



Sunshine Coast Audience and Market Research

Executive Summary



October 2020



Acknowledgements

This report was prepared for Sunshine Coast Arts Foundation and Sunshine Coast Council by research agency Patternmakers.

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About the Sunshine Coast Arts Foundation

The Sunshine Coast Arts Foundation (SCAF) promotes the development and prosperity of the arts on the Sunshine Coast.

It was established by the Sunshine Coast Arts Advisory Board, which has developed the Sunshine Coast Arts Plan 2018-2038, the blueprint for support for the arts. The Sunshine Coast Council has provided three-year funding and office support for SCAF, after which time the Foundation is to be self-funding.

About Patternmakers

Patternmakers is a research agency specialising in culture, creativity, and community. We believe in the power of insight to help the arts flourish in Australia.

For any questions, please contact Tandi Palmer Williams, Managing Director on tandi@thepatternmakers.com.au.

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Background

SCAF and the Sunshine Coast Council commissioned new research to understand and develop audiences in the region

In 2020, the Sunshine Coast Arts Foundation (SCAF) and the Sunshine Coast Council worked with Patternmakers to carry out market and audience development research to support the Sunshine Coast Arts Plan 2018–2038.

This research aimed to understand key audience segments in the Sunshine Coast region, identify ways to deepen engagement and highlight opportunities for new arts and cultural experiences in 2020 and beyond.

This report explores the findings from data collected from over 600 participants through depth interviews, focus groups, and an online survey of audience databases of venues and events based in the Sunshine Coast region. More information about the research method is included in the Methodology section of this report.

Key findings

9 in 10 people agree that arts and culture make the Sunshine Coast a better place

Respondents to the online survey were asked a series of questions about their interests and the value of arts and culture in their personal lives.

The majority of respondents generally agreed with numerous positive statements about arts and culture, including that children should be exposed to a variety of cultural experiences (93%), and that arts makes for a more meaningful life (88%).

When asked about the role of arts and culture on the Sunshine Coast, 9 in 10 agreed that arts and culture make the Sunshine Coast a better place to be (89%), and that they enjoy seeing local artists achieve success (92%).

When asked to rate the importance of a series of different activities, most respondents rated engaging in arts and culture as important or very important (61%), alongside socialising with

friends (60%), and slightly lower than spending time with family (79%) and outdoor activities (71%).

Most respondents attend the arts, and many are getting creative themselves

When asked about their participation in key forms of arts and culture, 96% said they attended at least one type of event as an audience member in 2019. The most common types of artforms that people engaged with as an audience member were musical performances (82%), visual arts (71%) and theatre or dance (61%).

A sizeable proportion of respondents creatively participated in arts and culture in 2019 (47%), a trend which is growing fast nationally. This includes activities like making music, creating films, and painting and drawing. Over one-fifth of respondents (22%) earn an income from performing, teaching, or creating art themselves.

In terms of venues and events that were attended in 2019, the largest proportion of respondents attended the Events Centre (54%), Venue 114 (34%) and the Sunshine Coast Regional Gallery (32%).

Pre-COVID-19 pandemic, most people attended Sunshine Coast events occasionally and there is interest to see more on offer

While many people value arts and culture and agree that it should be embedded into everyday life, survey data indicates that attendance at local venues and events (pre-COVID-19 pandemic) in the region is generally 'occasional'. Just over one quarter (27%) of people were attending arts and culture events locally more than once a month.

Feedback from focus group participants aged 18 to 35 reveals that arts experiences on the Sunshine Coast are seen as 'few and far between', and young people perceive a lack of cultural activities to get involved in locally. One said,

'It's hard to [find events] when you know there's nothing happening on your doorstep'.

Other age groups also express a desire to see more events in the region and would prefer to attend locally rather than travel to Brisbane to attend performances and exhibitions.

The Sunshine Coast is still developing its reputation as a 'creative region'

Despite the majority of respondents agreeing that arts and culture make the Sunshine Coast a better place, there are mixed views about whether the Sunshine Coast is known for its creativity. A sizeable proportion of survey respondents feel 'neutral' or 'disagree' (39%) that the Sunshine Coast is 'known as a creative region'.

In terms of satisfaction, just over half (57%) feel satisfied with arts and culture on the Sunshine Coast, which represents a solid baseline from which to measure improvements and track progress over time. Survey respondents who identified as visitors were more inclined to feel satisfied with arts and culture overall (69%), compared to local residents (56%).

Around two-thirds (62%) of respondents feel satisfied with the quality of experiences on offer, however fewer than half are satisfied with the appeal to all age groups (46%), the range of venues and facilities in the region (49%) and the quantity of events available (48%). Some participants even highlighted the tendency for Sunshine Coast arts and culture to be 'safe' or lacking risk and experimentation.

Awareness of local venues and events varies, and many don't know what's on

While most survey respondents said they were aware of key cultural venues and events in the Sunshine Coast region, such as The Events Centre (81%) and Caloundra Music Festival (80%), commentary in the focus groups suggests that awareness varies in the wider community, particularly of smaller venues and events.

Past attendees of Horizon Festival acclaimed the event for its high-quality programming; however, research participants also highlighted the notable lack of awareness and accessibility of the event in the broader community.

Further, when respondents were invited to recall factors that had prevented them from attending arts and cultural events in 2019, the most highly ranked barrier to attendance was not knowing 'what's on' locally: 83% experienced this at least 'sometimes'.

There is appetite for regular, outdoor, and 'incidental' events

When considering what kinds of events they would like to attend in future, survey respondents were favourable towards events held in outdoor spaces and, on average, this idea was ranked as the most preferred type of event for future participation.

Several research participants explained that outdoor events would make the most of the unique landscape of the Sunshine Coast region, as well as incidental events that can be engaged with on a regular basis. For example, some described ‘stumbling upon’ artwork in public, or watching a local musician play at a nearby park.

While the COVID-19 pandemic has limited opportunities for regular live attendance, the data indicates that audiences have a desire for regular activity, complemented by targeted, niche activities, in future scenarios. Research participants were also more inclined to prioritise ‘lots of small, niche events’, as opposed to ‘fewer, large, accessible events’ for future attendance options.

Priority opportunities

Meaningful audience development relies on a continuation of a coordinated and collaborative approach among stakeholders

The establishment of SCAF and adoption of the Arts Plan represents an excellent foundation for audience development across the region.

The research findings were discussed in a virtual workshop with SCAF, Sunshine Coast Council and representatives from key venues and events across the region.

In terms of strategy and planning, further opportunities identified include:

- ▶ Hosting a group event to share the research findings among the region’s arts and culture stakeholders
- ▶ Updating survey respondents when the results are available, and the actions planned on the back of the research
- ▶ Engage and collaborate with stakeholders on an Audience Development Plan for the region, to set a strategy based on this research and identify shared goals, roles, timelines and resources, and a dashboard to track progress
- ▶ Consulting with stakeholders for advice on access and inclusion, to provide recommendations and guidance for venues and events across the region.

Best practice marketing and communications will maximise opportunities for locals and visitors to enjoy the arts

With awareness identified as one of the key barriers to participation, there are a range of opportunities to continue improving marketing and communications related to arts and culture. Important specific opportunities identified in relation to marketing include:

- ▶ Increasing the level of community understanding and awareness of the full range of venues and events locally
- ▶ Supporting ongoing professional development of marketers across the region, particularly in relation to social media and email marketing
- ▶ Exploring the case for best practice marketing guidelines, such as advice on paring back language to avoid intimidating people
- ▶ Enlisting organisations with large databases and large audiences for strategic cross-marketing of taster events and opportunities for participation
- ▶ Launching a 'What's on' website and regular email – to grow awareness and participation across the region.

Strategic programming will help to fill gaps in current provision for outdoor events, music events and regular creative workshops

The research has helped to identify community priorities for future programming. The key opportunities are:

- ▶ Strategically identifying 'gateway' or 'taster' experiences that are important for the region as a whole and can be marketed to a broad audience
- ▶ Increasing programming of regular events – growing opportunities for weekly engagement (e.g. life drawing), offering more commitment where needed
- ▶ Considering ways to activate outdoor public places with arts installations and cultural events as the COVID-19 pandemic passes, such as re-igniting busking locally across the region and regular programming of Sunday Sessions
- ▶ Considering ways to incentivise investment in regular arts event programming by local businesses, artist collectives and entrepreneurs, through grants or concessions on spaces
- ▶ Reviewing the event listings and calendars to identify gaps in relation to audience interests and increasing programming accordingly.



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