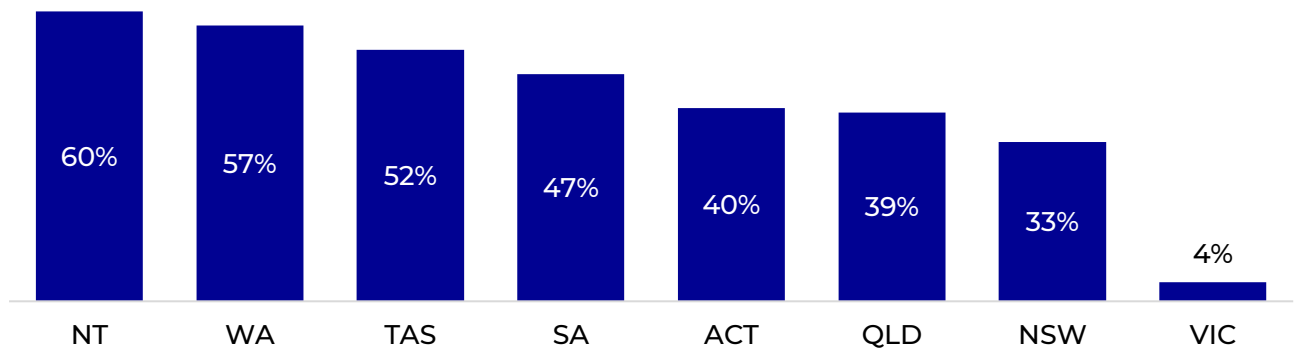
The most common venues that people are reattending are cinemas (18%, up from 10%) and museums and galleries (13%, up from 9%), which are currently the most common types of facilities to be open consistently. Attendance at live performances has grown significantly since July (10%, up from 2%), as more events return to stages and venues.

Nationally, QLD audiences are most similar in their attendance to audiences in the Australian Capital Territory (ACT) (40% have attended recently), where proximity to outbreaks in neighbouring NSW and VIC are causing audiences to remain vigilant.



Figure 1 displays the proportion of audiences who have attended a cultural event recently in each state/territory in September 2020.

Figure 1: In the past fortnight, did you do a cultural activity in-person (not online)? By state/territory of participating organisations (September 2020).



As performances return to venues, more people are buying tickets

In QLD, more past attendees are making plans to attend an event, of some kind, in future, increasing from 42% in July to 51% in September 2020. By comparison, audiences in the Northern Territory (NT), South Australia (SA), Western Australia (WA) and Tasmania (TAS) are demonstrating more confidence, with around two-thirds making plans to attend an event.

In terms of artforms, the proportion of QLD audiences making plans to attend a live performance has grown the most strongly in the past two months, with 26% planning for this right now, increasing from 17% in July.

The proportion who are buying tickets has increased only slightly from 13% to 16%, though almost two-thirds (59%) of ticket buyers are purchasing for events this month (September). The proportion who spent more than \$50 on tickets has also grown from 16% in July to 29% in September, suggesting QLD audiences are feeling optimistic about reattending.



Attitudinally, 1 in 3 QLD audience members are ready to reattend venues and events

In September 2020, results show that 32% of past attendees in QLD are 'ready to attend cultural events as soon as permitted', an increase from that observed in May 2020 (25%) and a consistent level since July (33%).

QLD audiences are most similar in their outlook to audiences in SA (33%). By comparison, 'readiness to attend' is highest in the NT (42%), WA (40%) and TAS (40%) where restrictions on live events have widely lifted.

QLD audiences are increasingly confident attending outdoor venues

In July, QLD audiences were demonstrating high levels of confidence with outdoor venues. As summer approaches, the proportion of QLD audiences who are at least somewhat comfortable to attend outdoor events overall has increased slightly (79%, up from 73%).

Consistent proportions are comfortable attending an outdoor music festival with no seating (46%, stable since July), a street market or fair (79%, stable with 78%) and a performance in an amphitheatre (85%, stable with 83%).

The proportion feeling comfortable with various types of indoor venues has also remained consistent, such as stadiums (55%, stable with 54%), large theatres and concert halls (71%, stable with 70%) and comedy clubs or live music venues (39%, stable since July).

QLD audiences are showing similar levels of comfort with venues seating 250 people (61%, stable with 63%), but slightly lower levels of comfort with larger venues, seating 500 people (47%, down from 51%) and 1000 people (37%, down from 40%).

Further probing about social distancing in Phase 2 showed that different social distancing arrangements would also have a greater effect on attendance. Currently, 93% of QLD audiences would be at least somewhat comfortable to attend venues with 4 square metres per person enforced. This drops to 71% under a scenario of 2 square metres per person and 13% with no social distancing at all.

QLD audiences have grown more supportive of the use of face masks

In May 2020, face masks were a polarising issue nationally, and QLD audiences were divided on whether this measure would encourage (34%) or discourage (29%) them from attending cultural events.

Now, in September 2020, support for face masks has increased in QLD, with 61% saying they would feel encouraged by them. By comparison, support for face masks is strongest in VIC (88%) and NSW (80%), where they have been more widely adopted and enforced due to recent outbreaks.

Another safety measure with stronger levels of support in QLD is temperature checking upon entry to venues. Around two-thirds (69%) of audiences say this procedure would make them more comfortable when attending events, which is slightly higher than the rate in May (63%).

Slightly more QLD respondents are feeling encouraged by social distancing measures at venues, through practices such as timed ticketing and crowd control (87%, up from 82% in July) and seating audience members apart based on distancing guidelines (88%, up from 83%).

Audience experiences

Most audiences are satisfied with venue safety, and there is a sense of goodwill

When asked to reflect on their experiences returning to cultural events, QLD audiences are generally satisfied, with only minor suggestions for improving.

Many acknowledged the circumstances and expressed appreciation for the safety measures taken by the venue to make people feel comfortable. Recent gallery attendees commonly mentioned the value of having space to move around, as one person said,

‘The area was not crowded and you had time to look at the works and were able to work around others so that you weren't all vying to see a particular exhibit’.



Others expressed gratitude for limited capacity and online booking. One person said,

‘The process of booking before we went. They had us on their list and we signed in. There was a maximum of 20 people allowed in the gallery, which made it a much better experience’.

Finding ways to gently enforce social distancing is important

QLD audiences are slightly more cautious about seated live performance venues, in line with sentiments across the county. Clear communication about audience expectations continues to be key for QLD audiences, as one recent attendee said,

‘Being really upfront and clear with COVID safety expectations (what they were responsible for, what I was responsible for)’.

Where staff can do this proactively, sensitively and with good humour, it appears to work best for QLD audiences. One person described their recent experience at a live performance:

‘The organisation published a video (in good humour) of themselves measuring and setting up the spaced seating for publicity, and I noticed attendees commented on feeling more comfortable because of it.’

Future attendance

QLD audiences are most favourable to events in outdoor spaces

Again, in Phase 3, audiences were asked to rank their preferred setting for attending a cultural event today, from a list of four options.

A slightly greater proportion of QLD audiences rank outdoor venues as their first preference (40%, up from 36% in July), and this remains the top preference for QLD audiences, on average. As summer approaches, preference for outdoor events has also grown elsewhere in Australia, such as in TAS (up 20%), ACT (up 8%) and VIC (up 7%). One QLD respondent shared,

‘Being outside seems the best option at the moment in terms of your experience and also your personal wellbeing’.



A sizeable proportion of QLD audiences (29%) continue to show support for live-streamed digital programs that they could watch from home, as this feels the safest. One QLD respondent explained,

‘Best option currently is to watch from home and go out in public at least as possible, what has happened in Victoria has happened because as soon as things started reopening people lost all thought to social distancing. You only have to look on social media - it is non-existent...

...In my area where we had no cases people are complacent and I am waiting with the influx of people to QLD from interstate and holidaying returning for cases to come here and be spread. I have immune system issues, as does my sister whom I live with and an elderly father - it is not worth it’.

Around one-quarter (29%, stable since July) of QLD respondents rank an indoor, 100-seat venue following social distancing guidelines highest, and just 5% (stable since July) prefer an indoor, flat-floor venue with loose chairs and plenty of space to spread out as their first preference.

QLD audiences are eager to show their support for artists and creatives

In Phase 3, audiences were asked ‘Is there anything you can tell us about the types of venues or events you’ll prioritise, and how they may differ from prior to the pandemic?’

Although community transmission has been minimal in QLD, safety is one priority that will influence the decision to attend events in future for many QLD audience members. Some QLD respondents mentioned being cautious of venue size and capacity, as one said,

‘I’ll probably be cautious about indoor events where you’re sitting close to other people for a few hours. However, I also really miss live music and theatre so if it sounds like a really good show and the venue is not too large, I’ll be there’.

One mentioned that their preferences have changed with the pandemic, and they have become open to making adjustments. They commented,

'I would now prefer to attend events that are delivered online and in outdoor spaces, whereas I would previously had preferred indoor events'.

Another said,

'I'll probably attend the same kind of events as previously. However, last weekend, my partner and I did attend an event we probably wouldn't have attended, solely in order to support live performance'.

Others shared that they simply want to feel confident that venues and event organisers are following safety protocols and communicating this to attendees. One respondent explained,

'I will give preference to outdoor events and to those who make it known in advance what their Covid-19 controls will be so I can make an informed decision about risk'.

While venue safety will be an important factor among QLD audiences, there is also a desire to support the artists and cultural organisations hardest hit by the pandemic. One respondent said,

'I will make more of an effort to support local, grassroots outfits and community-based events as they have been severely impacted by the pandemic. I used to only go if I had nothing else planned, but these events will become my plans'.

QLD audiences are among the most optimistic about returning to events long-term

In May 2020, 13% of QLD audiences said their future attendance will be negatively affected by the pandemic long-term. This increased to 19% in July and has remained stable at that rate (19%) in September.

Nationally, QLD audiences are among the least likely to anticipate that their attendance will be negatively affected by the pandemic, along with audiences in NT (16%), TAS (19%) and WA (19%), where audiences are reporting a sense of relative normalcy after months with zero or only small numbers of cases.



By comparison, the largest proportions of audiences saying their attendance will be negatively affected are in VIC (25%) and NSW (21%), where audiences are feeling uncertain about the likelihood of future outbreaks.

When they do return to cultural events, most QLD audiences (76%) expect to spend the same amount as they did before, 14% expect to spend less, and 10% expect to spend more, consistent with the July results.

Participating at home

QLD audiences remain engaged with creative activities at home, both on- and off-line

Past attendees in QLD are continuing to participate in creative activities while at home, such as listening to music (90%) and reading for pleasure (85%).

Smaller, but consistent, proportions are making art or craft (37%, stable with 39% in July) and making videos or doing photography (21%, stable with 22%). A slightly smaller proportion of QLD audiences are making music (21%, down from 24%).

Slightly fewer QLD audiences are participating in online arts or cultural experiences (64%), compared to the proportion in July (70%) and May 2020 (71%). Nationally, QLD audiences are among the least likely to be engaging in online arts and culture activities right now, along with audiences in NT (60%), WA (60%) and SA (61%), potentially due to live experiences becoming increasingly available as restrictions have eased.

Engagement in some online activities has dropped slightly in QLD

In QLD, participation in some online arts and culture activities has been consistent, including the proportion of audiences doing online classes, courses and tutorials (27%, stable with 28% in July) and creating content to share online (7%, stable with 6%).

The most consistent levels of participation have been in online video of performances and events, although this has generally decreased across the country as more venues reopen. In QLD, 40% are watching pre-recorded performances online (down from 46% in July) and 33% are watching live-streamed performances (down from 38%).



When asked if they, or anyone they know, has discovered a new artist, artwork, or performance online, 25% of QLD audiences say they themselves have made a discovery in the fortnight before data collection (down from 28% in July) and 13% say they know someone who has (stable with 15% in July).

Further, when asked if they are doing online arts and cultural activities more or less frequently than before the pandemic, 48% say they are engaging online more frequently, which is consistent with the July results (50%).

Online participation appears to vary across different regions. QLD audiences in inner regional areas are less likely to be engaging online (56%), compared to audiences in metropolitan (66%) or outer regional locations (64%).

Metropolitan QLD audiences are also more likely to be engaging more frequently than before the pandemic (51%), compared to inner regional (44%) and outer regional QLD audiences (37%).

The proportion of QLD audiences, overall, who plan to continue engaging online post-pandemic has increased (74%, up from 71% in July), indicating that long-term digital programming will be important for some audiences, even while live events resume.

QLD audiences are continuing to pay for online experiences, but spending has dropped slightly

The data shows that the market for digital offerings in QLD is steady, in line with trends nationally.

When asked if they have paid for an experience online, 32% of QLD respondents said they have, a rate that increased from May (28%). A larger proportion are purchasing single experiences (16%, up from 9% in May), while consistent proportions are making donations for online experiences (15%, stable with 16% in May) and subscribing to digital platforms (9%, stable with 8%).

Spending on online experiences has decreased slightly in QLD, with 29% having spent more than \$50 in the past fortnight, compared to 39% in July, and 34% in May.



When asked to describe what they'll prioritise when spending online in future, QLD audiences shared feelings of goodwill, with many expressing that they would like to support emerging creatives in need of assistance. One person commented,

'I'm fortunate to not be financially affected (yet) by COVID-19, so am doing my best to support the most disadvantaged. So, no, I'm not spending money paying for a Rolling Stones performance, or a government-funded art gallery or museum, but will try to direct my money to small, up and coming artists and performers'.

Others are interested in paying for interactive and participatory online activities. As one person explained,

'If not comfortable to return to attending or participating in performances, I will continue to prioritise donating to online opportunities to participate in the arts, e.g. Opera Queensland singing sessions, Couch Choir'.

Others shared that they will be seeking events that they would not ordinarily be able to access. For example,

'I would prioritise events that wouldn't be able to attend otherwise, e.g. interstate events where usually I'd have to travel to the event to see it. But if they offered an online version I would participate and pay for that'.

Another person shared a similar sentiment, commenting,

'I'd continue to pay for online performances, particularly by small, independent companies that are more likely to do more experimental work — the online environment permits me to see works in other cities that I'd normally ever be able to get access to'.



What's next

To explore the data in more detail and find out how audiences for your work are responding, visit the study's Australian homepage at:

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.

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



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