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Audience Outlook Monitor

Live Attendance Update

August 2022

Australian Government

Australia Council for the Arts

Live Attendance Outlook

Market activity is increasing, but audiences continue to behave differently when it comes to attending events

2,262
arts attendees shared their recent activity, attitudes and plans to attend cultural events

3 in 4
audiences are attending in-person arts events right now, up from 7 in 10 in March 2022

38%
spent $100+ on tickets in the past fortnight, the highest level since the pandemic began

43%
of those making plans are booking events scheduled for later this month

Key barriers

46%
say the risk of transmission still prevents them attending as they did pre-pandemic

+7%
increase in the proportion citing financial barriers, as the cost of living rises

2x
Under 35s are almost twice as likely to report financial barriers, compared to older audiences

1 in 2
of those over 65 won't attend large theatres if masks aren't mandatory

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Key findings: August 2022

Market activity is increasing, but audiences continue to behave differently when it comes to attending events

- Two-thirds of audiences say they are now ready to attend 'whenever permitted' (65%, up from 59% in March 2022), and despite high case numbers say they are eager to get on with life under 'COVID-normal' conditions.
- A greater proportion say they attended a cultural event of some kind in the fortnight before data collection (76%, up from 70% in March), with the highest proportions attending live performances (49%), cinemas (32%) and museums/galleries (29%).
- A range of factors influence attendance decisions – and uncertainty continues to lead people to buy tickets for events scheduled within seven days (26%) or later this month (43%).
- Almost half (46%) say the risk of transmission will inhibit their attendance in the next 12 months, just below the level seen in March 2022 (52%), confirming that COVID is still a factor to contend with.
- Around one-quarter (24%) say that financial reasons have come into play, which is up from 17% in March 2022, and people under 35 appear to be the most affected (47%).
- Only one in five (22%) say their attendance won't be inhibited in any way in the next 12 months, which offers guidance for forecasting demand this year and next.

Audiences are divided on matters of safety – and masks have regained popularity in some segments

- Although many audiences want to move on from COVID-19 and regain a sense of normalcy, it is clear that the virus continues to play into decision-making for many – either some, or all of the time.
- One-third (33%, down from 38% in March) of audiences say their general risk tolerance is low. They'll only attend when they're reasonably confident the risks of transmission are minimal.
- A further 18% of people have mixed views: they say they're generally happy to attend whenever permitted, but that the risk of transmission will likely inhibit their attendance in some ways over the next 12 months.
- Qualitative data shows that some people are limiting their activity in anticipation of key events or travel plans, which may mean they de-prioritise arts attendance.
- 43% of audiences are now happy to attend large theatres/concert halls without any safety measures in place. Some are comfortable with the level of risk associated with 'COVID-normal', while others have accepted that further mandates are unlikely and are managing their own safety through masking and distancing.
- Older audiences are more likely to need reassurance, and 54% of audiences aged 65 and over say they won't attend large theatres/concert halls unless masks are required. It's worth considering if varying protocols by event (for example, offering a 'masked matinee') could help offer a way for cautious audiences to stay connected, without alienating others.

Understanding audience priorities in the post-COVID landscape can help position events

- Although there are positive signs, the situation is complex and there are a range of broader factors playing into attendance decisions.
- There is a need for the sector to adapt to suit the conditions, as dramatic changes from this position now appear unlikely. From programming, to marketing, to venue management – there is a need for bold strategic planning and remodelling.
- The market is crowded and the wide range of activities and events now available to audiences means that competition for audience time and attention is fierce. The need for targeted marketing continues to grow in importance – as different segments are behaving very differently.
- Many people continue to prioritise social events, key milestone celebrations that might have been postponed, and travelling to visit friends and family.
- Appetite to travel for cultural events has not changed significantly since March, which suggests that the recovery of cultural tourism remains a long-term proposition.
- Patternmakers' Visions for Culture research shows that audiences see a role for the arts to help the community heal, transform and remodel – and as the country moves into its 'COVID-normal', there will be a role for leadership and creative solutions from the sector.
- Stay tuned for Phase 8 for a deeper dive into the role that lifestyle, cost of living, competing priorities and cultural tourism are playing in attendance decisions.

Introduction

This August 2022 report shares insights from over 2,200 past attendees of cultural events

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

The 'pulse check' survey is a short, targeted questionnaire developed between the March 2022, Phase 7, and the upcoming October 2022, Phase 8, of the Audience Outlook Monitor. It is designed to 'take the temperature' of audiences in response to recent changes in case numbers, lifestyles, economic outlook and acceptance of COVID-19 and other risks.

On 10 August 2022, Patternmakers sent the 'pulse check' survey to 12,500 past respondents from previous phases of the study, who opted-in to be contacted about future research on this topic. The survey closed on 14 August 2022.

Over 2,200 audience members responded (2,262), from all over Australia: New South Wales (NSW; n=658), Victoria (VIC; n=674), Queensland (QLD; n=318), South Australia (SA; n=261), Western Australia (WA; n=214) and the Australian Capital Territory (ACT; n=115). A small number of responses were collected from audiences in Tasmania (TAS; n=16) and the Northern Territory (NT; n=6). These are included in national averages but not reported separately.

This report compares the new results with data collected previously in July 2021 (Phase 5), November 2021 (Phase 6) and March 2022 (Phase 7), to examine how things are changing over time.

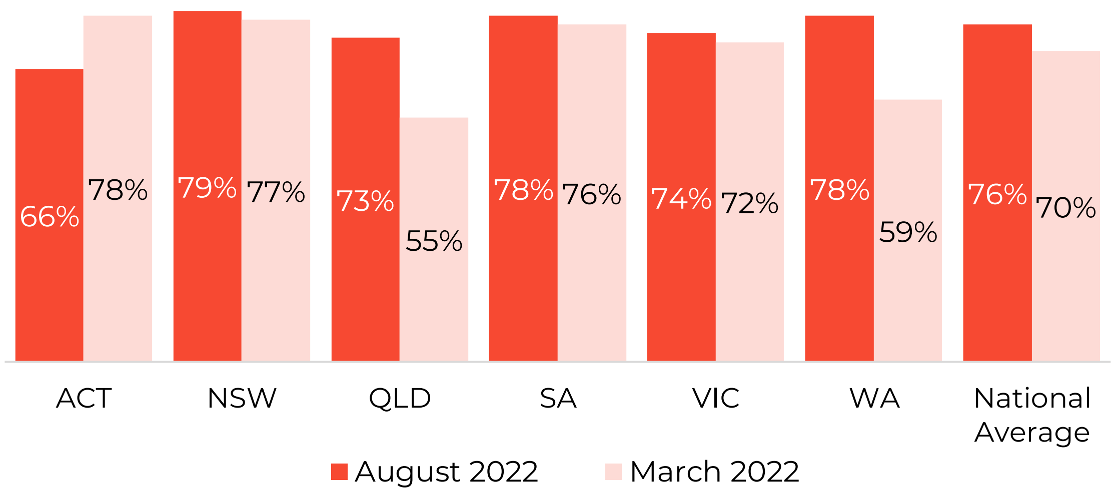
Phase 8 reporting will be available in late October 2022, where we will probe behaviours and attitudes around the 'post-COVID lifestyle' in greater detail. Read on for the key August 2022 'pulse check' findings.

Attendance outlook

In the new 'COVID-normal', three-quarters are attending the arts – but audiences have competing priorities

In August, three quarters (76%) of audiences attended a cultural activity in the fortnight before data collection (10-14 August 2022) – the highest rate of participation seen since the study began. The largest proportions attended a live performance (49%), a cinema (32%) or museum/gallery (29%) – all have increased since March 2022.

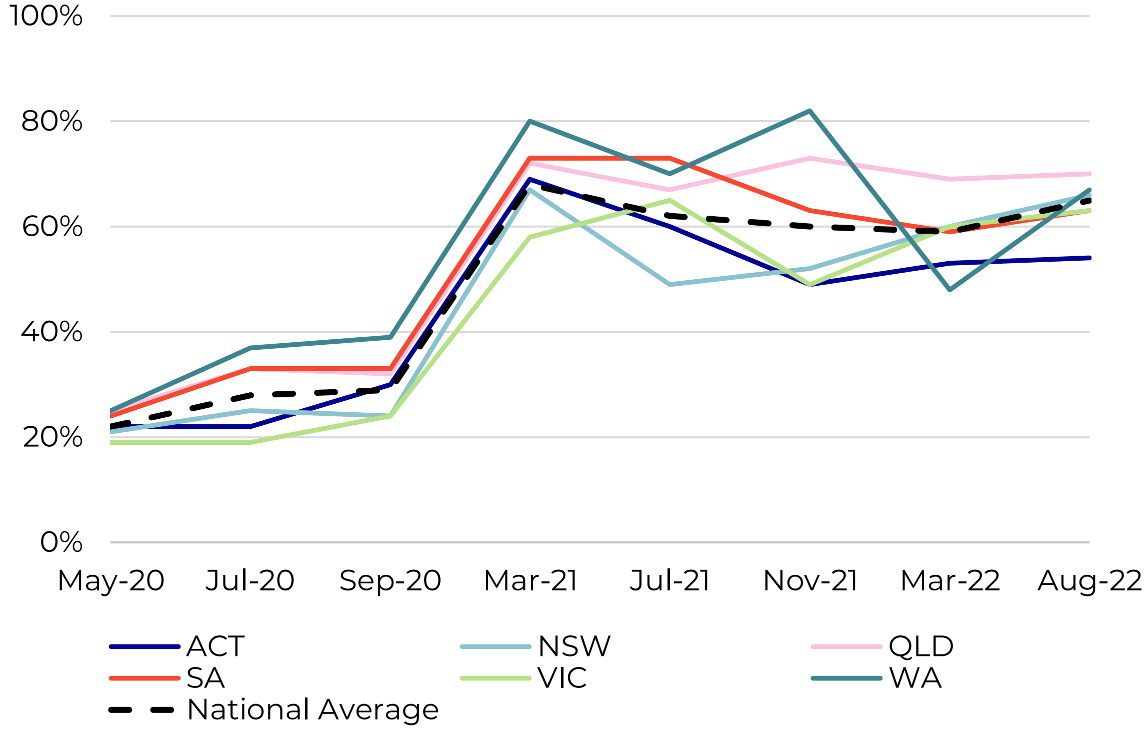
Figure 1: Proportion of respondents attending an arts or cultural event in the fortnight before data collection, August 2022 (n=2,262) and March 2022 (n=8,353), by state/territory.



Audiences are also feeling more confident, and two-thirds (65%) say they are 'ready to attend', up from 59% in March 2022. This is the highest rate seen since March 2021 (68%). Another 33% (down from 38% in March) are risk-averse and will attend 'when reasonably confident that the risk is minimal'.

As shown in Figure 2, the exception to this trend is the ACT – where only half of audiences are 'ready to attend' (54%, stable with 53% in March), and the proportion attending has decreased since March (66%, down from 78%). Throughout the study, ACT audiences have been some of the more risk-averse – and were likely influenced by high case numbers at the time of data collection.

Figure 2: Proportion of audiences who are 'ready to attend now or as soon as permitted', by state/territory, May 2020 to August 2022 (n=2,262).



However, the proportion attending is not the same as measuring the volume of attendances, and the situation is complex. Confidence is no longer the only limiting factor when it comes to arts attendance.

Right now, audiences are making trade-offs between other priorities and the cost and risk of attending

In the 'COVID-normal' world, arts and cultural activities have to contend with a number of competing priorities for audiences: including social obligations, family responsibilities, the possibility of interstate and overseas travel, and the rising cost of living.

Although the majority of audience members view the current level of COVID-risk when attending as acceptable, their risk perceptions may change when other priorities enter the picture. Audiences mention restricting their activity when anticipating important events like weddings and family gatherings, major work commitments, or plans to travel.

One audience member says,

> 'I think it would be dependent on my own situation – how much risk do I want to put myself in, at whatever time the event is on, e.g. in the two(ish) weeks following, can I afford to be sick/not see friends/take leave from work?'

Another says,

> 'Risk of contracting COVID-19 when I have a specific event approaching; I.e. travel, work trip, weddings, etc, then I would refrain from high risk venues for approximately 10 days before the important upcoming event.'

We're also seeing audiences make lifestyle changes that can have flow-on effects for arts participation. Many people are adopting hybrid work patterns, and it's increasingly popular to work from home on Mondays and Fridays.

One audience member says,

> 'I love and miss the arts. But honestly, post-COVID I do much less. I go out to less shows, I work from home. Not only that, I turned 30. The ticket prices for over 30's to the theatre is awful and I doubt I'll got to another big theatre show because of it.'

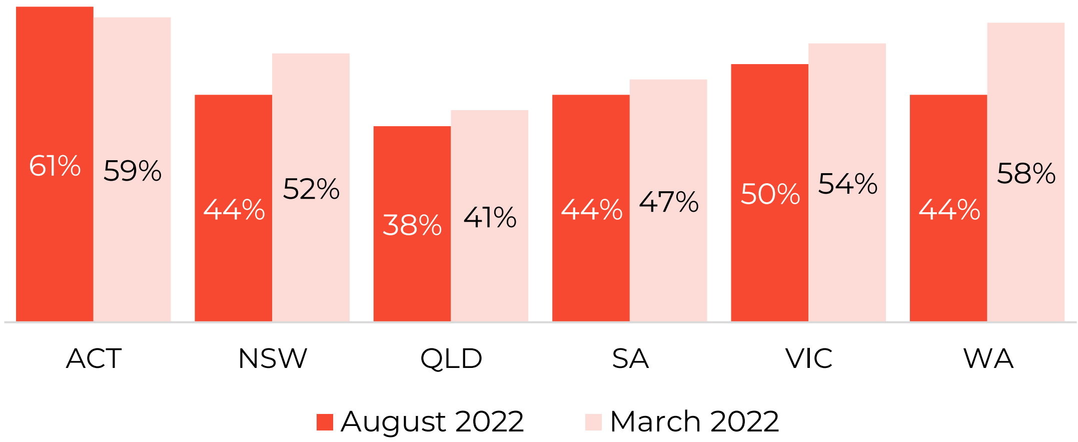
When asked if anything was preventing them from attending events as they used to, half of audiences said the risk of transmission

In August 2022, audiences were once again asked, 'thinking about the next 12 months, can you tell us if anything is preventing you from attending in-person arts and culture events as you used to in the past?'

Consistent with March 2022, the primary barrier to attendance is the risk of contracting or transmitting the virus (46%, down from 52%). Audiences are less likely to worry about the risk of becoming a close contact (26%, down from 43% in March), with isolation rules for close contacts relaxed since March.

Audiences in the ACT were particularly conscious of the risk of transmission (61%), with audiences in QLD less so (38%).

Figure 3: Proportion of audiences by state/territory who say 'the risk of contracting/transmitting the virus' will prevent them from attending as they used to in the past, August 2022 (n=2,256) and March 2022 (n=8,352).



Compared to 2021, audiences this year are less likely to say, 'there are not as many options available' (8% in August, down from 33% in July last year), or that 'events are booking out too quickly' (8%, down from 15% in July). In fact, the arts and culture market appears to be saturated right now, and competition is fierce. One audience member said,

> 'I'm much more choosy now.'

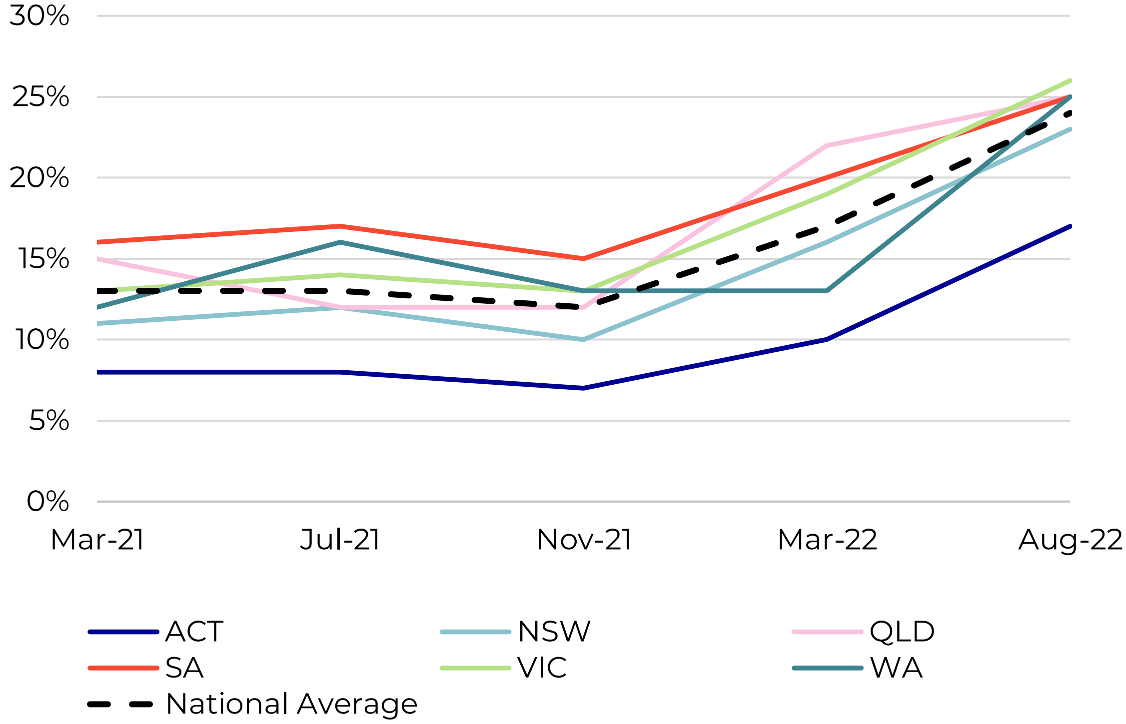
One in five (22%) say their attendance won't be inhibited in any way in the next year.

Spending

The proportion of audiences facing financial limitations has increased

With the cost of living on the rise, the proportion of arts audiences facing financial limitations to attending has increased to 24% (up from 17% in March 2022) as shown in Figure 4 – and is now the highest it has been since this survey question was introduced (13% in March 2021).

Figure 4: Proportion of audiences by state/territory who say 'financial barriers' will prevent them from attending as they used to in the past, March 2021 to August 2022 (n=2,256).



Audiences say that rising ticket prices and cost of living concerns are playing into their attendance decisions, with one saying,

> 'Ticket costs for performances seem to have risen significantly post-lockdown and, combined with rising costs of living, I do not foresee myself attending events as frequently as I did pre-COVID.'

Another says,

> 'With everything going up in price, attending cultural / arts things goes down the list. Weekly expenses are getting higher and higher, which leaves less for non-essentials.'

And another says,

> 'Increased cost of living has meant less money available to spend on events.'

Cost of living was particularly likely to be an issue for younger audiences – with 45% of those aged under 35 and 39% of those aged 35 to 54 saying they face this barrier to attendance.

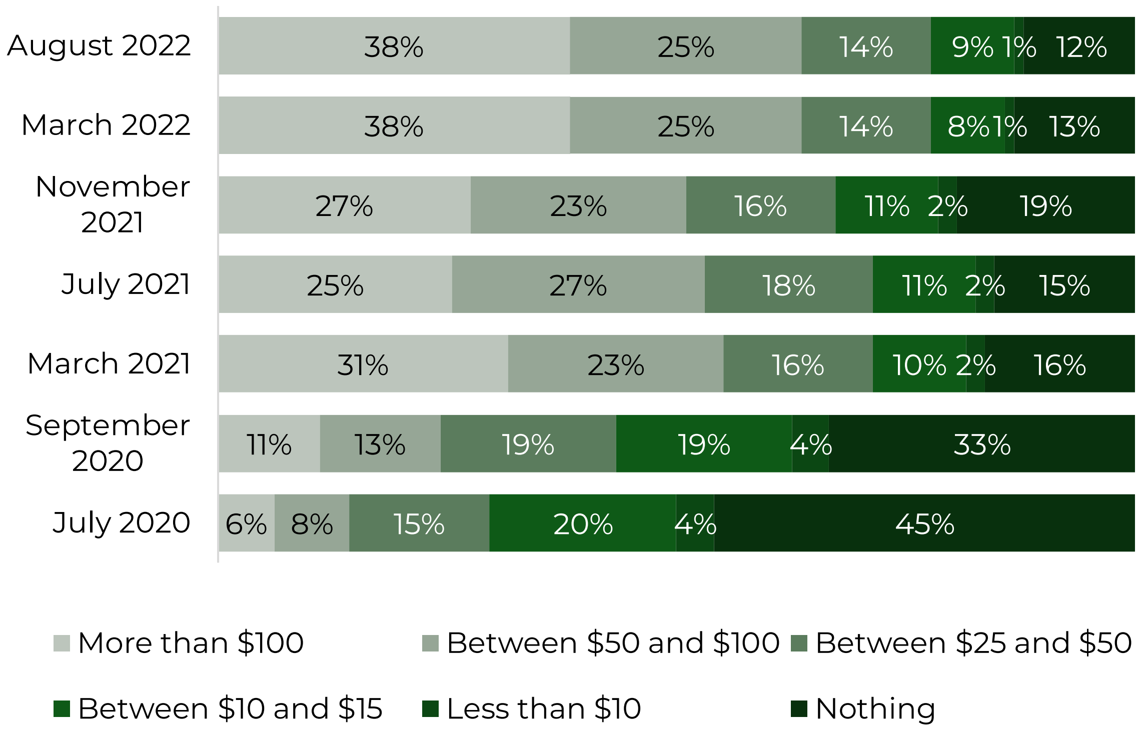
4 in 10 audience members are spending more than $100 on cultural events – but some attribute this to rising ticket prices

Among those attending live arts and cultural events, spending continues to be the highest it's been since the start of the study (with trends from March 2022 holding stable). 4 in 10 (38%) are spending more than $100 (consistent with March 2022), and 25% are spending between $50 and $100 (also consistent with March).

Spending was slightly lower in states/territories such as the ACT (24% spending over $100) and WA (30% spending over $100) – and highest in NSW (43% spending over $100) and QLD (40% spending over $100).

Figure 5: In the past fortnight, how much did you spend on tickets to in-person live events and cultural activities?

August 2022 (n=1,708), March 2022 (n=5,797), November 2021 (n=3,686), July 2021 (n=4,131), March 2021 (n=9,830), September 2020 (n=3,571) and July 2020 (n=3,779).



While high spending levels are a positive sign for the sector's economic recovery, it's worth noting that some audience members say they're spending more because tickets are more costly, not because they're buying more. One says,

> 'Tickets do seem to be quite a bit more expensive, which reduces the amount of shows I can afford to go to.'

Another says, 'Prices are now ridiculously high!'

Making plans

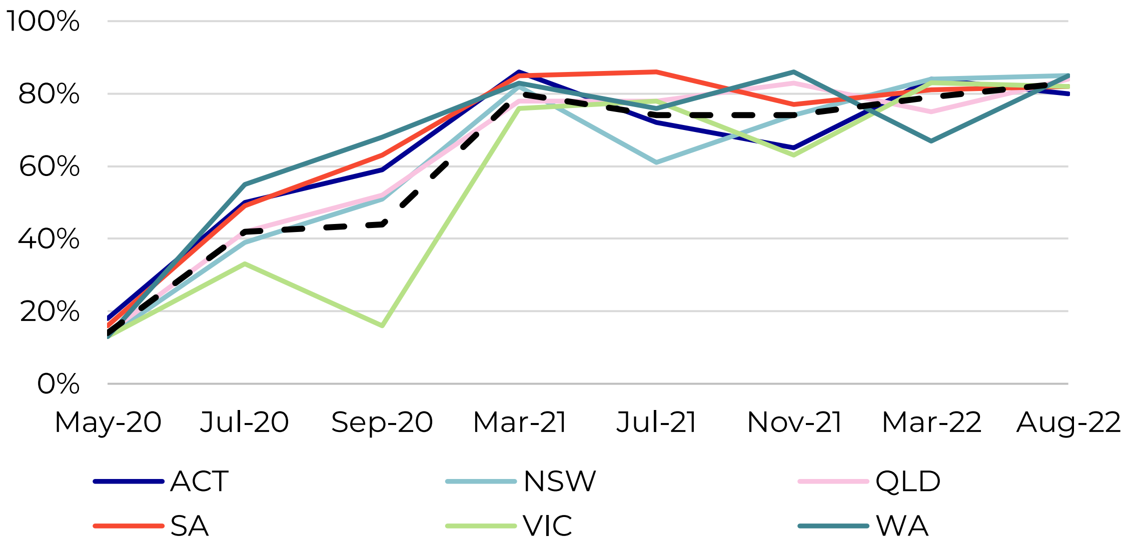
8 in 10 audience members are making plans, and they appear increasingly accepting of the status quo

Most audience members (83%, up from 79% in March) are making plans to attend a cultural activity – the highest rate since the study began, and another promising sign that key indicators are moving in the right direction.

The largest changes were in QLD (84%, up from 75% in March) and WA (85%, up from 67% in March). The outlook is now reasonably consistent across all states/territories, as audiences nationwide become more accepting of the 'COVID-normal'.

Audiences are most likely to be making plans to attend live performances (63%), and or visit a museum or gallery (36%).

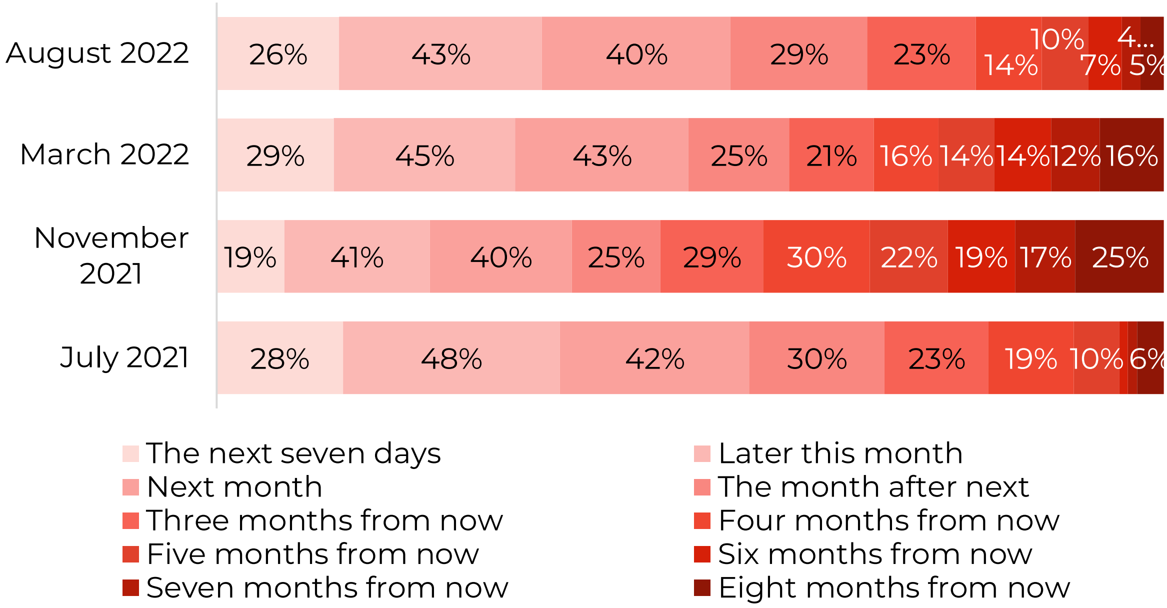
Figure 6: Proportion of audiences who made future plans to attend an arts or cultural activity, May 2020 to August 2022 (n=2,262).



There is a long tail to COVID-uncertainty and audiences continue to make plans for the immediate future

The majority of audiences who are purchasing tickets for future events continue to do so in the short term – with most opting for later in August (43%) and September (40%).

Figure 7: In the past fortnight, did you purchase tickets for one or more live shows or performances that are scheduled for...? August 2022 (n=1,211), March 2022 (n=4,415), November 2021 (n=2,809) and July 2021 (n=3,199).



Although audiences are now more confident about attending events, COVID-19 remains a factor when it comes to forward-planning and making advance commitments. This appears to be compounded by cost-of-living concerns, and the risk of contracting COVID-19 and missing out on a costly event.

One audience member says,

> 'I am still somewhat hesitant to book anything too far in advance, since I can't be sure the event won't be cancelled, or I won't be forced to isolate. This is especially important with the ever-increasing cost of living; potentially wasting any amount of money is becoming more and more of an issue.'

Another says,

> 'It's a worry when buying expensive tickets that they would be useless if I or other ticket holders in our party contracted COVID-19 or were close contacts. I would assume that our tickets would be useless and non-refundable. A loss for us.'

While an audience member with disability says,

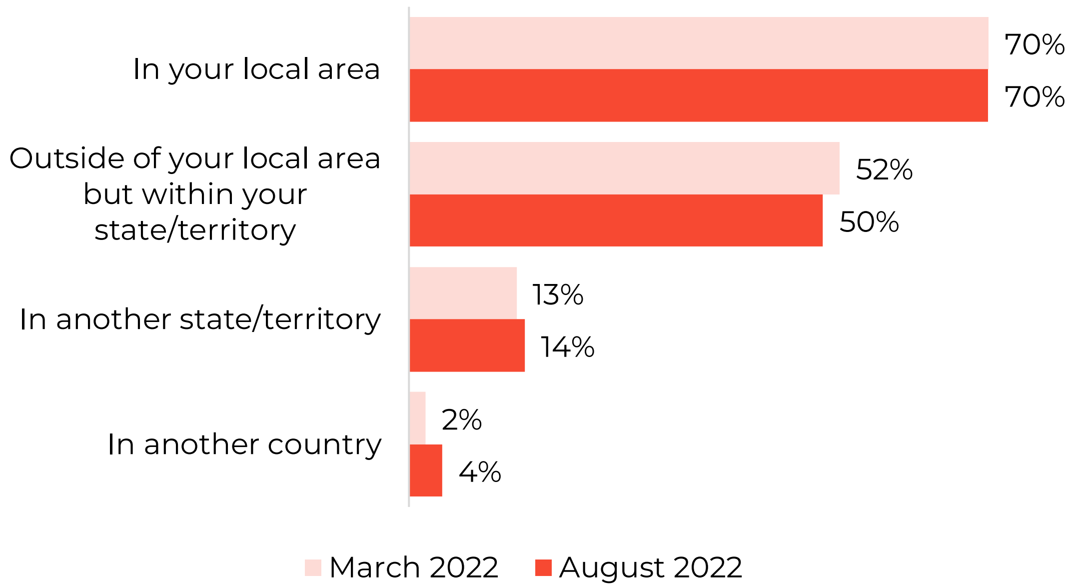
> 'I have a disability and can't always predict if I will be able to attend an event in person, so I'm discouraged from purchasing expensive tickets to live events with no online options or refunds.'

Offering refundable tickets for a small additional fee could be one strategy for providing more certainty for risk-averse ticket-buyers.

Audiences continue to look locally for events, with only 14% of those making plans doing so to attend events interstate

Among those making plans, most people continue to book events in their local area (70%), or intrastate (50%) – consistent with March 2022.

Figure 8: Were those plans for attending a venue or event ... (select multiple). August 2022 (1,880) and March 2022 (n=6,618).



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The proportion booking events interstate has remained stable since March. Audiences seem more likely to be travelling for tourism and/or social reasons, and attending events incidentally, than making advance plans to attend interstate or overseas events.

The impact of cancelled plans continues to deter some audience members, with one saying,

> 'I am hesitant to book for more expensive or interstate events as I'm still chasing up a number of concert and flight refunds, this creates an admin burden for me and I will probably lose some of this money.'

Audiences in the ACT were more likely to make plans interstate (32%), likely to nearby NSW.

COVID-safety

4 in 10 audience members are now happy to attend without COVID-safety measures

In August 2022, audiences were asked, 'which measures would absolutely need to be in place for you to attend an event in a large theatre/concert hall today?'

4 in 10 (43%) responded that they would be happy to attend with no safety measures. Some audience members felt comfortable taking their own precautions in the current 'COVID-normal', as one says,

> 'I'm happy taking personal responsibility for my health and others, and if appropriate wearing a mask.'

Others say COVID-safety is a preference rather than a requisite – or that despite being in favour of these protocols, they understand they're unlikely to be made mandatory again. One says,

> 'I would prefer these things to be in place, but I am reasonably comfortable with going to an event where I expect that most people will be well, vaccinated and masked.'

Another said,

> ‘At this stage, I'm making sure I'm fully masked, and just hoping for the best. Still very anxious, but I'm aware that the industry can't mandate any of these requirements currently.’

Some segments are more likely to take precautions – and mask requirements could be important for some events

Certain segments were more likely to feel strongly about COVID-safety – and, as shown in Figure 9, over half of audiences aged 65+ responding to the survey said they wouldn’t attend a large theatre or concert hall unless mask requirements were in place (54%).

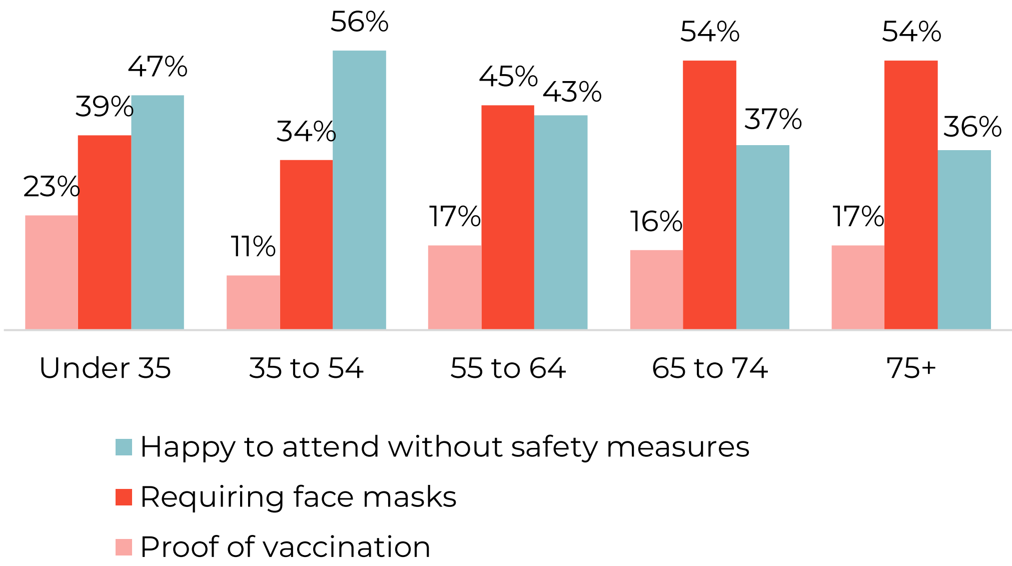
One audience member said,

> ‘There should be mask mandates in enclosed venues - no mask, no entry.’

Another said,

> ‘The evidence is everywhere, that N95 face masks prevent transmission up to 95% or thereabouts. I don't understand why, with the current increase in cases, that face masks are not mandatory with large indoor gatherings.’

Figure 9: Proportion for whom the following measures would 'absolutely need to be in place to attend an event in a large theatre/concert hall', August 2022 (n=2,253).



A significant number of audiences (27%) say they are either themselves vulnerable to a serious health outcome from COVID-19 (13%) or live with someone who is (14%) – and among that group, 6 in 10 say they'd want to see mask requirements in order to attend.

It's worth considering if varying protocols by event (for example, offering a 'masked matinee') could help reassure cautious audiences, and offer ways for the concerned to still attend comfortably, without alienating others.

One audience member said,

> 'I'd love if shows did a 'mandatory mask' performance so I could take elderly and vulnerable people there while decreasing risk of transmission. It would be great if galleries and museums also had 'mask only' mornings or afternoons for the same reason.'

As the ‘new normal’ takes shape, audiences are increasingly accepting of the status quo – and COVID-safety has a different role to play

Overall, audiences seem to be increasingly accepting of the ‘COVID-normal’ – and key indicators like attendance, future-planning and willingness to attend are all moving slowly in the right direction.

At the same time, it’s clear that the sector is in a ‘new normal’ right now – and short-term planning, juggling priorities, and a higher degree of selectivity are all likely to be the norm.

With a crowded market and the cost of living rising it’s clear that the pandemic is going to have a long tail and some changes to people’s lives may be permanent.

In the past, COVID-safety has been a major factor in reassuring audiences and getting feet through doors – but it’s unlikely to play this role now, with almost half of audiences willing to attend without any COVID-safety measures (43%).

There’s still a place for measures like mask requirements at select events and for specific audiences, to ensure that certain segments are not left behind, but overall COVID-safety measures are not going to be the defining thing that rebuilds audiences.

It’s a good time for clear-eyed reviews of our programs and bold strategic planning.

Patternmakers’ Visions for Culture research shows that audiences believe the arts can help the community heal, transform and remodel after the pandemic – and there’s an opportunity for the sector to take up this role as the country moves into its ‘COVID-normal’ phase.

What's next

To read about the story so far, visit the study's Australian homepage at: www.thepatternmakers.com.au/covid-19.

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.

Acknowledgment

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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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