



PATTERNMAKERS



AUDIENCE
OUTLOOK
MONITOR



NOVEMBER 2021

Australian Capital Territory Snapshot

Audience Outlook Monitor



ACT
Government

Image: The Australian Dance Party performing Lake March as part of the ACT Government's Where You Are Festival, photo courtesy of Lorna Sim, 2020

Summary

ACT audiences are cautiously optimistic after the territory's reopening, but confidence will be dependent on outbreak conditions

- ▶ Data from 403 past attendees of ACT arts organisations suggests that audiences are cautiously optimistic as the territory returns to almost 'pre-Delta' conditions in November 2021.
- ▶ As of 1 December, the ACT had one of the highest vaccination rates in the world. 97% of ACT arts audiences were fully vaccinated in early November, and 5% have already received booster shots.
- ▶ With case numbers very low and restrictions eased in most public places, confidence has increased slightly since October, with around half (49%) ready to attend now or as soon as is permitted (up from 30%).
- ▶ However, only 23% attended in the fortnight before data collection, compared to 76% in March 2021, suggesting it will take time for attendances to rebuild. In a positive sign, 65% of ACT audiences had made plans to attend in the future, with 50% of bookings made for later in November.
- ▶ Some ACT audiences are wary about lower vaccination rates across the rest of the country and the prospect of new variants may cause further fluctuations in confidence. Risk-averse audiences are likely to continue being selective about their public activity for the time being.
- ▶ Overall, ACT audiences are increasingly confident that the vaccination effort will allow things to return to normal within a year (95% at least somewhat confident) – with this proportion increasing from 82% in July 2021.

COVID-safety remains critical as ACT audiences face uncertainty

- ▶ ACT audiences – like those in other states recently affected by outbreaks (VIC and NSW) – are relying on COVID-safety measures more so than those in the rest of Australia, where the virus is not yet circulating widely.
- ▶ The results confirm that COVID-safety will play a pivotal role in stabilising confidence as the country's reopening plan progresses and Australia faces the prospect of new variants.
- ▶ ACT audiences continue to be encouraged by mask requirements at venues, and 60% say they won't attend some indoor venues without them. With mask mandates no longer in place in the ACT, some audiences may be looking for venues to institute mask policies on an organisational basis.

- ▶ Similarly, ACT audiences are encouraged by proof of vaccination at entry to arts venues (72%), with only 6% discouraged. Half (48%) say this measure would need to be in place to attend some indoor venues – though others feel the ACT’s high vaccination rates make this measure redundant.
- ▶ Overall the data confirms that COVID-safety measures are playing a pivotal role in rebuilding attendances, especially at indoor venues. Staying vigilant will ensure more audiences feel confident in their decisions.

After extended lockdowns, ACT audiences are looking for ways to show their support – with ‘local loyalty’ on the rise

- ▶ After the hardship faced by the sector during the pandemic, ACT audiences are eager to support organisations and artists, particularly those local to them.
- ▶ The outlook for loyalty programs is more positive than 2021, with almost half (45%) indicating they are at least somewhat likely to purchase a subscription or membership in 2022.
- ▶ As people weigh up the risks of attending amid greater uncertainty, 8 in 10 (82%) of ACT audiences agree that they’ll be attracted to events in their local area over the next year.
- ▶ An increasing number of audiences say they will be interested in ‘light-hearted programs’ (42%, up from 35% in July) – with some seeking escapism and uplift after the cumulative impacts of the pandemic.

ACT audiences are becoming more likely to see a role for online arts and culture in their lives

- ▶ After several quarters of slight declines in online participation, digital engagement has increased again for ACT audiences – from 42% in July 2021 to 51% in November 2021.
- ▶ One form of participation that stands out is online courses and tutorials, with 32% of audiences participating recently (up from 19% in July).
- ▶ Despite some reports of ‘screen fatigue’, overall ACT audiences are significantly more likely to see an ongoing role for digital arts experiences in their lives (76%) compared to July 2021 (56%).
- ▶ Audiences can be divided into three groups for the purposes of marketing digital arts experiences: ‘digital devotees,’ the 27% of audiences who see a substantial role for digital in their lives, ‘selective but supportive’ audiences, the 49% who see a small role, and ‘tired of tech’ audiences, the 24% of audiences who see no role at all outside of lockdown.
- ▶ Many audiences support hybrid models that offer greater flexibility and accessibility as we transition to a ‘COVID-normal’ Australia. When asked if they



would attend a digital program in place of a cancelled live event, 38% of ACT audiences said they would be likely to attend.

- ▶ It is clear that digital marketing and online experiences are playing a key role in keeping audiences engaged with arts organisations as uncertainty continues.

Introduction

About the ACT sample

This Australian Capital Territory (ACT) Snapshot Report analyses data from respondents surveyed in November 2021 as part of the Audience Outlook Monitor.

In the past, the ACT Snapshot Report has reported on two different audience groups. The first is the 406 survey respondents connected with ACT-based arts and culture organisations ('audiences of ACT organisations') which typically attract a nation-wide audience. In this phase of research, this sample of audience members is drawn from the ACT (81%), New South Wales (NSW) (17%) and further afield (2%).

The second is 403 respondents who live in ACT themselves ('ACT-based respondents'), many of whom are connected with ACT-based organisations, but some who are audiences of organisations in Victoria (VIC), NSW and elsewhere.

However, in this latest, November phase of data collection, the views of 'audiences of ACT organisations' and 'ACT-based respondents' were very similar. For this reason, the report will only refer to 'ACT audiences,' an umbrella term which captures the perspectives of both groups.

About the study

Launched in May 2020, the Audience Outlook Monitor study is tracking audience sentiment in relation to the COVID-19 pandemic. Each phase involves a cross-sector collaborative survey process involving over 100 arts and culture organisations, including museums, galleries, performing arts organisations and festivals.

On 3 November 2021, participating organisations simultaneously sent the Phase 6 survey to a random sample of their audience – defined as those who had attended an arts or cultural event in person since January 2018. This data provides excellent visibility of trends across the country, noting that results for the Northern Territory (NT) and Tasmania (TAS) are not reported separately due to small sample sizes.

This report compares new results with data collected previously in July 2021 (Phase 5) and October 2021 (Pulse Check), to examine how things are changing over time.

In addition to this Snapshot Report, the November 2021 results are accessible in a free interactive dashboard. Users can explore the data for 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.

Terminology

At the time of data collection (3-7 November 2021), outbreak conditions varied significantly by jurisdiction: NSW, VIC and the ACT were transitioning out of extended lockdowns, while in the rest of the country, audiences were enjoying minimal restrictions.

The three outbreak-affected states/territories of NSW, VIC and the ACT (referred to in this report as '**outbreak-affected states**') share similar trends - and are grouped together, where relevant, for reporting purposes. However, it should be noted that ACT audiences tend to be slightly less tolerant of risks than audiences in NSW and VIC.

States/territories across the '**rest of Australia/rest of the country**' - Queensland (QLD), South Australia (SA), Western Australia (WA), NT and TAS - also share many similarities, with border closures helping to suppress the virus and minimise risks for audiences. These jurisdictions are also grouped together in places - noting that confidence levels in WA tend to be higher than in SA and QLD, where border restrictions were beginning to lift at the time of publication.

Read on for the key November 2021 findings for the ACT.

Current conditions

Vaccination rates continue to climb amongst ACT audiences and 5% have now had booster shots

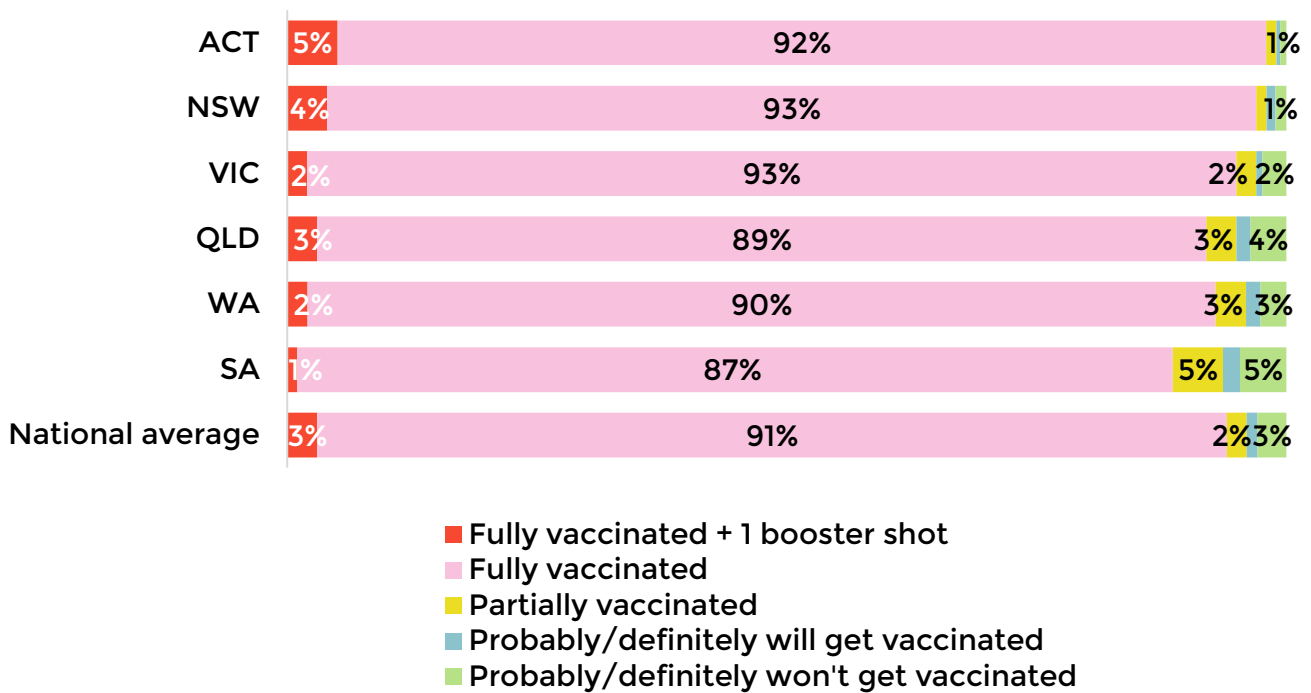
As of 7 November 2021, 97% of ACT audiences say they are now fully vaccinated (up from 94% in October), with another 1% partially vaccinated (down from 4%). Among those fully vaccinated, 5% have had a booster shot - as shown in Figure 1.

The proportion fully vaccinated has increased significantly since July 2021, when around 1 in 4 audiences were fully vaccinated and 49% had received their first dose.

Vaccination rates vary by state/territory, with uptake highest in the ACT and neighbouring NSW (97% fully vaccinated). Rates are slightly lower in VIC (95%), QLD (92% fully vaccinated), WA (92% fully vaccinated) and SA (88% fully vaccinated).



Figure 1: Proportion of audiences who are vaccinated November 2021, by state/territory (n=7,484)



ACT audiences are increasingly optimistic that vaccination will allow normal activities to resume within a year

Vaccination rates in the ACT are some of the highest in the world and case numbers remained low in the weeks following data collection. With major freedoms put in place in early November, ACT audiences appear increasingly optimistic about the prospect of a ‘COVID-normal’. Compared to July 2021, ACT audiences are significantly more confident that vaccination will allow normal activities to resume within a year.

Nearly half of ACT audiences (45%, up from 21% in July) are very confident in the vaccine effort, and only 4% (down from 17%) are not confident at all. One audience member says,

‘I don't have the medical/public health knowledge to make sense of the complexity of the COVID situation, but I am buoyed by relevant experts' optimism about 2022 and normality.’

Another said,

‘The vaccination effort, along with other safety measures, has been successful- otherwise it’s unlikely we would be out of lockdown now. There’s no reason to think (especially with the booster vaccine now available) that ‘normal’ activities won’t be allowed within a year from now.’

Some ACT audience members qualify that, rather than resuming ‘normal’ attendance, they would like to see a ‘new normal’ in the next year, with some safety measures still in place. One said,

‘We shouldn’t go back to the ‘normal’ of before the pandemic. I know many immunocompromised people... Safety for all needs to be in place and accommodations made and kept for flexibility around work, shopping and event accessibility.’

Some ACT audiences are still exercising caution – and suggest it is still too early to say how things will play out in the long term. One said,

‘We are still learning about the effect of mass vaccination on the ongoing infection rate and morbidity/mortality when someone contracts the disease. It is looking good – but time will be the best indicator.’

Confidence in the success of the vaccination program tends to be higher in outbreak-affected states like the ACT, NSW (47% very confident) and VIC (45% very confident) – where vaccine rates are higher and audiences are seemingly acclimatising to the idea of a ‘COVID-normal’ world.

However, some audience members remain uncertain about how the vaccination effort will proceed in the long term

Despite an overall attitude of cautious optimism, some ACT audiences are conscious of factors that could complicate the vaccination effort – such as the risk of new variants, breakthrough infections, or complications caused by existing health vulnerabilities. One ACT audience member said,

‘We do not know what next year will bring, particularly in terms of new variants. We don’t know how important boosters will be, and whether winter will see another wave. We don’t know what increased international travel will do.’

Another said,

‘I think there’s a possibility of future variants, especially from countries with lower vaccination rates.’

While another said,

‘Overseas experience has been a bit bumpy with a surge in cases after opening up and we may have a similar pattern. Other strains may show up and immunity may be patchy so I am not very confident all will be fine but am fairly optimistic.’

With world-leading vaccination rates in the ACT, many audiences are now looking to booster shots to provide additional confidence

With almost all ACT audiences vaccinated, respondents were increasingly likely to be thinking about the next step: booster shots.

Many ACT audiences report they will get a booster shot as soon as they are eligible. Some are cautiously optimistic about the roll-out of booster shots and say it will improve confidence, with one ACT audience member saying,

‘The vaccines are incredibly good. With ongoing boosters it’ll become an endemic strain and we won’t worry about it.’

Another said,

‘I’m open-minded about the future – I will have a booster COVID-19 shot when I become eligible, which helps.’

However, some fear that booster shots will present another barrier to entry to the vaccine-hesitant, and are concerned about the logistics of rolling out boosters. One said,

‘It’s all dependent on whether there is sufficient supply of booster shots for the whole population.’

Another said,

‘There’s so much uncertainty, and now we need booster shots. There’s the inability to trust people near you.’

Others worry that protection against the virus will be insufficient without boosters, saying,

‘I definitely believe we will need booster shots.’

Audience comfort in ACT is in a state of flux, with restrictions nearly back to 'pre-lockdown' levels

Audience comfort in ACT is in a state of flux as restrictions change, and remained below pre-Delta levels as of early November. Around half of audiences are now ready to attend 'now or as soon as it is permitted' (49%, down from 69% in March).

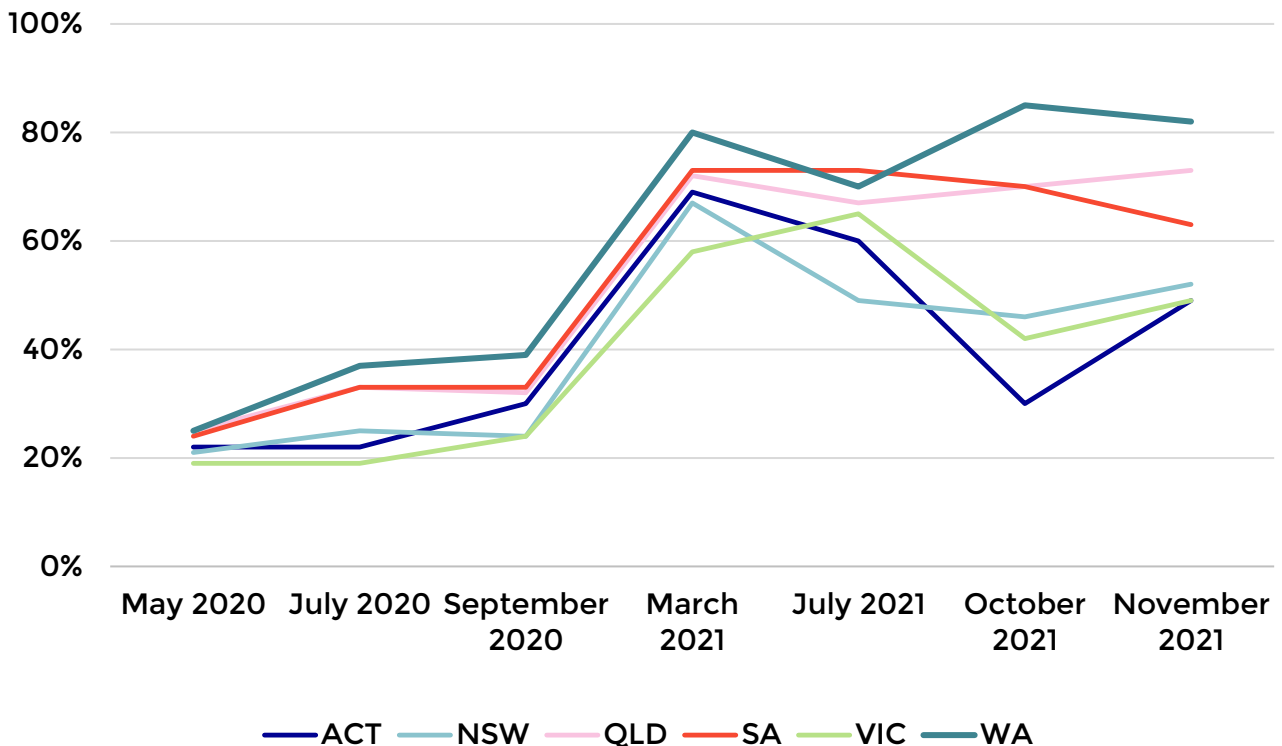
The other half (47%) say they will attend 'when reasonably confident that risk of transmission is minimal' - and may be adopting a 'wait and see' approach as they assess the risks associated with a 'COVID-normal' ACT. One audience member said,

'Still feeling nervous about international borders being open.'

Another said,

'I am concerned about interstate and international borders opening, and I will be waiting some time until the impact of this plays out until I would be comfortable getting out and about.'

Figure 2: Proportion of audiences who are 'ready to attend now or as soon as permitted', by state/territory, May 2020 to November 2021 (n=7,637)



ACT audiences are equally, if not more, comfortable with arts attendance than other public activities

In a positive sign for arts and cultural venues, ACT audiences are equally, if not more, likely to be ‘very comfortable’ with arts attendance than with many other public activities.

The majority of ACT audiences feel ‘very comfortable’ at outdoor events with fixed seating (65%) and museums and galleries (55%) – while 4 in 10 feel ‘very comfortable’ at community art spaces (41%). ACT audiences are less likely to be ‘very comfortable’ at large theatres and concert halls (35%) and outdoor events without fixed seating (34%) – and only a small proportion are ‘very comfortable’ at comedy clubs (14%) and hands-on exhibits (10%).

By comparison, half of ACT audience members feel ‘very comfortable’ eating at a local restaurant or bar (48%), and less than half feel ‘very comfortable’ going to a local cinema (34%) or attending a sporting event (27%). Even smaller numbers feel ‘very comfortable’ exercising at a gym (23%), using public transport (19%) or flying domestically on a commercial airline (22%).

Live attendance

Current attendance levels are low, but ACT audiences are making plans for summer and 2022

When asked about their attendance behaviours in the fortnight before data collection, 23% of ACT audiences reported they had attended an in-person arts or cultural event. This proportion is significantly lower than pre-Delta levels, with 76% of ACT audiences attending in March.

ACT audiences were less likely to have attended in-person compared to audiences in neighbouring NSW (37%). Attendance rates were similar to VIC (23%), which is also in the early stages of recovery from outbreaks.

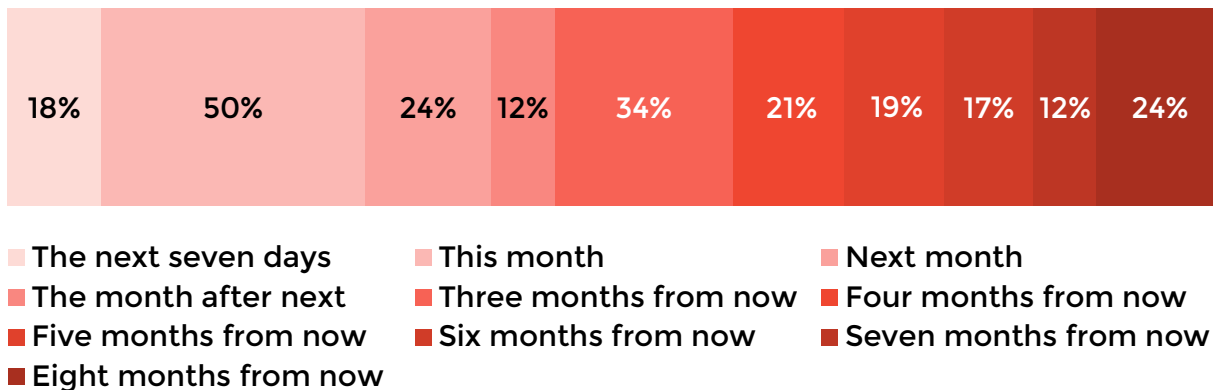
In a positive sign for the future, 65% of ACT audiences had made firm plans to attend an in-person event in the future.

Bookings peaked for later in November (50%), with audiences seemingly eager to enjoy arts and culture during this period of relative certainty.

Audiences were also relatively likely to be booking events for December (24%), February (34%), and even as far away as July 2022 (24%) – as shown in Figure 3 – suggesting that, while there may be some hesitancy about planning ahead, some audience members are starting to adjust their outlooks and think more long term.



Figure 3: In the past fortnight, did you purchase tickets for one or more live shows or performances that are scheduled for...? ACT (n=140).



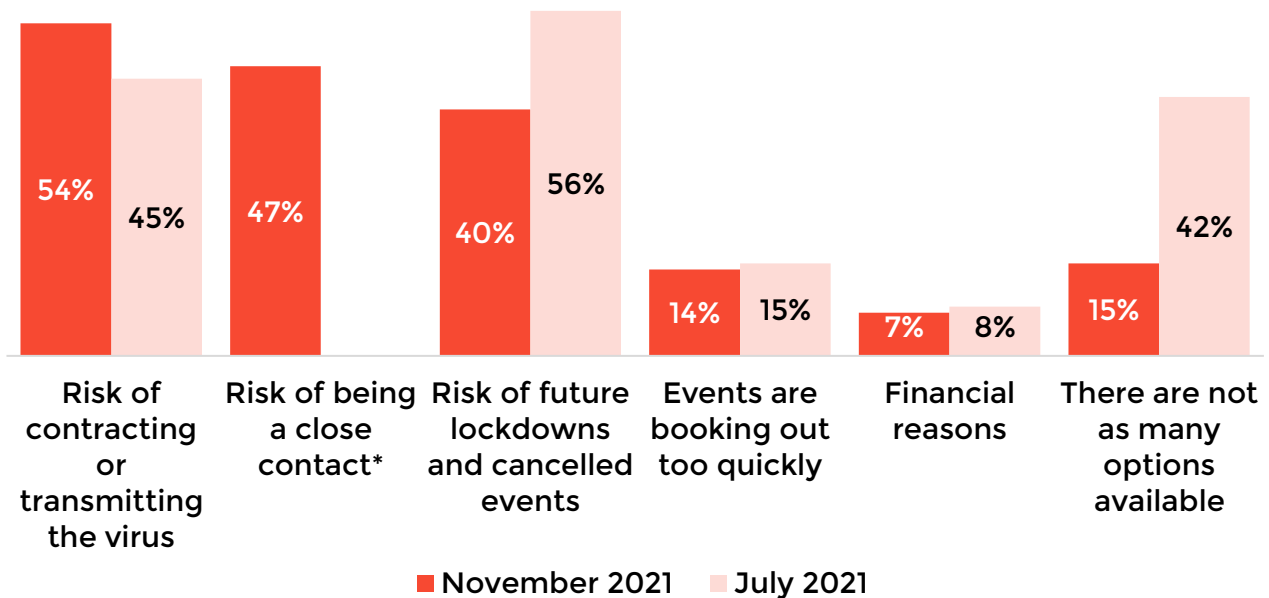
ACT audiences are wary of the risk of transmitting the virus or being a close contact and needing to isolate

When asked what would prevent them from attending arts and cultural events in the next year, ACT audiences were most likely to name risks arising from virus circulation – such as the risk of contracting or transmitting the virus (54%, up from 45% in July 2021) or the risk of being a close contact and needing to isolate (47%).

Although the case numbers remain low at present, audiences are understandably conscious of the risks which arise when there are active cases in the community – and these fears may become more acute if new variants arise.

Overall, the outlook is different from July, when the main barrier to attendance was the risk of lockdowns and cancelled events (40% in November, down from 56%). ACT audiences were also much less likely to report being prevented from attending because there were ‘not as many options available’ – only 15% of audiences as opposed to 42% in July (Figure 4).

Figure 4: Proportion of ACT audiences who say these factors will preventing them from attending in-person arts and culture events as they used to in the past, July 2021 (n=505) and November 2021 (n=401)



*Option introduced in Phase 6 - no historical comparison available

COVID-safety

The most widely encouraging COVID-safety measures are check-ins, mask-mandates and proof of vaccination

With a degree of uncertainty persisting, it is clear that COVID-safety will be critical for maintaining confidence. When asked about a list of potential COVID-safety measures at cultural venues, most ACT audiences say they would feel encouraged to attend by the majority of safety measures.

The largest proportion of audiences said they would be encouraged by requiring check-ins on arrival (88%, down from 92%).

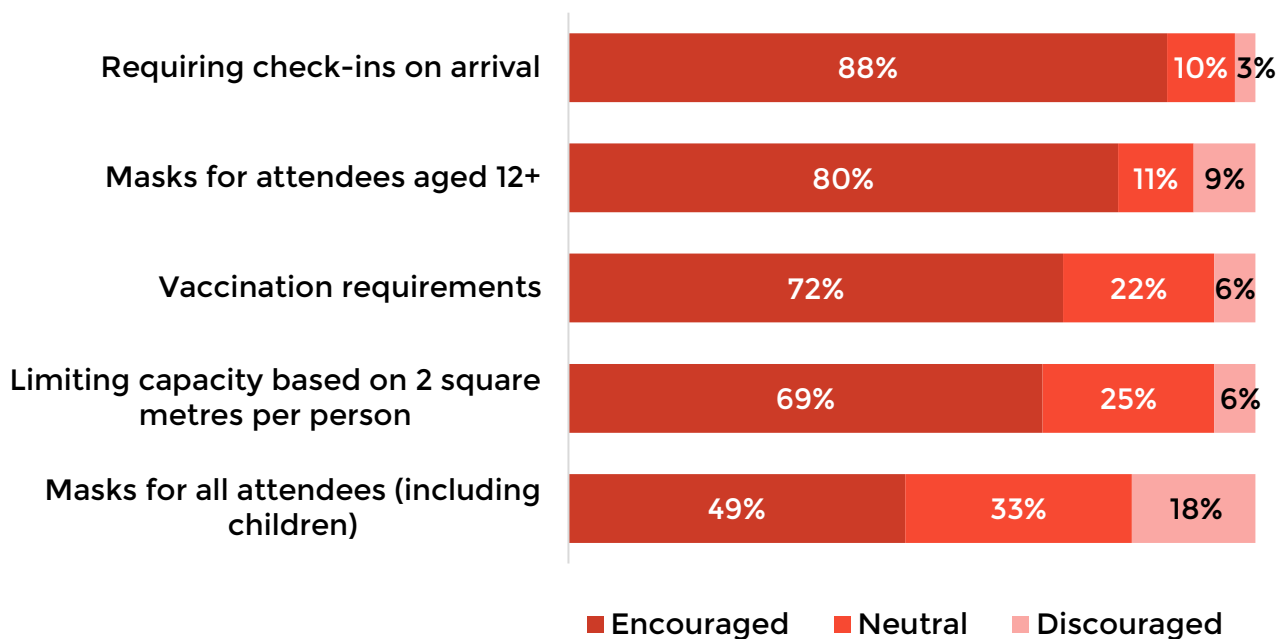
The second most encouraging measure was masks for attendees aged 12+ (80%, down from 86%) - with ACT audiences the most likely in the country to be in favour of this measure. When it came to mandating masks for all attendees, including children, ACT audiences were more polarised – with half (49%, down from 57%) encouraged and 18% (up from 14%) discouraged.

Significant proportions of ACT audiences also feel encouraged by proof of vaccination requirements (72%, down from 82%).

However, ACT audiences were less likely to be encouraged by this measure than other outbreak-affected states, and were the most likely in the country to feel neutral (22%). The proportion 'neutral' about vaccine passports has increased since October (13%), suggesting that ACT's very high vaccination rates have made this point moot for some.

Only 6% of ACT audiences say this measure would discourage them from attending, compared to 13% of audiences in QLD and SA.

Figure 5: How much would each of the following steps discourage or encourage you to attend? Audiences in ACT, November 2021 (n=396)



Vaccine passports and masks are 'dealbreakers' for many ACT audience members – and may be holding them back from attendance

When asked whether any COVID-safety measures absolutely need to be in place to attend a large theatre or concert hall, 60% of ACT audiences named mandatory mask-wearing and 48% named proof of vaccination.

Given that mask mandates and vaccine requirements are no longer in place in the ACT, these audience members may be looking to venues to institute these policies on an organisational basis. One said,

'Although proof of vaccination isn't currently compulsory in the ACT when entering shops, restaurants, cinemas etc. I would feel more comfortable if it WAS required in these settings.'

However, some were concerned that this would place unnecessary stress on front of house staff, saying,

‘I would love proof of vaccination to be required but hate the idea of staff having to do the asking. Not sure what the workaround would be but maybe have security guards do the checking.’

Other COVID-safety ‘dealbreakers’ for the majority of ACT audiences include check-ins (73%) and fixed seating arrangements (63%). 2 in 5 are also requiring capacity limits (40%) and COVID-safety marshals to ensure compliance (40%). One audience member said,

‘There is huge necessity to have COVID marshals now more than ever – people are blatantly flaunting the rules thinking it is no longer a risk.’

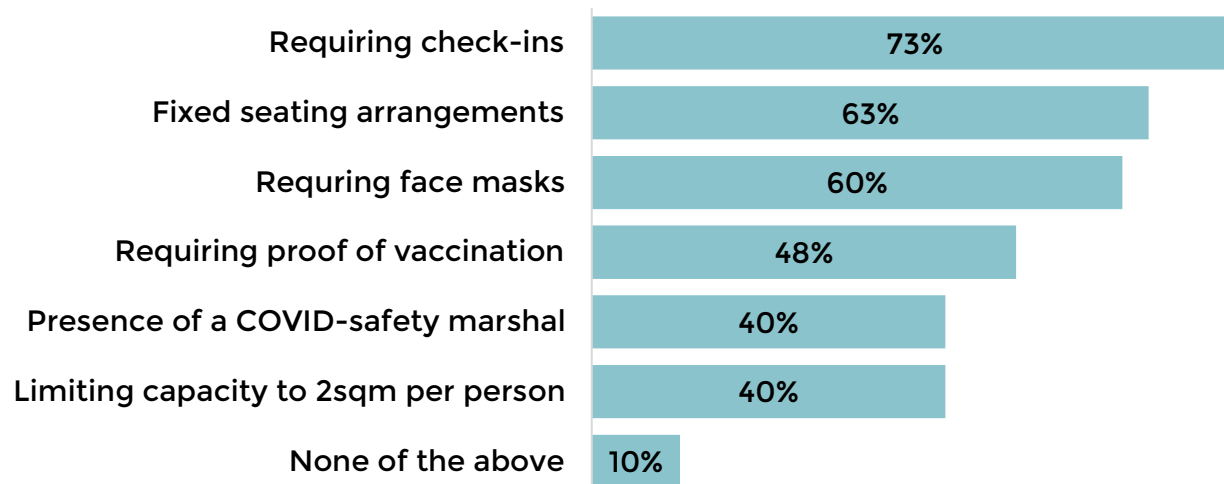
Generally, ACT audiences were less likely to have COVID-safety ‘dealbreakers’ than audiences in other outbreak-affected states – suggesting that the ACT’s high vaccination coverage is having a positive effect on confidence. One audience member said,

‘It depends on the jurisdiction. I ticked proof of vaccination, but that is less important where I live in the ACT because of our high vaccination rates and low case numbers.’

Another said,

‘Living in the ACT with a high rate of vaccination, plus being fully vaccinated since June 20, gives me confidence about interacting in the community.’

Figure 6: Would any of the following measures absolutely need to be in place for you to attend an event in a large theatre/concert hall today? (select multiple) ACT audiences, November 2021 (n=403)



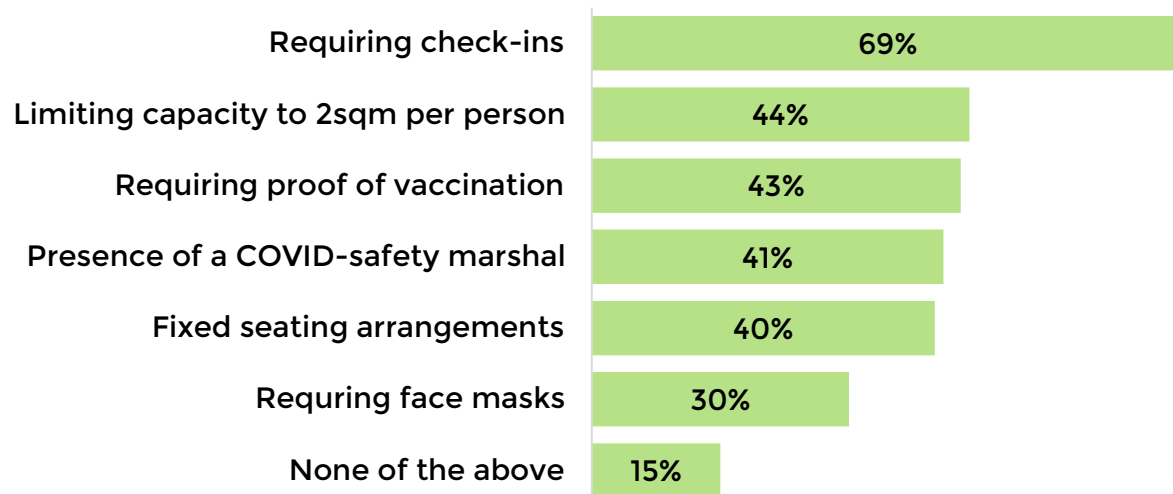
Only 10% of audiences would be willing to attend a large theatre or concert hall without any safety measures in place. This proportion was similar to that of audiences in NSW, but much lower than parts of the country that have not been affected by prolonged outbreaks, such as WA (31%).

ACT audiences are more comfortable at outdoor venues, but check-ins and proof of vaccination remain important

Some COVID-safety measures are equally important at outdoor events: such as check-ins (69%), capacity limits (44%), COVID-safety marshals (41%) and proof of vaccination (43%).

However, ACT audiences are relying on other COVID-safety measures to a slightly lesser extent, with open-air venues alleviating some of the risks associated with virus transmission – such as fixed seating arrangements (40%) and masks (30%). One said,

Figure 7: Would any of the following measures absolutely need to be in place for you to attend an outdoor event today? (select multiple) November 2021 (n=406)



Air circulation and the freedom to move around plays a key role for some audiences' decisions, and many perceive outdoor venues to be safer than indoor venues. One ACT audience member said,

'Would feel safer outdoors or well-ventilated venue. If indoors would prefer limit on numbers and measures to prevent bottle neck or crowding say around paintings.'

Outlook for comfort levels

Conditions in the ACT are changing rapidly, and will continue to do so as Australia reopens and faces the prospect of new variants.

To understand how readiness to attend may change, audiences were asked to consider a hypothetical **'COVID-normal' scenario** for attending events in which the following conditions were in place:

- ▶ interstate and international borders are open
- ▶ at least 90% of the population over 12 is vaccinated
- ▶ proof of vaccination or a negative test result is required at entry
- ▶ seated venues are operating at 100% capacity

When the ACT reaches 'COVID-normal', comfort at arts venues will improve upon current conditions

Reaching the 'COVID-normal' scenario will likely increase the proportion of ACT audiences 'very comfortable' at arts venues (as shown in Figure 8) – with ACT audiences saying higher vaccination rates across the rest of the country will give them greater confidence.

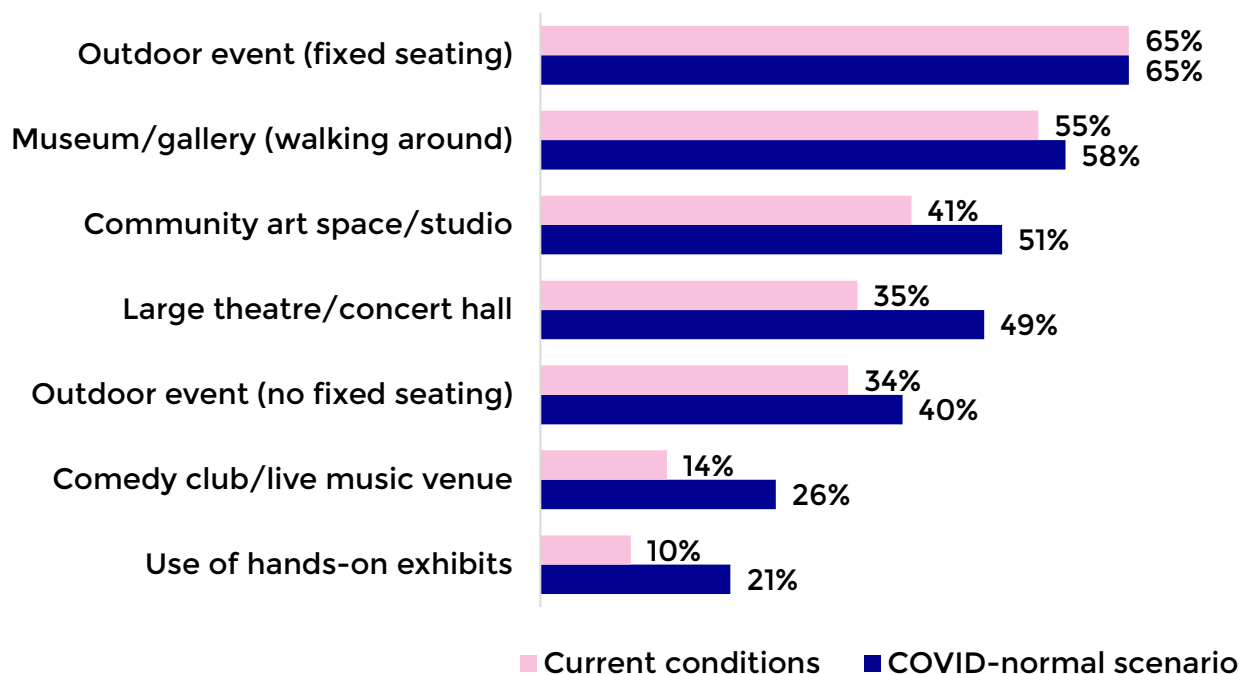
One said,

'I think once vaccination rates are up, I would be more comfortable.'

The greatest increases were observed for large theatres and concert halls (+14%) and comedy clubs and live music venues (+12%). This data suggests that reaching 'COVID-normal' will be hugely beneficial for the ACT's live music sector.

Large increases were also observed for community art spaces (+10%) and hands-on exhibits (+11%).

Figure 8: Proportion of audiences in the ACT who would be 'very comfortable' to attend selected cultural venues in current conditions and COVID-normal scenario, November 2021 (n=397)



However, some ACT audience members noted that after dealing with lockdowns and widespread outbreaks, it could take some time for them to adjust to this new 'COVID-normal' – and that much uncertainty remains. One said,

'I feel we are very much in a transitional period at present and my answers are qualified by not knowing outcomes even with high vaccination rates.'

Buyer behaviour

8 in 10 ACT audience members say they'll be attracted to events in their local area in the next 12 months – with 'local loyalty' seen as safer by some

When asked to what extent audiences would be attracted to events in their local area in the next 12 months, 8 in 10 (82%) of ACT audience members agreed that they would be looking local – while only 2% disagreed.

A desire to support local acts and venues after a long period of hardship was a factor, with one ACT audience member saying,

'When events/venues are open I'd really like to do my best to support local productions and businesses.'

Others say that local events feel ‘safer’ – from both the risks of virus transmission, and complications arising from cancellations and further border closures. One said,

‘I used to travel overseas and interstate to festivals but now with differing rules re: percentages vaccinated/proof of full vaccination throughout Australia, I feel much safer close to home. This saddens me greatly!’

Another said,

‘We used to attend the opera in Sydney frequently. We see Sydney as too high risk right now and for the next 12 months, until vaccination rates stabilise worldwide.’

Some ACT audiences are looking for uplifting events – and most say they’re not drawn to works that explore the pandemic just yet

When asked to share their preference for the types of arts and cultural content they would engage with over the next year, ACT audiences said they were interested in seeing the same kinds of events they used to attend, pre-pandemic (92%, stable with 93% in July). One said,

‘I miss the arts. I would attend many of the dance and performance companies that I have enjoyed in the past. I can't wait.’

However, 2 in 5 ACT audiences say they will prefer ‘light-hearted things’ (42%), with this proportion steadily increasing over time (it was 35% in July 2021, compared to 20% in May 2020). It appears that the cumulative impacts of the pandemic have left some audiences seeking escapism and uplift. One said,

‘I want my spirit to be elevated either by dance or music.’

Another said,

‘It is time for joy and fun!’

The proportion of ACT audiences likely to seek ‘works that make sense of the pandemic’ remains low (12%, up from 8% in July), with 50% disagreeing that they will be attracted to these kinds of works. When explaining their answers, some expressed ‘pandemic fatigue’ and/or an aversion to didactic works, for example:

‘I think I want to move on and don’t want the arts to just be a reflection of a pandemic. I want to see the full range of theatre, dance musicals etc that bring me joy and give us back the arts.’

Another said,

‘I don't need to hear any more about COVID-19! It's so oversaturated.’

Consistent with the [Visions for Culture](http://www.thepatternmakers.com.au/visions-for-culture-analysis) (www.thepatternmakers.com.au/visions-for-culture-analysis) in late 2020, this data confirms that many audiences see a role for the arts in the recovery process – and will turn to trusted organisations for connection, joy and healing.

There are some positive signs for subscriptions and memberships, with ACT audiences wanting to keep supporting artists

When asked whether they were going to purchase a subscription or membership in 2022, almost half (45%) of ACT audiences said they were likely, pointing to an opportunity area for further investigation.

These audiences acknowledged that there are risks involved with subscription models when the future remains uncertain, but suggest they want to support arts organisations and performers regardless. One said,

‘Have already purchased classical concert tickets for 2022 and likely to purchase theatre subscription as well. I'm keen to see live performance again and it is a social activity in a way that Zooming isn't.’

However, another 2 in 5 (39%) of ACT audience members said they were unlikely to subscribe next year – with some pointing to the inconvenience or disappointment of cancellations as a reason.

Over the course of the pandemic, the proportion of ACT arts audiences purchasing subscriptions and memberships has fallen – likely due to the difficulty of planning ahead. A smaller proportion of audiences said they purchased a subscription or membership for the 2021 season (42%), compared to the 2020 season (50%).

Around 1 in 5 (21%) ACT audience members have already made a donation to an arts or cultural organisation for the 2021/22 financial year – a slightly smaller proportion than those who donated in the 2020/21 financial year (28%), though more than half of the fundraising year remains.

Online participation

Half of ACT audiences are participating in arts and culture online – and these digital audiences are more likely to be paying for their experiences

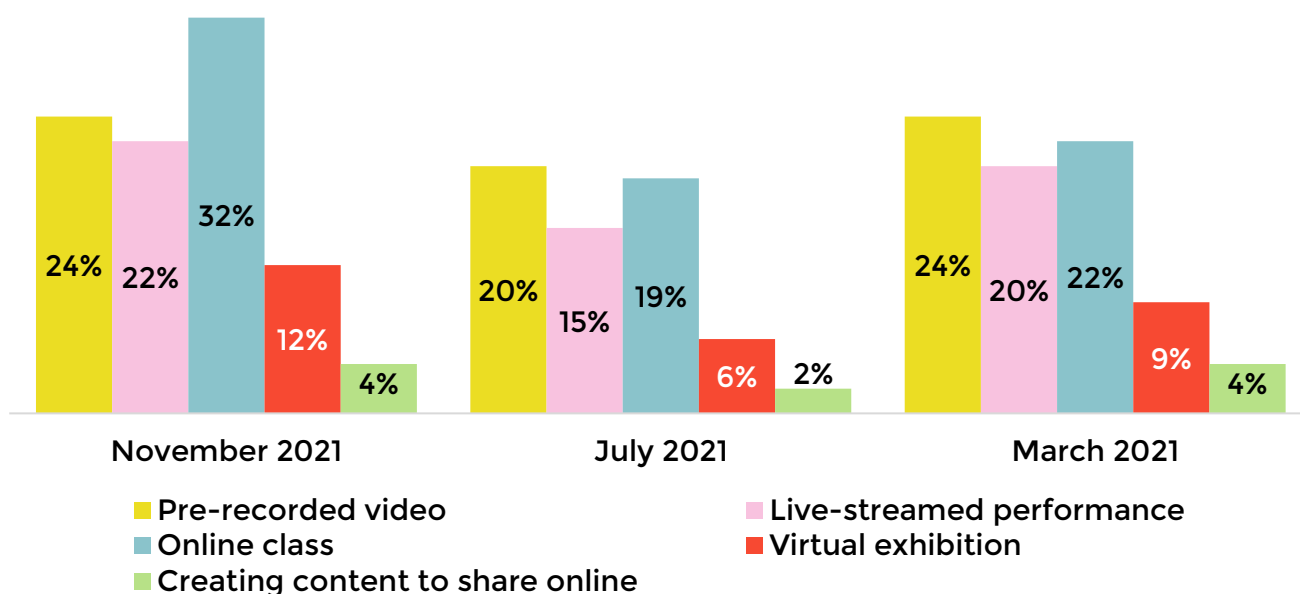
In the first half of 2021, participation in online arts and cultural activities trended downwards after an early pandemic ‘boom’ in 2020 – with many audience members reporting ‘screen fatigue’ and an eagerness to return to regular, in-person attendance.

In light of recent lockdowns in the ACT, November saw an uptick in online participation, with 51% of audiences (up from 42% in July) participating in an arts or cultural activity in the fortnight before data collection.

Greater proportions are participating in online courses (32%, up from 19% in July), watching pre-recorded video (24%, up from 20%), watching live streams (22%, up from 15%) and attending virtual exhibitions (12%, up from 6%). A small, stable proportion are creating content to share online (4%, stable with 2%).

Audiences in outbreak-affected states, such as the ACT, NSW (55%) and VIC (52%) are the most likely to engage with digital programming nationally, particularly during prolonged outbreaks where in-person attendance is limited.

Figure 9: During the past fortnight, have you participated in any of the following online or digital arts & culture experiences? (select all that apply). ACT audiences, November 2021 (n=403)



Furthermore, in November, 41% of ACT audiences participating in online arts and culture paid for an experience, increasing from 36% in July 2021. Audiences were most likely to purchase a single, pay-per-view experience (21%) or make a donation for something seen online (19%).

Donating as an expression of gratitude for an online experience was more common among ACT and other outbreak-affected audiences, suggesting that a shared sense of hardship may have made them more inclined to donate in support.

2 in 5 ACT audiences would be happy to attend a digital alternative to a cancelled event

In November 2021, audiences were asked 'In the case of a future live event being cancelled due to COVID-19, how likely would you be to attend a digital program featuring elements of the planned event?'

Nationally, half say they are unlikely to attend a digital program (50%), though a significant proportion say they are likely (29%) – while 23% are neutral.

ACT audiences were some of the more likely to say they were interested in attending a digital alternative (38%), along with audiences in outbreak-affected states like VIC (35%) and NSW (38%). Audiences in the rest of the country, such as those in QLD (28%) and SA (28%), were less likely.

Those who were likely to seek out digital alternatives said they would do so because they'd prefer not to miss out in the event of cancellations or sold-out events. One ACT audience member said,

'We have attended a few digital performances in the wake of cancellations, and would continue to do so.'

Some ACT respondents advocated for hybrid models, saying they would appreciate the flexibility of a digital option. One said,

'The accessibility of it is a big thing for me – I'd love to attend in person but often the commutes and scheduling around that are limiting or there are limited shows that don't fit my schedule. Online versions make at least some part of sharing in the experience a lot more possible.'

Another said,

‘This pandemic has increased accessibility in beautiful ways. As someone who would often miss out due to inaccessible buildings, times of performances clashing with medications etc, I have got to see so much more in the online platform. I can't wait to see more in person but there is still a substantial amount that should remain online too.’

The viability of digital alternatives may depend on the type of event

Some ACT audiences qualified that their interest in a digital alternative to a cancelled event depended on the type of event, saying that some are better suited to the virtual medium better than others. One said,

‘I guess it depends on the type of event. Some translate better online than others. I fully engage with going online, but sometimes it's the last thing I want to do. Even for fun!’

Another said,

‘It would strongly depend on the nature of the event as to whether I would be happy to attend a digital program (and I may not be happy to pay the same amount as I did for the ticket).’

A greater proportion of ACT audiences see an ongoing role for digital in their lives

Overall, the proportion of ACT audiences who see a role for digital arts experiences in their lives outside of lockdown has increased since this sentiment was first measured in July 2021.

A larger proportion of ACT audiences now see a ‘substantial role’ for digital arts experiences in their lives (27%, up from 11% in July 2021), or even a ‘small role’ (49%, up from 45%). The proportion who sees ‘no role’ declined significantly between July and November (24%, down from 44%).

Some ACT audiences suggested that prolonged lockdowns have led them to incorporate online experiences into their arts-going habits, and that they were likely to continue into the future.

Marketing of digital experiences can be targeted to three groups

ACT audiences were asked about the role that digital arts experiences play in their lives outside of lockdown. Based on their responses, ACT audiences can be divided into three groups:

- ▶ **Digital devotees** are the 27% of ACT audiences who see a ‘substantial role’ for digital experiences in their lives. They can be expected to show deeper and more dedicated engagement. 3 in 5 (57%) participated in arts and cultural activities online in the fortnight before data collection – and on average are more averse to attending in-person right now. Half (49%) are paying for online experiences.
- ▶ **Tired of tech** audience members are the 24% who see ‘no role’ for digital in their lives and are generally more eager to return to in-person attendance. Some report being ‘screen-fatigued’ and others say that after trying digital events, they just aren’t that interested. However, during stay-at-home orders, some may still be willing to participate online in the absence of in-person alternatives.
- ▶ **Selective but supportive** audience members are the 49% that see a ‘small role’ for digital in their lives. They feel favourably about online offerings but will generally only participate in the right events and under the right conditions. They are likely to favour digital events that are more convenient, more accessible or less risky than in-person alternatives. Half (52% in November 2021) participated in the fortnight before data collection, while around 38% of those paid to access online content.

What's next

To read about the story so far, visit the study's Australian homepage at: www.thepatternmakers.com.au/covid19.

There, you can also access 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.

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