PHASE 3

COVID-19 Audience Outlook Monitor

Australia Snapshot Report: September 2020

PATTERNMAKERS

AUDIENCE OUTLOOK MONITOR

PHASE 3: KEY FINDINGS

Audience Sentiment

COVID-19 Audience Outlook Monitor
Australia, September 2020

12,147
participants

144
organisations

29% stable with 28% in July 2020
are ready to attend as soon as permitted

77% up from 70% in July 2020
are comfortable to attend outdoor events

29% up from 24% in July 2020
attended a cultural event in the past fortnight

14% up from 10% in July 2020
are purchasing tickets for live shows or performances

78% stable with 78% in July 2020
expect to attend the same or more than before, long-term

70% up from 36% in May 2020
say face masks would encourage them to attend

PATTERNMAKERS

wolf brown

AUDIENCE OUTLOOK MONITOR

Introduction

This Snapshot Report outlines key findings from Phase 3 of the Audience Outlook Monitor in Australia (September 2020). Beginning in May 2020, the study involves bi-monthly data collection to track how audiences feel about attending arts and culture events in the context of the COVID-19 pandemic.

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

Phase 3 results, from over 12,000 respondents, have been combined with Phase 1 data in a freely available dashboard. It is designed to provide insights about all different artforms, types of events and demographic groups in all parts of Australia.

For more information about the study, and to access resources such as the dashboard, visit: www.thepatternmakers.com.au/covid19

Read on for the key Phase 3 findings nationally.

Current conditions

Views about public interaction are diverse and vary markedly across Australia

In September 2020, levels of comfort participating in public events vary markedly around Australia, based on rates of community transmission.

Nationally, the proportion who are at least somewhat comfortable to use public transport has remained stable (62% in September compared to 61% in July 2020). In New South Wales (NSW) and Queensland (QLD), comfort has declined slightly (down 5% and 2% respectively), with cases of the virus increasing slightly in these states. In South Australia (SA), comfort is stable, while in all other states/territories it has improved, including in Victoria (VIC), where audiences have been living with significant restrictions under Stage 4 shutdown.

There are diverse views about public interaction, and some people now view some activities with more caution compared to July 2020.

On average nationally, audiences feel increasingly comfortable flying domestically on a commercial airline (48% in September, up from 44% in July). However, they feel less comfortable eating at a local restaurant (85%, down from 89%), or exercising at a gym or fitness studio (53%, down from 57%), potentially due to these places being sources of recent local outbreaks.

Returning to events

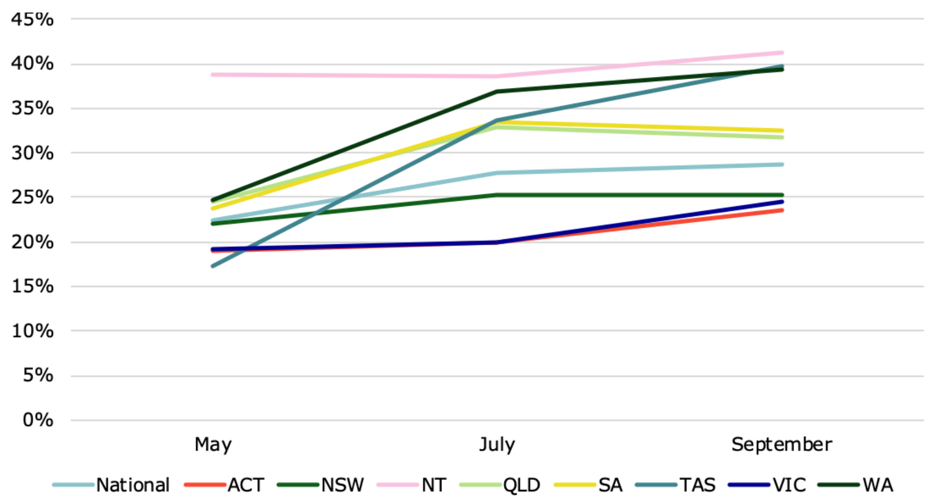
Audience views on attending are stable or increasing

In September 2020, the Audience Outlook Monitor shows that nationally, 29% of past attendees are ready to attend as soon as permitted, similar to that observed in July (28%). However, the picture varies across the states/territories:

- In Western Australia (WA), the Northern Territory (NT) and Tasmania (TAS), confidence is increasing, with around 40% of attendees now saying they are 'ready to attend as soon as permitted'
- In QLD and SA, confidence is stable or slightly lower than it was in July, with 33% 'ready to attend'
- In NSW, VIC and the Australian Capital Territory (ACT), around 25% are 'ready to attend', with confidence in VIC growing slightly during the shutdown period.

These latest figures confirm that confidence in attending is closely linked with rates of community transmission, how these are changing and the level of confidence in border controls and other public health policies.

Figure 1: Proportion ready to attend as soon as permitted, by state/territory (Phases 1, 2 and 3)



29% of past attendees have returned to a cultural event recently

The proportion of audiences that attended a cultural event of any kind in the past fortnight has increased from 24% in July to 29% in September, as more venues and facilities reopen.

Most commonly, attendees are returning to museums and galleries (13%), and cinemas (13%), which are currently the most common types of facilities to be open consistently. Rates of attendance at performances have grown since July, as more events have returned to stages and venues in many states/territories (8%, up from 3%).

Across most parts of Australia, more past attendees are making plans to attend an event of some kind in future. In NSW, QLD and ACT, rates of planning to attend an event have increased to around half of all audiences. In NT, SA, WA, TAS, it is now around two-thirds of all audiences. In VIC, it has dropped from 34% in July to 20% in September, with uncertainty around shutdown timelines preventing many from making decisions about future events.

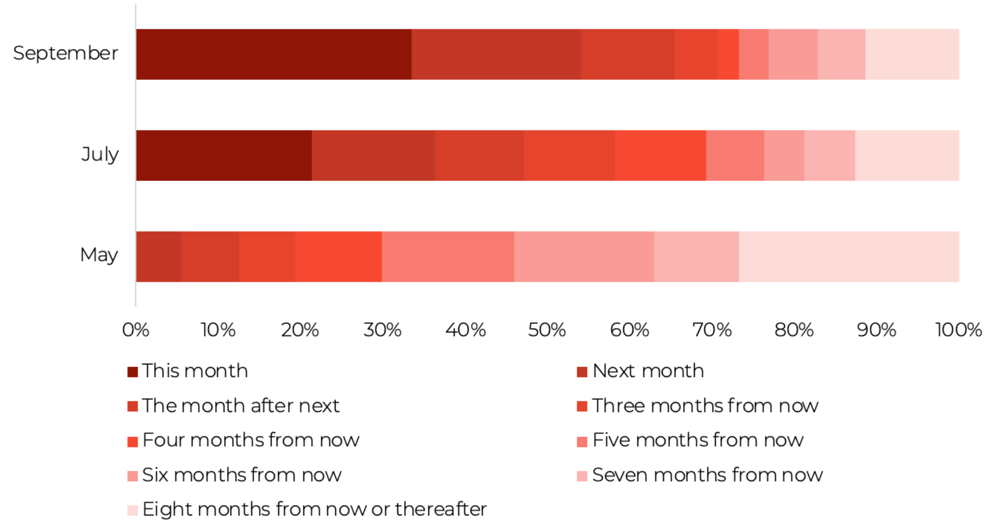
As performances return to venues, more people are buying tickets

The findings suggest that greater revenues are beginning to flow into the market, with recent attendees now spending more on tickets. The proportion that spent more than $50 on tickets has grown from 14% in May to 23% in September.

In the performing arts, the proportion making plans to attend a live performance has grown the strongly in the past two months, with 23% nationally planning for this right now, up from 14%.

The proportion who are buying tickets has grown from 10% to 14%, and over half of ticket buyers are buying tickets for events this month (51%).

Figure 2: In the past fortnight, did you purchase tickets for one or more live shows or performances that are scheduled for...? (Phases 1, 2 and 3)



Social distancing is helping more people feel comfortable at large venues

Whilst overall, audience sentiment is not shifting dramatically, public health measures and in particular, social distancing guidelines are helping more people feel comfortable attending cultural venues.

There has been a slight increase since July in the proportion who feel at least somewhat comfortable with outdoor events (77%, up from 70%), including street market (80%, up from 75%), music festivals (46%, up from 42%) and performances in outdoor amphitheatres (81%, up from 76%).

Comfort levels have also increased with a range of performance venues, such as stadiums (53%, up from 45%), large theatres and concert halls (67%, up from 61%), comedy clubs or live music venues (37%, up from 34%).

Enforcement of social distancing remains key, with only 13% nationally feeling comfortable at a venue with no social distancing. However, audiences in some states/territories are appearing more comfortable with the concept of two square metres per person, compared to July, such as WA (90%), TAS (87%), SA (86%), and NT (81%).

Comfort levels with other types of cultural venues and events remain high. Most audiences say that they would be at least somewhat comfortable to visit museums and galleries (93%) and botanic gardens and zoos (99%) today, along with community art spaces (87%).

A majority of audiences now accept the use of face masks

In May 2020, face masks were a polarising issue, with audiences divided on whether this measure would encourage (36%) or discourage (27%) them from attending cultural events.

Now, in September 2020, 70% say they would find them encouraging, and 10% discouraging, confirming widespread adoption and support of face masks in public.

Support for face masks is particularly high in VIC (88%) and NSW (80%). It is lowest in WA (46%) and SA (49%).

Another safety measure receiving higher levels of support is the taking of temperatures upon entry to venues, with 71% now saying this would make them more comfortable, compared to 65% in May 2020.

Audience experiences

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

When asked to reflect on their experiences returning to cultural events, most audiences appear to be satisfied and have no or only minor suggestions for improving.

Many acknowledged the circumstances and expressed appreciation where venue staff had made extra efforts to make people comfortable and make the experiences as 'normal' as possible.

Some people regretted the fact that not all areas of some sites were open, such as the bar or museum shop, or that they could not move around as freely as they used to.

One person said,

> **'Harder to create a 'vibe' but audience goodwill was evident. People were grateful for the chance to see live performance'.**

Finding ways to gently enforce social distancing is important

It appears that the degree of caution about performance spaces is higher compared to museums and other sites, and as more performances resume, managing social distancing will be challenging.

Among people who recently attended a live performance, those who suggested areas for improvement were inclined to mention crowd management and social distancing. Some people noted issues around entering and exiting, such as a lack of distancing, congestion and wait times.

One person said,

> **‘Naturally people end up banked up and too close’.**

Communication continues to be key — and where staff can do this proactively, sensitively and with good humour, it appears to work best. Emphasising information available online ahead of performances may be useful for some people who feel cautious.

One person shared:

> **‘My partner and I were a little nervous about how it would all work, as it was our first show since the lockdowns. The venue could have put more information about the COVID protections in place on their website. We face the same unease with the show we will be going to this weekend'.**

Future attendance

Outdoor events and digital streaming continue to be the most popular formats

Again, in Phase 3, audiences were asked to rank their preferred setting for a cultural event, from a list of four options. Many say they would prefer a live-streamed digital program that they could watch from home, as this feels the safest. However, the proportion who put this as their first choice has dropped back slightly across Australia (35%, down from 39%).

Slightly more people now rank outdoor venues more highly (39%, up from 34%), where there is enough lawn space to spread out. One person explained,

> **'In an outdoor area you can social distance how you feel most safe and comfortable with'.**

One-quarter (24%, stable since July) ranked an indoor, 100-seat venue following social distancing guidelines highest, and only 5% (also stable) ranked an indoor, flat-floor venue with loose chairs and plenty of space to spread out highest. One person explained,

> **'I have more faith in event organisers to space out patrons appropriately than I would for individuals to make their own seating area. Especially for a ticketed event, I imagine this would also make contact tracing easier'.**

These options attract different preferences across the country, depending on rates of transmission and climate. As summer approaches, preference for outdoor venues. has grown significantly in TAS (up 20%), as well as ACT (up 8%) and VIC (up 7%).

Some audiences express a desire to support more local venues and grassroots events

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

While some people mentioned crowds and venue safety as the key factor driving their attendance decisions, others say they want to support local, 'homegrown', independent and grassroots community events.

Other factors mentioned by audiences as relevant to their decisions included:

- Supporting the artists and spaces hardest-hit by the pandemic
- Family-friendly venues and events, as children have missed out on many activities and are having to process complex topics
- Affordable options, as people's incomes have been affected.

Some continue to feel pessimistic about returning to events long-term

In Phase 3, audiences were asked 'Thinking about your likely future spending online, if any, can you tell us what you'd prioritise?'

Many people mentioned classes, workshops and learning opportunities, across all artforms, skill levels and age groups. Another theme in the responses was flexibility to access content on-demand, as one person described,

> **'Ease of access. Possibly things that allow me to access the content for a certain amount of time not just once'.**

Some people mentioned that they don't expect to keep paying for streamed theatre or music performances when venues reopen.

As it has been noted in previous phases, many people spending online are motivated to support the artists and cultural organisations they care about. While the rate of donation currently remains high, there are indications that audiences may not continue at this level long-term, as one person said,

> **'[I'm] supporting arts companies that I currently subscribe to but may not be able to in the future.'**

Participating at home

Most audiences are continuing to participate from home, however in some regions, slightly fewer are engaging online

In September 2020, 70% of respondents say they are participating in online arts or cultural experiences, down slightly from 73% in July and 75% in May. Rates of engagement online have fallen by around 5-6 percentage points in most states/territories, with the largest falls noted in SA (down 10%) and WA (down 8%).

Audiences are continuing to participate in a range of cultural activities at home, such as listening to music (90%) and reading for pleasure (87%). Smaller, but consistent, proportions are making art or craft (41%), making music (24%) and making videos or doing photography (23%).

Most types of online engagement are steady, and 4 in 10 are continuing to discover new works

In terms of the types of online experiences people are engaging with, most types of experiences are attracting similar rates of engagement to July 2020. Participation in pre-recorded performances and events continues to reach the largest proportion of audiences, though this rate has fallen slightly from 51% to 46%.

When asked if they, or anyone they know, has discovered a new artist, artwork, or performance online, 31% said they had, similar to July (33%), and 15% say they know someone who has, similar to July (16%).

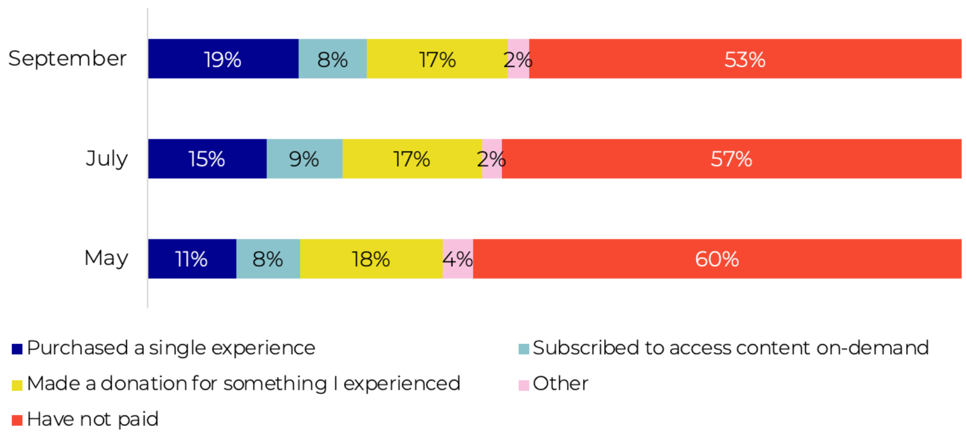
When asked if they are doing online arts and cultural activities more or less frequently than before the pandemic, 54% say they are engaging online more frequently, consistent with July (54%). More of these audiences expect to continue to do online arts and cultural activities after the pandemic ends, too (74% compared to 72% in July).

Slightly more people are paying for experiences, but not necessarily spending more

The data shows that the market for digital offerings is not declining. When asked if they have paid for an experience online, 39% of respondents said they have, compared to 36% in July and 34% in May 2020.

The rate of donation appears stable (20% compared to 19% in July), as is the proportion subscribing to digital platforms (10%, stable). The proportion paying for single pay-per-view experiences has risen (21%, up from 16% in July and 12% in May), potentially as a result of more offers coming online. The proportion of those paying who have spent over $100 in the fortnight before data collection, has fallen slightly, from 17% to 14%.

Figure 3: Have you paid for any online arts & culture experiences in the past fortnight? (Phases 1, 2 and 3)



Audiences have multiple motivations for paying for online experiences

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What's next?

To explore the data in more detail and find out how audiences for your work are responding, visit the study's Australian homepage at: www.thepatternmakers.com.au/covid19

There, you can access a range of Fact Sheets and a dynamic dashboard, to help you explore the results by location, artform and other variables. Instructions and tips for using the dashboard are available in a short video.

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

If you have a question, or an idea to put forward, relating to this study, you can contact info@thepatternmakers.com.au.

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

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