



PATTERNMAKERS



NOVEMBER 2021

Victoria Snapshot

Audience Outlook Monitor

CREATIVE VICTORIA



Summary

VIC audiences are cautiously optimistic and the majority are confident in the vaccination effort

- ▶ November 2021 data from 2,317 past attendees of VIC arts organisations suggests that confidence levels are in a state of flux, with new changes to restrictions introduced shortly after data collection (3–7 November 2021).
- ▶ Arts audiences are getting vaccinated at a slightly faster rate than VIC's general population, reaching 95% fully vaccinated in November, and 2% have already received booster shots.
- ▶ The proportion who are 'ready to attend' cultural events is increasing (currently at 49% compared to 42% in October). However it has not yet reached the 'pre-Delta' levels of March 2021 (58%) – and just 23% have actually participated in an in-person cultural activity recently.
- ▶ While the [vaccinated economy](#) will likely reassure some risk-averse audience members, others may take time to adjust to attending with fewer restrictions. Some remain anxious as the virus continues to circulate, and news of new variants could further challenge confidence.
- ▶ VIC audiences tend to be making shorter-term plans, with the majority of recent tickets booked for events later this month (38%) or in December (46%), but overall VIC audiences are increasingly confident that vaccination will help things return to normal within a year (93% are at least somewhat confident, up from 84% in July).

COVID-safety is pivotal as audiences grapple with the easing of restrictions while the virus circulates

- ▶ VIC audiences are relying on COVID-safety measures more so than some other states/territories right now, with rates of transmission in VIC currently the highest in the country.
- ▶ The results confirm that COVID-safety will play a pivotal role in stabilising confidence as VIC's reopening plan progresses and Australia faces the prospect of new variants.
- ▶ VIC audiences continue to be overwhelmingly encouraged by proof of vaccination being required at entry to arts venues (85%).
- ▶ With mask mandates and density limits easing in most indoor settings from 18 November, confidence among VIC audiences may wane if case numbers remain high. Over half (57%) of audiences say they would need mask mandates in place to attend indoor venues like theatres and concert halls, and 41% say they would want to see capacity limits.

- ▶ As Australia approaches a 'COVID-normal' scenario, VIC audience comfort will likely increase, assuming 90%+ vaccination, no masks, no density limits, and requiring proof of vaccination or a negative test result at entry.
- ▶ The largest increases are likely to be seen at large theatres and concert halls (+16%) and comedy clubs and live music venues (+14%) – a promising sign for VIC's live music sector.

Audiences are looking for ways to show loyalty after two years of lockdowns, particularly to local artists

- ▶ VIC organisations have cultivated audience loyalty over the difficult past two years – with pandemic hardship highlighting the importance of arts and culture.
- ▶ The outlook for loyalty programs is more positive in 2022, with 4 in 10 (39%) indicating they are at least somewhat likely to purchase a subscription or membership for next year.
- ▶ As people weigh up the risks of attending amid further uncertainty, 81% of VIC audiences agree that they'll be attracted to events in their local area over the next year.
- ▶ An increasing number of VIC audiences say they will be interested in 'light-hearted programs' (47%, up from 37% in July) – with some seeking escapism and uplift after the cumulative impacts of the pandemic.

VIC audiences are seeing a greater role for online arts and culture in their lives

- ▶ After several quarters of slight declines in online participation, digital engagement has increased again for VIC audiences – from 47% in July 2021 to 52% in November 2021.
- ▶ 4 in 10 (40%) online audiences in VIC are paying for these experiences (up slightly from 37% in July) – and 34% of those paying spent more than \$50 (down from 40% in July).
- ▶ Despite some reports of 'screen fatigue', overall VIC audiences are significantly more likely to see an ongoing role for digital arts experiences in their lives (76%) compared to July 2021 (56%).
- ▶ Marketing efforts should be concentrated on 'digital devotees,' the 25% of VIC audiences who see a substantial role for digital in their lives, and 'selective but supportive' audiences, the 51% who see a small role.
- ▶ 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, 35% of VIC 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

This report summarises insights from over 2,300 audience members in Victoria

This Victoria (VIC) Snapshot Report outlines key findings from the November 2021 phase of the Audience Outlook Monitor in Australia (Phase 6), based on data collected from 2,317 audience members connected with 34 organisations in VIC.

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 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.

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), 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 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 VIC.

Current conditions

Vaccination rates in VIC continue to climb and 95% of arts audiences are now fully vaccinated

As of 7 November 2021, 95% of VIC arts audiences say they are now fully vaccinated (up from 86% in October) with another 2% partially vaccinated (down from 10%). Among those fully vaccinated, 2% have had a booster shot.

The proportion fully vaccinated has increased significantly since July 2021, when 24% of audiences were fully vaccinated and 49% had received their first dose.

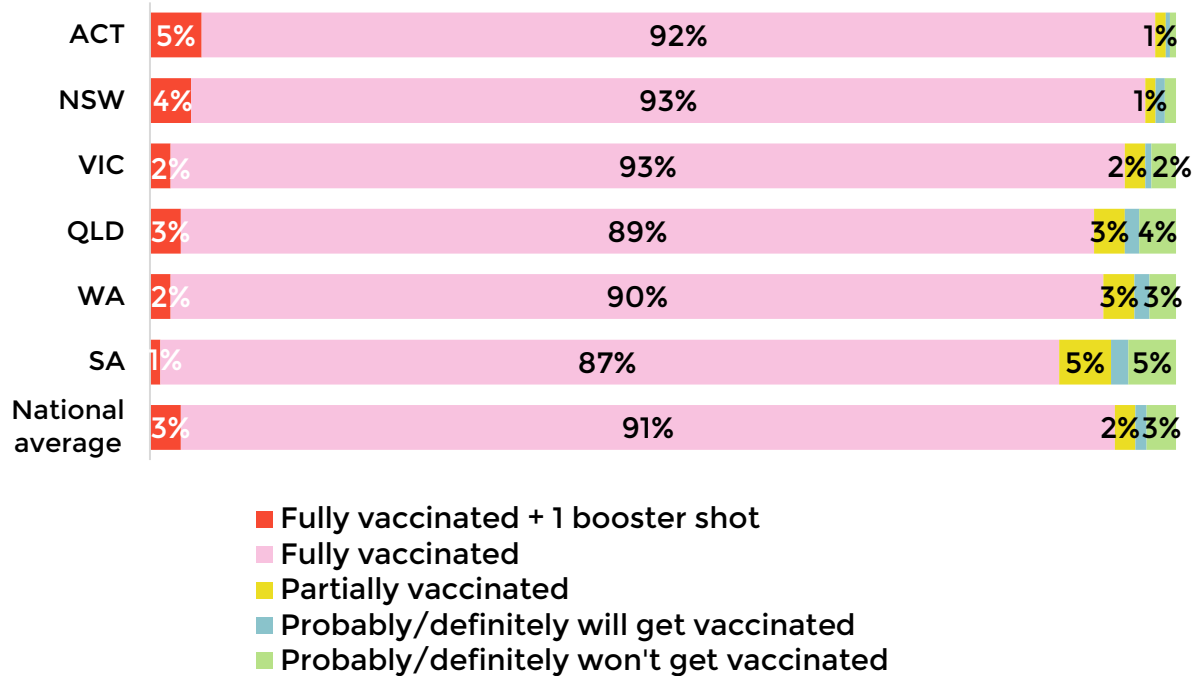
VIC arts audiences remain slightly ahead of the state-wide curve, with VIC reaching its 90% double-vaccination milestone shortly before this report's publication.

Of the 3% 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 2% say they will probably or definitely not get the COVID-19 vaccine.

Vaccination rates vary by state, with uptake in VIC slightly behind that of other outbreak-affected states like the ACT and NSW (97% fully vaccinated), but higher than states like QLD (92% fully vaccinated), WA (92% fully vaccinated) and SA (88% fully vaccinated) - as shown in Figure 1.

Vaccination rates also increase with age, with 98% of VIC audiences aged 75+ fully vaccinated, compared to 93% 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)



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

The rise in vaccination rates, easing of restrictions after extended lockdowns, and potential decline in case numbers appear to have VIC audiences looking more optimistic. Compared to July 2021, VIC audiences are significantly more confident that vaccination will allow normal activities to resume within a year.

Nearly half (45%, up from 26% in July) are very confident in the vaccine effort, and only 7% (down from 16%) are not confident at all. One audience member says,

'I feel very confident about vaccination allowing us to live with COVID-19 and minimize harm, hospitalisation etc. I'm also pretty much ready and booked in for my booster shot due in March 2022.'

While another says,

'Look at the rates, we're doing really well.'

As case numbers fluctuate, many audience members are still exercising caution – and suggest it is still too early to say how things will play out in the long term. One said,

‘It’s still early days to determine how long the vaccine protection will last. But hopefully things will get back to normal.’

Another said,

‘I think ‘normal’ is a relative term. I hope we will be able to attend things with reduced risk, but not like prior to 2020.’

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

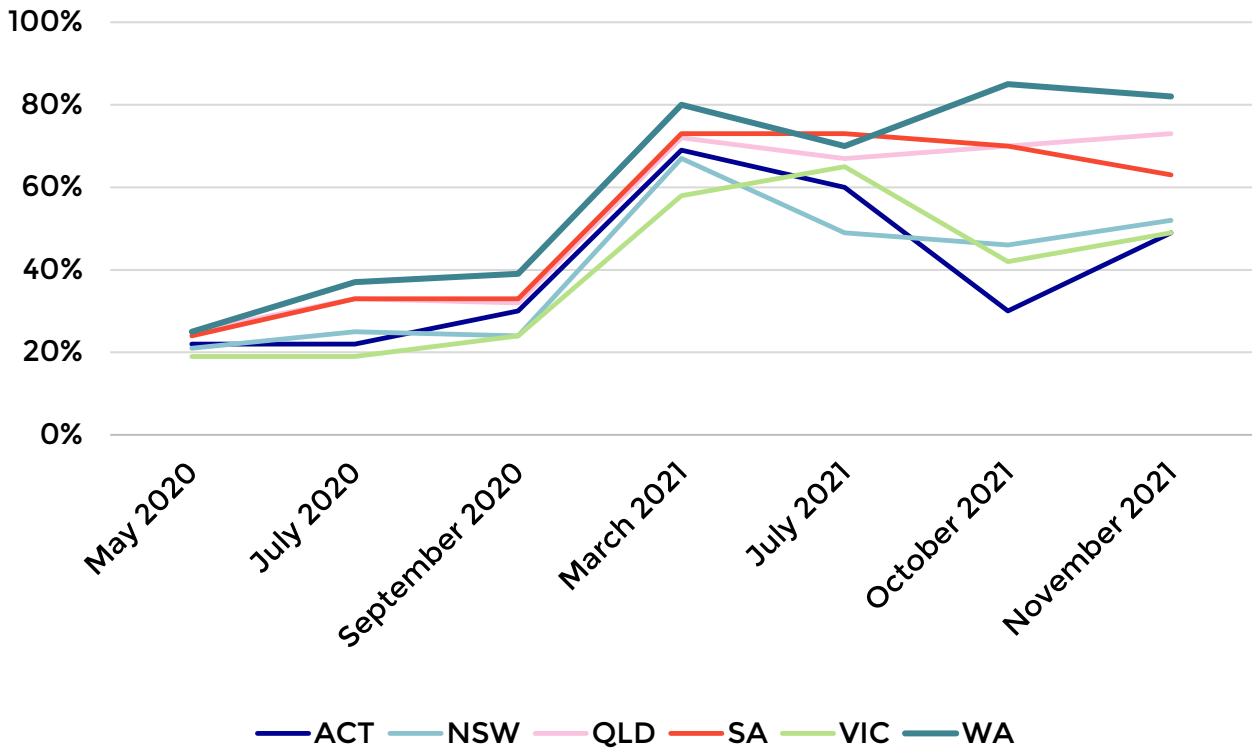
Audience comfort in VIC is in a state of flux as cases stay high and the country works towards a ‘COVID-normal’ state

Audience comfort is changing rapidly, with various competing factors at play. Shortly before this report’s publication, further restrictions eased for fully-vaccinated Victorians and vaccination rates exceeded 90%+.

As of early November, confidence remains below pre-Delta levels, with around half of VIC audiences ready to attend ‘now or as soon as it is permitted’ (49%, down from 58% in March), as shown in Figure 2.

The other half (48%) say they will attend ‘when reasonably confident that risk of transmission is minimal,’ and although VIC’s high vaccination rates are likely to reassure some risk-averse audience members, others may take time to adjust to attending with fewer restrictions – particularly as the virus continues to circulate.

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)



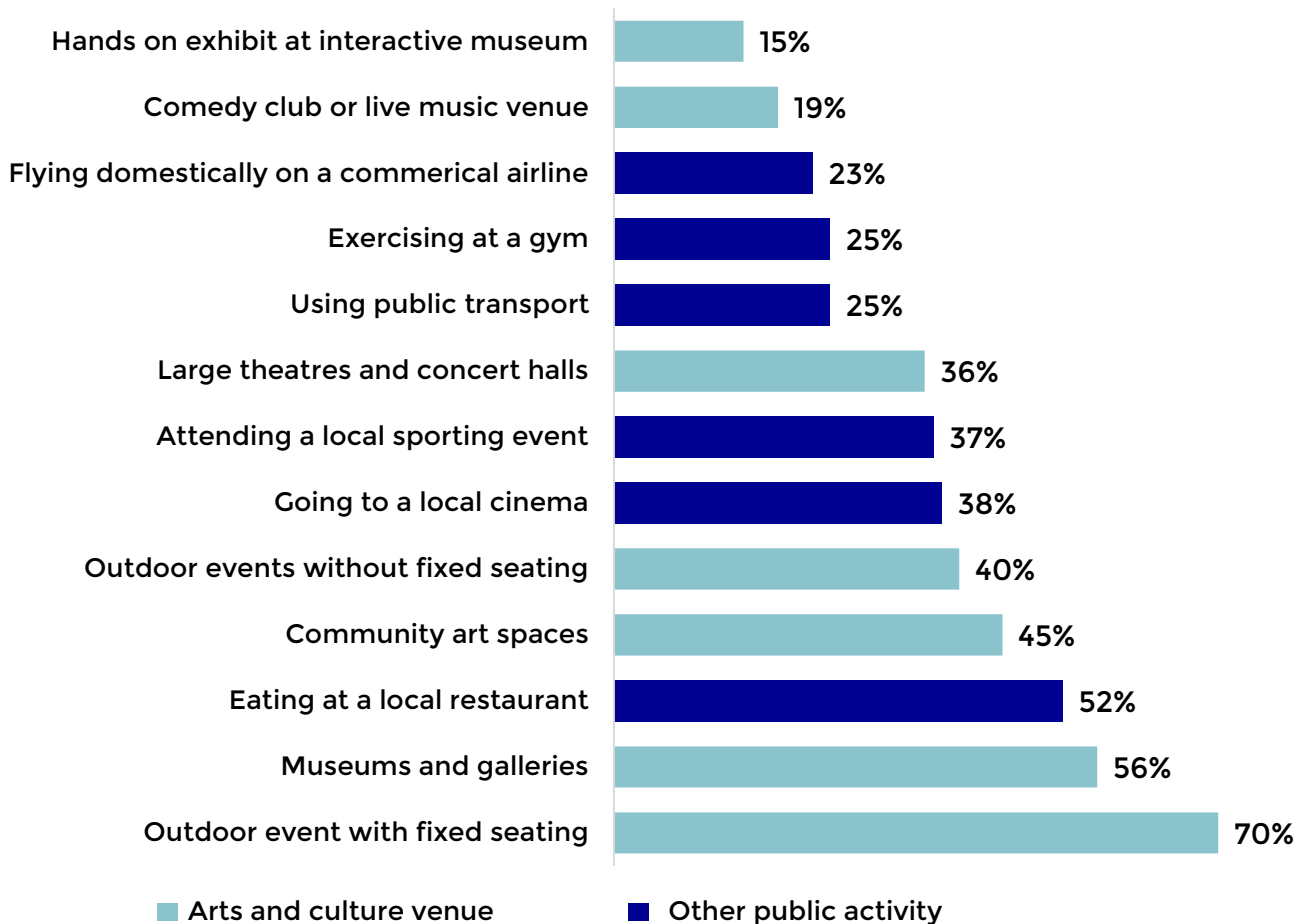
VIC audiences are equally, if not more, comfortable with arts attendance than other public activities

In a positive sign for arts and cultural venues, VIC audiences are equally, if not more, likely to be 'very comfortable' with most kinds of arts attendance compared to other public activities (see Figure 3).

Qualitative research suggests that audiences perceive cultural venues to be safe, clean spaces, and they have strong confidence in venue and event managers to comply with public health orders.



Figure 3: Proportion of VIC arts audiences who are ‘very comfortable’ doing the following activities today, assuming they were open. November 2021 (2,124)



The majority of VIC audiences feel very comfortable at outdoor events with fixed seating (70%) and museums and galleries (56%) – while another 4 in 10 feel very comfortable at community art spaces (45%), outdoor events without fixed seating (40%) and large theatres and concert halls (36%). A small proportion of audience members feel very comfortable at comedy clubs (19%) and hands on exhibits (15%).

By contrast, half of VIC audience members feel very comfortable eating at a local restaurant or bar (52%), and less than half feel very comfortable going to a local cinema (38%) or sporting event (37%). Even smaller numbers feel very comfortable using public transport (25%), exercising at a gym (25%) or flying domestically on a commercial airline (23%).



Live attendance

Current attendance levels are low and booking behaviours suggest VIC audiences are uncertain about the future

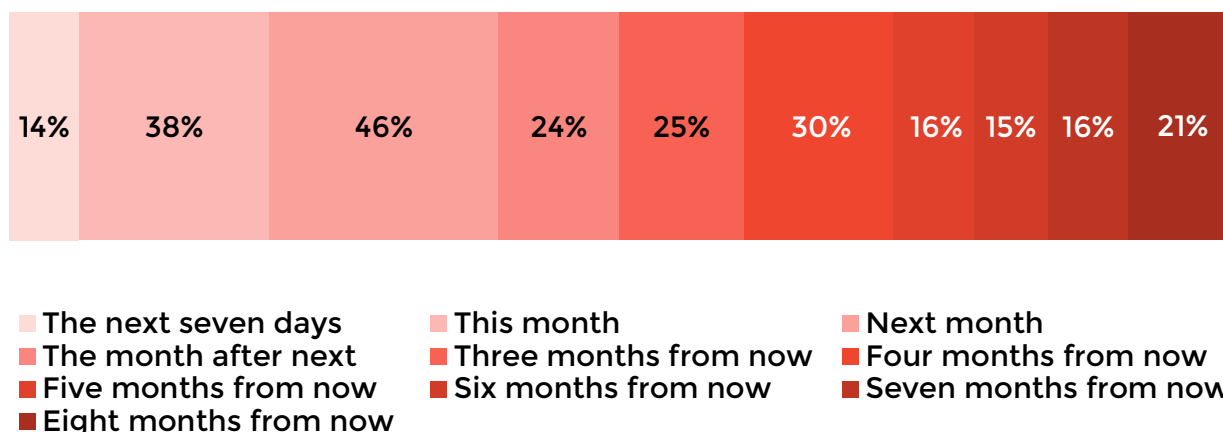
When asked about their attendance behaviours in the fortnight before data collection, 23% of VIC audiences reported they had attended an in-person arts or cultural event. This proportion is significantly lower than pre-Delta levels, with 62% of VIC audiences attending in March.

Around 2 in 3 VIC audience members (63%) reported making plans for in-person attendance in the future – the lowest compared to other states and territories.

Most plans to attend are concentrated in the short-to-mid-term, with the majority of audiences booking for events this month (38%) and December (46%), January (24%), February (25%) and March 2022 (30%).

Relatively fewer bookings are made in the long term, which could indicate VIC audiences are more uncertain about attendance in the far future. Compared to the earlier months, smaller proportions of VIC audiences are booking for April (16%), May (15%) and June (16%).

Figure 4: In the past fortnight, did you purchase tickets for one or more live shows or performances that are scheduled for...? VIC audiences (n=582).



VIC audiences 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, VIC audiences were most likely to name risks arising from virus circulation. These include the risk of contracting or transmitting the virus (53%, up from 36% in July 2021) or the risk of being a close contact and needing to isolate (48%), as shown in Figure 5.

Given that case numbers remain high in VIC, audiences are understandably conscious of the risks which arise when the virus is active in the community.

This anxiety was particularly acute for VIC arts audiences who work with vulnerable populations, with one saying,

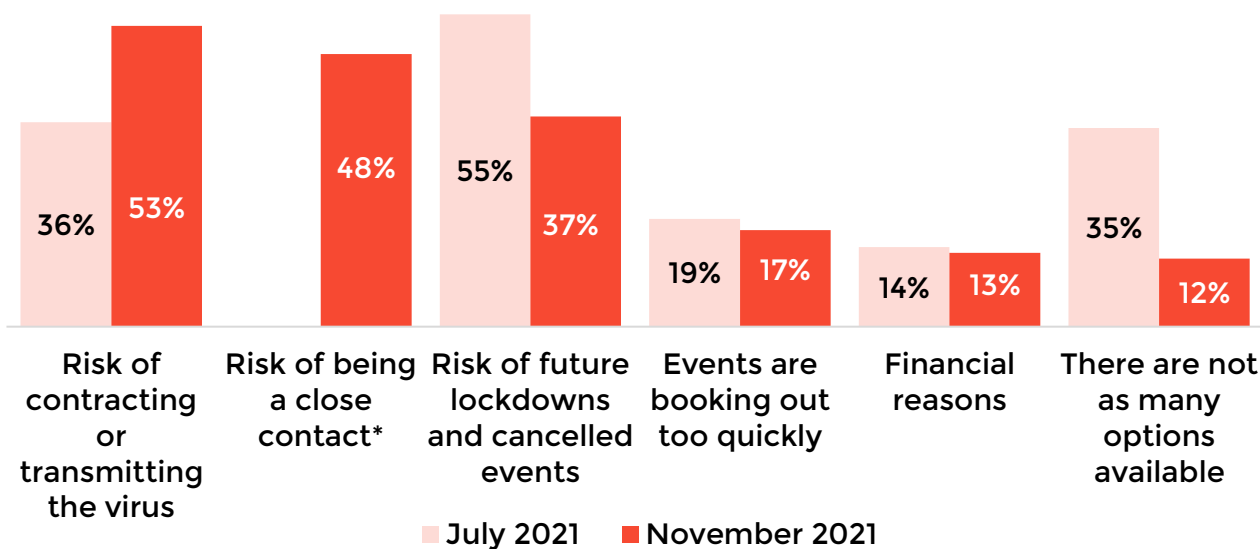
‘I’m a healthcare worker, so risk of contracting and or transmitting the virus to my patients is my highest concern.’

Some suggested their opinions would likely change over time as they adjust to the ‘COVID-normal’, with one saying,

‘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 virus.’

Overall, the outlook is different from July, when the main barrier to attendance was the risk of lockdowns and cancelled events (37% in November, down from 55%). Audiences were also much less likely to report being prevented from attending because there were ‘not as many options available’ – only 12% of audiences as opposed to 35% in July.

Figure 5: Proportion of VIC audiences who say these factors will prevent them from attending in-person arts and culture events as they used to in the past, July 2021 (n=2,147) and November 2021 (n=2,310)



*Option introduced in Phase 6 – no historical comparison available

Outlook for comfort levels

Conditions in VIC are changing rapidly and will continue to do so as audiences adjust to the latest changes to restrictions. 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

Reaching ‘COVID-normal’ will likely improve comfort across almost all arts venues

Across the board, this COVID-normal scenario saw significant increases in the proportion of VIC audiences ‘very comfortable’ at arts venues. One audience member said,

‘This is exactly the scenario that I would feel free and clear.’

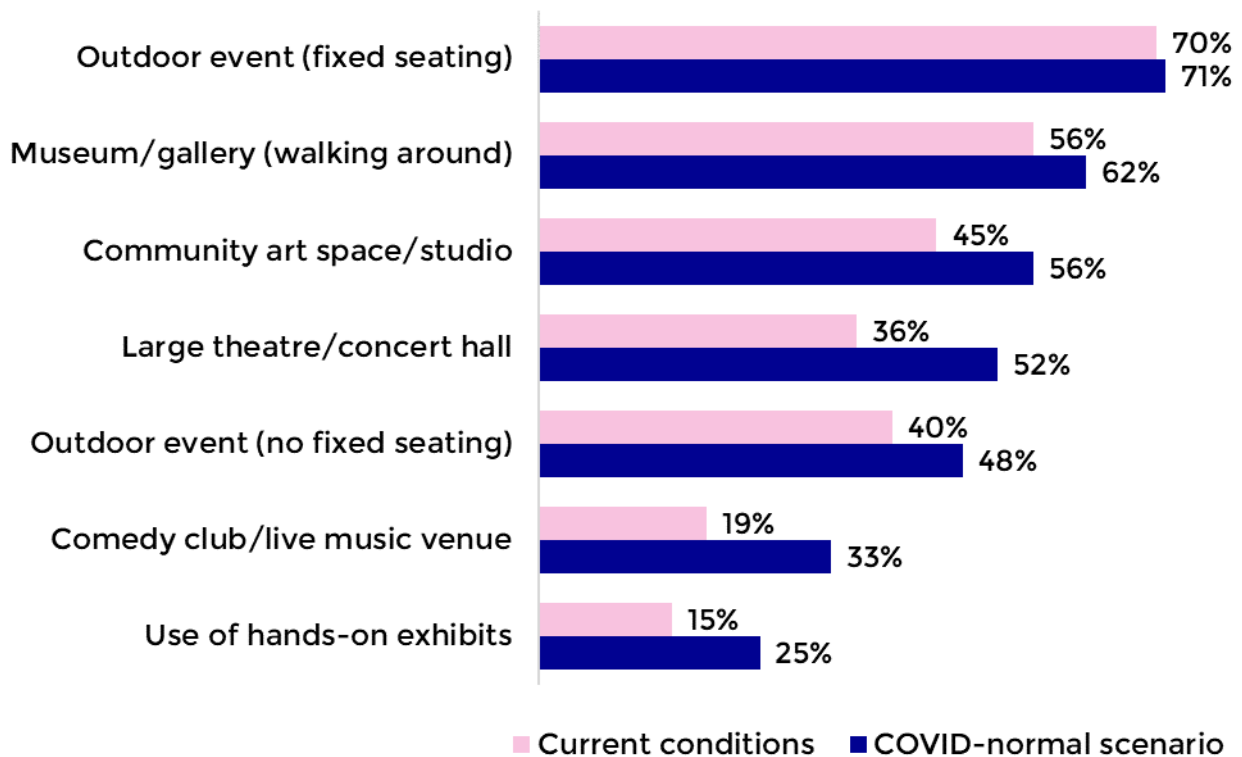
This is a positive sign, considering the combination of high-vaccination rates, no mask mandates and no capacity limits is very similar to VIC’s recently introduced restrictions.



The greatest increases were observed for large theatres and concert halls (+16%) and comedy clubs and live music venues (+14%). This data suggests that reaching COVID-normal will be hugely beneficial for VIC’s live music sector.

Large increases were also observed for community art spaces (+11%), hands-on exhibits (+10%) and outdoor events without fixed seating (+8%).

Figure 6: Proportion of audiences in VIC who would be ‘very comfortable’ to attend selected cultural venues in current conditions and ‘COVID-normal’ scenario, November 2021 (n=2,264)



However, some VIC audience members noted that after dealing with protracted lockdowns and widespread outbreaks, it could take some time for them to adjust to this new ‘COVID-normal.’ One 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.’

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 most VIC audiences, some 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 VIC audience member said,

‘Even with 90% of population vaccinated there is still a very large number unvaccinated. Also with our borders open & no quarantine with people coming into the country, variants of COVID-19 will be brought into Australia and our community.’

While another said,

‘Just worried about other variants popping up!’

Some audiences are adopting a ‘wait and see’ approach, saying,

‘It’s still early days to determine how long the vaccine protection will last. But hopefully things will get back to normal.’

Another said,

‘I don’t even know if the powers that be can honestly answer. I’m really hoping so because a large part of life and mental health is the cultural/artistic part of our life. I’ve so missed it.’

COVID-safety

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

With a degree of uncertainty persisting, it is clear that COVID-safety will be critical for maintaining confidence.

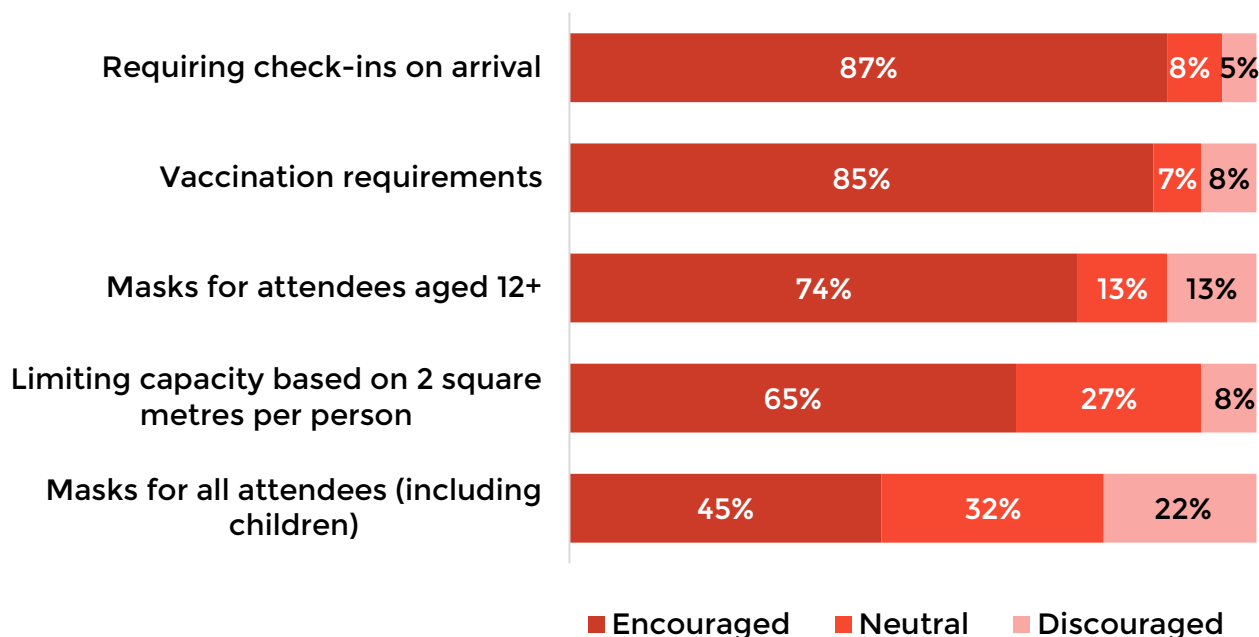
When asked about a list of potential COVID-safety measures at cultural venues, most VIC audiences say they would feel encouraged to attend by the majority of safety measures. Their feedback confirms the role of COVID-safety in the recovery process.

The largest proportion of audiences said they would be encouraged by requiring check-ins upon arrival (87%, stable with October), as shown in Figure 7.

The next most widely encouraging COVID-safety measure was proof of vaccination required at entry (85%, stable with 87% in October).

In spite of the debate surrounding vaccine passports, only 8% of audiences say this measure would discourage them from attending – a positive sign considering VIC’s plan to operate as a ‘vaccinated economy’ for the foreseeable future.

Figure 7: How much would each of the following steps discourage or encourage you to attend? VIC audiences, November 2021 (n=2,136)



VIC audiences are mostly in favour of mask mandates and density limits, and recent changes to rules may make some audiences apprehensive

Significant proportions of VIC audiences feel encouraged by mandating face masks for people aged 12 and over (74%, stable with 73% in October), while 1 in 10 (13%) would be discouraged.

Similarly, 65% say they feel encouraged by limiting capacity based on 2 square metres per person, and another 27% feel neutral.

Shortly after data collection, VIC removed mask requirements and capacity limits at most indoor venues on 18 November – a change which is likely to make some audiences apprehensive.

When asked about what measures absolutely need to be in place for them to attend a large theatre or concert hall, over half of VIC audiences say the requirement to wear a mask (57%). Another 25% would need mask mandates to be in place to attend an outdoor event, and the removal of this requirement could present a challenge to confidence levels to VIC audiences.

One VIC audience member said,

‘I’m so used to masks & checking in now that it’d feel weird without it.’

Another said,

‘I think face masks with dense audiences is a safety precaution that should be around for a little while longer, although I am double vaxxed I would still want to wear a mask and QR check in as a precaution.’

Similarly, 41% of audiences say they would need 2sqm capacity limits in place to attend an indoor event, and 39% say they would need this capacity limit to attend an outdoor event.

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

While the majority of VIC audiences would feel encouraged by mask mandates for people aged 12 and over – with some even considering the removal of mask mandates a ‘dealbreaker’ for attendance – when enforced for all children, audiences are polarised.

Almost half of VIC audiences (45%) are encouraged by masks for all ages and 1 in 5 (22%) would find them discouraging – the largest proportion discouraged by any COVID-safety measure. 3 in 10 (32%) feel neutral about this measure.

The proportion encouraged by this measure has decreased slightly since October (53% encouraged).

VIC parents were, understandably, the most likely to take issue with this measure, with 35% saying it would discourage them from attending.

8 in 10 VIC 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 VIC audiences named proof of vaccination (78%) and check-ins (78%), as shown in Figure 8.



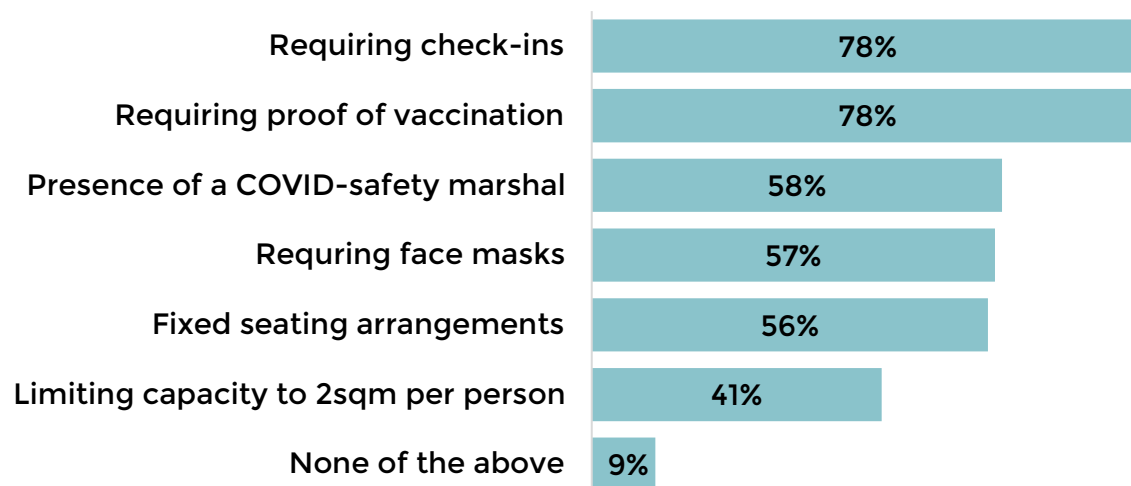
One audience member said,

‘I feel mostly comfortable as a person who is double vaxxed – my biggest concern is that those who are unvaccinated may transmit the virus and cause vaccine breakthroughs/infections to those in attendance of events. With that in mind, I cannot feel comfortable with any business/event/anything unless it requires mandatory vax status of everyone working and attending.’

Slightly smaller – though still significant – proportions of VIC audiences will rely on the presence of a COVID-safety marshal (58%) and fixed seating requirements (57%). One audience member said,

‘Marshalls absolutely essential, also clear rules – this means they can be enforced properly and it is not personal.’

Figure 8: 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=2,161)



Only 9% of VIC audiences would be willing to attend without any safety measures in place – demonstrating the important role of COVID-safety in the transition to ‘COVID-normal’. This proportion was similar to that of audiences in NSW and the ACT, but much lower than parts of the country that have not been affected by prolonged outbreaks, such as WA (31%).

VIC audiences are more comfortable at outdoor venues, but proof of vaccination is still equally important

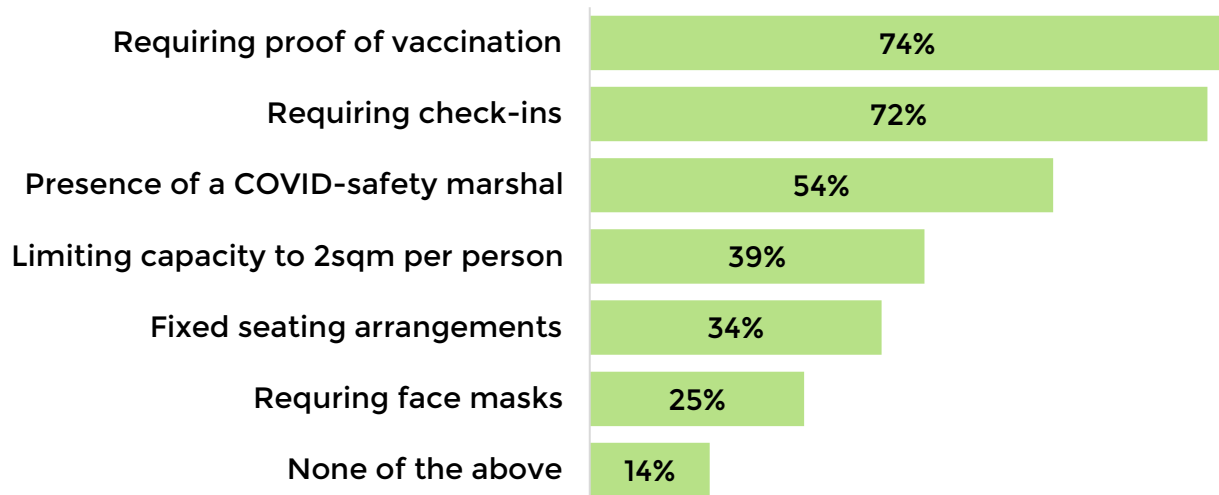
Proof of vaccination is almost equally important at outdoor events, with 74% of VIC audiences saying they wouldn't attend without this measure. One audience member said,

'Unseated outdoor events can be a bit raucous in my experience, so I would only feel comfortable if it wasn't too crowded and I could be relatively confident that the people surrounding me are vaccinated.'

Similarly, the majority of audiences still say check-ins (72%) absolutely need to be in place at outdoor events.

However, 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 capacity limits (39%), fixed seating arrangements (34%) and masks (25%).

Figure 9: 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=2,001)



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 VIC audience member said,

'I feel safe outside in the fresh air but believe stricter measures should be in place indoors.'

For particularly vulnerable or risk-averse audiences, outdoor venues may be a priority as the transition to COVID-normal takes place, with one saying,

‘I need to be very careful due a chronic lung disease. If I was to contract COVID it would probably be fatal. We attended the ‘Sounds Better Together’ at Rockford Winery and the set up was great. It was pleasant having space. People could stand up, dance etc, without impacting those behind them!’

Some VIC audiences see rapid testing as an additional or alternative measure to proof of vaccination

Qualitative data suggests that audiences are starting to see rapid antigen testing as an important addition to COVID-safety measures like vaccine passports. One VIC audience member says,

‘Providing everyone is vaccinated & checked at door I would feel moderately comfortable, more so if rapid test checks were carried out as I have heart problems.’

Another says,

‘Infection numbers would need to be lower, and depending on crowd size rapid antigen testing would help me feel more comfortable attending.’

Furthermore, although the proportion of VIC audiences who would be discouraged by proof of vaccination requirements is small (8%), some of them have suggested that, in time, proof of a negative test result could be a way of ‘splitting the difference’ and allowing unvaccinated patrons to attend. One VIC audience member said,

‘Vaccinated people can acquire and pass on the virus. Instead, there should be rapid testing or a covid test within 48-72 hrs. I’m not comfortable with the vaccinated economy.’

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 VIC audience members say they'll be attracted to events in their local area in the next 12 months – with 'local loyalty' on the rise

When asked to what extent audiences would be attracted to events in their local area in the next 12 months, 8 in 10 (81%) of VIC audience members agreed that they would be looking local – while only 3% disagreed.

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 VIC audience member stating,

'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 VIC audience member saying,

'I have a bigger desire to support local after these challenging times.'

Others say that local events feel 'safer' – from both the risks of virus transmission, and complications arising from cancellation. One said,

'I'm not feeling overly comfortable with the idea of travel so keeping things local would be important.'

Another said,

'I live in Geelong. I'm going to be more mindful about going to Melbourne for a while; it will have to be an awesome event to make it worth the risk. Getting COVID means those living with me would have to isolate, which has an economic impact.'

Some VIC 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, VIC audiences said they were interested in seeing the same kinds of events they used to attend, pre-pandemic (89%, stable with 91% in July).

Almost half of VIC audiences say they will prefer ‘light-hearted programs’ (47%), with this proportion steadily increasing since last year (21% in May, compared to 37% in July 2021). In fact, VIC audiences were the most likely in the country to say they would be attracted to these kinds of works, suggesting that the cumulative impacts of extended lockdowns have left them seeking escapism and uplift. One said,

‘Being able to attend pre-covid events would be an important milestone psychologically. Light-hearted is important to lift spirits.’

Another said,

‘I have a tendency to enjoy "heavy" brave entertainment! But the pandemic has given even me an overload of opportunity for soul searching and existential angst! I'm looking for light hearted for the moment, thanks! I think that's partly why we binged at the Comedy festival.’

The proportion of VIC audiences likely to seek ‘works that make sense of the pandemic’ remains low (15%, up from 10% in July), with 42% 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:

‘No need to remind us of the situation... no need to make sense of the pandemic.’

Other VIC audience members said they felt these works should be positioned strategically, perhaps at a later date, 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.’

And another said,

‘I think the art we create now needs to be responsive to the past 2 years of upheaval. Whether the response is to be more light-hearted, or to delve deep into the changes that have occurred, as long as it responds to what audiences need now.’

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 4 in 10 VIC audiences wanting to keep supporting artists

When asked whether they were going to purchase a subscription or membership in 2022, 4 in 10 (39%) of VIC audiences said they were likely to, pointing to an opportunity area for further investigation.

Audiences mentioned wanting to support arts organisations and performers – with some suggesting they trust in organisations to compensate them fairly if things don't go to plan. 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.'

However, around the same number (42%) of VIC 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 waiting for the uncertainty of the present to clear. 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.'

Another said,

'I'm worried I'll buy something and the money will go to waste as we will go into lockdown again.'

Over the course of the pandemic, the proportion of VIC 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 (34%), compared to the 2020 season (44%).

Around 1 in 5 (18%) VIC 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

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

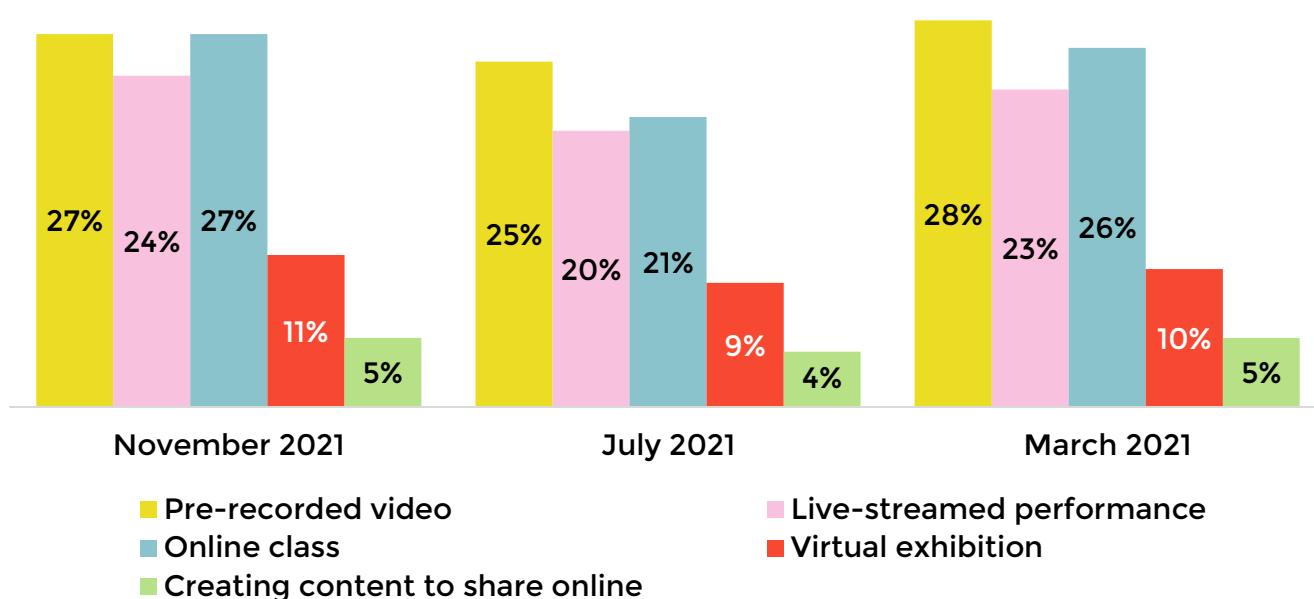
In the first half of 2021, participation in online arts and cultural activities trended downwards after an early pandemic ‘boom’ in 2020 – with many audience members reporting ‘screen fatigue’ and an eagerness to return to regular, in-person attendance.

In light of extended lockdowns in VIC, November saw an uptick in online participation, with 52% of audiences (up from 47% in July) participating in an arts or cultural activity in the fortnight before data collection.

Specifically, the proportion participating in online courses has increased since July 2021 (27%, up from 21%). Participation in other activities is consistent or slightly higher, such as watching pre-recorded video (27%, stable with 25%), watching live streams (24%, up from 20%), attending virtual exhibitions (11%, stable with 9%) and creating content to share online (5%, stable with 4%).

Audiences in outbreak-affected states, such as VIC, NSW (55%) and ACT (51%) are the most likely to engage with digital programming nationally, particularly during prolonged outbreaks where in-person attendance is limited.

Figure 10: During the past fortnight, have you participated in any of the following online or digital arts & culture experiences? (select all that apply). VIC audiences, November 2021 (n=2,136)



Furthermore, in November, 40% of VIC audiences participating in online arts and culture paid for an experience, increasing from 37% in July 2021. Audiences were most likely to purchase a single, pay-per-view experience (22%) or make a donation for something seen online (16%).

Donating was more common among VIC and other outbreak-affected audiences, suggesting that a shared sense of hardship may have made them more inclined to donate in support. One VIC audience member said,

‘I hate how much the arts industry has suffered so I like to support them online if I can.’

A third of VIC 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.

VIC audiences were more likely to say they were interested in attending a digital alternative (35%), along with audiences in outbreak-affected states like NSW (38%) and the ACT (38%). Audiences in the rest of the country, such as those in WA (30%) and SA (28%), were less likely.

Those who were likely to seek out digital alternatives suggested that they could be a way to avoid disappointment in the event of cancellations. One VIC audience member said,

‘Even seeing an online event does give you a similar feeling of at least seeing the show, even though you are at home.’

These audience members tended to agree that digital options were preferable to missing out altogether, saying,

‘In person events are best – however we are very fortunate to have back-ups with virtual events – so can't complain!’

Some audiences want digital alternatives to be as close to in-person experiences as possible, while others are interested in hybrid experiences

Some audience members say they would want any digital alternative to be as close to the live experience as possible, with one commenting,

‘Would depend on the event. If you could stream it to the cinema very likely, otherwise unlikely. The experience of the event is as important to me as the content.’

While others advocate for hybrid models, saying they would appreciate the flexibility of a digital option. One said,

‘I would love if digital versions were available for all shows – in case I miss something, can't make it for some other reason. I also think it's great to make work accessible for people who can't get to a theatre for any number of reasons.’

Another said,

‘Online also helped to see events and performances which otherwise would only be available to in-person attendees. I hope the ability to see livestreams or recorded performances will stay regardless. It allows me to connect with the artists and helps me learn from them too.’

A greater proportion of VIC audiences see an ongoing role for digital in their lives – and digital spending has increased slightly

Overall, the proportion of VIC 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 VIC audiences now see a ‘substantial role’ for digital arts experiences in their lives (25%, up from 12% in July 2021), or even a ‘small role’ (51%, up from 44%). The proportion who see ‘no role’ declined between July and November (24%, down from 44%).

Some VIC 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.

One said,

'I attended lots of online events during lockdown and I hope to continue to do so because it makes the arts more accessible to me (particularly having a young family). I've been able to watch international performances that I otherwise would not have access to.'

Another said,



'I have been subscribing to & watching more classical music digitally than I could have ever attended in person! Being very short sighted the pleasure of good camera work observing musicians closely has been immense! Without that experience, which will continue irrespective of live performances, the last 18 months would have been very difficult.'

Marketing of digital experiences can be targeted to three groups




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

- ▶ **Digital devotees** are the 25% of VIC audiences who see a 'substantial role' for digital experiences in their lives. They can be expected to show deeper and more dedicated engagement. 7 in 10 (68%) 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 (52%) are paying for online experiences and 41% of those spent more than \$50 in the past fortnight.
- ▶ **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 51% 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. Just over half (54% in November 2021) participated in the fortnight before data collection, while around 36% of those paid to access online content.

Table 1: Key segments for digital audiences, VIC audiences (n=2,094)

	Digital devotees 	Supportive but selective 	Tired of tech 
Proportion of audiences	25%	51%	24%
When live attendance is possible, the role of digital in their lives is...	Substantial	Small	None
Online participation rate	68%	54%	23%
Live stream participation	36%	25%	6%
Most interested in	Quality, high-production digital programming	Hybrid events	Live performance
Spending behaviours	52% online are paying for experiences	36% online are paying for experiences	22% online are paying for experiences
Demographic features	<ul style="list-style-type: none"> • More likely to be in an outbreak-affected state • More likely to have a disability (8%) 	<ul style="list-style-type: none"> • More likely to be a parent (23%) 	<ul style="list-style-type: none"> • More likely to live in a regional/remote area (44%)



	Digital devotees 	Supportive but selective 	Tired of tech 
Proportion of audiences	25%	51%	24%
	<ul style="list-style-type: none"> • More likely to earn income performing art (24%) 		
Other arts behaviours	<ul style="list-style-type: none"> • More likely to attend a digital alternative to a cancelled event (50%) • Typically attend performing arts very frequently (85% attend once a month or more) • Most likely to be donors to arts organisations (48%) 	<ul style="list-style-type: none"> • Typically attend performing arts frequently (68% attend once a month or more) 	<ul style="list-style-type: none"> • Most unlikely to attend a digital alternative to a cancelled event (75% unlikely) • Least likely to be donors to arts organisations (23%) • Typically attend performing arts less frequently (36% attend a couple of times per year or less)

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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