COVID-19 Audience Outlook Monitor

Australia Snapshot Report: May 2020

PATTERNMAKERS

AUDIENCE OUTLOOK MONITOR.

How do audiences feel about attending arts and culture events?

23,000

respondents from all 8 Australian States and Territories

159

surveying organisations, covering all forms of art and culture

85%

plan to attend as much or more as they did before the pandemic

22%

are ready to attend as soon as restrictions are lifted

96%

say venue safety measures will affect their decision to attend

Introduction

This Snapshot Report outlines key findings from the Audience Outlook Monitor in Australia, a study that 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 159 arts and culture organisations, including museums, galleries, performing arts organisations and festivals. These organisations simultaneously sent a survey to a random sample of audience members who had attended a cultural event since January 2018. Read more about the methodology and the types of events that are included.

Results from over 23,000 respondents 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 159 organisations, this study provides a detailed resource with insights about all different artforms, types of events and demographic groups in all parts of Australia.

Find out how to use the dashboard to access results relevant to you, or read on for the key findings nationally.

Planning to attend

9 in 10 attendees plan to return to arts and culture events

Overwhelmingly, audiences plan to return to arts and culture events in future (85%), with 78% planning to attend just as they did in the past and 7% even more often.

On average, 22% of audiences are comfortable attending as soon as restrictions are lifted. 67% 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 detail about who will be back first.

Planning to attend

Frequent attendees will be back at events sooner than others

There are some groups that are more likely to attend as soon as restrictions are lifted. This includes:

- those who previously attended the performing arts more than once a week (33%, compared to the national average of 22%)
- those who feel strongly committed to supporting arts and culture organisations (28%)
- those aged under 55 (23%)
- subscribers to performing arts organisations (24%).

In contrast, the groups that are more likely to stay away until there is no risk at all include:

- those living with a disability (20%, compared to the national average of 11%)
- those who attend the arts less than once a year (13%)
- those aged over 65 (14%) and over 75 (17%).
- audiences who are retired (15%) or not in the labour force (13%).

Shows and performances

Audiences are not yet ready to return to large performance venues

Looking more closely at performance venues, audiences' comfort-levels also depend on the size of the venue.

Even if they were open, and following recommended safety guidelines, 14% of audiences say they would be 'very comfortable' attending a venue seating 100 people today, and 30% say they would be 'somewhat comfortable'. Just 7% would be 'very comfortable' at venues seating 1,000 or more, which is similar to the proportion that would be very comfortable flying domestically on a commercial airline (10%) right now.

Smaller venues of 50 people or less are the most likely to attract audiences in the near future, with 62% of audiences saying they would be at least somewhat comfortable attending today, if they were open and following relevant guidelines.

Outdoor programming may be viable sooner than indoor programming, with a greater proportion of audiences feeling comfortable attending an outdoor festival or event today (64%).

Only small numbers are actively making plans to attend live shows or performances in future (14%), and among those that are, most are doing so for events in January 2021 or thereafter (44% of all audiences).

Audiences in the Northern Territory (NT), South Australia (SA) and Western Australia (WA) are showing higher levels of comfort attending performance venues compared with other jurisdictions – likely to be linked with low transmission rates in these regions.

Exhibitions

People are comfortable visiting museums and galleries, but not using interactive exhibits

The outlook for museums and galleries is looking positive and most audiences say they would be at least 'somewhat comfortable' walking around a museum or gallery (88%) or visiting a community art space (80%) today, if they were open and following recommended safety procedures.

One person explained their feelings:

> **'[I'm more] likely to attend museums where I have more agency in determining the space around me.'**

Among those who attend museums weekly, a higher proportion of people are 'very comfortable' (49%) compared to those who attend a few times a year or less (40%).

However, even among frequent museum-goers, few would feel comfortable using hands-on exhibits at a museum (24%), confirming the need to rethink visitor experience design while health risks remain.

On average, across the country, the proportion making firm plans to visit museums/galleries is small (7%), however audiences in the Australian Capital Territory (ACT) are twice as likely to as those in other States/Territories (15%).

Returning to events

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

There are a wide range of views about the public health response to COVID-19, and whether safety measures are essential or excessive.

Most audiences would generally feel encouraged by measures like disinfecting public areas (89%) 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 relevant public health guidelines (83%).

However, some measures may be polarising with a proportion saying they would actually be discouraged from attending if they had to wear a face mask (27%) or have mandatory temperature checks at entry (11%).

Overall, 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.

How are audiences participating in arts & culture from home?

46%

are doing creative hobbies more frequently

3 in 4

are engaging with culture online

28%

have discovered a new artist, performance or work online

1 in 3

of those online have paid for a digital experience

Participating from home

Many have taken up creative hobbies in isolation and most plan to continue post-pandemic

Many audience members (46%) say they are being creative at home more frequently than before the pandemic, and most of those are planning to continue doing so after the pandemic (89%).

Even among those who rarely attend arts events, a sizeable proportion (39%) are doing creative activities more frequently. However, 6% say they are doing creative activities less frequently, and one person explains:

> **'I still work outside the house and I am a single parent. Quite jealous of people who had time to take up an artistic pursuit.'**

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 (42%), making music (25%) and making videos or doing photography (23%).

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. Others shared examples of how creative activities have been a part of special interactions with family and friends during social isolation. One person gave an example of:

> **'Recording a hip hop song written by my son and helping him to make the video for it'.**

Visit the dashboard to explore more examples of creative activities that people are doing.

Online engagement

Three-quarters of audiences are participating in arts and culture online

Most audiences (75%) are also participating in online arts and culture activities, like watching arts video content (52%), watching live-streamed events (42%), or doing online classes or tutorials (36%).

Online participation is occurring in all age groups: 54% of audiences aged over 75 have watched a pre-recorded performance in the past fortnight, similar to the proportion of under 35s (56%).

In giving examples of what they're doing online, people shared that digital participation has helped with their wellbeing, for example:

> **'I took online dance classes and learnt routines. The movement and creative output was really mood lifting.'**

Over one third of audiences (37%) 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 (51%).

One-third say they are motivated to engage online to support an organisation they feel is important (37%), while others say they are engaging online for their own wellbeing (26%).

Online engagement

Digital participation is allowing audiences to discover new works

Interestingly, one-third say they are going online see things that they wouldn't normally be able to see (32%). Confirming the audience development potential of this time, a sizeable proportion (29%) have discovered a new artist, artwork or performance online, or they know someone who has (13%).

One person shared how music is helping their family stay connected during social distancing:

> **'We have developed a collaborative music playlist with family members. Each day has a prompt and we each add a song to the list. It has increased our interactions with each other, the amount and variety of music we listen to and has prompted memories and stories.'**

There are signs that digital participation could translate to attendance at live events after the pandemic, e.g.:

> **'Pre-recorded content has made me revisit arts organisations (ie The Australian Ballet) which I hadn't engaged with in years. It would make me more likely to attend a performance of the Australian Ballet in the future when I'm able to.'**

Streamed performances are also fuelling discussion and interpretation of works. For instance, one person said:

> **'My friends have been suggesting theatre shows that are now online. We have an email group and send links and then talk about the shows in a chat room. We are loving the opportunity to see National Theatre productions from London.'**

Online engagement

Digital distribution will play a role beyond the pandemic

Among those 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, such as people with a disability (70%), those who are caregivers to older adults (70%) and parents of children aged under six (68%). One person shared:

> **'I have severe social phobia so attending in person is often impossible for me. The wealth of online activities around the world has made arts and culture so much more accessible to me. It's wonderful.'**

Some people say that after the pandemic, they would like a choice of attending in-person or watching a livestream (35%). Again, people who live with a disability are more likely to want this option available, confirming the role for digital in expanding access to the arts.

Online engagement

Markets for digital work could be developed further

Most audiences engaging online say they have not paid for any online arts or culture experiences in the past fortnight (66%), though a significant number have (35%).

Over two-thirds say they are at least somewhat likely to pay a small amount for access to digital programs in future (68%), suggesting there may be room to grow the market.

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.

Among those that have paid for an online arts experience, a sizeable proportion has spent more than $50 in the past fortnight (36%). Older audiences over 65 years have spent the most (49% have spent over $50), while under 35s have spent the least (19% have spent over $50).

People are experiencing a variety of barriers to engaging with culture online, but most commonly people report that they either have other priorities for their time (34%) or generally don't know what is on offer (35%), suggesting there could be a role for greater investment in content discovery and digital marketing.

Online engagement

Audiences want to support arts and culture through the pandemic, but not everyone feels able to

Most of those surveyed in this study (who are recent attendees of cultural organisations) say they are moderately (53%) or strongly (37%) committed to supporting cultural organisations. However, some feel like they are not in a position to do so financially at present.

Audiences say they are more likely to donate to a specific artist or organisation that is important to them (68% are moderately or very likely to do this), rather than a general sector support fund (51%).

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 purchasing a subscription or membership, even if some of the events might be cancelled (55%).

Artists and cultural organisations can use the dashboard to see which 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, people are most interested to hear about upcoming online events and digital offerings (56%) and plans for future live events, post pandemic (50%). Emails with audience-centred offerings tend to rank higher than general communications about how organisations are faring.

What's next?

This Snapshot Report shared findings from the national, cross-sector dataset. 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 in a short video.

In the coming weeks, we'll be analysing the data in more detail, and sharing Fact Sheets to provide you with insights about key regions, artforms and topics. We'll also provide tips and practical steps you can think about to apply the findings in your work.

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 here.

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

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