



PHASE 2

COVID-19 Audience Outlook Monitor

Australia Snapshot Report: July 2020



PATTERNMAKERS



AUDIENCE
OUTLOOK
MONITOR

PHASE 2: FACT SHEET

Audience Sentiment

COVID-19 Audience Outlook Monitor
Australia, July 2020

15,656
participants

152
organisations

↑ **28%** up from 22%
in May 2020
are ready to attend as
soon as permitted

↑ **68%** up from 44%
in May 2020
are comfortable to
attend a 100-seat venue

↑ **1 in 4** up from 0
in May 2020
attended a cultural event
in the past fortnight

↑ **42%** up from 14%
in May 2020
are currently making
plans to attend

↓ **72%** down from
85% in May
2020
expect to attend the same
or more than before, long-
term

July 2020
previously January 2021+
most common month
of tickets sold

NT

state/territory with
the strongest demand



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AUDIENCE
OUTLOOK
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PHASE 2: FACT SHEET

Online Engagement

COVID-19 Audience Outlook Monitor
Australia, July 2020

15,656
participants

152
organisations

→ **73%** stable with 75%
in May 2020
are experiencing art
and culture online

↑ **33%** up from 29%
in May 2020
have discovered a new
artist or work recently

↑ **54%** up from 37%
in May 2020
are engaging online
more frequently
during the pandemic

↑ **72%** up from 67%
in May 2020
of those engaging
more plan to continue,
post-pandemic

→ **36%** stable with 34%
in May 2020
have paid for an
experience online

→ **38%** stable with 36%
in May 2020
of those paying have
spent more than \$50

4 in 10

would prefer a digital stream
to live attendance right now



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AUDIENCE
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Introduction

This Snapshot Report outlines key findings from Phase 2 of the Audience Outlook Monitor in Australia (July 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 over 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 2 results, from over 15,000 respondents, have been combined with Phase 1 data in a freely available dashboard. It's 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 like the dashboard, visit:
www.thepatternmakers.com.au/covid19

Read on for the key Phase 2 findings nationally.

Current conditions

Views about public interaction vary markedly across the country, based on cases of the virus

Between May and June 2020, the number of confirmed cases of the virus in Australia fell, and restrictions on events were loosened around Australia.

On average, audience comfort to engage in activities in public has increased from Phase 1 to Phase 2. The proportion that are at least somewhat comfortable using public transport increased from 51% to 61%, and those that are comfortable to eat at a local restaurant increased from 65% to 88%.

However, in July 2020 cases of the virus have begun rising again in Victoria (VIC), leading to a return to Stage 3 restrictions in that state. There were also small numbers of cases in New South Wales (NSW) and the Australian Capital Territory (ACT) at the time of data collection (8-12 July 2020).

Accordingly, audience sentiment varies markedly across the country. In VIC, the proportion comfortable to eat at a local restaurant is 80%, compared to 96% in both the Northern Territory (NT) and Western Australia (WA).

Throughout this national Snapshot Report, state-by-state differences will be noted where most pronounced. Further detail about audiences in each jurisdiction will be covered in state/territory Snapshot Reports, available from late July 2020.

Returning to events

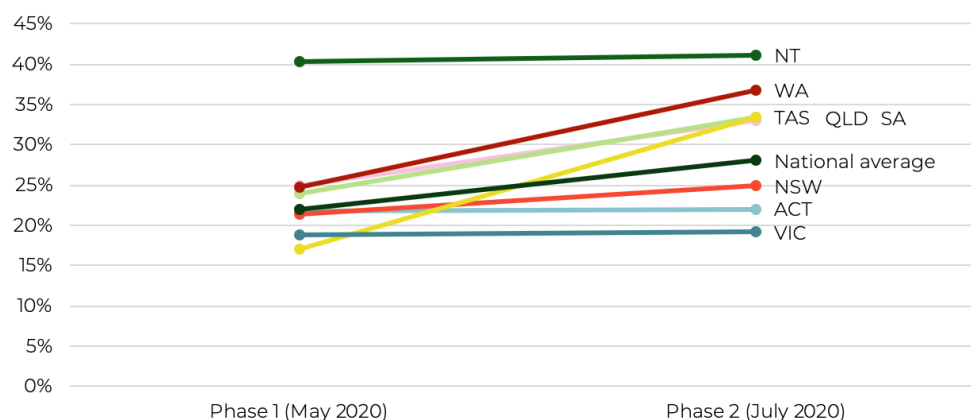
Audiences are increasingly ready to attend cultural events in most locations

Between May and July 2020, the Audience Outlook Monitor shows an increase in the proportion of past attendees who are ready to attend, as soon as permitted, from 22% to 28%.

This proportion is highest in the NT (39%, stable since May), Queensland (QLD) (33%, up from 25%), South Australia (SA) (33%, up from 24%), Tasmania (TAS) (34%, up from 17%) and WA (37%, up from 25%), where there were no recent cases of community transmission at the time of data collection.

This proportion is lowest in the ACT (19%) and VIC (20%), where audiences are currently concerned about community transmission. In NSW, it has increased slightly (25% up from 22%), but not to the extent seen elsewhere in the country.

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



1 in 4 past attendees have started returning to cultural events

While audiences have largely returned to eating at restaurants (68% nationally have done this), smaller numbers (24%) have attended a cultural event of any kind in the past fortnight, noting that many venues and facilities remain closed, at present.

Most commonly, attendees are returning to museums and galleries (12%), and cinemas (9%), which were the main types of facilities open at the time of data collection.

Rates of attendance at performances (3%), festivals (2%) and workshops (4%) are currently lower, although with more of these events coming on sale, larger numbers of people are making plans to attend in future (14%, 6% and 8% respectively).

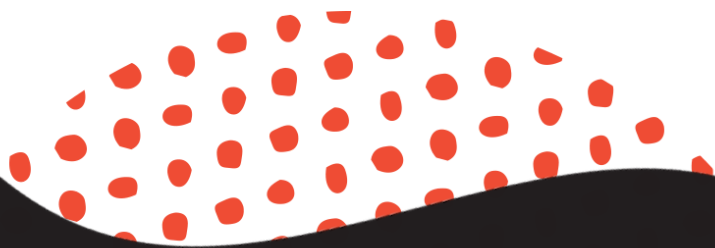
Across Australia, more past attendees had made plans to attend an event of some kind (42%, up from 14% in May 2020). This rate is highest in NT (66%) and lowest in VIC (34%).

Most people are comfortable to visit museums and outdoor settings

Most audiences say that they would be at least somewhat comfortable to visit museums and galleries (93%) and botanic gardens and zoos (98%) today, along with community art spaces (87%) and outdoor events (70%).

The level of comfort attending museums and outdoor events has increased in most places – most markedly in the less restricted states/territories of NT, QLD, SA, TAS and WA. Smaller changes in the level of comfort attending museums is observable in the ACT, NSW and VIC.

However, using interactive exhibits remains the form of cultural participation that audiences are least comfortable with at this time (33%, up from 23%), confirming that the visitor experience at museums will be affected for some time yet.



Audiences are comfortable attending 250-seat venues in areas with no community transmission

Audiences are increasingly comfortable to attend performance venues of all sizes, assuming they were open, following safety procedures and observing distancing guidelines.

Since May 2020, there is more information about venue safety in the marketplace, and this is helping to build trust in attending venues. Even in states/territories with recent examples of community transmission, audiences are signalling higher levels of comfort with venues of all sizes.

However, this comfort level has reached an important tipping point for venues up to 250 people in NT, QLD, SA, TAS and WA, where the proportion that are not comfortable to attend has dropped below 50%.

Further probing about social distancing in Phase 2 shows that above and beyond venue size, different social distancing arrangements would have a greater effect on attendance. With 4 square metres per person, 89% would be at least somewhat comfortable to attend. This drops to 64% under a scenario of 2 square metres per person, and 14% with no social distancing at all.

Audience experiences

By limiting capacity, venues are making attendees comfortable

When asked to reflect on their experiences returning to cultural events, recent attendees mentioned capacity limitations that ensure social distancing. For instance, one recent visitor to a museum/gallery said,

‘I felt comfortable wandering the gallery. There were not too many people there so social distancing wasn't a problem’.

This was also noted in performance settings. One person who recently attended a live performance shared,

‘The seating allowed for space between different groups of people there for the show. They didn't squash you together when there were spare seats next to you’.

Online booking and timed entry were other measures frequently mentioned by respondents. In some cases, safety measures were perceived to actually improve the visitor experience. One exhibition attendee shared,

‘Timed entry meant it was fantastically easy to see the artwork! (No having to dance around other people also trying to view the exhibition) A much better experience than normal, actually’.

Clear communication is integral to informing and reminding attendees about safety measures

Reflecting on their experiences attending live performances recently, several people shared that they would like to have clearer communication of safety guidelines. When asked about opportunities to improve, one person mentioned,

'Signage. I feel we all need constant reminders about social distancing. It's all too easy to fall into old habits'.

Others thought that staff could play a stronger role in reminding attendees to follow social distancing guidelines. One cinema attendee suggested,

'Gentle reminders from staff to patrons to ensure they are social distancing, as I had people constantly standing directly behind me'.

Several respondents acknowledged the difficulty in ensuring individuals take responsibility in taking safety precautions. Some respondents mentioned pre-event communication to remind visitors about their responsibility as a visitor, as one said,

'While the event was ultimately successful, it could have been explained better. Perhaps an email prior to outline the way the event was going to run? i.e. we weren't allowed to stand while drinking our wine, which meant attendants were constantly reminding people to'.

Future attendance

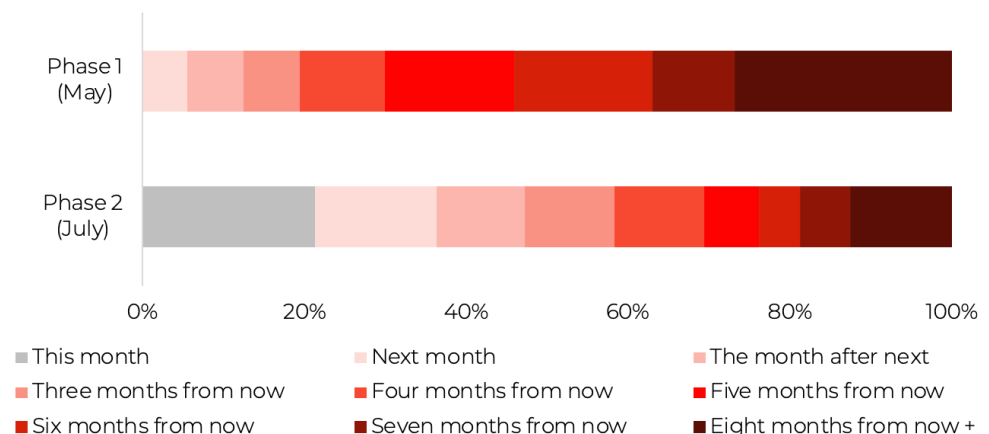
Lead times are becoming shorter, with most ticketholders buying less than one month out

At this stage, 10% of respondents say they bought a ticket for a live show or performance recently. Most of those buying tickets for future shows and performances are buying tickets in the same month as the event (33%) or a month ahead (23%), which may partly reflect the number and timing of events on sale at the time of data collection.

This contrasts with May 2020, when most ticket buyers were planning for January 2021 or later. At that time, many events were being cancelled.

Notwithstanding, the pattern suggests that in the short-term, sales will be strongest in the month leading up to any event, when audiences have more certainty of the conditions surrounding the event.

Figure 2: Month of event, for those purchasing tickets to live shows or performances (respondents could select multiple).



4 in 10 would prefer a digital program rather than attending in-person right now

For the first time in the Phase 2 survey, audiences were asked to rank their preferred setting for a cultural event, from a list of four options. The largest number (39%) said they would prefer a live-streamed digital program that they could watch from home. One third (34%) said they would prefer an outdoor venue with enough lawn space to spread out.

One quarter (24%) said an indoor, 100-seat venue following social distancing guidelines, and only 5% said an indoor, flat-floor venue with loose chairs and plenty of space to spread out.

After taking into account second and third preferences, outdoor venues have the highest levels of support, on average, followed by digital streaming.

Across Australia, these options attract different preferences, depending on rates of transmission, but also other factors like the climate. For instance, in the NT, 63% would prefer an outdoor venue, far higher than QLD (36%) and SA (35%). In VIC, 52% would prefer a digital program.

Some are feeling more pessimistic about returning to events long-term

In May 2020, 15% said their future attendance will be negatively affected by the pandemic, long-term. In July 2020, this has increased to 22% nationally.

Unlike other sentiments, this result is fairly consistent across the country varying only in small amounts from the national averages. The highest rates of this pessimism (23%) are being seen in VIC, SA and ACT, the lowest are in the NT (18%) and in QLD (19%).

Qualitative data suggests that between May and July 2020, audiences have had more time to process the implications of the pandemic and some are adopting a more conservative stance.

One person said,

'I don't think anyone has any idea what it's going to be like in the post-pandemic world. And I also think it's going to be with us for a long long time - life will be different. The new "normal" will not be the old normal'.

Although health concerns are the main factor, this result also appears to be related to the worsening economic outlook and the respondents' own personal circumstances, including their health, relationships and financial situation.

1 in 5 expect to spend less on arts and culture events

When they feel comfortable going out again, most people expect to spend the same as they did before (72%), 17% expect to spend less and 11% expect to spend more.

Those who plan to spend more expect to do so at relatively low rates (54% said up to 20% more). However, those who expect to spend less indicate their behaviour will be significantly different: 56% expect to spend more than 40% less.

When asked if there's anything they want to share about their views, one person said,

'As well as not feeling currently safe, my business has taken quite a hit, so I will also be impaired in terms of my budget once things are safe again'.

Another said,

'I am likely to be more selective about events and venues. I will attend more venues closer to home. I feel that I will travel less and spend my "holiday" money on arts and cultural events[...]locally'.

Participating at home

Audiences remain engaged with creative activities at home, both on- and off-line

Further to the Phase 1 reporting on creative engagement, audiences are continuing to participate in a range of creative activities at home, like listening to music (89%) and reading for pleasure (86%).

Smaller, but consistent, proportions are making art or craft (41%), making music (25%) and making videos/photography (23%).

Three in 4 (73%) are participating in online arts or cultural experiences (approximately consistent with the result of 75% in May 2020).

Some forms of participation have fallen slightly, but more people are discovering new works

While the overall proportion of audiences participating online remains high, the data shows small declines in the proportion participating in some forms, such as virtual exhibitions and tours (17%, down from 23%) and online classes, courses and tutorials (30%, down from 36%).

Other forms have attracted consistent levels of participation, and may overall be holding audiences' attention better, such as live streamed events and recorded video.

When asked if they, or anyone they know, has discovered a new artist, artwork or performance online, both returned higher rates than previously. One-third (33%) say they themselves have made a discovery in the past fortnight, up from 29%, and 16% say they know someone who has, up from 13%.

Further, 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, compared to 37% in May 2020. More of these audiences expect to continue after the pandemic ends, too (72% compared to 67%).

One interpretation of these insights is that participation online is maturing slightly as the pandemic continues. More, and potentially better quality, options are being released, and while the 'novelty factor' may be wearing off in some areas, people are exploring new artists and engaging more deeply with the forms they enjoy.

Slightly more people are paying for experiences, and they are spending more

The data shows that the market for digital offerings is not declining. In fact, if anything it appears to be growing.

When asked if they have paid for an experience online, 36% said they have, compared to 34% in May 2020. The rate of donation appears stable (19%, as it was in May 2020), whereas the proportion paying for single experiences has risen (16%, up from 12%), as has the proportion subscribing to digital platforms (10%, up from 9%).

Respondents' spending on online experiences has also risen slightly, with 38% having spent more than \$50 in the past fortnight, compared with 36% in May 2020.

When asked to describe the characteristics of the experience that made it worth paying for, people commonly mention quality, value and a desire to support creators.

One person said the value is particularly important for subscriptions, which involve a longer commitment than one-off experiences. They said,

'Being able to access additional content on-demand has also helped give me something to look forward to (waiting for new releases). Additionally, the opportunity to contribute to the content (making suggestions for segments etc.) helps with my own creativity and to also feel less isolated'.

Further to the Fact Sheet on Fundraising and Support released in Phase 1, audiences continue to express a desire to help and support the arts.

'For instance, one person said, 'Supported some artists that I had followed prior to the pandemic to help them through. Gratitude more than anything'.

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.

Each month, the researchers release new insights about key regions, artforms and topics. They also provide tips and practical steps you can think about to apply the findings in your work.

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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