NOV 2021

Audience Outlook Monitor

Australia Snapshot Report

NOVEMBER 2021

Live attendance outlook

Key findings from 7,637 participants
Audience Outlook Monitor, Australia

50% up from 43% in October 2021

in outbreak-affected states/territories are 'ready to attend' now

72% stable with 74% in October 2021

across the rest of Australia are 'ready to attend' now, while borders are closed

94% up from 87% in October 2021

of arts audiences are fully vaccinated and 3% of these have already had one booster shot

93% up from 86% in July 2021

are confident that vaccination will help things return to normal within 12 months

74%

are making firm plans to attend a cultural event in future

78%

say they'll be attracted to events in their local area in the next 12 months

63%

of audiences won't attend large theatres unless proof of vaccination is required at entry

49%

of audiences won't attend large theatres unless masks are required

PATTERNMAKERS

NOVEMBER 2021

Online participation

Key findings from 7,637 participants
Audience Outlook Monitor, Australia

53% up from 48% in July 2021

in outbreak-affected states/territories recently participated online

42% up from 38% in July 2021

across the rest of Australia recently participated online

25% up from 19% in July 2021

participated in an online arts class in the past 2 weeks, nationally

21% up from 17% in July 2021

watched a live-streamed arts event in the past 2 weeks, nationally

38% up from 33% in July 2021

of those participating online paid for an experience

43% stable with 44% in July 2021

of those paying for online arts experiences spent more than $50

73% up from 52% in July 2021

see an ongoing role for digital arts and culture in their lives

33%

would be interested in a digital alternative to a cancelled event

wolf brown

PATTERNMAKERS

Executive Summary

Audiences are cautiously optimistic as summer approaches, but many uncertainties remain

- In November 2021, data from 7,637 past attendees suggests that confidence levels are in a state of flux, as restrictions change around the country.
- Compared to the mid-year results, audiences are less likely to be inhibited from attending cultural events by the risk of lockdowns (now 38%) and more likely to be concerned with risks of transmission (51%) or being a close contact (43%).
- Confidence in the outbreak-affected states is beginning to recover as lockdowns end and audiences grow accustomed to 'living with the virus'.
- 50% say they are 'ready to attend', however only 29% have done so in practice, suggesting it will take time to rebuild attendance activity in all areas.
- Across the rest of Australia, recent attendance rates are high (74%) though some are anxious about the virus circulating once border restrictions are lifted. Comfort levels could drop slightly in these areas as travel resumes.
- With COVID cases trending downwards in late October and early November, most audience members appear cautiously optimistic about attending over summer. 7 in 10 (67%) audience members in the outbreak-affected states/territories of NSW, VIC and ACT have recently made plans to attend a cultural event of some kind. This rises to 8 in 10 audience members (82%) in the rest of the country.

COVID-safety remains paramount, with vaccine passports being top of mind

- The results confirm that COVID-safety measures will play a pivotal role in rebuilding attendances, especially at indoor venues, while audiences across Australia grow used to living with the virus.

- Audiences continue to be encouraged to attend cultural venues by the presence of safety measures such as check-ins (85%) and proof of vaccination at entry (79%).
- In fact, some measures would need to be in place for a majority of audiences to attend. Nationally over half won't attend many spaces unless proof of vaccination is required, including large theatres and concert halls (63%) and outdoor events (58%).
- Audiences in outbreak-affected states are relying on COVID-safety measures more so than those in the rest of Australia – particularly in VIC where the rates of transmission are currently highest.
- Audiences in the rest of Australia are slightly more neutral about some safety measures, though this could change once domestic and international borders open, if case numbers increase in those jurisdictions.
- As we move towards a scenario of open borders and 90%+ vaccination rates nationally, the proportion who are 'very comfortable' to attend will stabilise nationally around 56% for large theatres/concert halls, 62% for museums/galleries and 69% for outdoor venues with fixed seating.

Local loyalty is on the rise as audiences look for low-risk ways to support the arts

- As confidence builds, there are positive signs for audience loyalty programs, with 44% indicating they are at least somewhat likely to purchase a subscription or membership in 2022, compared to the 40% who subscribed in 2021.
- As people weigh up the risks of attending, 78% of 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' (44%, up from 34% in July) – with some seeking escapism and uplift after the cumulative impacts of the pandemic.

Digital participation has begun to climb again, as cultural organisations grow more proficient with engaging audiences online

- After several quarters of declining online participation, digital engagement has increased slightly for all audiences – from 44% in July 2021 to 48% in November 2021.
- Audiences in outbreak-affected states are more likely to be participating online (53%) compared to those in the rest of Australia (42%), however participation rates have increased in all jurisdictions.
- One form of participation that stands out is online courses and tutorials, with 25% of audiences participating recently (up from 19% in July).
- Despite reports of 'Zoom overload' by some, overall audiences are now more likely to see a role for digital arts experiences in their lives outside of lockdown (73%) compared to July 2021 (52%).
- Audiences can be divided into three groups for the purposes of marketing digital arts experiences: 'digital devotees,' the 24% 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 27% 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, 33% nationally said they would be likely to attend. This rate increases among disabled audiences (44%) and audiences in outbreak-affected states (36%).
- 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

This report shares insights from over 7,500 past attendees of cultural events

Launched in May 2020, the 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 Snapshot Report outlines key findings from the November 2021 phase of the Audience Outlook Monitor in Australia (Phase 6), based on data collected from 7,637 respondents. This size dataset 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 in those areas.

This report compares new results with data collected previously in March 2021 (Phase 4), 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.

Audiences in outbreak-affected states/territories are reported separately to the rest of Australia

At the time of data collection (3–7 November 2021), outbreak conditions varied significantly by jurisdiction: New South Wales (NSW), Victoria (VIC) and Australian Capital Territory (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 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 more risk averse than audiences in NSW and VIC, on average.

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.

State Snapshot Reports will be available in early December 2021. Read on for the key November 2021 findings nationally.

Current conditions

Vaccination rates continue to climb and 94% of arts audiences are now fully vaccinated

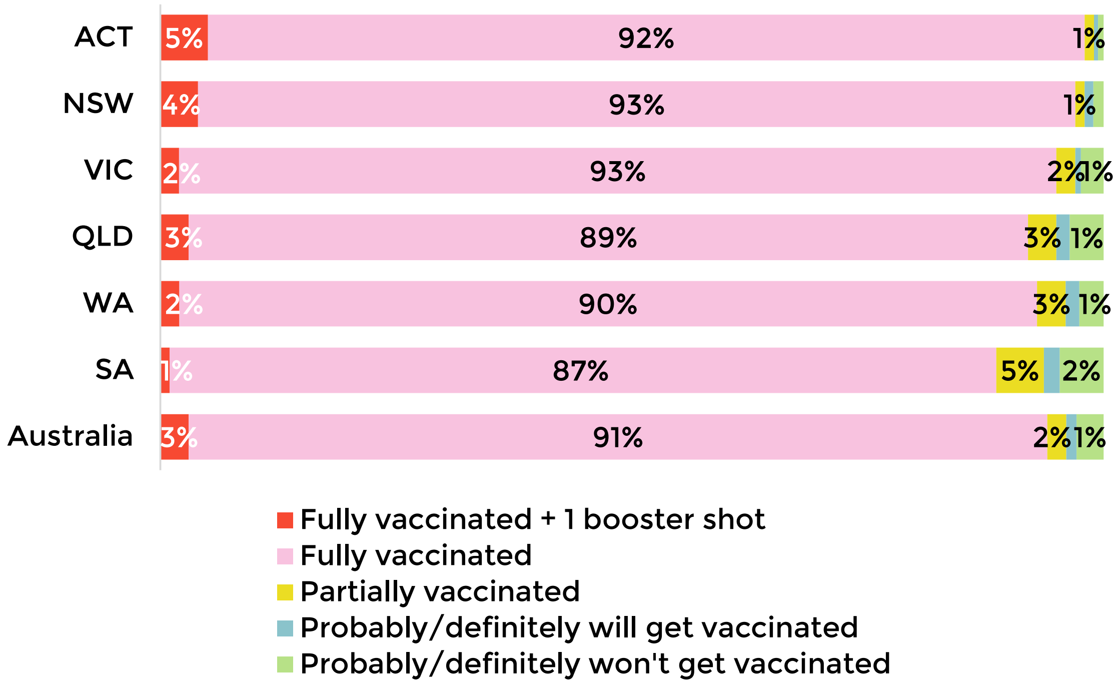
As of 7 November 2021, 94% of arts audiences say they are now fully vaccinated (up from 87% of audiences in October) with another 2% partially vaccinated (down from 9%). Among those fully vaccinated, 3% of audiences have had a booster shot.

The proportion fully vaccinated has increased significantly since July 2021, when 23% of audiences were fully vaccinated and 50% had received their first dose, and audiences continue to take up opportunities to be vaccinated faster than the population-wide averages.

Of the 4% of audiences who are not vaccinated, 1% say they probably or definitely will get vaccinated, suggesting that vaccine supply issues have now largely been addressed for those audiences participating in the study. Around 3% say they will probably or definitely not get the COVID-19 vaccine.

Vaccination rates vary somewhat by state and remain higher in the outbreak-affected states and territories. However, rates in the rest of the country are climbing, and are now as high as 92% fully vaccinated in states such as QLD (up from 83% in October) and WA (up from 79% in October). Vaccination rates also increase with age, with 99% of audiences aged 75+ fully or partially vaccinated, compared to 94% of audiences under 35 and 92% of audiences aged between 35 and 54.

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



Audiences are increasingly optimistic that vaccination will allow normal activities to resume

Compared to July 2021, audiences are more confident that vaccination will allow normal activities to resume within a year. Almost half (43%, up from 28% in July) are very confident in the vaccine effort, and only 7% (down from 14%) are not confident at all.

Confidence in vaccination is highest in outbreak-affected states of NSW (47% very confident), VIC (45% very confident) and the ACT (45% very confident). One audience member said,

> 'In contacting friends and relatives overseas, I can see that fully vaccinated populations make the world of difference. I feel very grateful.'

Another said,

> 'I think there will always be a small proportion of the population that will not be vaccinated, but that is the same with other vaccinations. So we need to be flexible and adjust our activities to suit a 90% – 95% vaccination rate. We need to get the confidence to open up as Europe has done.'

Confidence was lowest in SA (33% very confident), the state with the lowest rates of complete vaccination – with some SA audience members suggesting that vaccination rates were not high enough to support a complete return to normalcy. One suggested,

> 'Moving from the freedom of a COVID-free community (SA) to embracing COVID (opening borders) could be a disaster. Time will tell.'

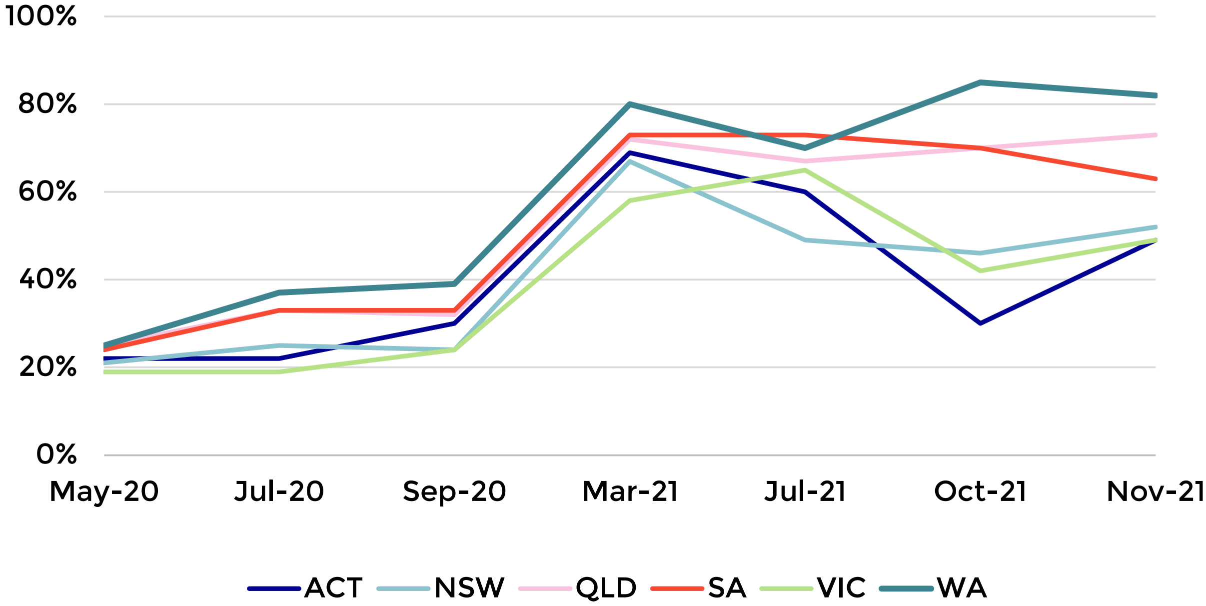
With vaccination rates climbing and the country reopening, audience confidence is in a state of flux

Audience comfort is in a state of flux right now, as the security afforded by greater vaccine coverage competes with risk factors like the easing of restrictions and the opening of interstate and international borders.

When asked how they feel about going to cultural events right now, half (50%) of audiences in outbreak-affected states are ready to attend, although another 47% are waiting until 'reasonably confident that the risk of transmission is minimal.'

In the rest of the country, by comparison, the majority of audiences are ready to go 'now or as soon as it is permitted' (72%, stable with 74% in October) – with this proportion particularly high for audiences in WA (82%), and lowest in SA (63%).

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)



However, while many report feeling comfortable now, some audiences anticipate their comfort levels will decrease when borders open over the next few months. One said,

> '[I'm] living in a state where there is currently no community transmission so I am happy to attend without COVID-safety measures. However, when there will be community transmission I will support requiring proof of vaccination at entry and will be happy to comply with any other measures such as wearing a face mask if deemed appropriate to reduce risks.'

Audiences are more comfortable attending cultural venues than many other public activities

In a positive sign for arts and cultural venues, audiences in outbreak-affected states are more likely to be 'very comfortable' with arts attendance than many other public activities.

Over half (56%) of outbreak-affected audiences are very comfortable at museums or galleries and outdoor events with fixed seating (67%), while slightly less feel very comfortable at community art spaces (45%), theatres and concert halls (38%) and outdoor events without fixed seating (37%). Audiences are least comfortable at comedy clubs or live music venues (17%) and interactive exhibitions (14%).

By comparison, around half (52%) of audiences feel very comfortable eating at a local restaurant, while smaller numbers feel very comfortable going to a local cinema (38%), exercising at a gym (24%), attending a sporting event (33%), using public transport (27%) or flying domestically on a commercial airline (23%).

Similarly, in the rest of the country, the majority feel very comfortable at museums and galleries (81%), outdoor events with fixed seating (81%), community art spaces (70%), theatres and concert halls (66%) and outdoor events without fixed seating (57%). Again, the proportion 'very comfortable' is lower for comedy clubs (35%) and hands on exhibits (29%).

Likewise, the majority of audiences in the rest of the country feel very comfortable eating at a local restaurant or bar (83%), going to a local cinema (70%), exercising at a gym (52%), attending a sporting event (54%), using public transport (55%). Smaller numbers feel very comfortable flying domestically on a commercial airline (34%).

Live attendance

Attendance patterns suggest it will take time to adjust to a 'COVID-normal'

Although comfort levels for most arts venues are relatively high, attendance patterns suggest it will take time to return to normalcy.

In-person attendance has not yet recovered to pre-Delta levels in the ACT (23%, down from 76% in March 2021), VIC (23%, down from 62%) or NSW (37%, down from 76% in March 2021). While some venues have re-opened, the volume of events is small and some audiences remain cautious.

The rest of the country is enjoying low-to-no cases and few restrictions – but some audience members in those areas are anxious about what comes next.

When asked about their attendance behaviours in the fortnight before data collection, 74% of audiences in the rest of the country reported they had attended an in-person arts or cultural event, compared to 29% of audiences in outbreak-affected states.

In-person attendance among those in the rest of the country was stable with or up from March – with the exception of audiences in SA (66%, down from 79% in March).

Audiences across the country are eager to attend and a majority are actively making plans

In a promising sign for attendance over the summer, the majority of audiences across the country are making future plans to attend arts and cultural events. In November, 7 in 10 (67%) of audiences in outbreak-affected states and 8 in 10 (82%) in the rest of the country reported making plans for in-person attendance in the future.

The majority of audience members are making plans to attend live performances (47% in outbreak-affected states, 60% in the rest of the country), attend a cinema (29% in outbreak-affected states, 34% in the rest of the country) or visit a museum or gallery (30% in outbreak-affected states, 31% in the rest of the country).

This interest in booking live performances was noted among very frequent performing arts attendees (81%) as well as those who attended a couple of times a month (63%), or a couple of times a year or less (34%).

When asked about the timing of their upcoming events, audiences were most likely to be booking events in the coming months. In the ACT, the highest proportion of bookings were for events this month (50%) – with the same being true of WA (51%), SA (49%) and QLD (36%). In VIC, audiences were most likely to have booked an event scheduled for the month after (46%), as were audiences in NSW (49%).

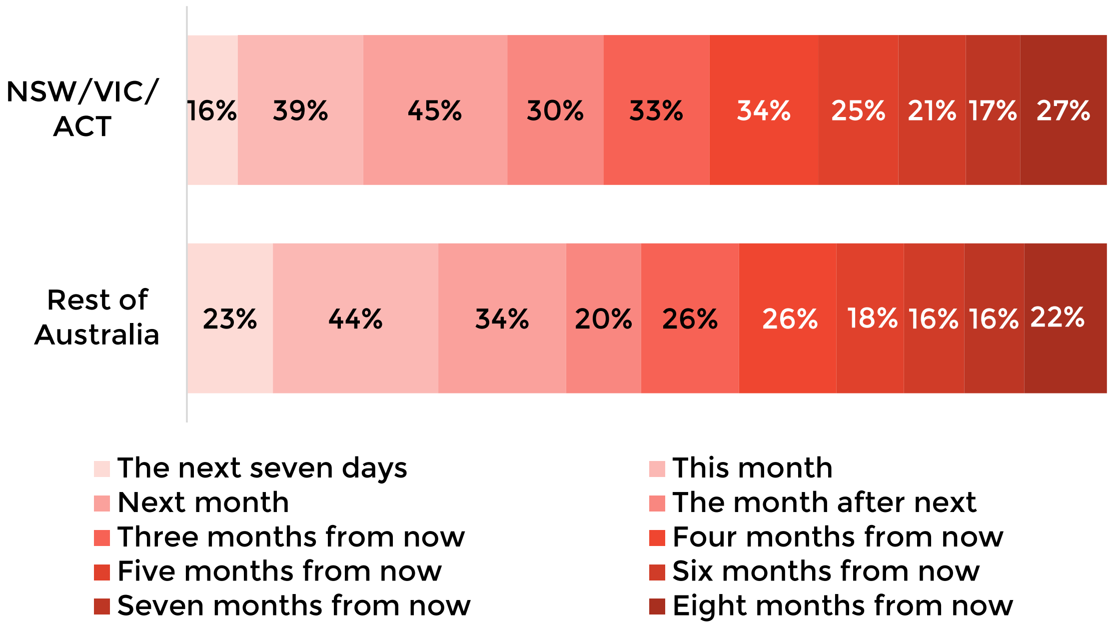
Whether they are based in states that are slowly coming out of lockdowns or states that are already experiencing minimal-to-no restrictions, it appears that many audiences are eager to get out and enjoy arts and culture as summer arrives.

Audiences in outbreak-affected states are booking further ahead, compared to audiences elsewhere

Compared to outbreak-affected states, audiences in the rest of Australia are more likely to be making bookings for events in the short-term, with greater proportions scheduling events in the next 7 days (23%, compared to 16%) or later this month (44%, compared to 39%). These audiences may be feeling more confident in events taking place in the immediate future than those scheduled for the coming months, when borders are likely to open and there is uncertainty around case numbers.

Audiences in outbreak-affected states were more likely to be making long term bookings than audiences in the rest of the country – with higher proportions booking for December (45%, compared to 34%), January (30%, compared to 20%), February (33%, compared to 26%), March (34%, compared to 26%), April (25%, compared to 18%), May (21%, compared to 16%) and July 2022 (27%, compared to 22%).

Figure 3: In the past fortnight, did you purchase tickets for one or more live shows or performances that are scheduled for...? NSW/VIC/ACT (n=1,462) and Rest of Australia (n=1,347)



Many are cautious about 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, audiences were most likely to name the risk of contracting or transmitting the virus (51%, up from 38% in July 2021) as their primary concern.

As vaccination rates rise, some audience members report that they are increasingly worried about transmitting the virus to someone vulnerable, rather than contracting it themselves. One audience member reported,

> ‘It's not that I'm afraid of getting it, I'm afraid of transmitting it to a loved one or my children.’

Another 4 in 10 audience members (43%) were concerned with the risk of being a close contact and needing to isolate. One audience member reported,

> ‘[There’s the] risk of being a close contact and needing to isolate thereby unable to provide daily support to a family member who lives in her own residence.’

This outlook is different to July, when the greatest barrier for audiences was the risk of lockdowns and cancelled events (38% in November, down from 52%).

Given that the prospect of attending events while cases are active in the community is a new one for many Australians, some audience members suggested that these concerns are particularly important now but may decrease over time. One said,

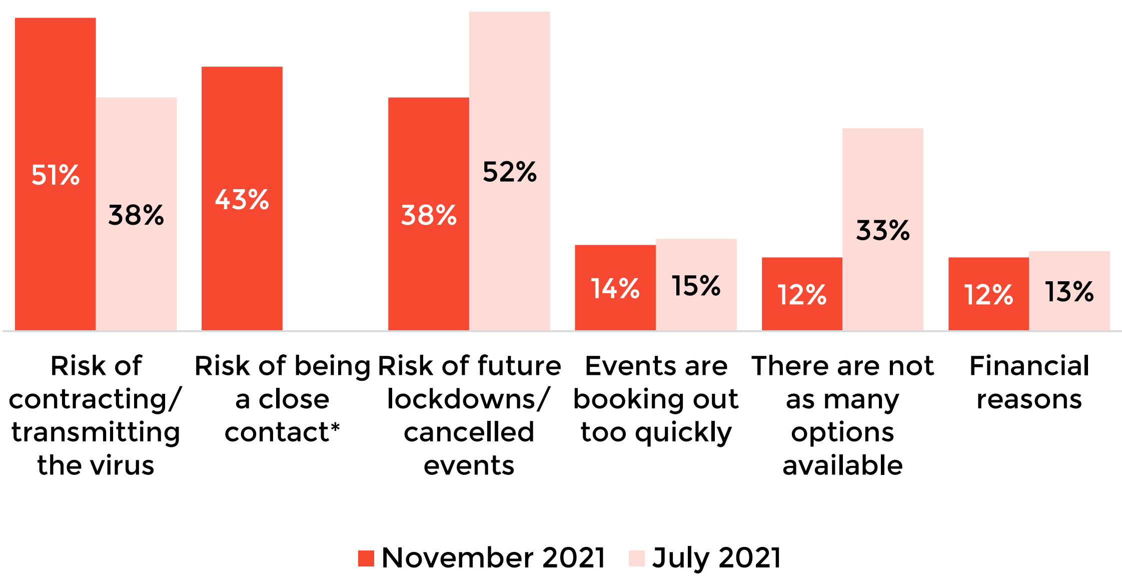
> ‘I think this will change over time and so my answer now is likely to be different than in a few months’ time. At the moment I feel cautious, but I do think that we will learn to live with the virus.’

Another said,

> ‘I think after two years of lockdowns in Melbourne, and restrictions, it's going to take a while to get back to being comfortable with the 'new normal' and being comfortable around random people.’

The relative importance of these barriers was consistent across the country, although virus-related barriers to attendance tended to be somewhat more heightened for audiences in outbreak-affected states. For example, 54% of outbreak-affected audiences were concerned with virus transmission, compared to 47% of audiences in the rest of the country, and 47% were concerned with being a close contact, compared to 39% in the rest of the country.

Figure 4: Proportion of 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=8,634) and November 2021 (n=7,583)



*Option introduced in Phase 6 – no historical comparison available

Outlook for comfort levels

Conditions are changing rapidly, and will continue to do so over the next few months. 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

In outbreak-affected states, comfort will continue to improve as national vaccination rates pass 90% – though some say they will still practice caution

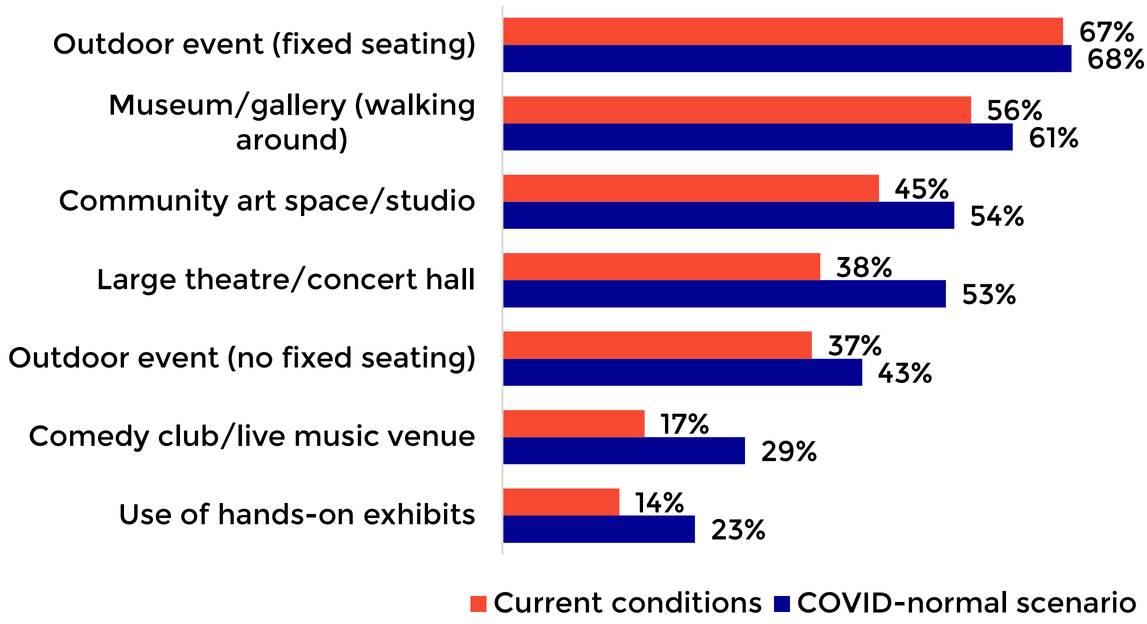
In response to the COVID-normal scenario, the majority of audiences in outbreak-affected areas report they would be 'very comfortable' with most venue types. One audience member stated,

> 'This is exactly the scenario [in which] I would feel free and clear.'

The largest impact will be felt at large theatres/concert halls (+15% very comfortable) and comedy clubs and live music venues (+12%).

When including the proportion who say they are 'somewhat comfortable,' more than two-thirds of audiences were comfortable at all venue types – ranging from 65% for comedy clubs and live music venues to 96% for museums/galleries and outdoor events with fixed seating.

Figure 5: Proportion of audiences in outbreak-affected states who would be 'very comfortable' to attend selected cultural venues in current conditions and COVID-normal scenario, November 2021 (n=4,218)



However, some outbreak-affected audiences say they would still practice caution in this scenario, especially for specific venue types. One said,

> 'I still feel the comedy club atmosphere could put some people in unnecessary risk.'

Another said,

> 'At 100% occupancy there is no social distancing and in the indoor scenarios and those with fixed seats you are shoulder to shoulder to someone else, potentially not wearing a mask and exposing you to the virus.'

Some would like to see other safety protocols in place under these conditions, saying 'masks would still need to be worn' for them to feel safe. One said,

> 'My knowledge of the ventilation of those venues would be important context – and whether masks would be required, and whether food/drink being consumed indoors (as it affects masks being worn).'

Across the rest of the country, comfort levels may decrease slightly as borders open

Outside the outbreak-affected states, audiences are generally less confident in the COVID-normal scenario – with open borders an object of anxiety for audience members in states that are currently COVID-free. One audience member said,

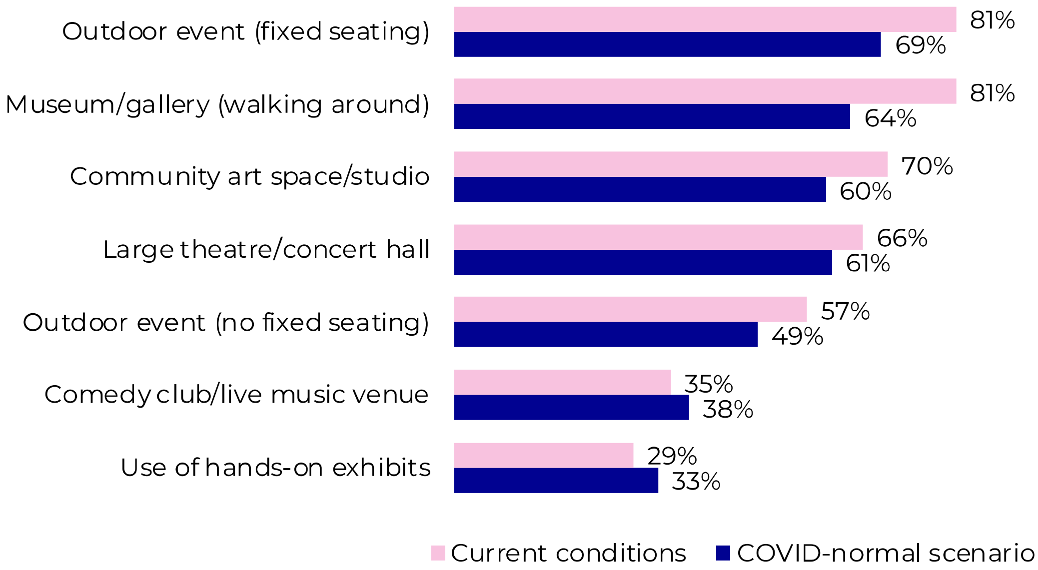
> ‘Although I feel somewhat comfortable there is a nagging doubt about the potential spread of illness, and the authorities are advising us that once the borders are opened, there will be consequences.’

Another said,

> ‘While I understand the need to balance risks against attendance numbers, for me the trifecta of international borders, only requiring a negative test not vaccination, and not requiring or even requesting masks puts it into levels that I don't think I am entirely comfortable with considering yet.’

The greatest decreases in confidence were observed in previously high-comfort venues like museums/galleries (-17% very comfortable), outdoor events with fixed seating (-12%), and community art spaces/studios (-10%).

Figure 6: Proportion of audiences in the rest of the country who would be ‘very comfortable’ to attend selected cultural venues in current conditions and COVID-normal scenario, November 2021 (n=3,272)



Some audience members expressed that they had difficulty imagining how they would feel in this scenario, given that they have not faced high cases of COVID-19 before – and that their behaviour would be contingent on case numbers or the extent of the virus. One said,

> ‘I'm not actually sure how I would feel in this scenario. We have been so sheltered and lucky here in SA, I am unsure as to whether I would be happy to continue on as normal (which is what I have selected here) or if I would be more hesitant. I think it would depend on case numbers and community transmission.’

Another said,

> ‘It depends what happens when we open the borders and embrace covid. It depends on the collateral damage, especially in my cohort.’

Some audience members remain uncertain about how the vaccination effort will proceed in the long term

While high vaccination coverage is an important aspect of this COVID-normal scenario for audiences, some audience members 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 said,

> 'I don't want to be one of the unlucky older people who gets a serious case of the virus, despite being vaccinated.'

Some audiences are adopting a 'wait and see' approach, saying,

> 'We still have to see how effective the vaccinations are in the medium term, and whether a build-up of COVID cases in the community will mean reintroduction of some restrictions.'

And,

> 'It's early days yet – we are yet to see how the vaccinations perform over the longer term, whether other variants arise that the vaccinations are less effective for, how the booster program goes, what impact COVID in under 12s has on community until they can be vaccinated too. I am concerned about vulnerable communities that haven't been fully vaccinated.'

Others emphasised that the arts will continue to be impacted by the pandemic for many months to come, saying,

> 'Despite being vaccinated, you can still get COVID-19, and are still required to isolate. Until we are at a point where vaccinations are widespread and isolation is not required, all arts organisations are at risk of cancelling performance or entire seasons.'

COVID-safety

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

When asked about a list of potential COVID-safety measures at cultural venues, most Australian audiences say they would feel encouraged to attend by the majority of safety measures. Their feedback confirms the role of COVID-safety in the recovery process.

The largest proportion of audiences said they would be encouraged by requiring check-ins upon arrival (85%, stable with 86% in October) and proof of vaccination required at entry (79%, stable with 81%).

In spite of the debate surrounding vaccine passports, only 8% of audiences say this measure would discourage them from attending.

Audiences feel more neutral about social distancing guidelines, with 56% saying they feel encouraged by limiting capacity based on 2 square metres per person.

Many audiences are apprehensive about removing masks as a requirement at cultural venues

Significant proportions feel encouraged by mandating face masks for people aged 12 and over (66%, down from 69% in October), while 17% would be discouraged.

Some people say that it detracts from their enjoyment of the event, with one saying it “diminishes the experience” and another saying,

> ‘If I had to wear a mask the whole time, I would probably not attend.’

However, as some states move to reduce mask mandates at indoor venues, many audiences are apprehensive. When asked about what measures absolutely need to be in place for them to attend, half of audiences say the requirement to wear a mask (49%). Removing this requirement could present a challenge to confidence levels while the virus is circulating.

Mask mandates for children continue to be polarising among arts audiences nationally

While the majority nationally would feel encouraged by mask mandates for people aged 12 and over, when enforced for all children, audiences are polarised.

Fewer than half nationally (41%) are encouraged by masks for all ages and one-quarter (25%) would find masks for children discouraging – the largest proportion discouraged by any COVID-safety measure. One-third (33%) feel neutral about this measure.

The proportion discouraged by masks for all ages has increased from 21% in October.

Parents and caregivers appear to be more concerned about this safety measure, with 38% discouraged. Meanwhile, audiences in WA, where rates of community transmission have been very low, are the most likely of any state or territory to feel discouraged (38%).

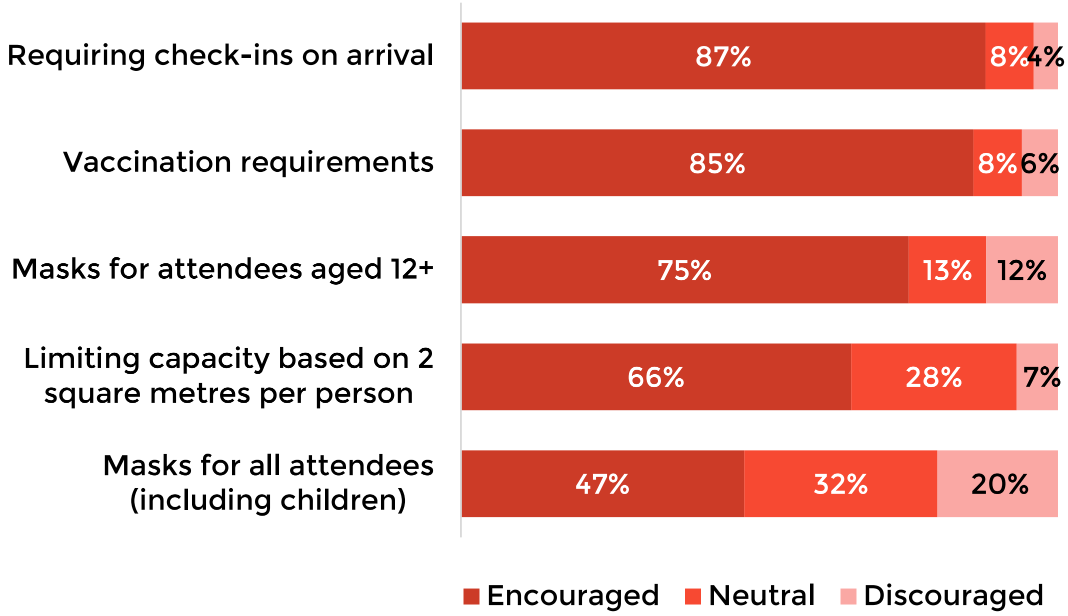
Audiences in outbreak-affected states are more likely to feel encouraged by COVID-safety at venues

Audience sentiment in relation to COVID-safety measures varies by state. Audiences in outbreak-affected states are more likely to say they would be encouraged by all safety measures at cultural venues, compared to those in the rest of Australia.

This is evident for proof of vaccination at entry (85% in outbreak-affected states, compared to 71% in the rest of Australia), check-ins (87%, compared to 81%) and limiting capacity based on 2 square metres per person (66%, compared to 46%).

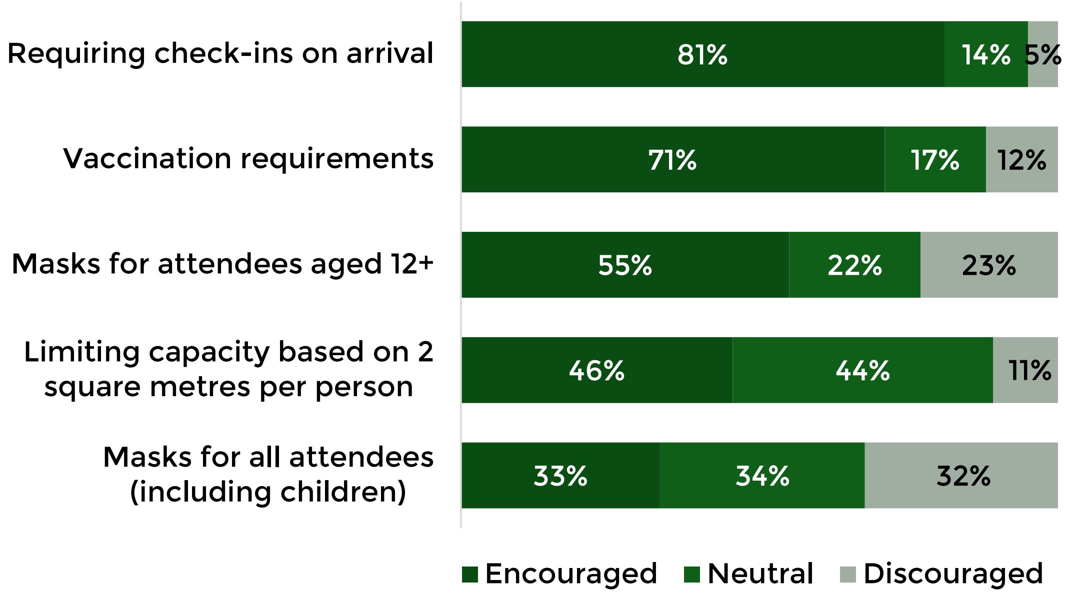
Compared to those across the rest of Australia, audiences in outbreak-affected states were more likely to say mandating masks for people aged 12 and over was an encouraging policy (75%, compared to 55%) – as well as for all attendees, including children (47%, compared to 33%).

Figure 7: How much would each of the following steps discourage or encourage you to attend? Audiences in outbreak-affected states, November 2021 (n=4,246)



Audiences in the rest of the country are the most discouraged by mask mandates for all attendees including children (32%), increasing since this sentiment was last measured in the October Pulse Check survey (28%).

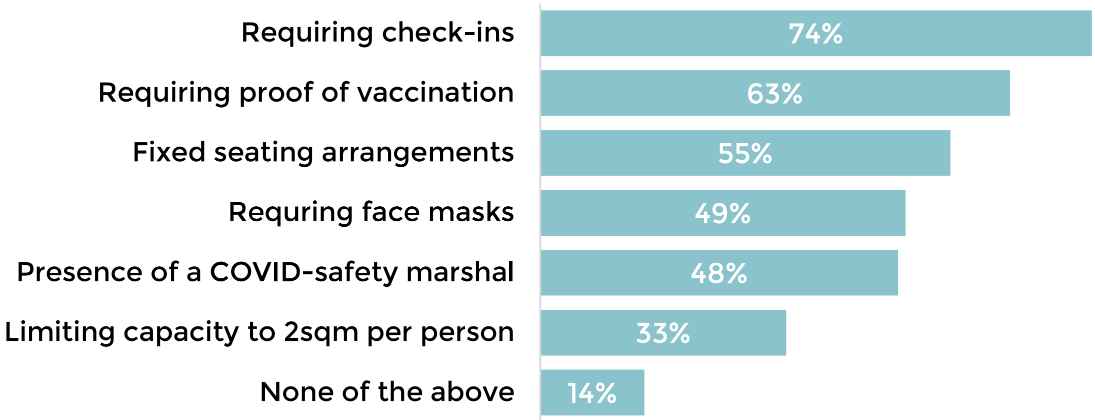
Figure 8: How much would each of the following steps discourage or encourage you to attend? Audiences in the rest of Australia, November 2021 (n=3,259)



The majority of audiences won't attend indoor venues unless proof of vaccination is required at entry

When asked whether any COVID-safety measures absolutely need to be in place to attend a large theatre or concert hall, the largest proportion of audiences nationally said that check-ins (74%) and proof of vaccination would be essential (63%).

Figure 9: 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) November 2021 (n=7,616)



Again, the results vary around the country. In outbreak-affected states, audiences are more likely to say they need every type of safety measure in place, compared to those in the rest of Australia. For example, equally sized proportions in outbreak-affected states will rely on proof of vaccination requirements (77%) and check-ins (77%) to attend a large theatre or concert hall.

Slightly smaller – though significant – proportions of outbreak-affected audiences will rely on fixed seating arrangements (60%) and the presence of a COVID-safety marshal to assist with compliance (56%).

One audience member from an outbreak-affected state shared,

> ‘I don’t feel comfortable with large crowds where it is hard or impossible to manage social distancing. Particularly as we don’t know what the rate of infections will be over the coming months post lock down, despite vaccinations.’

In general, audiences across the rest of Australia are slightly less likely to be relying on COVID-safety measures to attend large theatres, however the largest proportion would still decide to attend based on the presence of check-ins upon arrival (71%). Slightly less than half would rely on measures such as fixed seating arrangements (48%) and proof of vaccination at entry (45%) and the presence of a COVID-safety marshal (38%).

Mandatory masks were less important to the rest of Australia, but a significant proportion (37%) still consider this an essential condition for attendance.

The proportion who would be happy to attend a large theatre/concert hall without any COVID-safety measures is higher (20%) compared to outbreak-affected states (9%).

Audiences are more comfortable at outdoor venues, but proof of vaccination is still key

Overall, audiences are relying on COVID-safety measures to a slightly lesser extent at outdoor events, with open-air venues alleviating some of the risks associated with virus transmission.

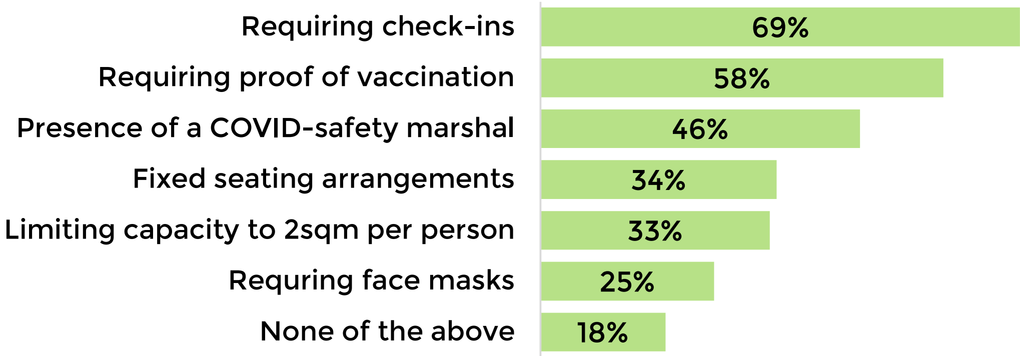
However, the majority of audiences still say check-ins (69%) and proof of vaccination requirements (58%) absolutely need to be in place at outdoor events.

The presence of a COVID-safety marshal was equally important at large theatres (48%) and outdoor events (46%), signalling that audiences want to see the rules observed at all venue types. One said,

> ‘I'm not concerned with the exact measures so long as the venue is complying with government requirements. I trust the government to set reasonable requirements based on the level

> of risk at the time (e.g. active outbreaks). My big concern is when venues are turning a blind eye to significant non-compliance.'

Figure 10: 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=7,616)



Some other measures were considered less crucial when attending outdoor venues, relative to a large theatre/concert hall – such as requiring face masks (25%, compared to 49% at theatres) and fixed seating (34%, compared to 55%). One person said,

> 'I would be more comfortable not wearing a mask to an outdoor event versus an indoor event.'

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 said,

> 'I consider indoor activities to be slightly more at risk than outdoors.'

Another said,

> 'My view is that outdoors an individual has the chance to distance themselves and take on their own duty of care/responsibility. Whereas indoors we still need to have our own duty of care but if a venue packs a lot of people into their space then they also need to take health measures such as check in etc. for their patrons.'

Many audiences see rapid testing as providing alternative, or additional comfort in key settings

Some audience members suggested that the proof of vaccination was less or equally important as a negative test result, with one saying,

> 'I don't think vaccination needs to be compulsory, but I like that there is an expectation of a clear test result.'

Another said,

> 'It should be proof of vaccination AND a negative test – people seem to think that vaccination stops them from spreading the virus. As someone who has health issues, is fully vaxxed and keen to get out and about, people's ignorance and attitude is what is holding me back from feeling safe.'

As rapid tests become more widely available, it is likely they can be introduced as an alternative or additional measure, similar to policies in Europe and North America.

Buyer behaviour

8 in 10 audience members say they'll be attracted to events in their local area in the next 12 months – with ongoing risks encouraging 'local loyalty'

When asked to what extent audiences would be attracted to events in their local area in the next 12 months, 8 in 10 (78%) of audience members agreed that they would be looking local – while only 3% disagreed. As one audience member reported,

> 'Local is good, local is accessible, local has all the variety I need.'

Some audience members suggested that restrictions on travel had made them more aware of and connected to arts and culture in their local area, with one stating,

> 'COVID lockdown made me feel more parochial and I love what some local theatres have done to help us appreciate our own local spaces.'

Another said,

> 'I've definitely developed more local loyalty throughout the pandemic. My sense of community is more connected to the physical place I live more than ever before.'

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

> 'I will continue to go to a range of arts performances but I feel even more strongly now about putting my money where my mouth is and buying tickets for smaller, local events. Not so much because of any concern about COVID but because I recognise how important these smaller local venues and companies are and I want to see them thrive.'

Others remain wary of the expense and possible complications associated with traveling further afield, and are likely to favour local events for this reason. One said,

> 'Despite my love of travel and having travelled regularly across the country and interstate for art and culture events, I don't see that happening as easily anymore. I'm sure I will find more events locally to enjoy and will be happy to support local artists and venues.'

Another said,

> 'I feel less inclined to circulate outside my local areas due to the continued risk of cross transmission and especially in crowded environments in venues.'

Some audiences are looking for uplifting content – and most say they're 'not ready' for works that explore the pandemic

When asked to share their preference for the types of arts and cultural content they would engage with over the next year, the majority of audiences across Australia said they were interested in seeing the same kinds of events they used to attend, pre-pandemic (90%, down from 93% in July).

Though in the minority, the proportion of audiences who say they will prefer 'light-hearted programs' has been steadily increasing since May of last year – with 44% of audiences now agreeing with this statement (compared to 34% in July 2021 and 21% in May 2020). Some audience members suggested that the cumulative impacts of the pandemic have left them seeking escapism and uplift, with one saying,

> 'The last two years have left people with a lot of anxiety, depression and disease. I have found myself naturally leaning toward more light-hearted, fun activities rather than depressing, serious or introspective pieces.'

The proportion of audiences likely to seek 'works that make sense of the pandemic' remains low (13%, up from 10% in July), with 44% of audience members 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'm over the pandemic! I am not attracted to works to 'make sense of it'!'

And another saying,

> 'I work in healthcare. I don't want to be explained or helped to understand COVID. I lived it and that was enough.'

Consistent with the Visions for Culture (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.

One person suggested that pandemic-related works may have a role to play at a later juncture, saying,

> 'I'll be interested in works that help me make sense of the pandemic later on, just help me have a laugh and feel alive again for now, thanks.'

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

Over the course of the pandemic, the proportion of arts audiences purchasing subscriptions and memberships has fallen. As expected, a smaller proportion of audiences said they purchased a subscription or membership for the 2021 season (40%), compared to the 2020 season (47%).

All audiences were asked the extent to which they are likely to purchase a subscription or membership in 2022, and 44% said they were likely, pointing to an opportunity area for further investigation. Several audiences mentioned wanting to support arts organisations – and are confident in refund policies should events be cancelled in future. One said,

> 'I still prefer to subscribe to support the theatre company, lock in tickets and planning for me. Any threat of cancellation or lockdown is okay because refunds have been forthcoming the last couple of years. There's little risk in planning ahead.'

A smaller number (39%) of audience members said they were unlikely to subscribe next year. Some audiences say they are not in a financial position to do so, while others are staying cautious and waiting longer to make a decision. One said,

> 'I have been very cautious, and I would still like to wait a while. When I see what happens after the international borders open I might be more open to it, but I wouldn't buy one right now.'

Other audience members would prefer to book individual events, as one comment,

> 'In 2021 I just bought tickets for individual performances rather than subscription due to uncertainty whether performances would proceed.'

Around 1 in 5 (19%) 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 2020/12 financial year (26%), though more than half of the fundraising year remains.

Online participation

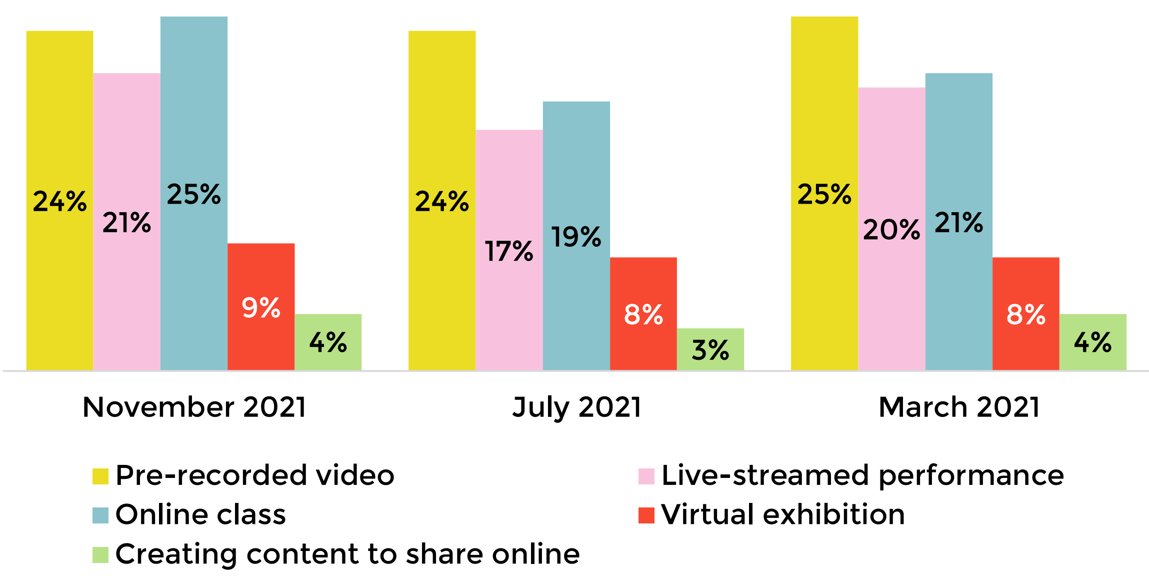
Around half of audiences continue to participate in online arts and culture experiences

In the first half of 2021, participation in online arts and cultural activities was lower than the levels seen in the early days of the pandemic, with some audience members reporting ‘Zoom overload’.

However in light of extended lockdowns in NSW and VIC, online participation has increased slightly. Around half (48%) of all surveyed audiences participated in an online arts experience (up from 44% in July 2021), as restrictions on live attendance and extended lockdowns have limited many audience members’ ability to attend in-person cultural activities.

Since July 2021, participation has increased for live-streamed events (21%, up from 17%) and online classes, courses and tutorials (25%, up from 19%). Participation in other activities is consistent, such as watching pre-recorded video (24%, stable with 24%), attending virtual exhibitions (9%, stable with 8%) and creating content to share online (4%, stable with 3%).

Figure 11: During the past fortnight, have you participated in any of the following online or digital arts & culture experiences? (select all that apply) November 2021 (n=7,637)



Audiences in outbreak-affected states are more likely to be participating online – though increases since July 2021 are evident around Australia

In general, audiences in outbreak-affected states (53%) are more likely to be participating in online arts experiences, compared to those in the rest of Australia (42%) – as lockdowns have impacted opportunities for live attendance. Among NSW audiences, 55% are participating online (up from 49%) and among VIC audiences, 52% are participating online (up from 47%).

Participation in all online arts activities is higher in outbreak-affected states, particularly online classes (30%, compared to 19% in the rest of Australia), but also for pre-recorded video (27%, compared to 21%), live-streamed events (24%, compared to 17%) and virtual exhibitions (11%, compared to 7%).

However, overall online participation has increased for audiences in the rest of Australia since July, signalling a promising outlook for digital programming country-wide.

One-third of 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?'

Around half say they are unlikely to attend a digital program (46%), though a significant proportion say they are likely (33%) – while 22% are neutral.

In the case of cancelled events, some audiences would be more even more likely to book a digital alternative, for example: digital devotees (46%), disabled audiences (44%) and audiences in outbreak-affected states (36%).

Some audiences mentioned that digital programs provide an opportunity to experience arts and culture where physical attendance is limited. One person 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.'

Some respondents advocate for hybrid models, saying they would appreciate the flexibility of a digital option – particularly if it was as close to the live experience as possible. One said,

> 'Change in personal circumstances with my children mean I wouldn't be able to attend many events in-person, so I would prefer the option of online or in-person (but must be with flexibility - i.e. if I can't make it in-person, I won't miss out). If the whole program isn't included and only 'elements', I would want the option of a refund or at least a discounted ticket if it won't include every aspect of the in-person viewing.'

Others said while it is not the same as a live experience, they would be willing to try a digital option. One said,

> 'It certainly is an option – it's not quite the same as in-person but I would be happy to trial.'

As spending on digital arts and cultural experiences has increased slightly, audiences also see a greater role for digital in their lives

In November, 38% of audiences participating in online arts and culture paid for an experience, increasing from 33% in July 2021.

The largest increases are seen in the proportion purchasing pay-per-view experiences (19%, up from 16%) and subscribing to a program/season that included the experience (9%, up from 6%).

Some forms of payment for online experiences are relatively consistent with July, with 15% making a donation for something they experienced (stable with 13% in July) and 9% subscribing to a platform to access content on-demand (stable with 7%).

Overall, the proportion of 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 audiences now see a 'substantial role' for digital arts experiences in their lives (24%, up from 10% in July 2021), or even a 'small role' (49%, up from 42%). The proportion who sees 'no role' declined between July and November (27%, down from 47%).

This increase is evident in both outbreak-affected states (77%, up from 56% in July) and the rest of Australia (69%, up from 48% in July).

Marketing of digital experiences can be targeted to three groups

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

- Digital devotees are the 24% of audiences who see a 'substantial role' for digital experiences in their lives (compared to 10% in July). They can be expected to show deeper and more dedicated engagement. 6 in 10 (60%) 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. More than half (51%) are paying for online experiences and half (51%) of those spent more than $50 in the past fortnight.

- Tired of tech audience members are the 27% 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. In outbreak-affected states, for example, 1 in 4 (26%) 'tired of tech' audiences participated online – slightly more than the average 'tired of tech' audience member (23%).

- 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. Around half (52% in November 2021) participated in the fortnight before data collection, while around one-third (34%) paid to access online content.

	Digital devotees	Supportive but selective	Tired of tech
Proportion of audiences	24%	27%	49%
The role of digital in their lives is...	Substantial	Small	None
Online participation rate	60%	52%	23%
Live stream participation rate	31%	22%	7%
Most interested in	Quality, high-production digital programming	Hybrid events	Live performance
Spending behaviours	51% online are paying for experiences	34% online are paying for experiences	18% online are paying for experiences
Demographic features	▸ More likely to be in an outbreak-affected state ▸ More likely to have a disability (7%)	▸ More likely to be a parent (20%) ▸ More likely to be younger (64% are under 65)	▸ More likely to live in a regional/remote area (22%)
Other arts behaviours	▸ More likely to attend a digital alternative to a cancelled event (46%) ▸ Most likely to be donors to arts organisations (46%) ▸ More likely to subscribe (59%)	▸ Slightly more risk-averse (41% will only attend with minimal risks) ▸ Slightly less confident vaccination will allow a return to normal	▸ Most unlikely to attend a digital alternative to a cancelled event (72%) ▸ Least likely to be donors to arts organisations (29%)

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

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