Federal Group

Federal Group
COVID-19 Tracking Research 2020
Community Survey
Research Report

emrs
enterprise marketing & research services

October 2020

emrs

enterprise marketing & research services

This report has been prepared by
Enterprise Marketing and Research Services
60 Main Road, Moonah TAS 7009

All enquiries should be addressed to:

Paul Jamrozik
Research Manager
EMRS
PO Box 402
Moonah TAS 7009

Phone: (03) 6211 1222
Fax: (03) 6211 1219
E-mail: paul.jamrozik@emrs.com.au

Contents

Contents

Federal Group

Section One

Executive Summary

Executive Summary

Introduction to the Research

In the light of the 2020 COVID-19 pandemic and the restrictions put in place to prevent its spread, Federal Group sought to determine and track the ensuing impacts on community and consumer behaviours and perceptions in Tasmania. Of particular interest to Federal Group was to explore how Tasmanians were feeling about leaving their socially isolated environments and re-engaging with hospitality through, for example, restaurants, bars, cafés, domestic travel, and casinos.

In undertaking this important community research, Federal Group also sought to share the findings with a range of key external stakeholders: including, industry colleagues, business groups, government, parliamentarians, and the wider community through the media. Federal Group recognised that, as a large Tasmanian company, it could play a leadership role in undertaking and sharing this research widely, to inform decision making by businesses and governments during the COVID-19 pandemic.

Thus, with the above aim, and to inform Federal Group's COVID-19 Response Group on its strategic considerations and decisions as the restrictions are eased, and best position its Tasmanian businesses, Federal Group assigned EMRS, the independent research firm, to design and implement an extensive tracking research program. Feedback was gathered from Tasmanian adults, aged 18 years and over, and resident in all regions of the state, on their behaviours and perceptions in response to the circumstances pertaining in Tasmania at six points in time during the ongoing COVID-19 pandemic.

The benchmark survey was conducted in May 2020, followed by 'pulse check' tracking surveys in June, early July, late July, August, and September 2020. The research was conducted via a quantitative online survey methodology. In total, n=3,500 Tasmanian adults were successfully surveyed across the five-month period.

The following report brings together the findings of the six rounds of the tracking research. In the body of the report, the results have been presented comparatively by each individual track across the research project, to observe levels of stability and change over time in the survey responses. This summary presents the key informational insights gained.

Executive Summary

Level of Concern about Specified COVID-19 Impacts

On being prompted by a list of specified areas, respondents were significantly more likely to be concerned about the impact of COVID-19 and the current restrictions on:

- **Local businesses** (with the total concerned in a high range from 89% to 97% across the six research rounds)
- **The loss of Tasmanian jobs** (93% to 96%)
- **The Tasmanian economy** (90% to 95%)

The levels of concern about personal impacts fell into the following ranges:

- **Your health and the health of your family** (53% to 65%)
- **Your personal finances and the finances of your family** (48% to 54%)
- **Your personal life** (39% to 49%)

The levels of concern about personal impacts were not negligible, however the results indicated that Tasmanians remained **far more concerned about the wider economic impacts**.

Whilst the levels of concern with respect to each of the areas tended to be somewhat lower in the most recent September track, compared to the first May track, there were **no clear trends of change** to be noted over time.

See Table 5, p.9.

Personal Actions and Expectations in Response to COVID-19

- **Download of the COVID-Safe Tracing App** – Confirmed download of the app remained **steady** across all six research rounds (in a range from 47% to 51%).
  See Chart 1, p.11.
- **Adherence to Social Distancing Guidelines** – The overwhelming majority in each of the six rounds confirmed that “yes” they were adhering to social distancing guidelines to some degree (in a high range from 97% to 100%).

On comparing the degrees of adherence to social distancing guidelines, by Track 2 in June 2020, the proportion of respondents reporting they were adhering to the guidelines **“all the time” began steadily decreasing**, while the proportion stating they were doing so **“most of the time” began increasing**.

The lessening of adherence to the guidelines was also evident in the **increase** in respondents stating they were doing so **“some of the time”**, from 3% in May Track 1 to 17% in September Track 6.

See Chart 2, p.12.

Executive Summary

- **Expectations of the Duration of Social Distancing** – Over the course of the tracking research since May 2020, there has been an **increase** in the proportion of respondents expecting social distancing to last for a longer time period of 1 to 2 years.

> The expectation that social distancing would last for **1-2 years was cited by a higher proportion of respondents in the latter half of 2020**: namely, Track 3 (26%), Track 4 (30%), Track 5 (33%), and Track 6 (30%); when compared to Tracks 1 and 2 (16% and 12% respectively).

See Chart 3, p.13.

- **Personal Test for COVID-19** – Since June 2020, the proportion of respondents who had been tested for COVID-19 steadily **increased**.

> By September 2020, 26% of those participating in Track 6 confirmed having been tested; compared to 13% in the June track.

See Chart 4, p.14.

- **Confidence in the State Government to Manage a Second Wave** – At all stages of the COVID-19 research from Track 2 on, the clear majority of respondents indicated their confidence to some degree that any increase in positive tests or a new outbreak in Tasmania would be well managed by the State Government. The high totals of those confident ranged between 89% and 95%.

> Whilst there were some shifts across the tracks in the proportion of respondents who were "very confident" as opposed to "somewhat" confident, these were **marginal and did not indicate any clear trend**.

See Chart 5, p.15.

Barriers to Socialising

- **General Level of Concern about Socialising or Social Environments** – In each of the research rounds from Tracks 1 to 4, more than one half of the respondents were concerned to some degree about socialising or going to social environments, with the combined totals ranging from 54% to 66%.

> By Track 5 in August 2020, the totals were split equally between those concerned and those not concerned (50% in each case). The shift became more pronounced in September 2020 (Track 6), with **41% concerned to some degree and an increase to 59% who were not concerned**.

See Chart 6, p.17.

Federal Group

Executive Summary

Specified Concerns about Socialising or Visiting Hospitality Venues

On being prompted by a list of potential concerns, the primary cause for concern that emerged among respondents in each of the six research rounds was:

- **Contracting COVID-19 from another customer** (with the total concerned to some degree ranging from 43% to 67%)

  followed by:

- **Contracting COVID-19 from a surface** (33% to 55%)
- **Contracting COVID-19 from a staff member** (32% to 50%)
- **Being able to afford these activities** (34% to 37%)

For each of the three aspects related to **contracting COVID-19**, there were significant **decreases in the levels of concern** from May to September 2020. Thus, the higher percentage figures here were recorded in Track 1 in May 2020, and the lower figures in September Track 6.

See Table 6, p.18.

Perceptions of the Government Restrictions on Hospitality and Tourism Businesses

- **Perceptions of the Government Restrictions on Hospitality and Tourism** – In all six research rounds, the clear majority of respondents believed that the government restrictions imposed on hospitality and tourism businesses were "about right", the figures falling into a high and close range from 84% to 88%.

Whilst in the latest Track 6 in September 2020, there was a very **slight increase** to 12% in the proportion of respondents thinking that the restrictions were **"too restrictive",** this variation was well **within the margin of error**.

See Chart 7, p.20.

- **Perceptions of the Pace of Easing Government Restrictions on Hospitality and Tourism** – In all six rounds, the clear majority of respondents believed that the government restrictions imposed on hospitality and tourism businesses were being eased "at about the right pace", the figures falling into a range from 69% to 77%.

The view that the restrictions were being **eased "too quickly"** was somewhat more prevalent in May 2020 Track 1 at 18%, **decreasing** to 5% in September Track 6.

And in the two most recent tracks, a slight shift was discernible in the proportion of respondents believing the restrictions were being eased **"not quickly enough"**, namely Track 5 in August (18%) and Track 6 in September (23%), an **increase** from between 10% and 12% in the earlier rounds.

See Chart 8, p.21.

Federal Group

Executive Summary

Past and Future Overnight Trips Staying in Paid Accommodation

- **Overnight Trips Already Planned, Booked or Taken Since Restrictions were Lifted in Tasmania** – From June to August 2020, the proportion of respondents who had already planned, booked, or taken an overnight trip staying in paid accommodation upon restrictions being lifted in Tasmania remained relatively steady across the four research tracks, in a range from 19% to 24%.

A significant 27 percentage-point **increase** subsequently emerged, from **24% in August 2020 up to 51% in September 2020**, reflecting an encouraging rebound in the intrastate travel market.

See Chart 9, p.23.

- **Frequency of Intended Overnight Trips within Tasmania While Restrictions Remain on Mainland and Overseas Travel** – From June 2020 onwards, a significant proportion of respondents in each of the research rounds reported that they would be taking "more trips" within Tasmania staying in paid accommodation, with a range of between 24% and 40%. These figures were somewhat exceeded by those intending to take "about the same" number of trips, with the range falling between 41% and 57%.

In the August 2020 round, the **margin narrowed significantly** between those stating **"about the same"** number of trips (41%) and those stating **"more trips"** (40%).

In the latest September Track 6, around one in three reported they would be taking "more trips" (35%).

See Chart 10, p.24.

- **Frequency of Past and Intended Interstate Travel Prior to and Post the COVID-19 Restrictions** – From June 2020 on, the percentages of respondents reporting each of the frequency intervals were:
  - **At least every 3 months** – Past Interstate Travel (11% to 14%); Intended Interstate Travel (6% to 9%)
  - **At least every 6 months** – Past Interstate Travel (19% to 24%); Intended Interstate Travel (12% to 20%)
  - **At least once a year** – Past Interstate Travel (34% to 37%); Intended Interstate Travel (29% to 32%)
  - **Less than once a year** – Past Interstate Travel (22% to 27%); Intended Interstate Travel (25% to 34%)

Even though the levels of frequency of past interstate travel, prior to the COVID-19 restrictions, shifted downwards to some **slight decreases in the respondents' intended frequency of interstate travel**, post the restrictions, it should be noted that the variations were **relatively marginal**.

See Charts 11 &12, pp.25-26.

Executive Summary

Economic Recovery from the COVID-19 Impacts

- **Importance of Specified Industry Sectors for Government Investment and Support to Help Tasmania Recover Economically**

On being prompted by a list of specified industry sectors for governments to invest in and support to help Tasmania's recovery economically, respondents across all tracks from June 2020 were most likely to identify as important to some degree:

- **Hospitality** (91% to 92%)
- **Tourism** (89% to 93%)
- **Residential housing construction** (86% to 89%)

followed by:

- **Road/ rail/ port infrastructure** (81% to 86%)
- **Arts and entertainment** (79% to 81%)
- **Commercial property construction** (56% to 61%)

The total percentages regarding the industry sector as important represented the majority of respondents and remained in a close range in each case, with only **marginal variations** discernible across the research rounds.

Whilst "commercial property construction" was nominated as important by a significantly lower proportion in each of the tracks, the majority here too considered the sector important.

See Table 7, p.28.

On being asked to rank the sectors from **Most Important (1) to Least Important (6)** for governments to invest in and support to help Tasmania's recovery economically**,** the top average importance scores across all tracks were:

- **Tourism** (2.4 to 2.6)
- **Hospitality** (2.7 to 2.9)
- **Residential housing construction** (2.9 to 3.1)

followed by:

- **Road/ rail/ port infrastructure** (3.7 to 4)
- **Arts and entertainment** (3.8 to 4)
- **Commercial property construction** (4.9 to 5)

The ranking of the industry sectors and the average importance scores they recorded remained relatively **consistent** across the research rounds.

The only trend that was to be noted was the widening of the differential between the scores for "tourism", "hospitality" and "residential housing and construction". On comparing the June 2020 scores with those in the subsequent tracks, **"tourism" drew slightly ahead** over time.

See Chart 13, p.29.

Executive Summary

Social Recovery from the COVID-19 Impacts

- **Importance of Specified Areas for Government Investment and Support to Help Tasmania Recover Socially**

On being prompted by a list of specified areas for governments to invest in and support to help Tasmania's recovery socially, respondents across all tracks from June 2020 were most likely to identify all as important to some degree:

- **Job creation** (97% to 99%)
- **Hospitals** (97% to 99%)
- **Vocational training and skills** (94% to 98%)
- **Schools and education** (96% to 97%)
- **Mental health** (95% to 97%)
- **Affordable housing** (94% to 96%)

The great majority of respondents attributed each of the above listed areas with importance for government investment and support to help Tasmania's social recovery from COVID-19.

The results were **consistent** across all the individual tracks, with each area recording importance totals in a high and close range from 94% to 99%.

See Table 8, p.30.

On being asked to rank the areas from **Most Important (1) to Least Important (6)** for governments to invest in and support to help Tasmania's recovery socially**,** the top average importance scores across all tracks were:

- **Job creation** (2.5 to 3.1)
- **Hospitals** (2.7 to 3.3)
- **Mental health** (3.5 to 3.8)
- **Affordable housing** (3.7 to 3.9)
- **Schools and education** (3.8 to 4)
- **Vocational training and skills** (3.7 to 4.1)

The ranking of the social areas according to their importance showed some variations in the course of the research rounds.

"Job creation" was ranked highest in importance in all the individual tracks from June to August 2020, while **"hospitals" drew ahead** in the September 2020 track. Also, by this latest track, **"mental health" had moved higher** in the rankings.

See Chart 14, p.31.

Executive Summary

Support for Interstate Travel to and From Tasmania Prior to 1 December

In the two most recent tracks in August and September 2020, respondents were asked whether there should be interstate travel to and from Tasmania prior to 1 December for those states and territories with no community transmission. Over the two tracks, a **discernible increase** was recorded **in those stating yes**, from 55% in total in August up to 66% in total in September.

- **Yes - definitely –** Track 5, 16%; Track 6, 27%
- **Yes - maybe –** Track 5, 39%; Track 6, 39%
- **No –** Track 5, 43%; Track 6, 32%

To be noted was the **increase in those stating yes - definitely**, from 16% in August, up by 11 percentage points to 27% in September; and the equivalent 11 percentage-point **decrease in those stating no**.

See Chart 15, p.33.

Attendance at Live Performances

- **Frequency of Attending Live Performances Previously Prior to the COVID-19 Restrictions** – In the most recent Track 6 round in September 2020, respondents were asked how often they had attended live performances prior to the COVID-19 restrictions:

- **9% - At least once a month**
- **15% - At least every 3 months**
- **17% - At least every 6 months**

TOTAL 41%

- **24% - At least once a year**
- **24% - Less than once a year**
- **9% - Never**

With respect to the individual frequency intervals, respondents were most likely to report that, prior to the COVID-19 restrictions, they had attended live performances "at least once a year" or "less than once a year"(24% in each case).

Nonetheless, a significant proportion of the sample confirmed more frequent attendance (a combined total of 41%).

See Chart 16, p.35.

Federal Group

Executive Summary

- **Frequency of Likely Attendance at Live Performances Post the COVID-19 Restrictions Compared to Previously** – Those respondents who had attended live performances in the past were most likely by far to state that their likely attendance post the COVID-19 restrictions would be about the same as previously:

  - **9% - More often**
  - **70% - About the same**
  - **14% - Less often**

Among respondents reporting a change to their likely attendance, there was only a marginal difference between the proportions stating "more often" (9%) and "less often" (14%). Further tracking research would help to ascertain any larger shifts in attendance levels that may emerge in conjunction with future developments related to COVID-19.

See Chart 17, p.36.

- **Importance of Specified Measures in Making Attendees at Live Performances Feel Comfortable in Future** – The clear majority of respondents who had attended live performances in the past confirmed all the listed measures as important to some degree:

  - **Cleaning and hygiene practices of the staff** – **TOTAL IMPORTANT**, **95%** ("very" 71%; "somewhat" 24%)
  - **Appropriate social distancing** – **TOTAL IMPORTANT**, **85%** ("very" 47%; "somewhat" 39%)
  - **Further easing of restrictions** – **TOTAL IMPORTANT**, **80%** ("very" 27%; "somewhat" 52%)

The "cleaning and hygiene practices of the staff and venue" emerged as the most critical measure, confirmed by 95% in total as important, among whom the greatest proportion by far stated it was "very important" (71%).

See Table 9, p.37.

Section Two
Introduction

Background and Scope of the Research

Background to the Research

Federal Group is a privately-owned family company, operating significant tourism, hospitality, retail, casino and gaming assets in Tasmania. In the light of the 2020 COVID-19 pandemic and the restrictions put in place to prevent its spread, Federal Group sought to determine and track the ensuing impacts on community and consumer behaviours and perceptions in Tasmania. Of particular interest to Federal Group was to explore how Tasmanians were feeling about leaving their socially isolated environments and re-engaging with hospitality through, for example, restaurants, bars, cafés, domestic travel, casinos, and gaming.

In order to inform Federal Group's COVID-19 Response Group on its strategic considerations and decisions as the restrictions are eased, and best position their Tasmanian businesses, Federal Group assigned EMRS, the independent research firm, to design and implement an extensive tracking research program, gathering feedback from residents across the state on their behaviours and perceptions in response to the circumstances pertaining in Tasmania at six points in time during the ongoing COVID-19 pandemic.

Scope of the Research

In accordance with Federal Group's brief, the scope of the research was to survey a representative sample of Tasmanian adults, aged 18 years and over, and resident in all regions of the state. The points at which the six rounds were conducted, and the sample sizes achieved (n=), were as follows:

1. **May 2020**: Benchmark survey, n=1,000
2. **June 2020**: Pulse check survey, n=500
3. **Early July 2020**: Pulse check survey, n=500
4. **Late July 2020**: Pulse check survey, n=500
5. **August 2020**: Pulse check survey, n=500
6. **September 2020**: Pulse check survey, n=500

In total, across the six tracking rounds, n=3,500 Tasmanian adults, aged 18 years and over, participated in the research.

Objectives of the Research

Objectives of the Research

The key informational objectives of the research were to identify, across at least five of the six tracks:

- Concerns about the impact of COVID-19 on specified areas of personal welfare and the wider economy;
- The rate of download of the COVID-Safe tracing app, and of testing for COVID-19;
- Adherence to social distancing guidelines, and expectations as to their duration;
- The level of confidence in the State Government to manage an increase in positive tests, or a new outbreak in Tasmania;
- Concerns around socialising, or going to social environments, and concerns specifically about visiting cafés, restaurants, pubs, clubs or casinos;
- Perceptions of the severity of government restrictions imposed on hospitality and tourism businesses, and the speed at which they are being eased;
- Tasmanian travel planned, or taken, since restrictions were lifted within Tasmania, and any correlation with restrictions on interstate and/or international travel;
- The frequency of <u>past</u> travel to mainland Australia prior to the COVID-19 restrictions, and of <u>future</u> travel once it is possible to do so; and
- Consideration of the most important industries for government investment and support to best enable Tasmania to recover from the economic and social damage caused by COVID-19.

There were also additional research objectives specified for certain individual tracking rounds to determine:

- The most important areas for government investment and support to assist young people with the employment impacts of COVID-19 (Track 3);
- The level of personal concern about safety and security in the community (Track 4);
- Views on allowing interstate travel to and from Tasmania prior to December 1st from states and territories with no community transmission (Track 6); and
- The frequency of <u>past</u> attendance at live performances prior to the COVID-19 restrictions, and of <u>future</u> attendance once restrictions are eased, as well the importance attributed to specified measures in making attendees at live performances feel comfortable (Track 6).

Research Methodology

The Research Methodology

EMRS undertook the design and conduct of all six rounds of the research, in close consultation with Federal Group. In order to collect the required information to meet the specified objectives, EMRS used a quantitative online survey methodology. The method of data collection was through a survey questionnaire of around 10 minutes in length. The target sample size was achieved, with n=3,500 Tasmanian adults, aged 18 years and over, being successfully surveyed across the five-month period.

The data was collected by means of EMRS' own online research capability. The fieldwork took place on the following dates:

- **Track 1 Benchmark survey:** 21st to 28th March 2020
- **Track 2:** 12th to 15th June 2020
- **Track 3:** 3rd to 7th July 2020
- **Track 4:** 24th to 27th July 2020
- **Track 5:** 23rd to 27th August 2020
- **Track 6:** 25th of September to 1st October 2020

To acquire the sample of respondents, EMRS utilised its own online panel, comprised of pre-screened Tasmanians who have expressed a willingness to participate in online surveys. A unique and secure link was sent by email directly to all panel members through which they could access and complete the survey.

In order to ensure results representative of the target population, quotas were put in place for gender, age and region. Where it was not possible to meet the set quotas, weighting was applied to the data, so that the results reflected as closely as possible the demographic profile of the Tasmanian adult population in accordance with the latest 2016 ABS census.

To maximise the response rate and ensure a quick capture, or 'pulse check' survey, members of EMRS' online panel were able to participate in multiple rounds of research. In total, n=311 individuals took part in the survey in two tracks, n=171 took part in three tracks, n=97 took part in four tracks, n=81 took part in 5 tracks, and n=44 took part in all six tracking rounds of research.

Reporting on the Results

Reporting on the Results

Where percentages do not sum to 100, this may be due to rounding or where respondents were able to give multiple responses. Throughout the report, an asterisk(*) denotes the reason for the results not summing to 100 per cent.

Any table cells that have been highlighted in colour indicate a statistically significant variation in the results, most notably with green-highlighted cells denoting a significantly more positive result and pink-highlighted cells denoting a significantly less positive result. Blue-highlighted cells indicate a significantly higher percentage figure.

The following report presents the findings of the quantitative research, conducted among a total cohort of n=3,500 adults aged 18 years and over, resident in Tasmania, and representative of the population, in order to determine and track the impacts on community and consumer behaviours and perceptions in the light of the 2020 COVID-19 pandemic and the restrictions put in place to prevent its spread.

The research results have been presented predominantly in charts and tables. Any statistically significant variations in the results across the population subgroups have been remarked upon in the accompanying analytical commentary.

The results have been presented by each individual track across the research project, to observe levels of stability and change over time in the survey responses.

The People Surveyed (1)

The People Surveyed

The tables which follow provide a breakdown of the population subgroups within the total sample of n=3,500 Tasmanian adults surveyed.

TABLE 1 – GENDER
(Number and percentage of respondents)†

Gender	Number	Percentage
Total	3,500	100
Male	1,611	46
Female	1,877	54
Other	12	0

TABLE 2 – REGION
(Number and percentage of respondents)†

Region	Number	Percentage
Total	3,500	100
South	1,818	52
North & North East	871	25
North West & West	811	23

TABLE 3 – AGE
(Number and percentage of respondents)†

Age	Number	Percentage
Total	3,500	100
18 to 24 years	93	3
25 to 34 years	366	10
35 to 44 years	528	15
45 to 54 years	671	19
55 to 69 years	1,121	32
70 years or over	721	21

†Number and percentage figures in these tables are unweighted. Elsewhere in the report, the percentage figures have been weighted accurately to reflect the demographic profile of the Tasmanian adult population according to gender, age and region.

The People Surveyed (2)

TABLE 4 – CURRENT SITUATION
(Number and percentage of respondents)*†

Current Situation	Number	Percentage
Total	3,500	100
Employed – full time	949	27
Employed – part time or casual	670	19
Self employed	255	7
Unemployed – but looking for work	75	2
Unemployed – not looking for work	57	2
Unemployed – due to COVID-19	50	1
Retired	1,158	33
Student	73	2
Home duties	130	4
Other	75	2
I'd prefer not to say	8	0

*Percentages do not sum to 100 due to rounding.

†Number and percentage figures in this table are unweighted. Elsewhere in the report, the percentage figures have been weighted accurately to reflect the demographic profile of the Tasmanian adult population according to gender, age and region.

Section Three

Level of Concern about Specified COVID-19 Impacts

Level of Concern about Specified COVID-19 Impacts

TABLE 5 – LEVEL OF CONCERN ABOUT SPECIFIED COVID-19 IMPACTS
(Percentage of all respondents in each round)*

Area of Concern	TRACK 1 May 2020 (n=1,000)		TRACK 2 June 2020 (n=500)		TRACK 3 Early July 2020 (n=500)		TRACK 4 Late July 2020 (n=500)		TRACK 5 August 2020 (n=500)		TRACK 6 September 2020 (n=500)	
	TOTAL CONCERNED	TOTAL NOT CONCERNED	TOTAL CONCERNED	TOTAL NOT CONCERNED	TOTAL CONCERNED	TOTAL NOT CONCERNED	TOTAL CONCERNED	TOTAL NOT CONCERNED	TOTAL CONCERNED	TOTAL NOT CONCERNED	TOTAL CONCERNED	TOTAL NOT CONCERNED
Local businesses	**97**	3	**96**	3	**94**	6	**96**	4	**93**	7	**89**	11
The loss of Tasmanian jobs	**96**	4	**95**	5	**95**	5	**96**	3	**95**	5	**93**	7
The Tasmanian economy	**95**	5	**94**	5	**90**	8	**94**	6	**94**	6	**94**	6
Your health and the health of your family	**63**	37	**57**	43	**58**	42	**65**	35	**60**	40	**53**	47
Your personal finances and the finances of your family	**54**	46	**51**	49	**51**	49	**50**	50	**48**	51	**50**	50
Your personal life	**49**	51	**40**	59	**44**	56	**42**	58	**43**	57	**39**	60

On being prompted by a list of specified areas, respondents were significantly more likely to be concerned about the impact of COVID-19 and the current restrictions on "local businesses" (with the total concerned in a high range from 89% to 97% across the six tracking rounds), "the loss of Tasmanian jobs" (93% to 96%), and "the Tasmanian economy" (90% to 95%).

Whilst the levels of concern about personal impacts were not negligible, the results indicated that Tasmanians were far more concerned about the wider economic impacts. On comparing the six tracking rounds, the levels of concern with respect to each of the areas showed no clear trends of change over time.

*Percentages may not sum to 100 as those who were "unsure" have not been included in this table.

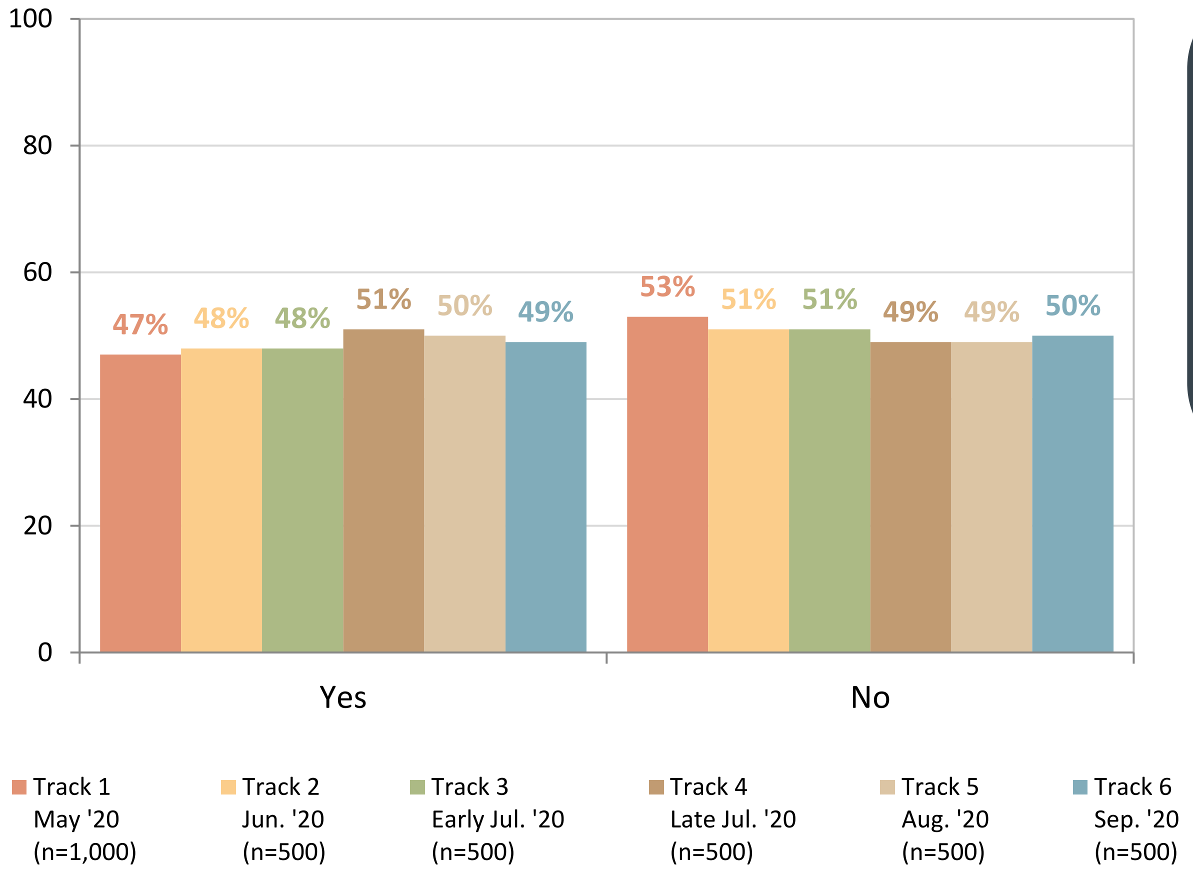
Q. Thinking specifically about the COVID-19 pandemic and current restrictions, how concerned are you about the impact it is having on each of the following areas.

Section Four

Personal Actions and Expectations in Response to COVID-19

Download of the COVID-Safe Tracing App

CHART 1 – DOWNLOAD OF THE COVID-SAFE TRACING APP
(Percentage of all respondents in each round)*



*Percentages may not sum to 100 as those respondents who were "unsure" in Track 1 (n=4), Track 2 (n=2), Track 3 (n=4), Track 5 (n=2) and Track 6 (n=3) have not been included in the chart.

Across the six research rounds, confirmation of having downloaded the COVID-Safe tracing app remained steady, at around one half of the sample in each case, and ranging from 47% to 51% over the five months of surveying.

Thus, the results were split relatively evenly between those who had downloaded the app, and those who had not done so, in the case of each of the tracking rounds.

Note: Respondents were able to participate in more than one track, and therefore would not have changed their response from round to round.

On analysing the total combined sample (n=3,500) demographically, the following findings emerged:

- Younger respondents aged 18 to 34 were significantly less likely to have downloaded the app (36%).
- Respondents employed full-time were significantly more likely to have downloaded the app (63%).

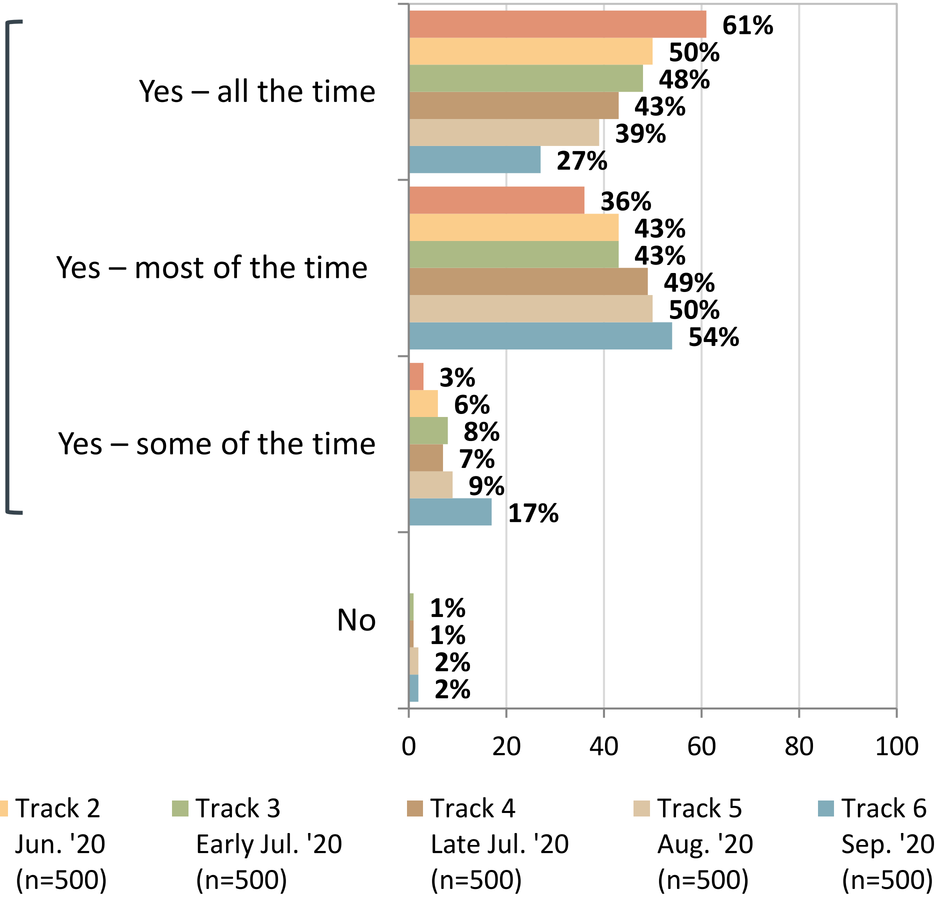
Q. Have you downloaded the COVID-Safe tracing app on your mobile phone?

Adherence to Social Distancing Guidelines

CHART 2 – ADHERENCE TO SOCIAL DISTANCING GUIDELINES
(Percentage of all respondents in each round)*

TOTAL YES BY TRACK

TRACK 1 – 100%
TRACK 2 – 100%
TRACK 3 – 98%
TRACK 4 – 99%
TRACK 5 – 98%
TRACK 6 – 97%



*Percentages may not sum to 100 as those respondents who were "unsure" in Track 1 (n=1), Track 3 (n=2), Track 4 (n=1), Track 5 (n=1) and Track 6 (n=3) have not been included in the chart.

Positively, in each of the six tracking rounds, the overwhelming majority of respondents confirmed that "yes" they were adhering to social distancing guidelines to some degree, with totals in a high range from 97% to 100%.

By Track 2 in June 2020, the proportion of respondents reporting they were adhering to the guidelines "all the time" began steadily decreasing, while the proportion stating they were doing so "most of the time" began increasing.

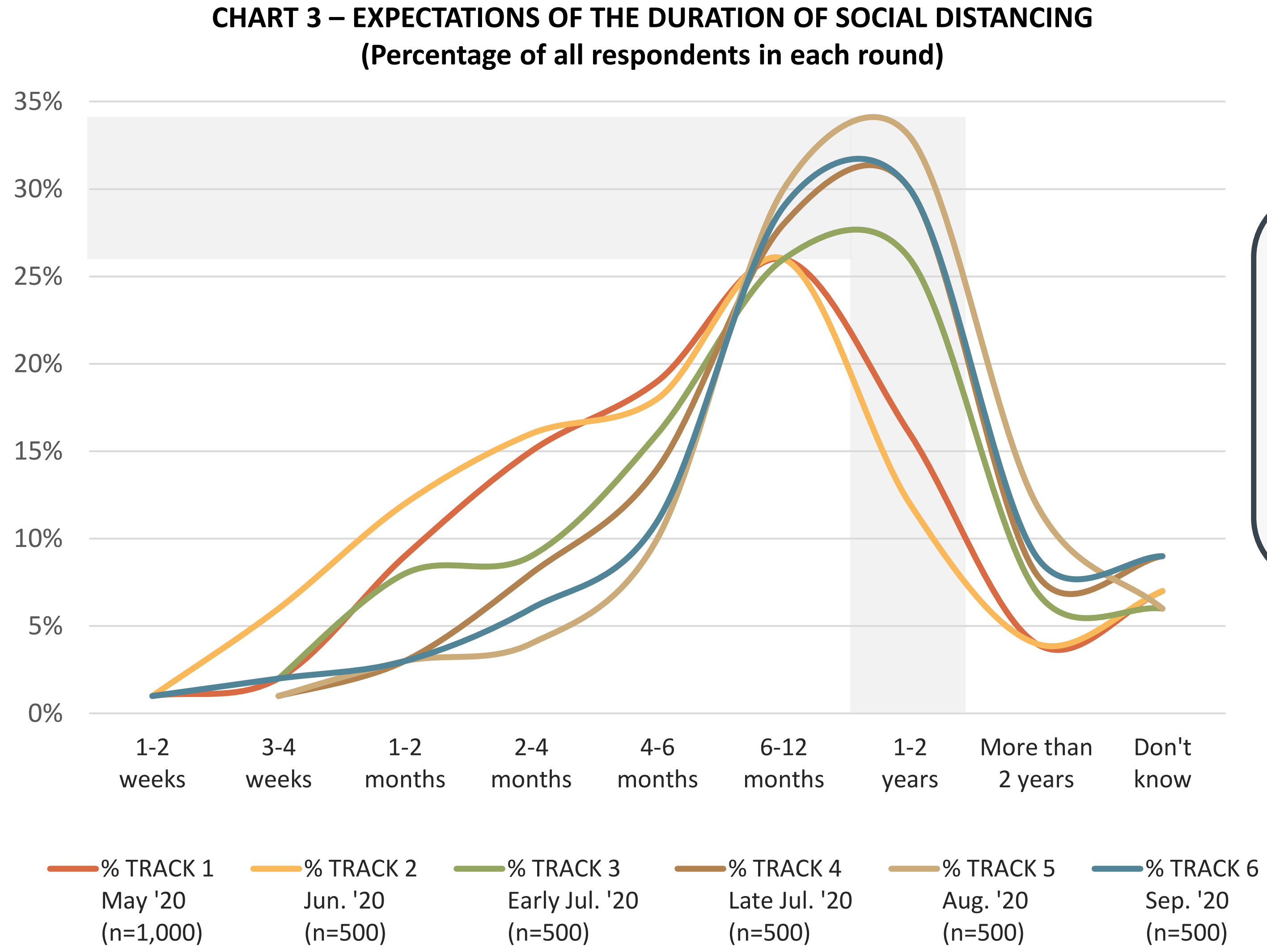
The lessening of adherence to the guidelines was also evident in the increase in respondents stating they were doing so "some of the time", from 3% in May Track 1 to 17% in September Track 6.

On analysing the total combined sample (n=3,500) demographically, the following findings emerged:

- Females were significantly more likely to state "yes – all the time" (50%), compared to males (44%).
- Younger respondents aged 18 to 44 years were significantly less likely to state "yes – all the time" (39%), compared to those aged 55 years and over (53%).

Q. Are you adhering to social distancing guidelines?

Expectations of the Duration of Social Distancing



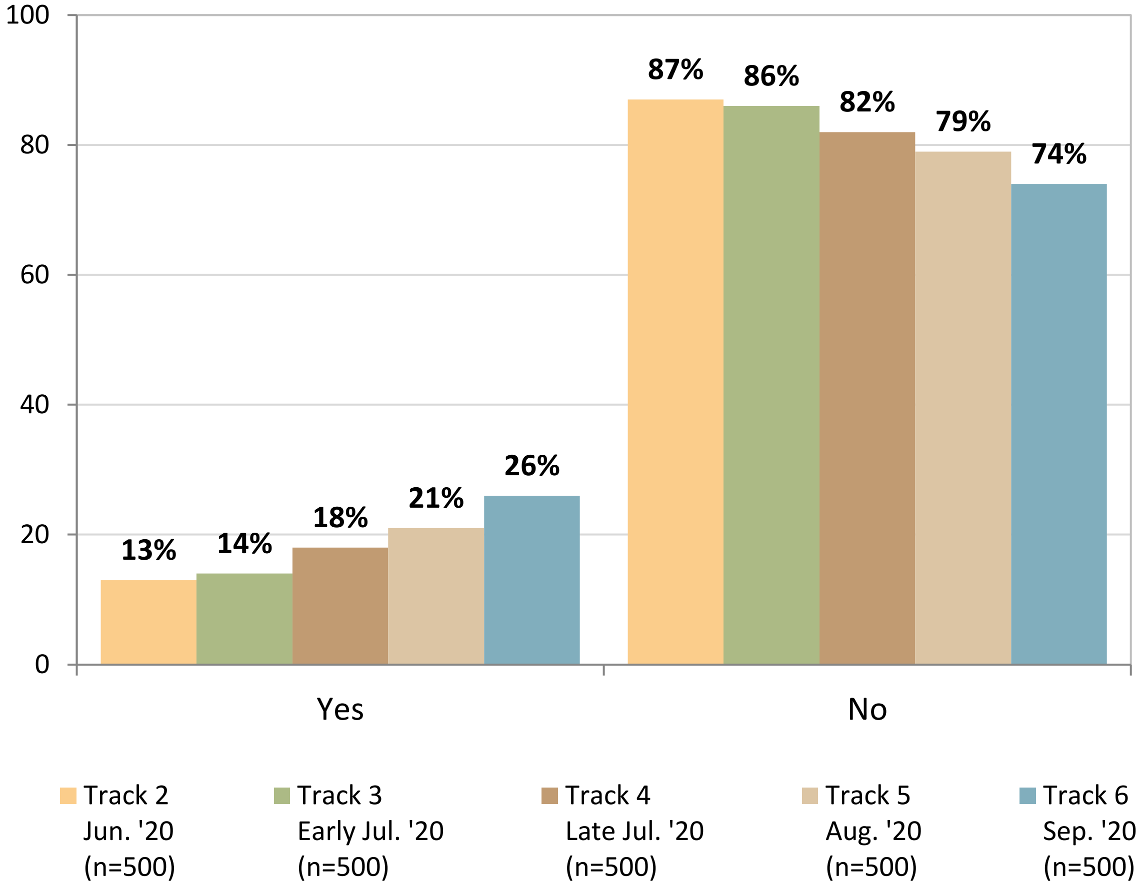
Over the course of the tracking research since May 2020, there has been a rise in the proportion of respondents expecting social distancing to last for a longer time period of 1 to 2 years, as indicated by the highlighted bands in the chart.

Thus, the expectation that social distancing would last for 1-2 years was cited by a higher proportion of respondents in the latter half of 2020: namely, Track 3 (26%), Track 4 (30%), Track 5 (33%), and Track 6 (30%).

Q. And how long do you expect social distancing to last for?

Personal Test for COVID-19

CHART 4 – PERSONAL TEST FOR COVID-19
(Percentage of all respondents in each round)†



Since June 2020, the proportion of respondents who had been tested for COVID-19 steadily increased.

By September 2020, around one quarter of those participating in Track 6 confirmed having been tested (26%).

Note: Respondents were able to participate in more than one track, and therefore the increases may be attributable in part to a cumulative effect.

On analysing the total combined sample (n=3,500) demographically, the following findings emerged:

- Females were significantly more likely to have been tested (21% in total), compared to males (16%).
- Younger respondents aged 18-34 years were significantly more likely to have been tested (26%), particularly when compared to those aged 70 years and over (11%).

†This question was not asked in the Track 1 research round.

Q. Have you been tested for COVID-19?

Confidence in the State Government to Manage a Second Wave

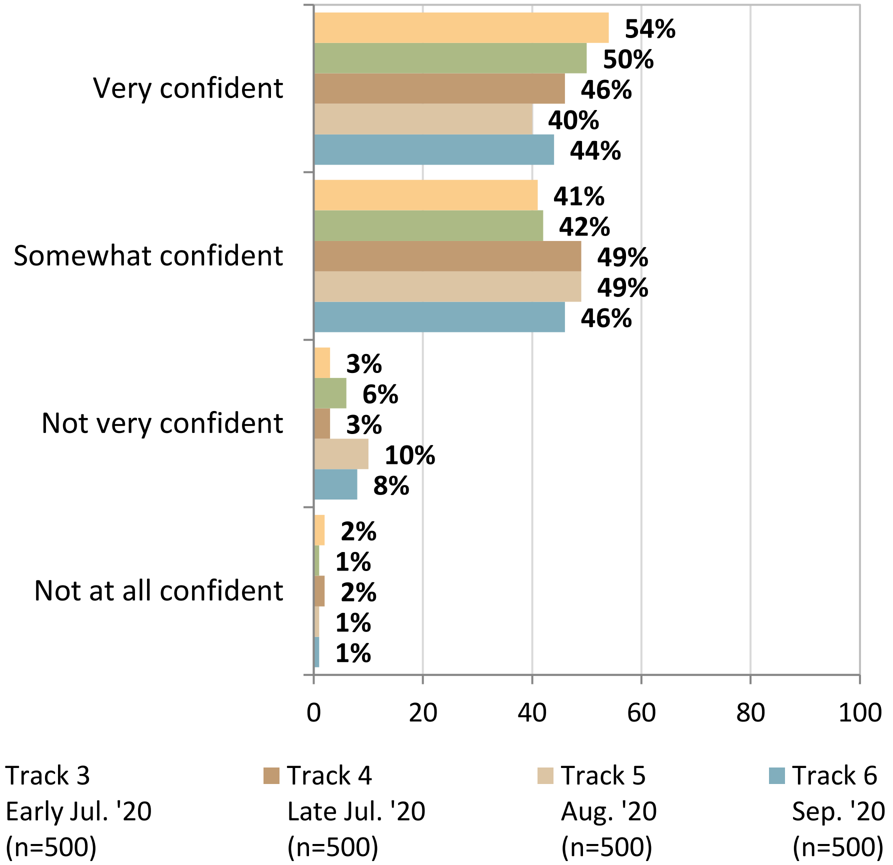
CHART 5 – CONFIDENCE IN THE STATE GOVERNMENT TO MANAGE A SECOND WAVE
(Percentage of all respondents in each round)*†

TOTAL CONFIDENT BY TRACK

TRACK 2 – 95%
TRACK 3 – 92%
TRACK 4 – 95%
TRACK 5 – 89%
TRACK 6 – 90%

TOTAL NOT CONFIDENT BY TRACK

TRACK 2 – 5%
TRACK 3 – 7%
TRACK 4 – 4%
TRACK 5 – 11%
TRACK 6 – 9%



*Percentages may not sum to 100 as those respondents who were "unsure" in Track 2 (n=2), Track 3 (n=4), Track 4 (n=4) and Track 6 (n=5) have not been included in the chart.
†This question was not asked in the Track 1 research round.

At all stages of the COVID-19 research from Track 2 onwards, the clear majority of respondents indicated their confidence to some degree that any increase in positive tests or a new outbreak in Tasmania would be well managed by the State Government. The high totals of those confident ranged between 89% and 95%.

In the initial two tracks where this question was asked (Track 2 and Track 3), the proportion of respondents who were "very confident" was somewhat higher than those who were "somewhat confident".

There was a marginal shift in late July 2020 (Track 4), where those who were "somewhat confident" began to constitute the slightly larger proportion.

On analysing the total combined sample (n=3,500) demographically, the following findings emerged:

- Subtracting the total percentage *not confident* from the total percentage *confident*, net confidence was significantly higher among females (90), compared to males (81).

Q. If there was an increase in positive tests or a new outbreak in Tasmania, how confident are you that it would be well managed by the State Government?

Section Five

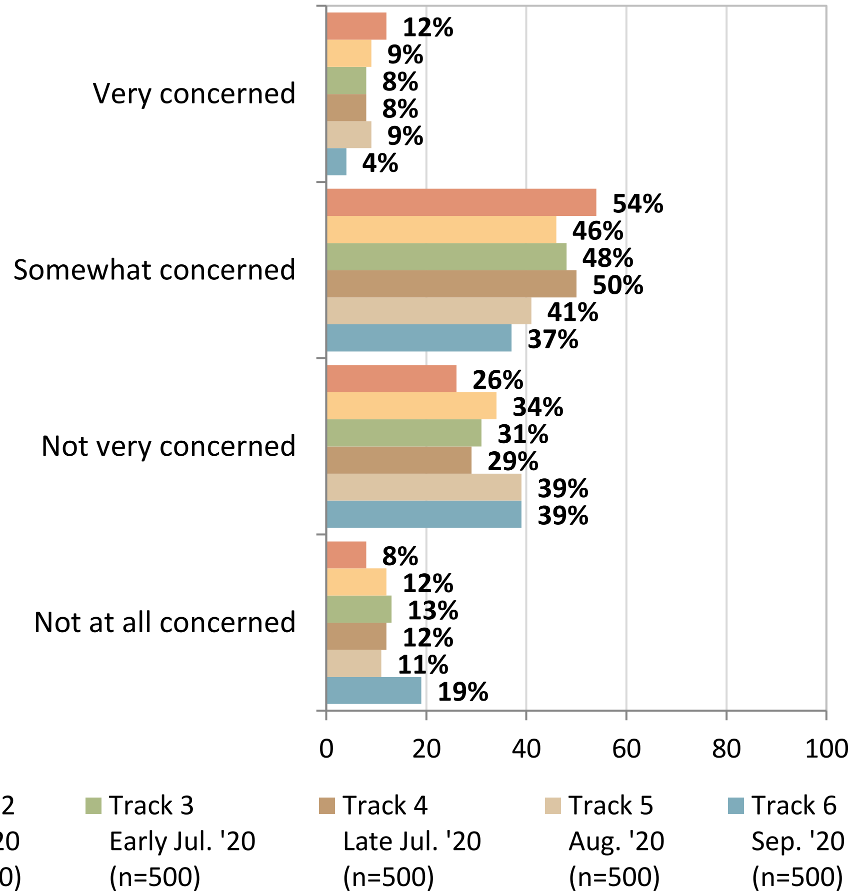
Barriers to Socialising

General Level of Concern about Socialising or Social Environments

CHART 6 – GENERAL LEVEL OF CONCERN ABOUT SOCIALISING OR GOING TO SOCIAL ENVIRONMENTS
(Percentage of all respondents in each round)*

TOTAL CONCERNED BY TRACK
TRACK 1 – 66%
TRACK 2 – 54%
TRACK 3 – 56%
TRACK 4 – 59%
TRACK 5 – 50%
TRACK 6 – 41%

TOTAL NOT CONCERNED BY TRACK
TRACK 1 – 33%
TRACK 2 – 46%
TRACK 3 – 44%
TRACK 4 – 41%
TRACK 5 – 50%
TRACK 6 – 59%



*Percentages may not sum to 100 as those respondents who were "unsure" in Track 1 (n=2), Track 3 (n=1), Track 5 (n=1) and Track 6 (n=1) have not been included in the chart.

In each of the research rounds from Tracks 1 to 4, more than one half of the respondents were concerned to some degree about socialising or going to social environments, with the combined totals ranging from 54% to 66%.

By Track 5, the totals were split equally between those concerned and those not concerned (50% in each case). The shift became more pronounced in September (Track 6), with 41% concerned to some degree and 59% not concerned.

Across all six tracking rounds, respondents tended to give the less strong response of "somewhat" concerned, or "not very" concerned.

On analysing the total combined sample (n=3,500) demographically, the following findings emerged:

- Females were significantly more likely to be concerned to some degree (62% in total), compared to males (50%).
- Respondents aged 55 years and over were significantly more likely to be concerned (63% in total), compared to those aged 18 to 44 years (49%).

Q. Are you concerned at all about socialising or going to social environments currently?

Specified Concerns about Socialising or Visiting Hospitality Venues

TABLE 6 – SPECIFIED CONCERNS ABOUT SOCIALISING OR VISITING HOSPITALITY VENUES
(Percentage of all respondents in each round)*

Area of Concern	TRACK 1 May 2020 (n=1,000)		TRACK 2 June 2020 (n=500)		TRACK 3 Early July 2020 (n=500)		TRACK 4 Late July 2020 (n=500)		TRACK 5 August 2020 (n=500)		TRACK 6 September 2020 (n=500)	
	TOTAL CONCERNED	TOTAL NOT CONCERNED	TOTAL CONCERNED	TOTAL NOT CONCERNED	TOTAL CONCERNED	TOTAL NOT CONCERNED	TOTAL CONCERNED	TOTAL NOT CONCERNED	TOTAL CONCERNED	TOTAL NOT CONCERNED	TOTAL CONCERNED	TOTAL NOT CONCERNED
Contracting COVID-19 from another customer	**67**	33	**54**	46	**57**	42	**61**	39	**57**	43	**43**	57
Contracting COVID-19 from a surface	**55**	45	**39**	60	**41**	59	**45**	54	**42**	57	**33**	66
Contracting COVID-19 from a staff member	**50**	50	**38**	62	**43**	57	**47**	53	**46**	54	**32**	67
Being able to afford these activities	**34**	65	**34**	65	**35**	64	**36**	63	**37**	63	**37**	63

On being prompted by a list of potential concerns related to socialising or visiting hospitality venues, "contracting COVID-19 from another customer" emerged as the primary cause for concern at some level in all six tracking rounds, ranging in total from 54% to 67% of respondents in Tracks 1 to 5, and decreasing in Track 6 to 43%.

"Being able to afford these activities" was most likely to be regarded as the area of least concern across all six tracks, with totals from 63% to 65% of respondents stating they were not concerned about it.

*Percentages do not sum to 100 as those who were "unsure" have not been included in this table.

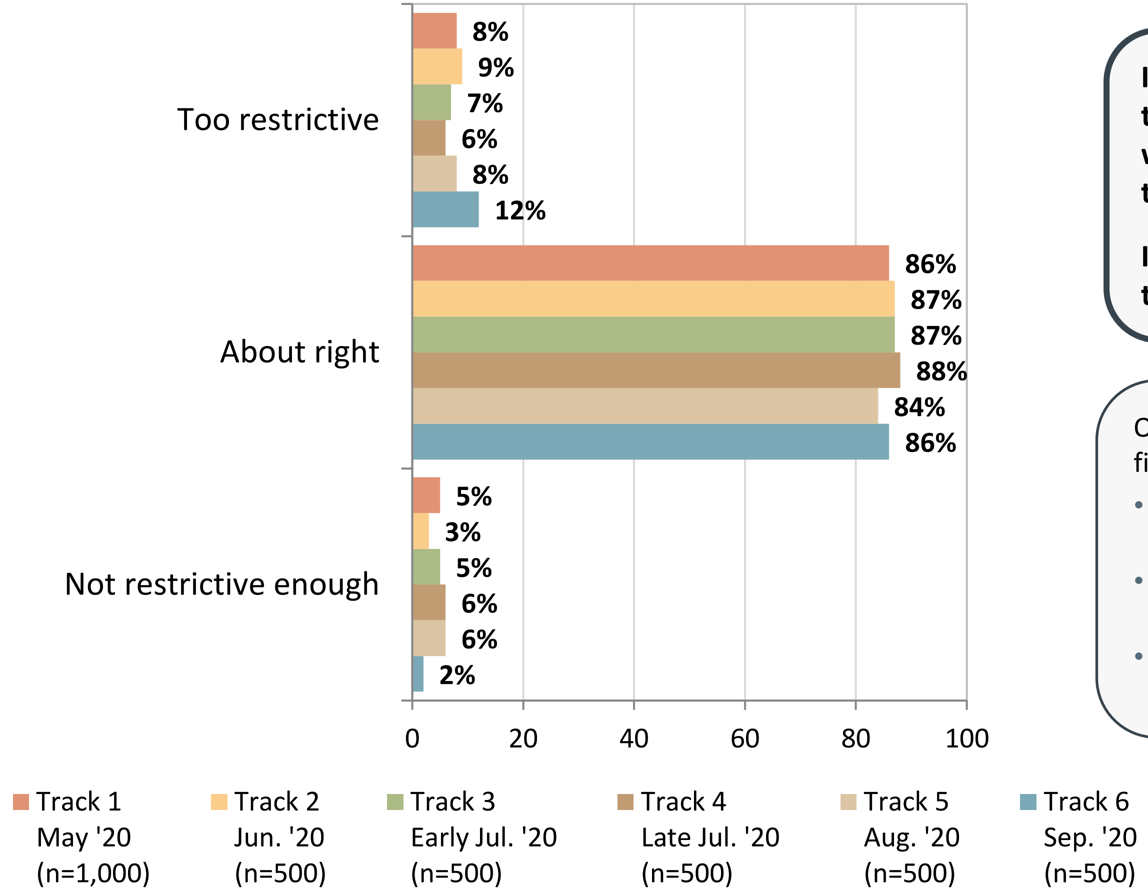
Q. Thinking about going out to socialise or visit cafes, restaurants, pubs, clubs or casinos, which of the following concern you?

Section Six

Perceptions of the Government Restrictions on Hospitality and Tourism Businesses

Perceptions of the Government Restrictions on Hospitality and Tourism

CHART 7 – PERCEPTIONS OF THE GOVERNMENT RESTRICTIONS ON HOSPITALITY AND TOURISM
(Percentage of all respondents in each round)*



In all six tracking rounds, the clear majority of respondents believed that the government restrictions imposed on hospitality and tourism businesses were "about right", the figures falling into a high and close range from 84% to 88%.

In the latest Track 6 in September 2020, there was a very slight increase in the proportion thinking that the restrictions were "too restrictive" (12%).

On analysing the total combined sample (n=3,500) demographically, the following findings emerged:

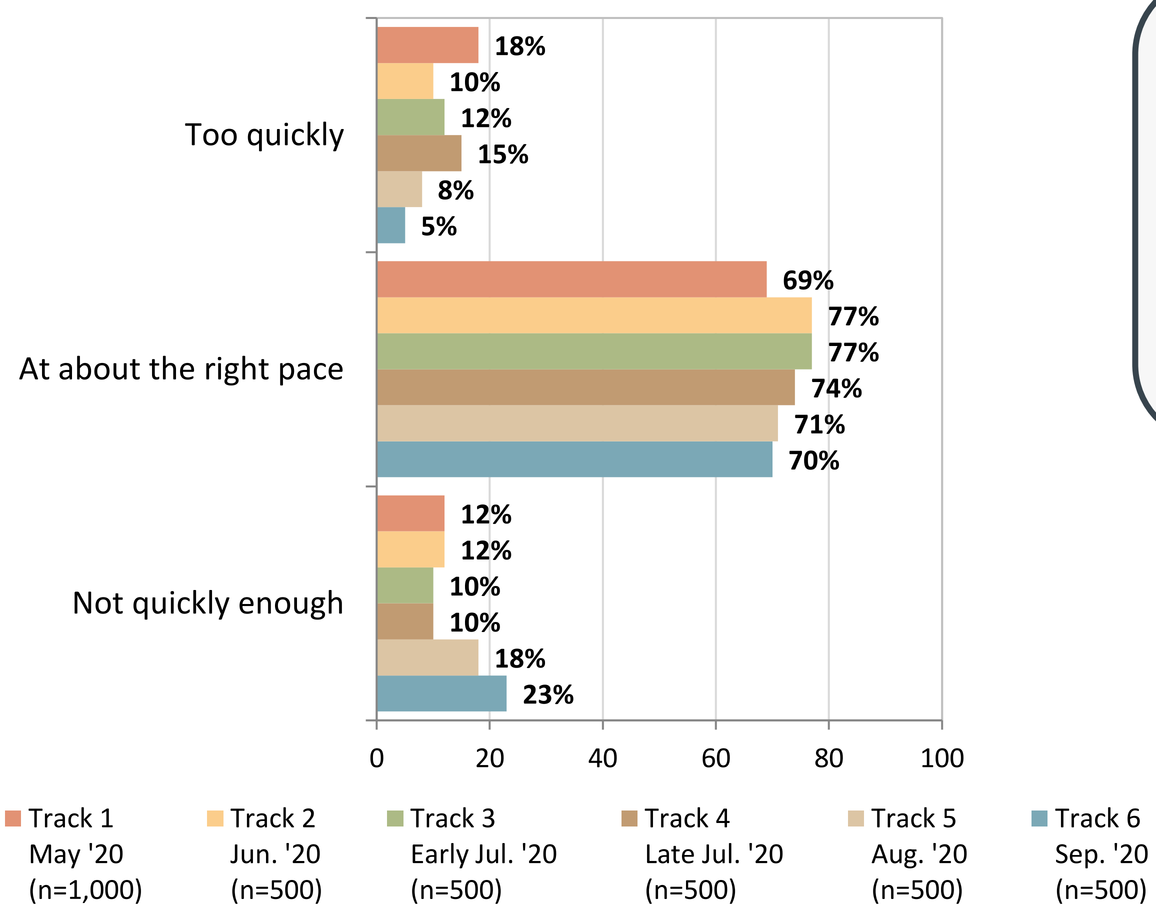
- Males were significantly more likely to believe the restrictions were **too restrictive** (12% in total), compared to females (4%).
- Females were significantly more likely to believe the restrictions were **about right** (90%), compared to males (83%).
- Older respondents aged 70 years and over were significantly more likely to believe the restrictions were **about right** (90%).

*Percentages may not sum to 100 as those respondents who were "unsure" in Track 1 (n=5), Track 2 (n=7), Track 3 (n=3), Track 4 (n=1), Track 5 (n=5) and Track 6 (n=4) have not been included in the chart.

Q. Thinking about the government restrictions that were imposed on hospitality and tourism businesses, do you believe they were…

Perceptions of the Pace of Easing Government Restrictions on Hospitality and Tourism

CHART 8 – PERCEPTIONS OF THE PACE OF EASING GOVERNMENT RESTRICTIONS ON HOSPITALITY AND TOURISM
(Percentage of all respondents in each round)*



In all six tracking rounds, the clear majority of respondents believed that the government restrictions imposed on hospitality and tourism businesses were being eased "at about the right pace", the figures falling into a range from 69% to 77%.

The view that the restrictions were being eased "too quickly" was somewhat more prevalent in Track 1 (18%).

In the two most recent tracks, a slight shift was discernible in the proportion of respondents believing that the restrictions were not being eased "quickly enough", namely Track 5 (18%) and Track 6 (23%).

On analysing the total combined sample (n=3,500) demographically, the following findings emerged:

- Males were significantly more likely to believe the restrictions were being eased **not quickly enough** (19% in total), compared to females (8%).
- Females were significantly more likely to believe the restrictions were being eased **at about the right pace** (75%, compared to 69% of males), or **too quickly** (15%, compared to 10% of males).
- Older respondents aged 70 years and over were significantly more likely to believe the restrictions were being eased **at about the right pace** (77%).

*Percentages may not sum to 100 as those respondents who were "unsure" in Track 1 (n=15), Track 2 (n=8), Track 3 (n=6), Track 4 (n=5), Track 5 (n=6) and Track 6 (n=8) have not been included in the chart.

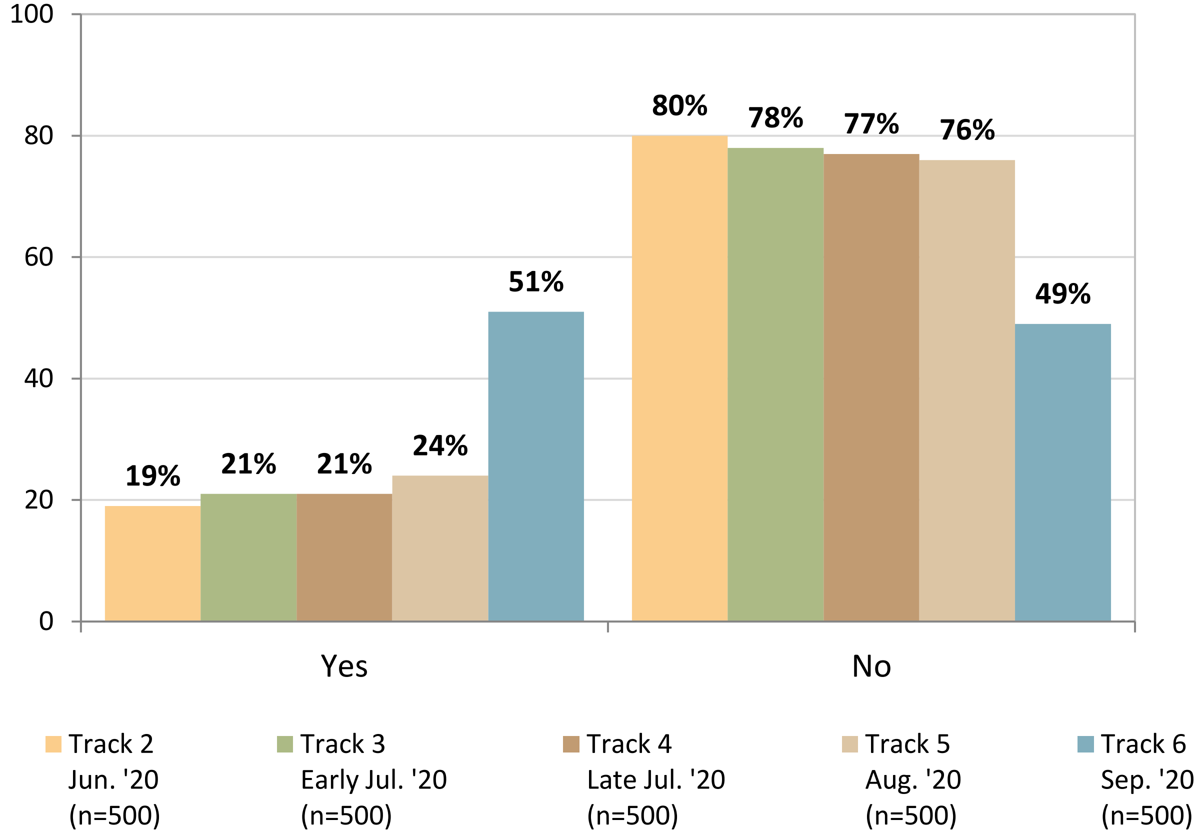
Q. And thinking about those same government restrictions on hospitality and tourism businesses, do you believe they are being eased…

Section Seven

Past and Future Overnight Trips Staying in Paid Accommodation

Overnight Trips Already Planned, Booked or Taken Since Restrictions were Lifted in Tasmania

CHART 9 – OVERNIGHT TRIPS ALREADY PLANNED, BOOKED OR TAKEN SINCE RESTRICTIONS WERE LIFTED IN TASMANIA
(Percentage of all respondents in each round)*†



*Percentages may not sum to 100 as those respondents who were "unsure" in Track 2 (n=2), Track 3 (n=5), Track 4 (n=3) and Track 5 (n=1) have not been included in the chart.
†This question was not asked in the Track 1 research round.

From June to August 2020, the proportion of respondents who had already planned, booked, or taken an overnight trip staying in paid accommodation upon restrictions being lifted in Tasmania remained relatively steady across the four research tracks, in a range from 19% to 24%.

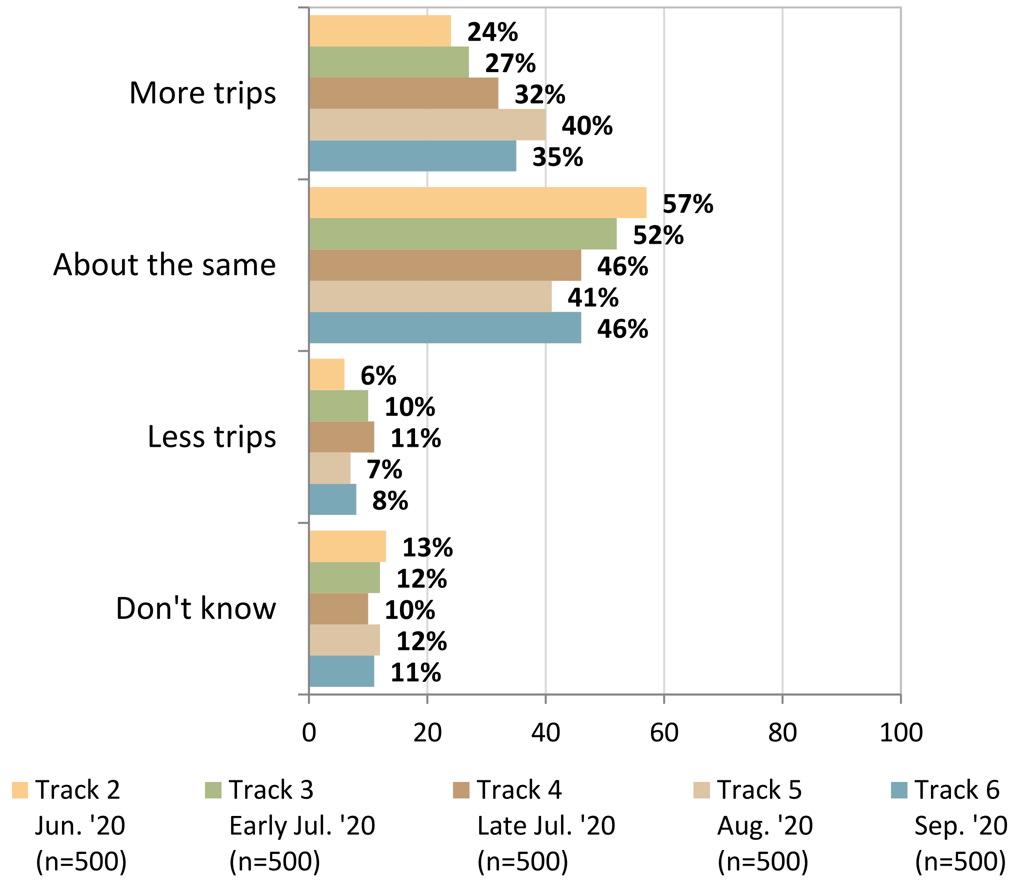
A significant 27 percentage-point increase subsequently emerged, from 24% in August 2020 up to 51% in September 2020, reflecting an encouraging rebound in the domestic travel market.

There were no statistically significant variations to be noted on analysing the results by the demographic subgroups.

Q. Have you already planned, booked, or taken an overnight trip staying in paid accommodation since restrictions were lifted in Tasmania?

Frequency of Intended Overnight Trips within Tasmania While Restrictions Remain on Mainland and Overseas Travel

CHART 10 – FREQUENCY OF INTENDED OVERNIGHT TRIPS WITHIN TASMANIA WHILE RESTRICTIONS REMAIN ON MAINLAND AND OVERSEAS TRAVEL
(Percentage of all respondents in each round)*†



*Percentages may not sum to 100 due to rounding.
†This question was not asked in the Track 1 research round.

In the tracking rounds from June 2020 onwards, respondents were most likely to report that they intended taking "about the same" number of trips within Tasmania staying in paid accommodation while the restrictions remained on mainland and overseas travel.

This was least the case in the August 2020 round, where the margin narrowed significantly between those stating "about the same" (41%) and those stating "more trips" (40%).

In the latest September Track 6, around one in three reported they would be taking "more trips" (35%).

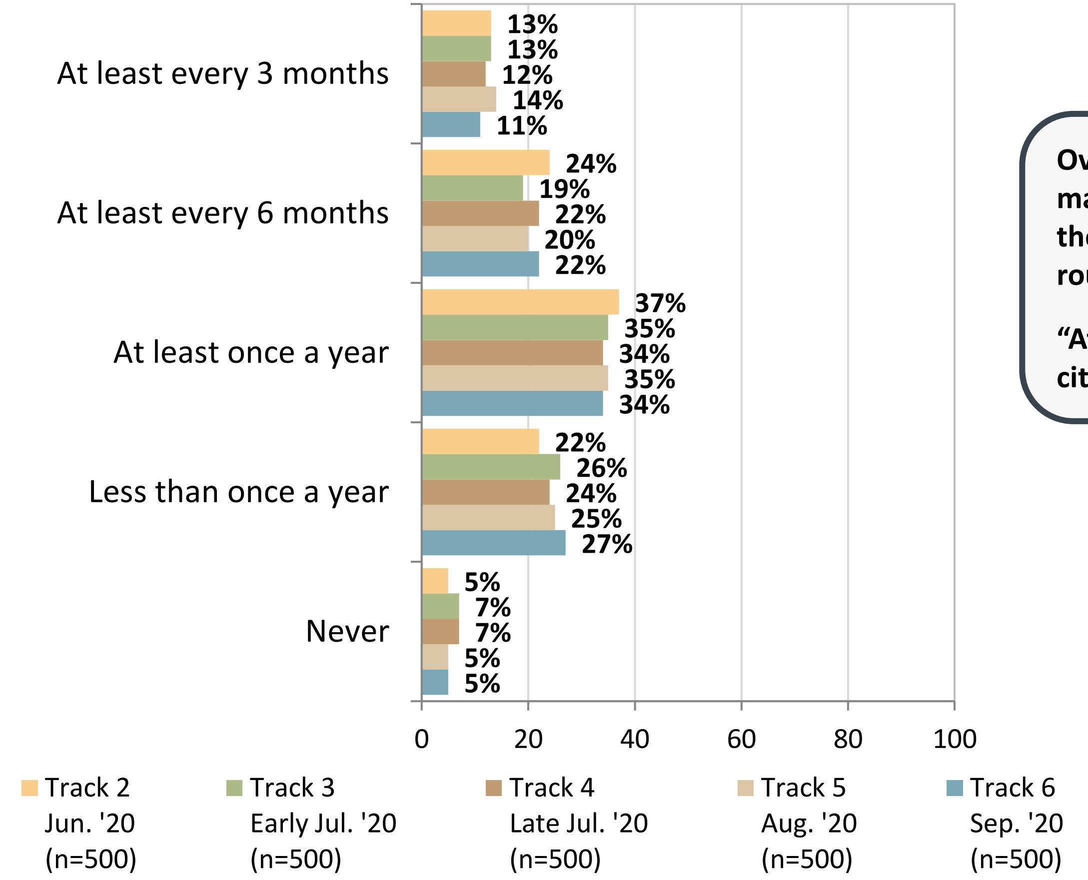
On analysing the total combined sample (n=3,500) demographically, the sole significant finding to emerge was that:

- Older respondents aged 70 years and over were significantly <u>less likely</u> to state they intended taking **more trips** (25%), and were the <u>most likely</u> to say they would be taking **less trips** (13%).

Q. While restrictions on travel to mainland Australia and overseas remain in place, do you intend to take more, less or about the same number of overnight trips within Tasmania staying in paid accommodation?

Frequency of Interstate Travel Prior to the COVID-19 Restrictions

CHART 11 – FREQUENCY OF INTERSTATE TRAVEL PRIOR TO THE COVID-19 RESTRICTIONS
(Percentage of all respondents in each round)*†



Overall, the respondents were most likely to report having travelled interstate to mainland Australia, staying in paid accommodation, "at least once a year", prior to the COVID-19 restrictions, cited by between 34% and 37% in each of the tracking rounds from June to September 2020.

"At least every 6 months" and "less than once a year" were next most frequently cited, and by a relatively similar proportion across all the tracking rounds.

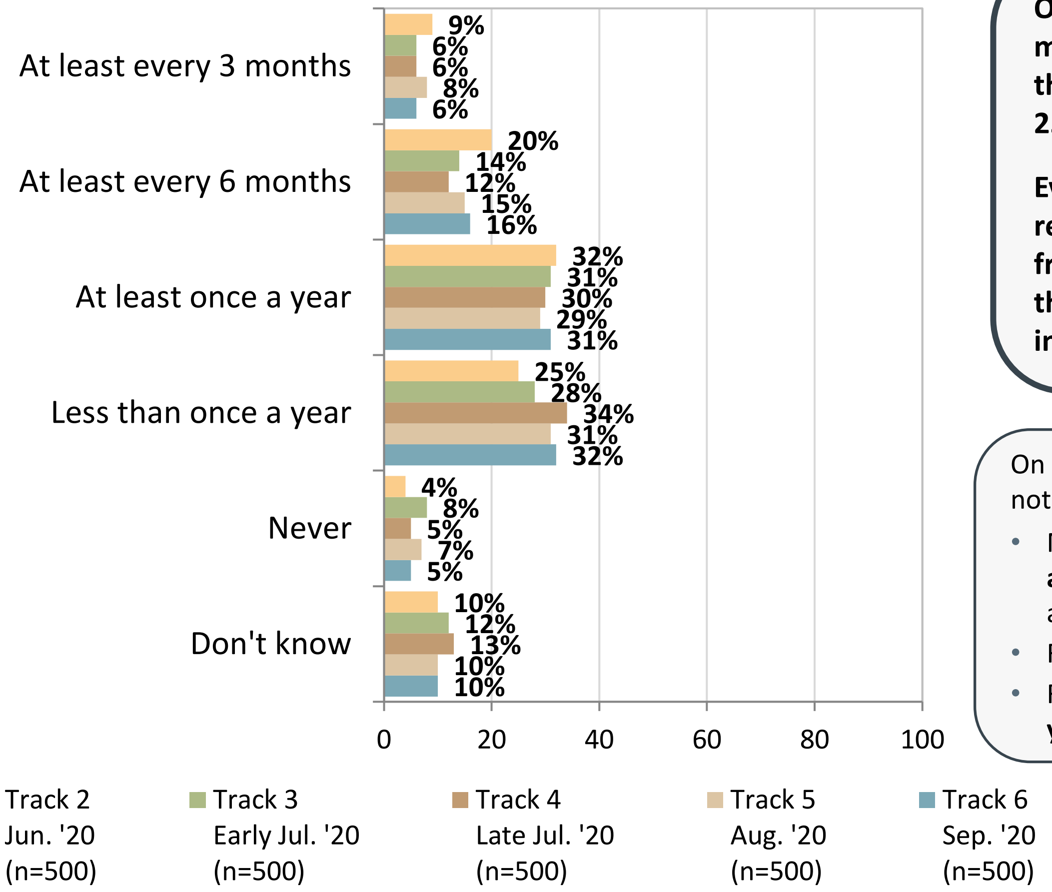
There were no statistically significant variations to be noted on analysing the results by the demographic subgroups.

*Percentages may not sum to 100 as those respondents who were "unsure" in Track 2 (n=2), Track 3 (n=2), Track 4 (n=3), Track 5 (n=3) and Track 6 (n=3) have not been included in the chart.
†This question was not asked in the Track 1 research round.

Q. Prior to the COVID-19 restrictions being enforced, how often did you travel interstate (to mainland Australia) staying in paid accommodation?

Frequency of Intended Interstate Travel Post the Lifting of the COVID-19 Restrictions

CHART 12 – FREQUENCY OF INTENDED INTERSTATE TRAVEL POST THE LIFTING OF THE COVID-19 RESTRICTIONS (Percentage of all respondents in each round)*†



*Percentages may not sum to 100 due to rounding.
†This question was not asked in the Track 1 research round.

Overall, the respondents were most likely to report intended travel interstate to mainland Australia, staying in paid accommodation, "at least once a year", or "less than once a year" upon the lifting of the COVID-19 restrictions, cited by between 25% and 34% in each of the tracking rounds from June to September 2020.

Even though the levels of frequency of past interstate travel, prior to the COVID-19 restrictions, shifted downwards to some slight decreases in respondents' intended frequency of interstate travel post the restrictions being lifted, it should be noted that the variations were relatively marginal and affected to some degree by the increases in respondents stating "don't know".

On analysing the total combined sample of the five tracks (n=2,500), the following findings were noted:

- Males were significantly more likely to state they thought they would travel to the mainland **at least every 3 months** (9%) or **at least every 6 months** (19%), compared to females (5% and 12% respectively).
- Respondents aged 55-69 years were the most likely to state **at least every 6 months** (20%).
- Respondents aged 70 years and over were significantly more likely to state **at least once a year** (39%).

Q. Thinking now about COVID-19 restrictions being lifted and interstate travel (to mainland Australia) being allowed, how often do you think you will travel to the mainland staying in paid accommodation once it is possible to do so?

Section Eight

Economic and Social Recovery from the COVID-19 Impacts

Importance of Specified Industry Sectors for Government Investment and Support to Help Tasmania Recover Economically

TABLE 7 – IMPORTANCE OF SPECIFIED INDUSTRY SECTORS FOR GOVERNMENT INVESTMENT AND SUPPORT TO HELP TASMANIA RECOVER ECONOMICALLY
(Percentage of all respondents in each round)*†

Economic Sector	TRACK 2 June 2020 (n=500)		TRACK 3 Early July 2020 (n=500)		TRACK 4 Late July 2020 (n=500)		TRACK 5 August 2020 (n=500)		TRACK 6 September 2020 (n=500)	
	TOTAL IMPORTANT	TOTAL NOT IMPORTANT	TOTAL IMPORTANT	TOTAL NOT IMPORTANT	TOTAL IMPORTANT	TOTAL NOT IMPORTANT	TOTAL IMPORTANT	TOTAL NOT IMPORTANT	TOTAL IMPORTANT	TOTAL NOT IMPORTANT
Hospitality	**92**	8	**92**	7	**91**	8	**91**	9	**92**	8
Tourism	**89**	11	**91**	8	**90**	9	**93**	7	**93**	7
Residential housing construction	**89**	10	**88**	11	**87**	13	**87**	12	**86**	13
Road/ rail/ port infrastructure	**86**	12	**82**	16	**85**	14	**81**	18	**83**	16
Arts and entertainment	**81**	18	**80**	17	**80**	20	**79**	21	**81**	19
Commercial property construction	**61**	38	**56**	42	**61**	37	**59**	40	**57**	42

On being prompted by a list of specified industry sectors, respondents were significantly more likely to identify "hospitality", "tourism", and "residential housing construction" as important for government investment and support to help Tasmania's economic recovery from COVID-19, each recording importance totals in a high and close range from 86% to 93% across the individual tracks.

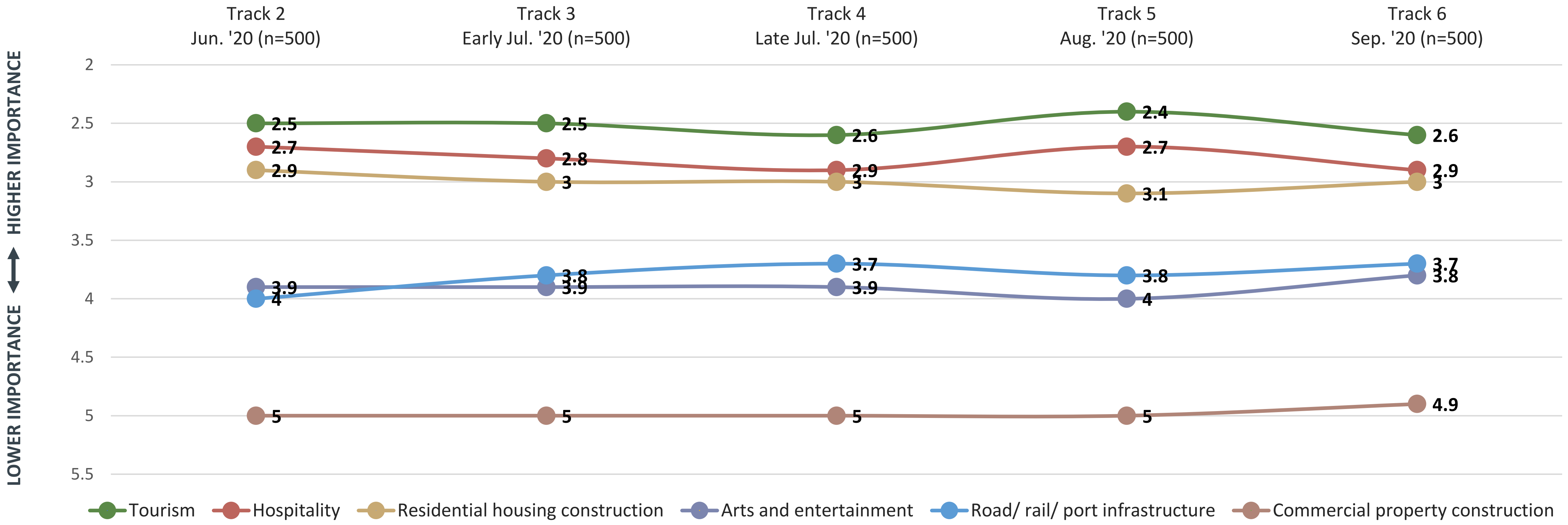
Of the listed sectors, "commercial property construction" was nominated as important by a significantly lower proportion of respondents in each of the tracks. Nonetheless, with figures ranging between totals of 56% and 61%, the majority here too considered the sector important.

*Percentages do not sum to 100 as the table does not include those who were "unsure".
†This question was not asked in the Track 1 research round.

Q. Thinking about how Tasmania might best recover from the economic damage caused by COVID-19, how important is it for all governments to invest in and support each of the following industry sectors?

Ranking of Industry Sectors for Government Investment and Support from Most Important (1) to Least Important (6) – Average Scores

CHART 13 – RANKING OF SPECIFIED INDUSTRY SECTORS FOR GOVERNMENT INVESTMENT AND SUPPORT TO HELP TASMANIA RECOVER ECONOMICALLY
(Average importance scores)†



As the average scores for the above industry sectors clearly indicate, "tourism" was ranked highest in importance for government investment and support to help Tasmania's economic recovery, across all the tracks from June to September 2020, followed by "hospitality" and "residential housing construction".

†This question was not asked in the Track 1 research round.

Q. Thinking about how Tasmania might best recover from the economic damage caused by COVID-19, please rank the following industry sectors from most important (1) to least important (6) for governments to invest in and support.

Importance of Specified Areas for Government Investment and Support to Help Tasmania Recover Socially

TABLE 8 – IMPORTANCE OF SPECIFIED AREAS FOR GOVERNMENT INVESTMENT AND SUPPORT TO HELP TASMANIA RECOVER SOCIALLY
(Percentage of all respondents in each round)*†

Social Area	TRACK 2 June 2020 (n=500)		TRACK 3 Early July 2020 (n=500)		TRACK 4 Late July 2020 (n=500)		TRACK 5 August 2020 (n=500)		TRACK 6 September 2020 (n=500)	
	TOTAL IMPORTANT	TOTAL NOT IMPORTANT	TOTAL IMPORTANT	TOTAL NOT IMPORTANT	TOTAL IMPORTANT	TOTAL NOT IMPORTANT	TOTAL IMPORTANT	TOTAL NOT IMPORTANT	TOTAL IMPORTANT	TOTAL NOT IMPORTANT
Job creation	99	1	98	2	98	2	97	2	98	2
Hospitals	98	2	97	2	99	1	98	1	99	1
Vocational training and skills	94	6	97	2	96	3	98	2	98	2
Schools and education	96	4	96	4	96	4	97	3	96	3
Mental health	95	5	95	5	96	4	96	4	97	3
Affordable housing	94	6	94	6	96	4	94	5	94	6

On being prompted by a list of specified social areas, the great majority of respondents attributed each with importance for government investment and support to help Tasmania's social recovery from COVID-19.

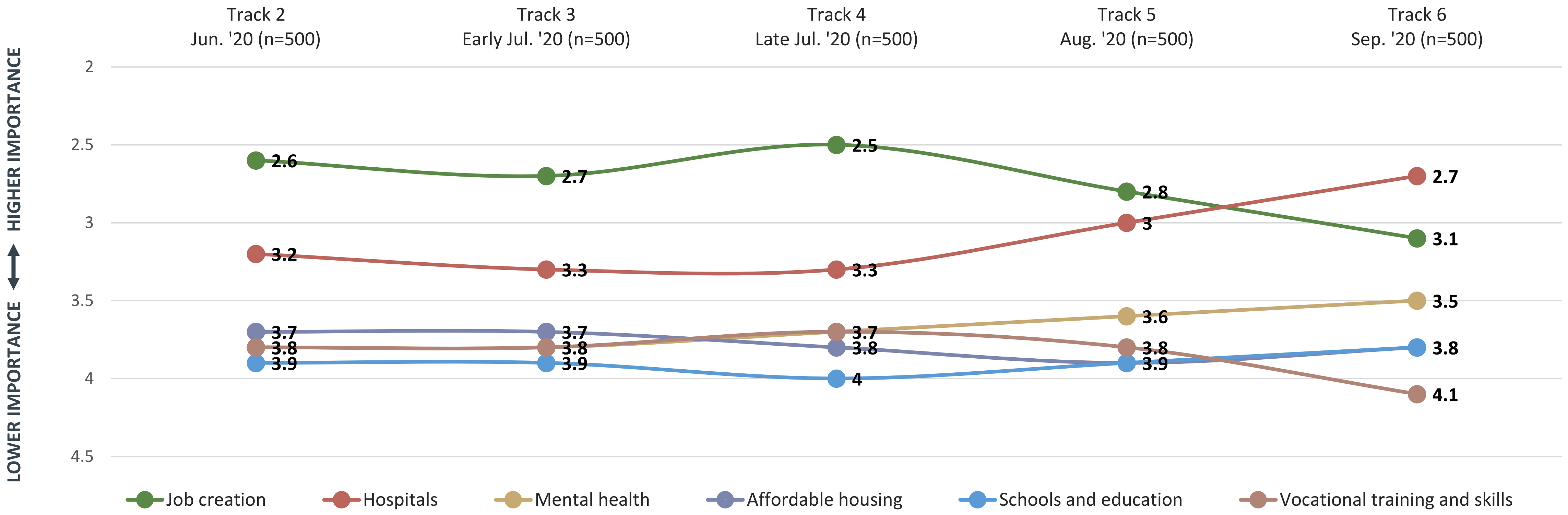
This was the case across all the individual tracks, each area recording combined importance totals in a high and close range from 94% to 99%.

*Percentages do not sum to 100 as the table does not include those who were "unsure".
†This question was not asked in the Track 1 research round.

Q. Thinking about how Tasmania might best recover from the social damage caused by COVID-19, how important is it for all governments to invest in and support each of the following areas?

Ranking of Social Areas for Government Investment and Support from Most Important (1) to Least Important (6) – Average Scores

CHART 14 – RANKING OF SPECIFIED AREAS FOR GOVERNMENT INVESTMENT AND SUPPORT TO HELP TASMANIA RECOVER SOCIALLY (Average importance scores)†



The average scores for the above social areas allow the importance rankings to emerge more clearly. Thus, "job creation" was ranked highest in importance in all the individual tracks from June to August 2020, the exception being the most recent track in September 2020, where "hospitals" recorded the highest ranking.

†This question was not asked in the Track 1 research round.

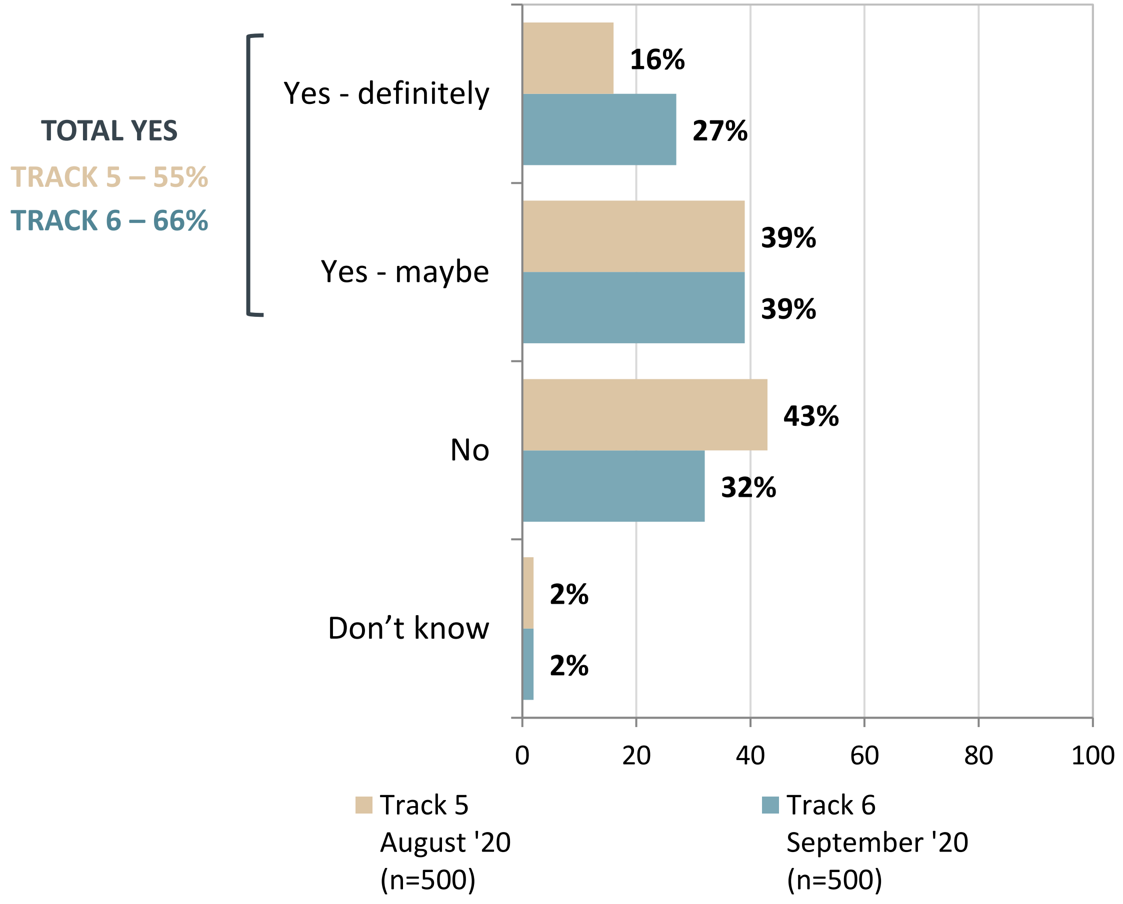
Q. Thinking again about how Tasmania might best recover from the social damage caused by COVID-19, please rank the following areas from most important (1) to least important (6) for all governments to invest in and support.

Section Nine

Support for Interstate Travel to and from Tasmania Prior to 1 December

Support for Interstate Travel to and from Tasmania Prior to 1 December

CHART 15 – SUPPORT FOR INTERSTATE TRAVEL TO AND FROM TASMANIA PRIOR TO 1 DECEMBER FROM AREAS WITH NO COVID-19 COMMUNITY TRANSMISSION
(Percentage of all respondents in Track 5 and Track 6)†



†This question was only asked in the Track 5 and Track 6 research rounds.

A discernible rise was recorded across the two most recent tracking rounds in respondents believing that there should be interstate travel to and from Tasmania prior to 1 December for those states and territories with no COVID-19 community transmission.

The combined total stating "yes" increased by 11 percentage points, from 55% in August Track 5 to 66% in September Track 6.

Within these totals, the greatest shift was in those stating "yes – definitely", from 16% in August Track 5 up to 27% in September Track 6.

On analysing the total combined sample of the two tracks (n=1,000) demographically, the following findings emerged:

- Males were significantly more likely to state **yes** there should be such interstate travel (66% in total), compared to females (55%).
- Older respondents aged 70 years and over were significantly more likely to state **no** (48%).

Q. Considering the recent Tasmanian Government announcement that the Tasmanian borders would remain closed until at least 1 December, do you think that there should be interstate travel to and from Tasmania prior to 1 December for those states and territories with no community transmission of COVID-19?

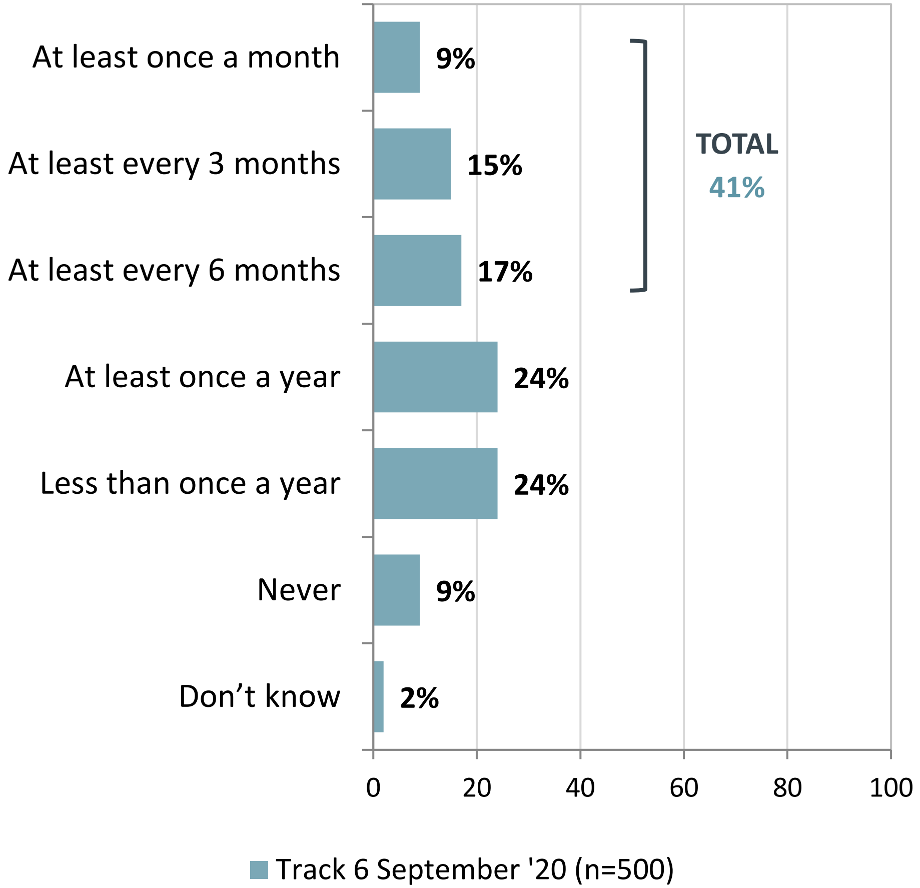
Section Ten

Attendance at Live Performances

Frequency of Attending Live Performances Previously Prior to the COVID-19 Restrictions

Federal Group

CHART 16 – FREQUENCY OF ATTENDING LIVE PERFORMANCES PREVIOUSLY PRIOR TO THE COVID-19 RESTRICTIONS
(Percentage of all respondents in Track 6)†



The respondents in the September 2020 research round were most likely to report that, prior to the COVID-19 restrictions, they had attended live performances "at least once a year" or "less than once a year" (24% in each case).

A significant proportion of the sample confirmed more frequent attendance at live performances, namely "at least every 6 months", "every 3 months" or "once a month" (a combined total of 41%).

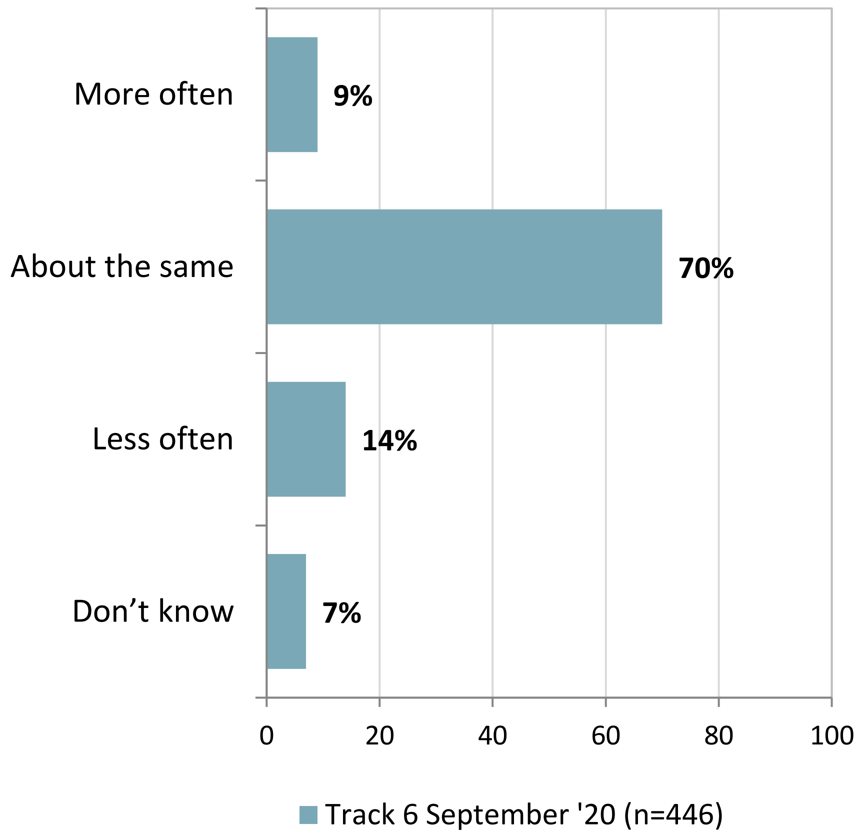
There were no statistically significant variations to be noted on analysing the results by the demographic subgroups.

†This question was only asked in the Track 6 research round.

Q. Thinking back prior to the COVID-19 restrictions, how often did you attend live performances?

Frequency of Likely Attendance at Live Performances Post the COVID-19 Restrictions Compared to Previously

CHART 17 – FREQUENCY OF LIKELY ATTENDANCE AT LIVE PERFORMANCES POST THE COVID-19 RESTRICTIONS COMPARED TO PREVIOUSLY
(Percentage of all respondents in Track 6 who attended live performances prior to the COVID-19 restrictions)†



In September 2020, the respondents were most likely by far to state that, once the COVID-19 restrictions were eased, they would be likely to attend live performances at "about the same" frequency as prior to COVID-19 (70%).

Among the remainder, there was only a marginal difference between the proportions stating "more often" (9%) and "less often" (14%).

There were no statistically significant variations to be noted on analysing the results by the demographic subgroups.

Q. Once the COVID-19 restrictions on live performances are eased, how often are you likely to attend live performances compared to prior to COVID-19?

†This question was only asked in the Track 6 research.

Federal Group

Importance of Specified Measures in Making Attendees at Live Performances Feel Comfortable in Future

TABLE 9 – IMPORTANCE OF SPECIFIED MEASURES IN MAKING ATTENDEES AT LIVE PERFORMANCES FEEL COMFORTABLE IN FUTURE
(Percentage of all respondents in Track 6 who attended live performances prior to the COVID-19 restrictions)*†

Measure	TRACK 6 – September 2020 (n=446)						
	TOTAL IMPORTANT	Very important	Somewhat important	**TOTAL NOT IMPORTANT**	Not very important	Not at all important	**Don't know**
Cleaning and hygiene practices of the staff and venue	**95**	71	24	**5**	4	1	**0**
Appropriate social distancing	**85**	47	39	**14**	10	4	**1**
Further easing of restrictions	**80**	27	52	**17**	13	4	**3**

The clear majority of respondents regarded all three measures as important, at some level, to make them feel comfortable when attending live performances in the future.

The "cleaning and hygiene practices of the staff and venue" emerged as the most critical measure, confirmed by 95% in total as important, among whom the greatest proportion by far stated it was "very important" (71%).

*Percentages may not sum to 100 due to rounding.
†This question was only asked in the Track 6 research round.

Q. Thinking about attending live performances in the future when it is possible to do so, how important would each of the following be to make you feel comfortable?