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AUDIENCE
OUTLOOK
MONITOR.

Queensland Snapshot

Audience Outlook
Monitor, May 2020



Queensland
Government



Summary

The findings of the Audience Outlook Monitor in Queensland suggest an increasingly positive outlook for live events: 25% say they are ready to attend as soon as restrictions are lifted, compared with 22% nationally.

Audiences in the State are slightly more positive about attending different types of events, compared to the national average, though most are not ready to attend large venues. Venue safety measures are seen as just as important as in other States/Territories.

While Queensland audiences are highly engaged online, there is room to increase online engagement and help more people discover a wider range of digital experiences and content.

There may also be room to grow the proportion who are paying for arts cultural experiences online, which is below the national average (28% vs 34% nationally).

Introduction

This Queensland Snapshot Report identifies insights from 4,379 survey respondents connected with Queensland organisations participating in the Audience Outlook Monitor. The Audience Outlook Monitor is tracking how audiences feel about attending arts and culture events in the context of the COVID-19 pandemic.

Baseline data was collected in May 2020 in a cross-sector collaborative survey process involving 30 Queensland arts and culture organisations, including museums, galleries, performing arts organisations and festivals. These organisations (totalling 159 nationally) simultaneously sent a survey to a random sample of their audiences, who had attended a cultural event since January 2018.

Data from over 23,000 respondents nationally have been aggregated in a freely available dashboard to assist artists and cultural organisations of all kinds to understand how audiences feel about attending events again. By aggregating the data from all participating organisations, this study provides a detailed resource with insights about all different artforms, types of events and demographic groups in all parts of Australia. Read below for the key findings about audiences in Queensland.

Returning to events

Queensland's audiences are positive about returning to arts and culture events

- ▶ Overwhelmingly, Queensland audiences plan to return to arts and culture events in future (89%), with 80% planning to attend just as they did in the past and 7% even more often.
- ▶ On average, 25% of audiences are comfortable attending as soon as restrictions are lifted, which is slightly more than the national average (22%). 64% will attend when they deem the risk of transmission to be minimal, while 11% won't be back until there is no risk at all.
- ▶ The results show that the pandemic will affect who comes back when, the types of events they attend, and the size of events that they feel comfortable with, but few say that they want to choose more light-hearted programs, or works that help make sense of the pandemic, when venues re-open.
- ▶ The vast majority agree they will be most interested in the same types of events they used to attend (93%). Read on for more information about who will be back and when.
- ▶ Audiences of First Nations works in particular are most likely to want to see work that helps make sense of the pandemic, compared with other audiences in Queensland (38%).

Frequent attendees will be back sooner than others

- ▶ Some groups in Queensland are more likely to attend as soon as restrictions are lifted. This includes:
 - People who previously attended the performing arts more than once a week (41%, compared to the national average of 22%)
 - People who feel strongly committed to supporting arts and culture organisations (33%)
 - Subscribers to performing arts organisations (29%).

- ▶ In contrast, the groups that are more likely to stay away until there is no risk at all include:
 - People with a disability (21%, compared to the QLD average of 11%)
 - Those who attend the arts a couple of times per year or less (14%)
 - Those aged over 65 (15%) and over 75 (19%).
 - People who are not in the labour force (18%), unemployed (17%) or retired (16%)
 - Audiences for organisations based in regional/remote areas (14%).
- ▶ One QLD respondent explained, 'I require a plane flight from rural Qld to attend events in Brisbane. Considering changes and costs to flights I will attend less. Also this pandemic has resulted in 3 return airfares being cancelled along with future QPAC events.'

Safety measures like hand-sanitiser will make a difference for some attendees

- ▶ There are a wide range of views about public health measures, and whether safety measures are essential or excessive, but overall Queensland audience views about venue safety are consistent with the national average.
- ▶ Most Queensland audiences would generally feel encouraged by safety measures like disinfecting public areas (88%) and providing hand sanitiser (89%). There is also general support for social distancing measures, and most performing arts subscribers would be encouraged to attend if patrons were seated apart according to social distancing guidelines (83%).
- ▶ However, some measures may be polarising with a proportion saying they would actually be discouraged if they had to wear a face mask (29%) or have mandatory temperature checks at entry (12%).
- ▶ Overall, 96% of Queensland respondents say that venue safety measures will positively impact their decision to attend. One person shared their view, 'I love the arts and cultural events in Brisbane and I am keen to support them, but

health hygiene and the hygienic conduct of the staff is key to the sentiment at any given event and my decision to attend for longer (i.e. drinks after).

- ▶ In Queensland like in other parts of Australia, over 65s are more likely to say that safety measures would positively influence a decision to attend, with the exception of those living with a disability or who feel especially vulnerable to a bad outcome from contracting the virus.

Shows and performances

Queenslanders are not ready to return to large performance venues

- ▶ Although Queensland audiences are very slightly more confident than other Australians about returning to events, audiences' comfort-levels largely depend on the size of the venue.
- ▶ Even if they were open, and following recommended safety guidelines, 16% of Queensland audiences say they would be 'very comfortable' attending a venue seating 100 people today, and 31% say they would be 'somewhat comfortable'.
- ▶ Just 8% would be 'very comfortable' at venues seating 1,000 or more, which is comparable with the national average (7%), and less than the proportion that would be very comfortable flying domestically on a commercial airline (12%) right now.
- ▶ One QLD respondent explained, 'It breaks my heart to say it but I am of an age where I have to be very careful. I have many tickets to many different events this year, including the Brisbane Ring Cycle, which I cannot see being able to attend until I can feel very safe. I hope the events can start soon even if I can't go as we need to save our artists from ruin for our future generations.'
- ▶ Smaller venues of 50 people or less are the most likely to attract audiences in the near future, with 65% of audiences saying they would be at least somewhat comfortable attending today, if they were open and following relevant guidelines (compared with 62% nationally).

- ▶ Outdoor programming may be viable sooner than indoor programming, with a greater proportion of audiences feeling comfortable attending an outdoor festival or event at present (62% in Queensland and 64% nationally).
- ▶ As is shown in the national data, only small numbers of Queensland audiences are actively making plans to attend live shows or performances in future (13%), and among those that are buying tickets, the largest proportion are doing so for events in January 2021 or thereafter (42%).
- ▶ Audiences of First Nations work are more likely to have made firm plans to attend arts events in future than other Queensland audiences (17%).

Exhibitions

- ▶ Queensland audiences would largely be comfortable visiting museums and galleries, but not using interactive exhibits
- ▶ The outlook for museums and galleries is looking positive nationally, and most Queensland audiences say they would be at least somewhat comfortable walking around a museum or gallery (89%) or visiting a community art space (81%) today, if they were open and following recommended safety procedures.
- ▶ Among frequent museum-goers and those aged between 55 and 64 the numbers that feel comfortable visiting museums are even higher (93% and 91% respectively).
- ▶ However, few Queensland audiences, of any age, would feel comfortable using hands-on exhibits at a museum (25%), confirming the need to rethink visitor experience design while health risks remain.

Creativity at home

Many Queenslanders have taken up creative hobbies in isolation and most plan to continue after the pandemic

- ▶ Many Queensland respondents (44% compared with 46% nationally) are being creative at home more frequently than before the pandemic, and a high

proportion of those being more creative are planning to continue doing so after the pandemic (91%).

- ▶ Even among those who rarely attend arts events, a sizeable proportion (37%) are doing creative activities more frequently. One person shares that they have had more time for creative pursuits: 'I've continued to do my normal activities, but have had a bit more time to do them. I can listen to more music working from home.'
- ▶ On average, 6% say they are doing creative activities less frequently, and one person explains, 'Full time work and schooling three kids at home.... there has been no brain space for anything new!'
- ▶ Reading for pleasure and listening to music are common ways people are engaging with art and culture at home, but many audiences are also doing things like making art or craft (40%), making music (22%), making videos or doing photography (22%) and creative writing (16%).
- ▶ When asked to share an example, many say that they've had a chance to resume long-forgotten hobbies, or finally had time to progress a creative project. One Queensland respondent said, 'Once upon a time I was a professional opera singer but I hadn't sung for a number of years. The pandemic has helped me rediscover my love of singing.'
- ▶ Another Queensland respondent shared, 'I started writing ideas for a show, which is nice because I don't always have motivation to do write and plan things like this anymore.'

Online engagement

Three-quarters respondents are participating in arts and culture online – but there is room to grow

- ▶ Queenslanders are slightly less engaged online, with 71% having participated in digital arts and culture activities compared with the national average (75%).

- ▶ Queensland audiences are commonly watching arts video content (47%), watching live-streamed events (39%), or doing online classes or tutorials (34%).
- ▶ Online participation is occurring in all age groups in Queensland: 53% of audiences aged over 75 have watched a pre-recorded performance in the past fortnight, similar to the proportion of under 35s (51%).
- ▶ In giving examples of what they're doing online, people shared that digital participation has helped them feel a sense of community, for example, 'The sense of community that has come from participating with like minded arts lovers.'
- ▶ A significant minority of audience members (32%) say they are doing online arts and culture activities more frequently than before the pandemic. Among those who frequently attend the performing arts, this rate is even higher (39%).

Online participation is allowing audiences to discover new works

- ▶ Interestingly, one-third say they are motivated to engage online for their own mental wellbeing (36%), while others say they are engaging online to support an artist or organisation they think is important (35%) or to see things that they wouldn't normally be able to see (31%), which is similar to the national picture.
- ▶ Confirming the audience development potential of this time, one-third (27%) have discovered a new artist, artwork or performance online, or they know someone who has (11%). Online discovery is particularly high in frequent performing arts attendees who usually attend weekly or more (56%) and under 35s in Queensland (39%).
- ▶ Several Queensland respondents shared examples of exploring new works for example, 'Just through links and exploring I've both discovered new artists and performances we don't normally have access to in Australia.'
- ▶ There are signs that digital participation has provided opportunities for respondents to attend shows they would not normally attend. For instance, one person said, 'Bangarra Dance at Sydney Opera House. Wonderful to watch something that I had missed out on seeing live and would not have opportunity to see again probably.'

- ▶ Online experiences have also allowed audiences to feel closer to artists and their work. For instance, one Queensland respondent said, 'Strangely, a stronger sense of connection with the artists but most likely due to the fact that they were performing under the same isolation conditions that we are all in',

Digital distribution will continue to play a role for Queensland audiences after the pandemic

- ▶ Among those Queenslanders who are participating online more frequently than they used to, most (67%) think they will continue doing so when the pandemic is over, suggesting there will be a long-term role for digital distribution of cultural content.
- ▶ The intention to continue participating online is higher among some groups, particularly those who are caregivers to older adults (86%), people who attend performing arts events a couple of times per year (73%) and parents of children aged 13 to 17 (72%). It is weaker among those who usually attend performing arts events once a week (63%), suggesting that frequent attendees may return to their usual patterns, at least to an extent.
- ▶ One Queensland respondent said, 'Teaching people violin through video chat has been my online connection to the arts. It has been really rewarding to give people the tools they need to grow as a musician.'
- ▶ Some Queensland respondents say that after the pandemic, they would like a choice of attending in-person or watching a livestream (34%). People in Queensland with children under the age of six (45%) and audiences of First Nations work (42%) are more likely to want this option available, confirming the role for digital in expanding access to the arts.

The Queensland market for digital work could be developed further

- ▶ In Queensland, most audiences engaging online say they have not paid for any online arts or culture experiences in the past fortnight (72%), though a significant minority have (28%).
- ▶ Queenslanders are less likely to have paid for an experience compared to the national average (34%), suggesting an opportunity for market development.

- ▶ Among those that have paid for an online arts experience nationally, 36% has spent more than \$50 in the past fortnight (34% in Queensland). Nationally, older audiences over 75 years have spent the most (48% have spent over \$50), while under 35s have spent the least (16% have spent over \$50).
- ▶ Two-thirds say they are at least somewhat likely to pay a small amount for access to digital programs in future (65% relative to 68% nationally).
- ▶ At this point, the most common form of payment has been via donation, with smaller proportions paying for a single online pay-per-view event or purchasing an ongoing subscription for an arts platform. However, these rates could change as the pandemic goes on, and will be measures to watch closely in future data collection phases of this study, planned for July and September 2020.
- ▶ People are experiencing a variety of barriers to engaging online, but most commonly Queensland respondents report that they generally don't know what is on offer (37% compared with 35% nationally) suggesting there could be a role for greater investment in content discovery and digital marketing.

Support

Queensland audiences want to support arts and culture through the pandemic, but not everyone feels able to financially

- ▶ Most audiences surveyed in this study (who are recent attendees of cultural organisations) say they are moderately (55%) or strongly (32%) committed to supporting arts and culture organisations, though some people note that they feel like they are not in a position to do so financially right now.
- ▶ One respondent in Queensland shared, 'Like everyone else in the workforce actors and performers are all trying to make a living so i would support the arts and cultural organisations if I can'.
- ▶ Some respondents note a connection to the sector in some way, through friends, family, or their work. It's perhaps then unsurprising that respondents say they are more likely to donate to a specific artist or organisation that is important to them (61%), rather than a general sector support fund (48%).



- ▶ There is a segment who would be willing to participate in other forms of support, like buying vouchers that can be redeemed for future programs (69%) or buying merchandise such as clothing, books and gift items (55%).
- ▶ Artists and cultural organisations can use the dashboard to see what demographic groups are most likely to participate in different forms of support, and identify audience segments to develop new offers for.
- ▶ In terms of organisations' communications with audiences, Queensland respondents are most interested to hear about plans for future live events, post pandemic (54%), and notices about upcoming online events and digital offerings (52%). These tend to rank higher than general communications about how organisations are faring.

What's next

To explore the data in more detail and find out how audiences for your work are responding, visit the dashboard. Instructions and tips for using the dashboard are available at: <https://www.thepatternmakers.com.au/blog/2019/4/5/audience-outlook-monitor-dashboard>.

In the coming weeks, more Fact Sheets will be released, to provide you with insights about key regions, artforms and topics. You can also expect tips and practical steps to apply the findings in your work.

Read more about the study's methodology and the types of events that are included at: <https://www.thepatternmakers.com.au/blog/2019/4/5/about-audience-outlook-monitor-australia>.

To receive future snapshots, fact sheets and resources in your inbox, as soon as they are available, you can opt in to receive Audience Outlook Monitor news directly from the researchers at: <https://www.thepatternmakers.com.au/covid19>.

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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