



MARCH 2021

# Australian Capital Territory Snapshot

Audience Outlook Monitor

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



**ACT**  
Government

## Summary

### 3 in 4 ACT audiences recently attended a live event, though some are conscious of complacency

The March 2021 results of the Audience Outlook Monitor show an increase in attendance activity among Australian Capital Territory (ACT) audience members, following months of low virus cases.

Around 3 in 4 (73%) are attending live events and 4 in 5 (85%) are making plans to attend events in the near future, consistent with national trends. ACT audiences are now comfortable attending museums and galleries (99% are at least somewhat comfortable), community art spaces (97%) and large theatres/concert halls (90%).

The most common factor inhibiting attendance by ACT audiences is the risk of cancellations and lockdowns (40%) – and ACT audiences are the least likely to select financial reasons as a barrier to attendance (9%) compared to the national average (13%).

Some people remain cautious about the virus and 27% say it's inhibiting their attendance. Audience comments suggest that people are conscious of times when COVID-safety measures are not properly adhered to or when other audience members are complacent about safety procedures. While case numbers are low in ACT, adherence to and communication of COVID safe policies will help to reassure audiences in the case of an outbreak.

### ACT audiences are among the most likely to be participating online and paying for content

While ACT audiences are participating in online arts and culture activities to a lesser extent compared to September 2020 (49%, down from 70%), they are among the most likely nationally to be engaging online, along with Victoria (VIC) (51%) and New South Wales (NSW) (49%).

The types of activities that ACT audiences are participating in continue to evolve and activities such as online classes and tutorials are now more common, relative to popular activities such as video content of performances and events.

ACT audiences are among the most likely to be paying for digital content (42%) compared to audiences nationally (37%) and the most likely to be motivated to support artists and organisations by participating in digital experiences (37%, compared to the national average of 30%).



Content that features an artist or artistic leader talking about their work (42%, compared to a national average of 38%) is the most appealing to ACT audiences, confirming an opportunity area for further exploration.

## Introduction

### About the ACT sample

This Australian Capital Territory (ACT) Snapshot Report analyses the data from respondents surveyed in March 2021 as part of the Audience Outlook Monitor. It identifies insights from 559 survey respondents connected with ACT-based arts and culture organisations ('audiences of ACT organisations') who typically attract a nationwide audience. This segment of audience members is drawn from the ACT (84%), NSW (13%) and further afield (3%).

This report also highlights the views of 594 respondents who live in ACT themselves ('ACT-based respondents'), many of whom are connected with ACT-based organisations, but some who are audiences of organisations in VIC, NSW and elsewhere. Where the views of these two groups are very similar, an umbrella term of 'ACT audiences' is used, referring to both audiences of ACT organisations and ACT-based respondents.

### About the study

Launched in May 2020, the Audience Outlook Monitor is tracking audience sentiment in relation to the COVID-19 pandemic. Each phase involves a cross-sector collaborative survey process involving 130 arts and culture organisations, including museums, galleries, performing arts organisations and festivals. On 3 March 2021, participating organisations simultaneously sent the Phase 4 survey to a random sample of their audience – defined as those who had attended an arts or cultural event in person since January 2018.

Throughout this report, comparisons have been highlighted between the different state and territory results. Note that the Northern Territory (NT) and Tasmania (TAS) samples in this study fall below 100 respondents, and this data has been marked with an asterisk (\*) within graphs to indicate that the results should be interpreted with caution.

In addition to this report, the March 2021 results are freely accessible in an interactive dashboard. Users can explore the data for all 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](http://www.thepatternmakers.com.au/covid19). Read on for the key March 2021 findings relevant to the ACT.

## Current conditions

### Comfort with public activities is growing — though ACT audiences are more cautious than some other states/territories

As many restrictions have eased after low rates of community transmission since September 2020, ACT audiences are showing increased levels of confidence when interacting publicly.

Compared to September 2020, the proportion of audiences of ACT organisations who now feel comfortable doing a range of activities has increased, including eating at a local restaurant (98%, up from 87%), using public transport (86%, up from 61%) and exercising at a gym or fitness studio (73%, up from 45%) – trends which are also evident among ACT-based respondents.

Overall, ACT audiences are most similar in their comfort levels to those in VIC, NSW and TAS. By comparison, audiences in Western Australia (WA), South Australia (SA), Queensland (QLD) and the NT are generally more confident interacting publicly.

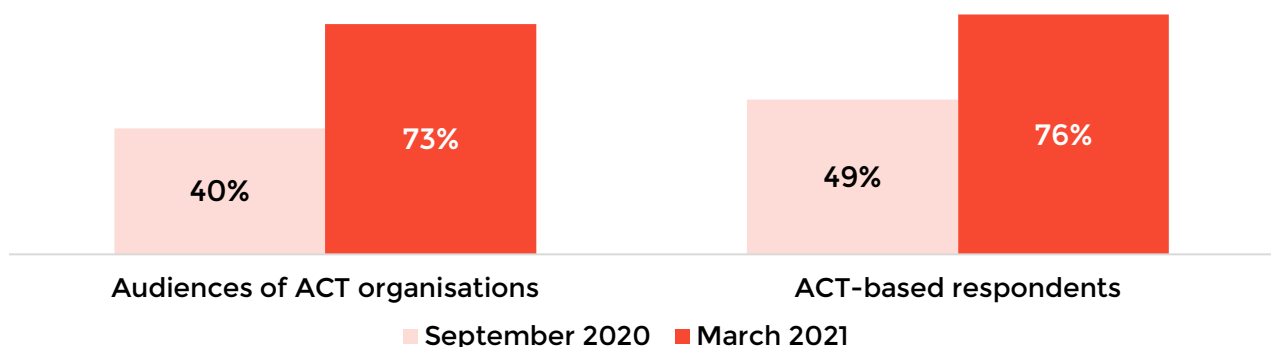
## Attending cultural events

### 3 in 4 ACT audience members are now attending live events

Attendance at live arts and cultural events is increasing among ACT audiences, as venues and facilities continue to reopen in accordance with COVID-safe regulations.

In March 2021, around 3 in 4 (73%, up from 40%) audiences of ACT organisations and 76% (up from 49%) of ACT-based respondents attended a cultural activity in-person within the fortnight before data collection.

Figure 1: In the past fortnight, did you do a cultural activity in-person (not online)? Audiences of ACT organisations (n=559) and ACT-based respondents (n=594) (March 2021)





Audiences of ACT organisations (73%) are attending events at a higher rate than VIC (62%) and QLD (69%) – though not to the extent of areas with lower levels of community transmission, such as WA (77%) and SA (79%).

Figure 2: In the past fortnight, did you do a cultural activity in-person (not online)? (By audiences of state/territory-based organisations) n=13,836



## 4 in 5 are making plans to attend in future — consistent with the national average

Consistent with national trends, the proportion who are making plans to attend events is increasing among ACT audiences. In the two weeks before data collection (3–7 March), 85% of audiences of ACT organisations and 86% of ACT-based respondents said they made firm plans to attend an event in future.

The largest proportions of audiences of ACT organisations made plans to attend a live performance (50%) or a museum or gallery (49%). Many also made plans to attend a cinema (38%), while smaller proportions planned to attend a fair or festival (27%), or a lecture, artist talk or workshop (21%).

Similarly, around half of ACT-based respondents recently made plans to attend a performance (53%) or a museum or gallery (49%). Slightly fewer made plans to attend a cinema (39%), a fair or festival (27%) or a lecture, artist talk or workshop (20%).

## The majority of ACT audiences are purchasing tickets for events in the month ahead

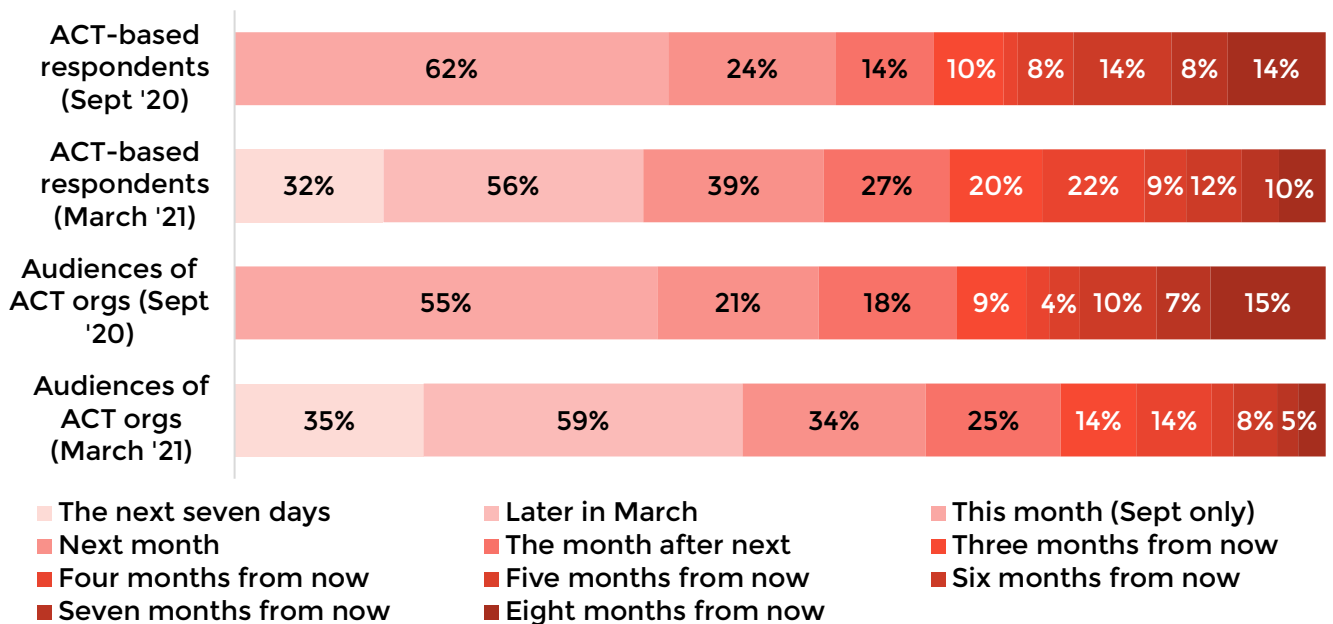
At the time of data collection (3–7 March), the greatest proportion of ACT audiences reported having purchased tickets for events in the month ahead. Among audiences of ACT organisations, most purchased tickets for events within the seven days after data collection (35%) or later in March (59%). Many also purchased tickets for events held in April (34%).



Similarly, the largest proportion of ACT-based respondents purchased tickets for events in the seven days after data collection (32%) or later in March (56%) – with many purchasing for events in April (39%).

These trends align with the ACT’s program of festivals that occurred in the lead up to data collection, such as Enlighten Festival.

Figure 3: In the past fortnight, did you purchase tickets for one or more live shows or performances that are scheduled for...? (select multiple) audiences of ACT organisations (n=182) and ACT-based respondents (n=209) (March 2021)



## For 1 in 3 audience members, concerns about virus transmission continue to inhibit attendance

While health risks and financial barriers continue to play a part in audience decision-making, these pressures are lessening.

Since September 2020, the proportion of ACT audiences who know of someone within their social network who has been sick with the virus has been stable (at 8%, compared to 9%).

Among audiences of ACT organisations, 22% reported experiencing financial hardship as a result of the pandemic (down from 32%). Among ACT-based respondents, 20% have experienced financial hardship (down from 26%).

One-quarter of ACT audiences (27%) say that the risk of virus transmission prevents them from attending as they did in the past – a rate that is consistent with the national average (26%).





Concerns about virus transmission are highest among audiences of organisations in NSW (32%) and VIC (34%), where cases have been the highest nationally, and lowest in WA (14%), SA (20%) and QLD (21%).

Just 1% of ACT audiences cannot foresee going out until there is no risk at all – down from 11% for audiences of ACT organisations and down from 8% for ACT-based respondents.

## The main factor inhibiting attendance right now is the risk of lockdown and cancellations

When asked about the factors preventing audiences from attending right now, the most common factor selected by audiences of ACT organisations (41%) and ACT-based respondents (40%) was the risk of lockdowns and cancelled events.

Responses also show that restrictions and COVID-safe arrangements are limiting attendance. The other most common reasons that audiences of ACT organisations selected are that there are not as many options available (34%), that events are booking out too quickly (24%) and/or that the quality of the experience has changed (10%).

Similarly, many ACT-based respondents also said that there are not as many options available (31%), that events are booking out too quickly (22%) and that the quality of experience has changed (8%).

ACT audiences are less likely than the national average (13%) to say that financial reasons are preventing them from attending, which is in the top three factors affecting 9% of audiences for ACT organisations and 8% of ACT-based respondents.

## ACT audiences are spending more, though overall spending is not likely to fully recover this year

Among audiences for ACT organisations, around one-fifth (19%) who attended events during the fortnight before data collection said they spent between \$50 and \$100 on tickets, and 21% spent more than \$100. This represents a significant increase on levels seen in September 2020, when 11% spent more than \$50 and 8% spent more than \$100.

Among ACT-based respondents, 19% (up from 11%) spent between \$50 and \$100 on tickets in the fortnight before data collection, and 24% (up from 8%) spent more than \$100.

However, over the next year, one-third (33% of audiences of ACT organisations and 34% of ACT-based respondents) say they expect their overall spending on arts and culture tickets, admissions, subscriptions and memberships to be lower than before

the pandemic started. This rate is relatively consistent with the national average (30% expect to spend less over the next 12 months), confirming it will take time to fully rebuild the market.

## Comfort levels

### ACT audiences are growing more confident attending most venue types

Comfort levels with most venue types is growing for ACT audiences, as restrictions have largely eased and virus cases have been consistently low.

Almost all audiences of ACT organisations are now comfortable attending museums and galleries (99% are at least somewhat comfortable, up from 95%), community art spaces/studios (97%, up from 89%) and large theatres or concert halls (89%, up from 56%).

Similarly, most ACT-based respondents are comfortable attending museums and galleries (99%, up from 96%), community art spaces/studios (97%, up from 90%) and large theatres or concert halls (90%, up from 61%).

### Comfort has also increased for venues that audiences were previously more cautious of

A greater proportion of ACT audiences also feel comfortable attending venues that they have been more cautious of in past phases of the study.

More audiences of ACT organisations are comfortable attending stadiums or arenas (78% up from 44%), comedy clubs or live music venues (61%, up from 30%) and hands on exhibitions at an interactive museum (60%, up from 31%).

Similarly, more ACT-based respondents are comfortable attending stadiums or arenas (77%, up from 48%), comedy clubs or live music venues (59%, up from 36%) and hands-on exhibitions at an interactive museum (57%, up from 37%).

### Seating capacity inside venues is a concern for some audience members

While most ACT audiences now feel relatively comfortable attending most indoor venue types, limits on attendance numbers are an important factor.

Capacity limits affect the viability of operation, but from an audience perspective, reduced seating capacities appear to encourage people's perceptions of safety, for instance, among audiences of ACT organisations:





- Almost everyone (97%) feels at least somewhat comfortable at 50% seating capacity
- Most people (86%) feel comfortable with 75% seating capacity
- Almost half (48%) feel comfortable with 100% seating capacity inside venues.

Likewise, among ACT-based respondents:

- Almost everyone (97%) feels at least somewhat comfortable at 50% seating capacity
- Most people (87%) feel comfortable with 75% seating capacity
- Almost half (45%) feel comfortable with 100% seating capacity inside venues.

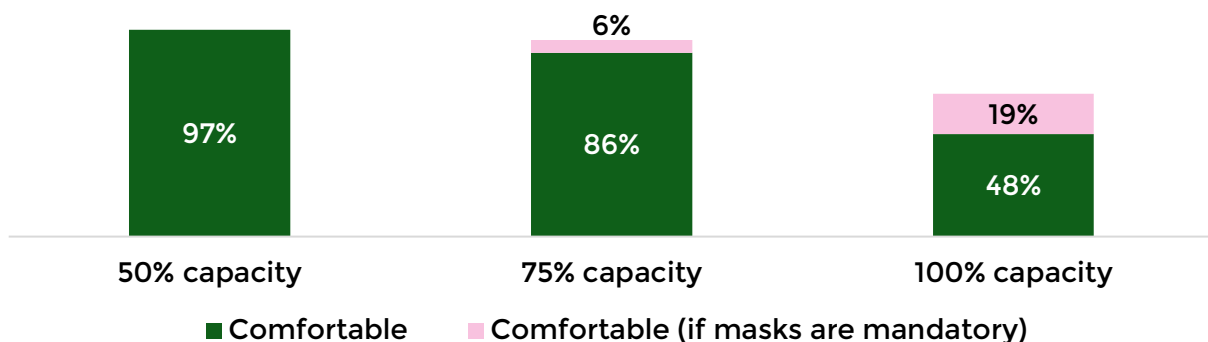
## More people are comfortable to attend if masks are mandatory, though some prefer activities that don't require them

Those who said they were not comfortable at venues were asked whether their answer would change if mask-wearing was mandatory.

Among audiences of ACT organisations:

- ▶ At an event with 75% seating capacity, the majority of those not previously comfortable said that it would improve their comfort (3% would be very comfortable and 41% would be somewhat comfortable) - meaning the overall proportion of audiences comfortable at this capacity rises from 86% to 92%.
- ▶ At an event with 100% seating capacity, a significant proportion of those not previously comfortable said that it would improve their comfort (4% would be very comfortable and 33% would be somewhat comfortable) - meaning the overall proportion of audiences comfortable at this capacity rises from 48% to 67%.

Figure 4: Would you be comfortable attending an event today with 50%/75%/100% seating capacity? (With and without mandatory mask policies.) (Audiences of ACT organisations) n=550

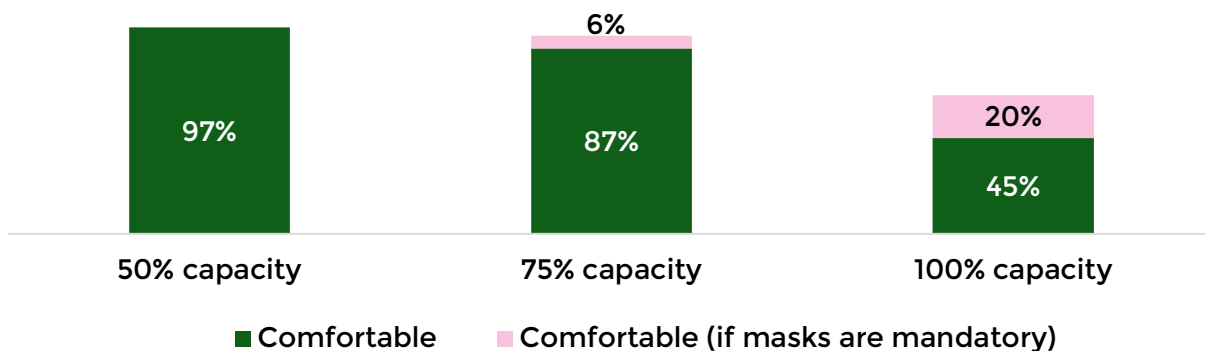




Among ACT-based respondents:

- ▶ At an event with 75% seating capacity, the majority of those not previously comfortable said that it would improve their comfort (3% would be very comfortable and 42% would be somewhat comfortable) – meaning the overall proportion of audiences comfortable at this capacity rises from 87% to 93%.
- ▶ At an event with 100% seating capacity, a significant proportion of those not previously comfortable said that it would improve their comfort (5% would be very comfortable and 32% would be somewhat comfortable) – meaning the overall proportion of audiences comfortable at this capacity rises from 45% to 65%.

Figure 5: Would you be comfortable attending an event today with 50%/75%/100% seating capacity? (With and without mandatory mask policies.) (ACT-based respondents) n=584



As public health guidelines are gradually relaxed, there may still be a case for some large venues, festivals and arts centres to voluntarily impose capacity limits for certain events, as it would allow them to be accessible to more audience members.

## The combination of capacity limits, social distancing and mask-wearing is confusing for some — and can affect confidence

With face mask policies, settings, capacity and social distancing all affecting people's choices to attend events, the situation in all states and territories is complex.

Some respondents mentioned inconsistencies in how capacity and distancing rules are applied in practice. For instance, one ACT audience member shared,

'I went to a concert and there was no dancing, yet we sat directly next to random people. [Then] I went to a concert at another venue and you could dance in front of your chair. It's confusing.'

It is important to clearly communicate what these policies mean, and others shared similar sentiments. One person said,

‘We are constantly advised to maintain a 1.5 m social distance, but seating arrangements inside theatres do not necessarily guarantee this, in spite of limitations on total numbers. In these circumstances very few people wear masks.’

## Comfort with square-metre regulations has increased, but some don’t see any benefit

Since September 2020, a greater proportion of audiences for ACT organisations are at least somewhat comfortable with 2 square metres (89%, up from 60%) and a similar proportion for 4 square metres (96%, stable with 94%) of space for each person.

Comfort with square-metre regulations has increased among ACT-based respondents. More people are now comfortable with 2 square metres (90%, up from 67%) and 4 square metres (96%, compared with 93%).

However, comfort is only improved when the regulations are properly implemented by venue staff. Some ACT respondents shared,

‘Social distancing needs to be enforced, because Canberrans are not doing it at restaurants and other venues.’

Since September 2020, the proportion who are now comfortable with no social distancing guidelines has increased to 36% of audiences of ACT organisations (up from 9%) and 34% of ACT-based respondents (up from 12%).

## Creative approaches to seating can help more people feel comfortable and engaged

One of the common themes in audience reflections about recent cultural activities they attended is social distancing and its impact on the atmosphere of an event.

Addressing the challenge of creating a buzzing atmosphere whilst observing COVID-safe guidelines is key. Events that feature ‘pods’ or tables of 4–6 people – where attendees can sit close to people in their immediate social circle – were appealing to 21% of audiences of ACT organisations and 18% of ACT-based respondents. One ACT audience member shared,

‘I love being able to be in a group, as I usually attend with others. I don't mind being distanced from strangers, but also miss interactions with strangers.’

However, this model did not appeal to everyone and an outdoor amphitheatre with fixed seating in rows ranked higher (29%). One person shared concern with potentially being seated next to strangers, commenting,

‘Members being seated in ‘pod’ groups would have to know each other, or else I would not be comfortable sitting with those I do not know.’

## Comfort is highest at outdoor venues, which may impact attendance as winter approaches

As winter approaches, some people expressed concern about the weather affecting outdoor events, as well as the potential for transmission of the virus in indoor venues – particularly in relation to ventilation and air circulation.

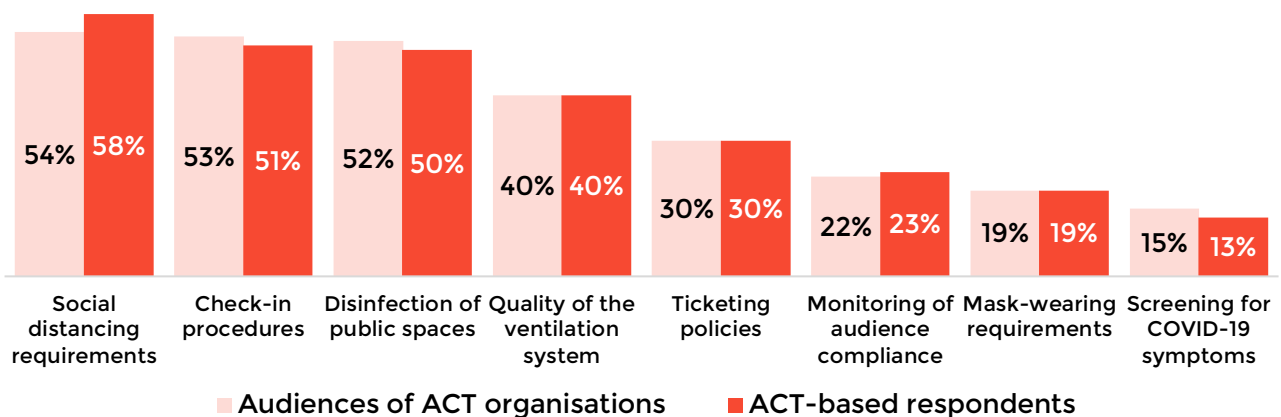
This topic is important in communication about venue safety for many ACT audience members (40%), as one mentioned, ‘Capacity of airflow, good natural ventilation from open windows and doors.’

To feel reassured about safety regulations, the most common topics audiences of ACT organisations and ACT-based respondents are interested in hearing about are social distancing requirements (54% and 58% respectively) and check-in procedures for contact tracing (53% and 51%).

ACT audiences are demonstrating more interest with communications about social distancing compared to the national average (46%).

Information about cleaning procedures also ranked highly among both audiences of ACT organisations (52%) and ACT-based respondents (50%).

Figure 6: In thinking about attending cultural venues and events, which of the following topics are most important to you? (select up to three) Audiences of ACT organisations (n=556) and ACT-based respondents (n=591)



## COVID-19 safety

### Most ACT audiences are satisfied with COVID-safety at cultural venues

When recent attendees were asked how satisfied they are with audience safety at the venue(s) they attended, the vast majority reported being satisfied.

Looking at specific aspects of COVID-safety plans, there are some slight differences relevant to different venue types. For instance, on average among ACT audiences:

- ▶ At cinemas, communication of COVID-safe practices was rated least well and limits on capacity had the highest satisfaction
- ▶ At live shows and performances, physical distancing measures rated least well, while the presence of check-in procedures had the highest satisfaction
- ▶ At fairs and festivals, physical distancing measures rated below other types of safety measures.

### Some people are conscious of others' complacency due to low rates of community transmission

Some audience members shared that while the ACT has had a low number of virus cases relative to other areas, there is a sense of complacency towards safety procedures being observed. This has been cited in relation to both staff members and audiences at venues and events. One ACT audience member shared,

'Public generally need to take responsibility for social distancing in public spaces and very few people do.'

Another mentioned,

'I think cleaning procedures and facilities have become lazy since incidences of community transfer [in the ACT] have declined. I have visited QLD and northern NSW where I feel this was more pronounced than in the ACT.'

One audience member suggested,

'A public awareness communications strategy that reinforces that arrangements/constraints will change to reflect the levels of COVID-19 identified in local areas i.e. Canberra is free of community transmission so all is easy at the moment, but it could change.'

## Staff and signage continue to be important ways to reinforce procedures and reassure audiences

Audiences who are cautious about attending continue to make suggestions for improving communication of COVID-safe arrangements, and in particular signage and written instructions. One ACT audience member suggested that messaging is not always clear, commenting,

‘Sometimes, in various stores or events the messages for what are expected can be confusing...too many signs etc.’

Audiences generally also appreciate clear instructions from staff – and some believe there is a case for staff to gently reinforce the need to comply with COVID-safe procedures. Some ACT-based respondents suggested,

‘It helps when staff or a volunteer is proactive at the door about procedures e.g. pointing out registration, keeping hand sanitizer full and tidy.’

‘We are being asked by ACT government to sign in at all venues. It is very helpful when staff politely remind visitors that they need to do this.’

## Inclusive methods to COVID-19 safe procedures will ensure events are widely accessible

Some ACT audience members expressed that while they appreciate the adherence to COVID-safety measures, policies such as check-in procedures can sometimes be inaccessible, particularly for those who do not use smart phones. One person said,

‘Check-in procedures should allow for people who do not have mobile phones. It shouldn't be based on the idea that everyone has an app on their phones.’

Some suggested providing alternate options, with one commenting,

‘They could have a pen and paper list for when the Check-in Canberra app either hasn't been downloaded or it fails (like mine did on the weekend).’

## Longer-term outlook

### 95% of ACT-based audiences say they are likely to get vaccinated, which is likely to further improve confidence

The commencement of Australia's vaccination program is already contributing to confidence levels and the outlook in most states/territories is looking positive. Almost





all audiences of ACT organisations (94%) and ACT-based respondents (95%) said they are likely to get vaccinated for COVID-19, and most do not have major concerns about issues like the effectiveness of the vaccine.

Looking ahead, 9 in 10 ACT audience members (90%) feel confident that the vaccination effort will lead to the resumption of normal activities within 12 months. Around 8 in 10 (78%) of audiences of ACT organisations and ACT-based audiences (79%) say that long-term, they expect to attend events just as they used to in the past.

## Support and fundraising

### ACT audiences remain committed to supporting the arts — though are among the least committed nationally

The proportion of ACT-based respondents who said they feel strongly committed to supporting arts and cultural organisations has grown slightly from 37% to 40% since May 2020. Among audiences of ACT organisations, this rate has remained stable at 38%.

ACT audiences are less likely to say they're strongly committed compared to the national average (44%). They are most similar to SA (41%) and VIC (41%) audiences, while those in NSW (48%) and WA (47%) are the most likely to say they are strongly committed.

### Fewer say they are likely to donate or purchase a subscription or membership to an arts organisation

In terms of the methods of support they are likely to engage in, a smaller proportion of audiences of ACT organisations said they are likely to purchase a subscription or membership, even if some of the events might be cancelled (63%, down from 71% in May 2020). The likelihood to donate to an artist or cultural organisation has also declined since May (67%, down from 74%).

Among ACT-based respondents, a consistent proportion is saying they are likely to purchase a subscription/membership (65%, stable), while slightly fewer are likely to donate to an artist/organisation (68%, down from 72%).

Regarding other forms of support, audiences of ACT organisations are more likely to buy ticket vouchers redeemable for future programs, compared to May 2020 (71%, up from 67%). This rate is also higher than the national average (67%).



ACT-based respondents are the most likely to buy merchandise such as clothing, books and gift items (55%), compared to audiences living in NSW (44%), QLD (48%), SA (51%) and WA (45%), for instance.

## 1 in 3 audience members of ACT organisations have purchased a subscription/membership this year

Around 1 in 3 audience members of ACT organisations (32%) and around 2 in 5 (38%) say they have already purchased a subscription, membership or season tickets to a cultural organisation for the 2021 season.

These rates are lower than the proportion who reported having subscribed to last year's season (50% of audiences of ACT organisations and 52% of ACT-based respondents were subscribed in September 2020).

However, among those who have purchased, 92% of audiences of ACT organisations and 93% of ACT-based respondents say they are planning to renew next year.

In March 2021, Audiences of ACT organisations were mostly likely to have purchased a museum or gallery membership (17%), while slightly smaller proportions purchased a subscription to a performing arts organisation (14%) or to another type of organisation (13%).

Similarly, among ACT-based respondents, the largest proportion purchased a museum or gallery membership (21%), followed by a subscription to a performing arts organisation (19%) or to another type of organisation (14%).

## Donating to artists and cultural organisations is stable or higher in ACT — and many want to support struggling artists

The proportion of audiences of ACT organisations making donations to artists or cultural organisations in the 2020/21 financial year (24%) is consistent with 2019/20 financial year (22%). This rate is slightly higher among ACT-based audiences in the 2020/21 financial year (30%) compared to the 2019/20 financial year (27%)

When asked what specifically prompted their donation, several ACT audience members expressed their desire to show appreciation for artists and organisations during the pandemic. Some shared,

'The local artists who we donated to were unable to perform and were not receiving government assistance at the time.'

'I know them and how hard they've been hit with the restrictions financially and mental health wise.'



Another shared how they donated the value for an unused ticket:

'I was unable to attend the Sydney Festival due to COVID-19 restrictions in the ACT and donated the money for the tickets as I wanted to support the event.'

## Online participation

### Around half of ACT audiences are participating online, and many more plan to continue

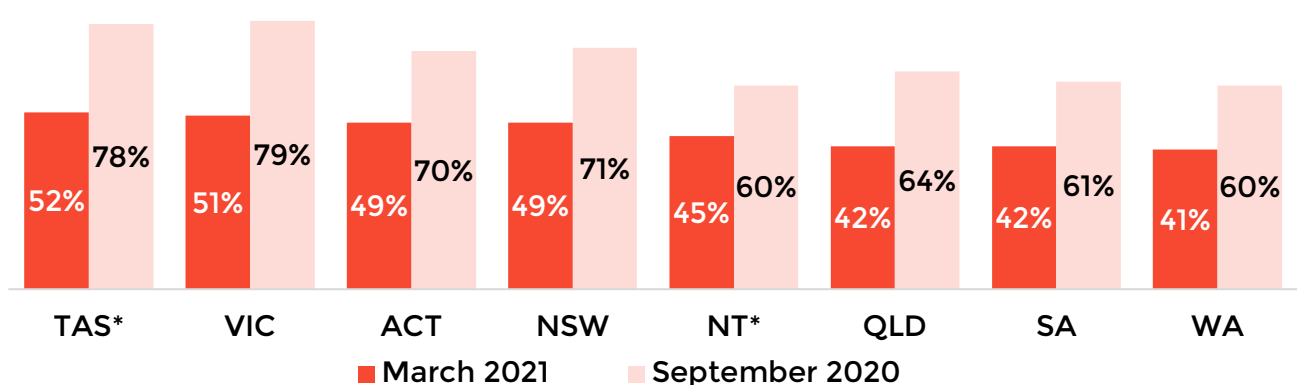
As opportunities for live attendance increase around the country, fewer say they recently participated in digital arts experiences – among both audiences of ACT organisations (49%, down from 70% in September 2020) and ACT-based respondents (48%, down from 74%).

Overall, ACT audiences are most similar in their digital participation levels to those in NSW (49%) and VIC (51%). In comparison, participation has continued to be lower in areas with fewer restrictions on live experiences, such as WA (41%), SA (42%) and QLD (42%).

Among the audiences of ACT organisations participating online, many say they are doing so more frequently than before the pandemic (47%) and two-thirds of those plan to continue when it ends (65%). For ACT-based respondents participating online, 49% say they are doing so more frequently, and among those, 70% plan to continue.

Smaller proportions of audiences of ACT organisations (26%) and ACT-based respondents (23%) say they're participating online less frequently, or plan not to continue post-pandemic.

Figure 7: During the past fortnight, have you participated in any of the following online or digital arts & culture experiences? (select multiple). By state-based respondents (n=13,836) (March 2021)





Among those participating online, a smaller proportion of audiences of ACT organisations (65%, down from 79%) and of ACT-based respondents (70%, down from 78%) said they plan to continue post-pandemic compared to September 2020.

## Video content remains key, but online courses are becoming relatively more popular

Video content of performances and events remains the most common form of digital participation for ACT audiences, though these levels have dropped in recent months, similar to national trends.

Among audiences of ACT organisations, 24% recently watched pre-recorded video of a performance/event (down from 42% in September 2020) and 18% recently watched a live-streamed performance/event (down from 38%). ACT-based respondents are also watching pre-recorded video (24%, down from 45%), and live-streamed performances/events (20%, down from 43%) at similar rates.

However, online classes and tutorials have had the smallest decreases in attendance and are now a relatively common way that audiences of ACT organisations (23%) and ACT-based respondents (22%) are choosing to participate online.

## Increasingly, ACT audiences are motivated to access things they wouldn't normally be able to see

When asked about their motivations for participating online, data collected in the early stages of the pandemic (May 2020) indicated that most ACT audiences were going online to support an artist/organisation they think is important (37%) or for their own mental wellbeing (31%).

Now, the most common reason given by audiences of ACT organisations (41%) and ACT-based respondents (39%) is seeing something online that you wouldn't normally be able to see.

However, compared to May 2020, 37% of ACT audiences (stable) are still motivated to support an artist/organisation they think is important – and some are still going online for their wellbeing (22% of audiences of ACT organisations and 23% of ACT-based respondents).

Nationally, ACT audiences are the most inclined to be going online to support an artist/organisation, compared to the national average (30%), followed by audiences living in VIC (34%). As one ACT respondent shared,

'I wanted to support the initiative shown by the artist in organising online concert events early during the pandemic. I used Patreon.'

## Some people simply prefer in-person activities that achieve a sense of connection

Since this study first measured the barriers to online participation in May 2020, the proportion of audiences of ACT organisations who say they're 'not interested in online or digital arts experiences' has risen from 13% to 26%. It has also risen among ACT-based respondents, from 14% to 25%.

A small number of ACT audiences (10%) would select a digital program as their first choice for attending a cultural event today.

Comments from ACT audiences show that some audience members would prefer to attend a live, in-person event. One person shared,

'I prefer in-person experiences, something intangible but important human connection-wise gets lost or doesn't ever translate the same via online.'

## 2 in 5 ACT audience members online continue to pay for digital experiences

Around 2 in 5 ACT audiences (42%) who are participating online are paying for digital content. Compared to September 2020, the proportion paying has dropped slightly for audiences of ACT organisations (down from 39%) and has remained stable for ACT-based respondents (at 42%).

Compared to other jurisdictions, such as VIC (39%), SA (35%) and QLD (29%), ACT audiences are among the most likely to be paying for online experiences nationally, along with those living in NSW (42%).

## The types of digital patronage contributed by ACT audiences are varied

The most recent data indicates that the types of payment for digital experiences are changing, while others have remained consistent since September 2020.

A similar number of audiences of ACT organisations (18%, stable) and slightly fewer ACT-based respondents (16%, down from 19%) are making donations for something they consumed online.

Pay-per-view remains the most common form of digital patronage, and has remained stable among both audiences of ACT organisations (23%, stable with 21%) and ACT-based respondents (26%, stable with 24%).

A small number of audiences of ACT organisations (4%) and ACT-based respondents (5%) say they subscribed to a platform to access content on-demand, while 7% of



audiences of ACT organisations and 10% of ACT-based respondents say they accessed digital content as a part of a program/season they subscribed to.

## Paying audiences are spending larger amounts on digital experiences

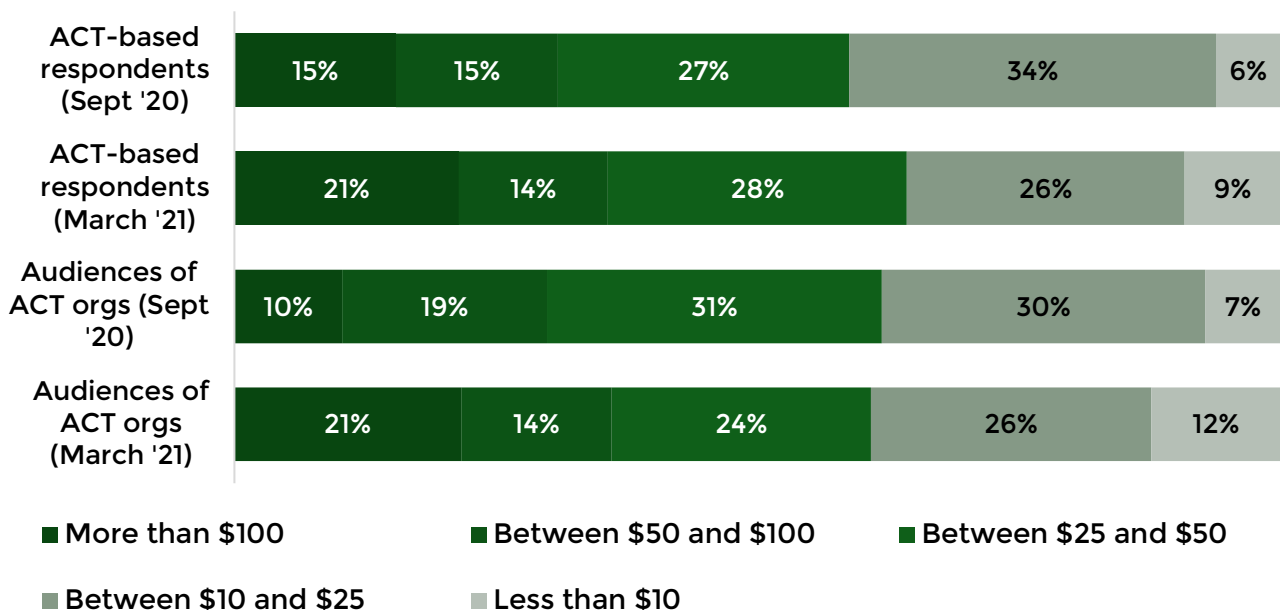
The proportion of paying ACT audiences who are spending large amounts on digital experiences has increased since September 2020.

During the fortnight before data collection, 21% of audiences of ACT organisations spent more than \$100 (up from 10% in September) and a further 14% spent between \$50 and \$100 (down from 19%).

Among ACT-based respondents, 21% of audiences of ACT organisations spent more than \$100 (up from 15%) and a further 14% spent between \$50 and \$100 (stable with 15%).

ACT audiences are spending slightly less on digital experiences compared to national audiences, among whom 22% spent more than \$100 and 19% spent between \$50 and \$100 recently.

Figure 8: Can you share with us your total spending on online arts & culture experiences in the past fortnight? (Audiences of ACT organisations) September 2020 (n=124) and March 2021 (n=42)





## Making content available on-demand is appealing for most audiences – and many want to hear artists talking about their work

Designing digital experiences is complex, and there are audiences for different types of experiences, though some features appear more popular than others.

Respondents were provided with a list of seven potential features of digital arts experiences and asked to select the top two most appealing to them.

The ability to access something on-demand was the most popular choice for ACT audiences, though slightly more ACT-based respondents selected this feature (69%) compared to audiences of ACT organisations (66%). One ACT audience member shared,

‘Some online events are only available for a limited time and, as I have a disability that may affect my ability to attend at a specific time, I’m not able to take part.’

This feature ranked higher than seeing something live that is happening right now for audiences of ACT organisations (35%) and ACT-based respondents (32%).

Another popular feature among audiences of ACT organisations (42%) and ACT-based respondents (44%) was hearing the artist or artistic leader talk about their work, and this is the among the highest rates nationally (compared to an average of 38%).

Accessing short, edited segments or taster experiences was in the top two features for 16% of audiences of ACT organisations and 17% of ACT-based respondents. Among audiences of ACT organisations, 14% said they want tips on how to improve their own skills or appreciation of an artform, compared to 17% for ACT-based respondents.

Smaller numbers of audiences of ACT organisations preferred connecting with other audience members during the experience (6%) or contributing to the experience themselves (3%). These rates are similar among ACT-based respondents.

## ACT audiences rely heavily on direct email marketing to find out what’s available online — more than other audiences

When asked about how they found out about their recent online arts experiences, the largest proportion of audiences of ACT organisations (62%) and ACT-based respondents (63%) said they received an email from an artist or cultural organisation. Many others said they were recommended the activity by someone they know personally (33% and 34% respectively).



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Hearing about the online experience through their social media ‘feed’ ranked higher among audiences of ACT organisations (45%) compared to those living in the ACT themselves (34%).

## What’s next

To explore the data in more detail and find out how audiences for different artforms are responding, visit the study’s Australian homepage at: [www.thepatternmakers.com.au/covid19](http://www.thepatternmakers.com.au/covid19)

There, you can read about the story so far and 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](mailto:info@thepatternmakers.com.au).

## Acknowledgment

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