

ACT
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PATTERNMAKERS



JULY 2021

Australian Capital Territory Snapshot

Audience Outlook Monitor



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

Summary

Outbreaks have disrupted attendance in the ACT, but most audience members are eager to attend when possible

In early July, around 6 in 10 ACT audience members had attended an event in-person – down from around 7 in 10 in March 2021. This setback to attendance reflected disruptions caused by an ongoing outbreak of the Delta variant in NSW and elsewhere in the country.

Comfort levels had decreased across all venue types and with the ACT undergoing a lockdown at the time of this report's publication, audience comfort may continue to trend downwards.

Audiences look forward to returning to cultural events when possible. In July around 6 in 10 ACT audience members said they were willing to attend 'now or as soon as it is permitted,' while approximately 4 in 10 stated they would attend when reasonably confident the risk of transmission is minimal.

In the case of an extended outbreak, ACT arts organisations may look to results from other states to assist with scenario planning. For instance, at the time of data collection, lockdowns in NSW had led to a fall of around 15 percentage points in the proportion who were comfortable attending most venue types.

ACT audiences want to support the arts, but may be deterred by the risk of lockdowns and the wait for vaccination

When asked about likely barriers to their attendance over the next 12 months, ACT audiences were more conscious of the risk of lockdowns, the risk of virus transmission and the availability of events than they were in March 2021.

However, audience members also expressed empathy and support for artists and venues – and emphasised their desire to support the arts through the pandemic. 7 in 10 continue to make plans for future attendance, despite the risks, although some say they are increasingly likely to book last-minute and preference local events.

Vaccination will play a key role in attendance decisions for many audience members, but COVID-safety measures like check-in procedures and improvements to ventilation systems can help maintain confidence in the interim.

Promisingly, ACT audience members are being vaccinated at high rates and 8 in 10 believe the vaccine rollout will be successful enough to allow normal activities to resume within 12 months.

4 in 10 ACT respondents participated online, and over half are committed to continued engagement

Around 40% of ACT audience members participated in some form of online arts or cultural activity in early July, stable with March 2021. While participation rates are down from the digital ‘boom’ of the early pandemic, there appears to be a sizeable proportion of ACT audiences who have a steady interest in digital engagement.

When asked what role digital participation plays in their lives when in-person attendance is possible, around 4 in 10 ACT audiences say that digital programming plays a small role, while 1 in 10 say it plays a substantial role.

Around a third of ACT audience members said they paid to access online content in the fortnight before data collection (7–11 July), down from 42% in March 2021. However, around a third of the ACT audience members who paid for online content spent more than \$50, in line with national trends – suggesting there is a stable cohort of digital audiences who are willing to pay greater amounts for works of corresponding quality.

Introduction

About the ACT sample

This Australian Capital Territory (ACT) Snapshot Report analyses the data from respondents surveyed in July 2021 as part of the Audience Outlook Monitor. It identifies insights from 473 survey respondents connected with ACT-based arts and culture organisations ('audiences of ACT organisations') which typically attract a nation-wide audience. In this phase of research this sample of audience members is drawn from the ACT (81%), NSW (17%) and further afield (2%).

This report also highlights the views of 510 respondents who live in ACT themselves ('ACT-based respondents'), many of whom are connected with ACT-based organisations, but some who are audiences of organisations in Victoria (VIC), New South Wales (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 7 July 2021, participating organisations simultaneously sent the Phase 5 survey to a random sample of their audience – defined as those who had attended an arts or cultural event in person since January 2018. Data collection concluded 4 days later, on 11 July.

Throughout this report, comparisons have been highlighted between the different state and territory results. Note that the 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 July 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.

Read on for the key July 2021 findings relevant to the ACT.

Current conditions

In early July, comfort with public activities was affected by outbreaks across the country

ACT audience members were somewhat less comfortable participating in public activities in early July - with confidence affected by an ongoing outbreak in nearby NSW and cases of the Delta variant identified across the country.

Compared to March 2021, the July results saw a decrease in the proportion of audiences of ACT organisations who felt at least somewhat comfortable participating in activities such as eating at a local bar (93%, down from 98% in March), going to a local cinema (82%, down from 90%), exercising at a gym (61%, down from 73%), using public transport (69%, down from 86%) and flying domestically on a commercial airline (63%, down from 73%). A similar trend was observed among ACT-based respondents.

Overall, ACT audiences were most similar to VIC audiences in their attitudes towards public activities, with the exception of using public transport. The proportion of audiences of ACT organisations (69%) and ACT-based respondents (72%) at least somewhat comfortable using public transport was somewhat lower than that of VIC audiences (79%).

Due to the territory's proximity to outbreak-affected NSW, ACT audiences tended to be less confident than those in Western Australia (WA) and Queensland (QLD) - states which, unlike the ACT, had seen community cases of the Delta variant shortly prior to data collection.

In light of the ongoing lockdown in the ACT, organisers can also look to other states to provide a sense of the ACT's current outlook. Results from NSW provide a sense of how audience confidence is affected when outbreaks continue long-term. In NSW, comfort levels were significantly lower than in the ACT, having decreased by around 20 percentage points for all public activities.

Attending cultural events

Live attendance in the ACT was set back in July 2021, after reaching a high in March 2021

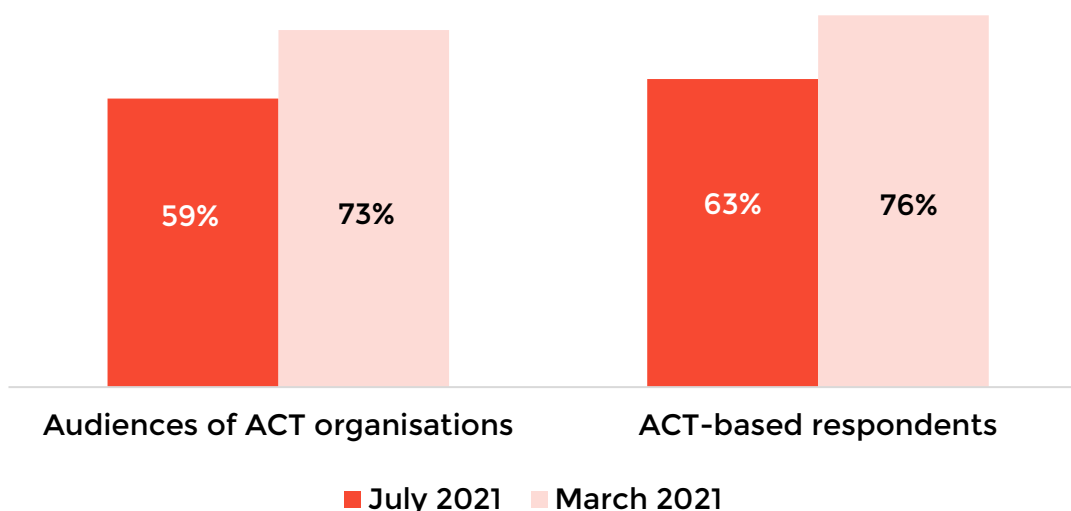
In July 2021, 59% (down from 73%) of audiences of ACT organisations and 63% (down from 76%) of ACT-based respondents attended a cultural activity in-person in the two weeks prior to data collection (7-11 July 2021).

Coming after steady increases in attendance rates from May 2020 to July 2021, these setbacks reflect disruption caused by outbreaks in nearby NSW and elsewhere around the country. (Figure 1).

The kinds of events ACT audiences attended were consistent with March 2021. Audiences of ACT organisations were most likely to attend a live performance (28%), attend a cinema (26%) or visit a museum or gallery (23%). ACT-based audiences showed similar patterns of attendance, but were slightly more likely overall to attend a live performance (32%), cinema (29%) or museum/gallery (28%).

The attendance rates of ACT audiences were above the national average (53%) – higher than states like NSW (34%), WA (53%) and VIC (56%).

Figure 1: In the past fortnight, did you do a cultural activity in-person (not online)? Audiences of ACT organisations (n=469) and ACT-based respondents (n=510) (July 2021).





Despite disruptions to live attendance, over half of ACT audience members spent over \$50 on tickets to cultural events in early July

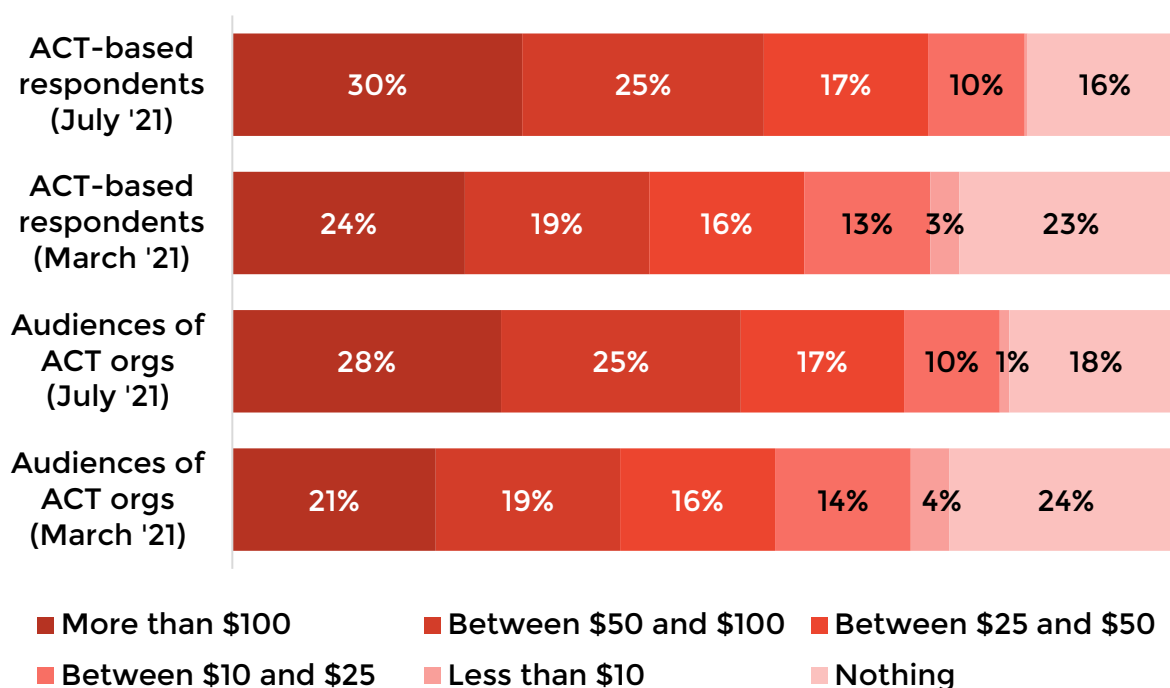
Although live attendance has been disrupted by lockdowns across the country, 53% of audiences of ACT organisations and 55% of ACT-based audiences reported that they had spent more than \$50 on tickets to in-person arts events in the fortnight before data collection.

The proportion spending over \$50 had increased by more than 10 percentage points for both audiences of ACT organisations (53%, up from 40% in March 2021) and ACT-based audiences (55%, up from 43%). (Figure 2).

ACT audiences were also less likely to spend no money at all on tickets to in-person events – with 18% of audiences of ACT organisations (down from 24% in March 2021) and 16% of ACT-based audiences (down from 23%) spending nothing on tickets in the fortnight before data collection.

Promisingly, spending was high even in states affected by ongoing outbreaks, such as NSW – where 50% of audience members reported that they had spent more than \$50 on tickets to in-person activities in the fortnight before data collection.

Figure 2: Can you share with us your total spending on arts & culture experiences in the past fortnight? Audiences of ACT organisations (n=244) and ACT-based respondents (n=286) (July 2021).



Comfort at arts venues has been affected by the outbreak — but half of audiences say they are willing to attend events as soon as they are able

The confidence of ACT audiences has been affected by the recent outbreak, with comfort down from March 2021 across all venue types.

Most audiences of ACT organisations remain at least somewhat comfortable at most venue types, including museums or galleries (93% at least somewhat comfortable, down from 99% in March 2021), community art spaces or studios (90%, down from 97%), outdoor festivals or concerts (89%, down from 94%) and large theatres or concert halls (83%, down from 89%).

Comfort is lower at comedy clubs or live music venues (47%, down from 61% in March), and hands-on exhibits at interactive museums (50%, down from 60%).

The same trends were evident for ACT-based audiences, whose comfort levels were very similar.

The comfort levels of ACT audiences were around the national average. Confidence was lower than in states such as WA and South Australia (SA) – likely due to the ACT's physical proximity to outbreak-affected NSW and the fact 1 in 5 (17%) of the audiences of ACT organisations are NSW-based. However, the comfort levels of ACT audiences were not impacted to the same extent as audiences in NSW - where confidence was down by around 15 percentage points for all venue types.

The proportion of audiences of ACT organisations who are willing to attend cultural events 'now or as soon as it is permitted' has decreased to 57%, down from 69% in March 2021. A further 39% state they will attend when reasonably confident the risk of transmission is minimal (up from 29% in March) and only 4% cannot foresee going out until there is no risk (up from 1% in March). These proportions were almost identical for ACT-based audiences.

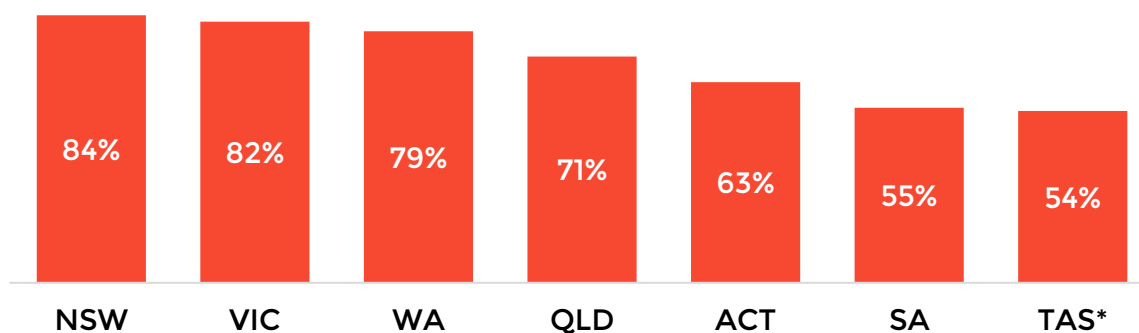
Impact of lockdowns and restrictions

Over half of ACT audiences have had their plans affected by lockdowns and restrictions

6 in 10 ACT audience members (63% of audiences of ACT organisations, 64% of ACT-based audiences) stated that their plans to attend arts and cultural events had been affected by lockdowns and restrictions in the four months leading up to data collection (7–11 July).

This proportion was below the national average (76%), and significantly lower than WA (79%), NSW (84%) and VIC (82%), where recent lockdowns saw audiences impacted to the greatest extent. (Figure 3).

Figure 3: In the past four months, have your plans to attend in-person arts and cultural events been affected by lockdowns/restrictions? July 2021 (n=8,668)



When asked how they had been impacted by lockdowns, the majority of audiences of ACT organisations said the artist they were planning to see was affected by lockdown/restrictions (50%) or the event/venue was in an affected area (49%). Compared to states like NSW (73%), VIC (63%) and QLD (62%), audiences of ACT organisations were less likely to live in an area that was itself affected by lockdowns (17%).

A further 1 in 4 audiences of ACT organisations (25%) chose not to attend events due to the risk of travel delays or quarantine. The same trends were observed for audiences of ACT-based organisations.

Some ACT audience members highlighted the impacts of border closures and lockdowns in other states. One said,

'I live in the ACT which is in very good shape but we often need to visit other cities for shows etc. The other States are not happy to have ACT residents visit. This has affected our show attendance.'

Findings from ACT audiences were similar to those in SA, which had also not experienced major outbreaks at the time of data collection – and where attendance was more likely to be inhibited by the risks related to travel (21%) compared to being locked down oneself (15%).

By comparison, in states that had recently experienced cases of COVID-19 (such as VIC, NSW, and WA), audiences were equally likely to have been affected because the artist they were planning to see was affected by lockdowns, because venues were affected by lockdowns or because their own area was in lockdown.

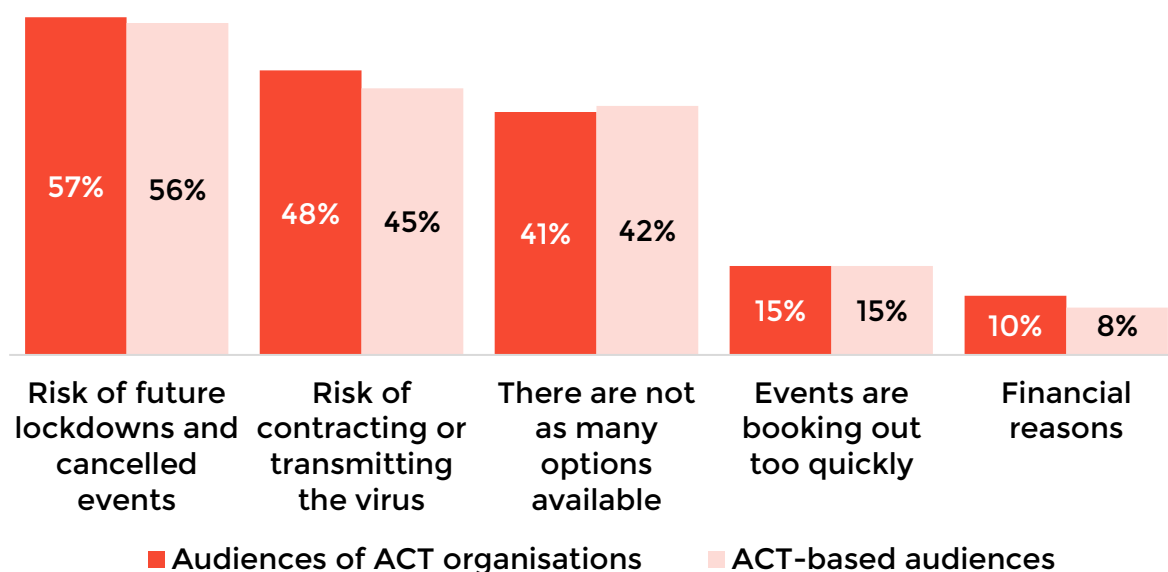
Risk of lockdowns and virus transmission are major barriers to attendance for ACT audiences

In March 2021, ACT audiences were asked 'Can you tell us if anything is preventing you from attending in-person arts and culture events as you used to in the past?'

In July 2021, they were asked whether similar factors would affect their attendance over the next 12 months. In the coming year, audiences of ACT organisations are most likely to be deterred from attending by the risk of future lockdowns and cancellations (57%, up from 41% in March 2021), the risk of contracting or transmitting the virus (48%, up from 27%) and the availability of events (41%, up from 34%). Less common barriers included the fact that events were booking out too quickly (15%, down from 24%) and financial reasons (10%, stable with 9%). The same trends were observed for ACT-based organisations. (Figure 4).

Alongside audiences from VIC (55%) and NSW (54%), ACT audiences were the most likely to cite the risk of lockdowns as a barrier to attendance. ACT audiences were the most concerned about virus transmission, along with NSW (46%) – while audiences in SA (27%) were the least likely to name it as a factor inhibiting attendance.

Figure 4: Can you tell us if anything is preventing you from attending in-person arts and culture events as you used to in the past? (select up to three) Audiences of ACT organisations (n=469) and ACT-based respondents (n=505) (July 2021).



Recent lockdowns and cancellations have been difficult for ACT audiences, but many are thinking of the artists and venues affected

When asked how their experiences with lockdowns had impacted them, audiences expressed a range of reactions: many were disappointed, some frustrated and others expressed anxiety about the continuing effects of the pandemic on arts-going behaviours. One audience member shared,

‘I have a lot of health issues so I book a lot of things in advance – so I have something to look forward to. It is disappointing when things get rescheduled, but I understand why it has to happen.’

Another said,

‘I have been unable to enjoy most of the theatre experiences I planned. I would have seen more films and gone to the NGA more often. I feel very deprived because all of these experiences add pleasure to my life.’

Some ACT audience members suggest that repeated lockdowns have made them more reluctant to book events in the future – and it may take time to rebuild their confidence. One stated,

‘It makes me wary of booking future shows while there is uncertainty about whether or not they will be able to go ahead.’

However, most ACT audience members acknowledged the necessity of restrictions and cancellations with many recognising how difficult this time has been for artists and venues. Respondents took this opportunity to emphasise their continued commitment to the arts and their willingness to make the best of this difficult situation. One stated,

‘[These experiences have] broadened my understanding of forces impacting the cultural sector and the tenuous finances of performing artists.’

7 in 10 ACT audience members continue to make future plans to attend events

In early July, 69% of audience members of ACT organisations (down from 85% in March 2021) and 72% of ACT-based audiences (down from 86%) continued to make firm plans to attend cultural events in the future.

The kinds of cultural events audiences of ACT organisations had planned to attend in July were consistent with March 2021, with the largest proportion of



audiences planning to attend a live performance (50%), attend a cinema (32%) or visit a museum or gallery (29%). The same trends were observed for ACT-based audiences.

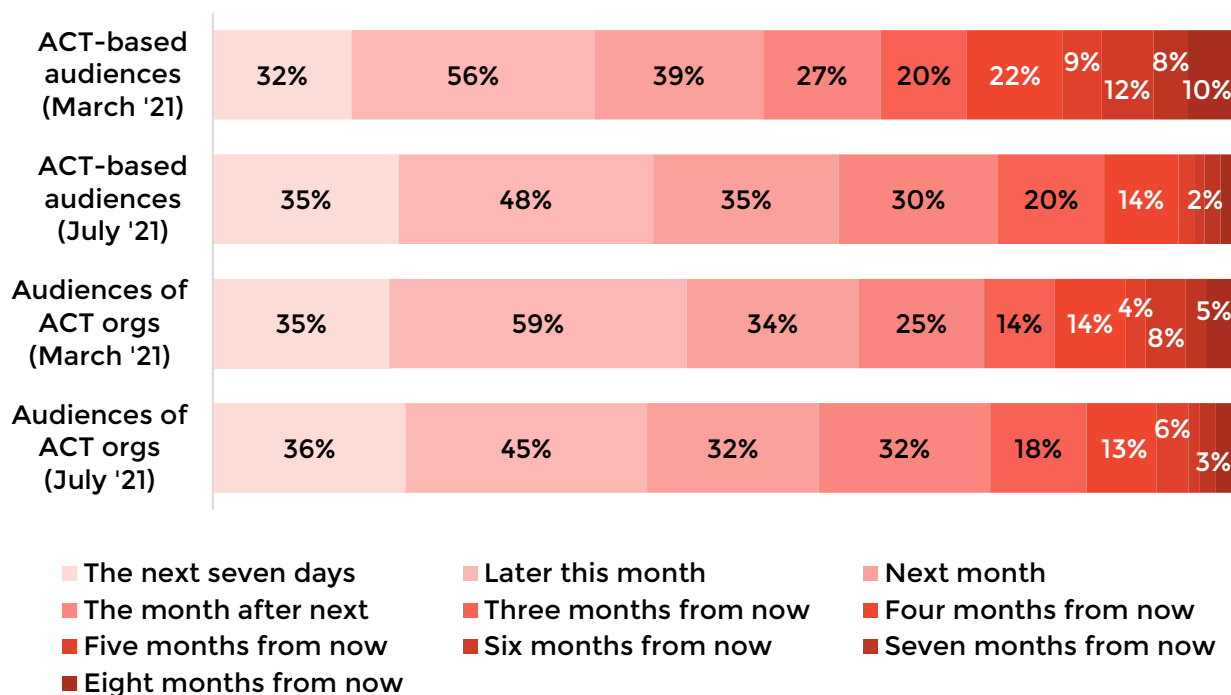
ACT audiences were decreasingly likely to book tickets for events in the next month

In early July, ACT audiences were less likely to book tickets to events in the next 2-3 weeks. The proportion of audiences of ACT organisations (45%, down from 59% in March) and ACT-based audiences (48%, down from 56%) purchasing tickets for this time dropped by more than 8 percentage points – likely reflecting uncertainty about the viability of events in light of the outbreak of the Delta variant in NSW.

Audiences of ACT organisations were increasingly likely to purchase tickets for the month after next (32%, up from 25% in March) – a trend which was less pronounced for ACT-based audiences (30%, up from 27%). (Figure 5).

ACT-based audiences were also decreasingly likely to purchase tickets for events four months from now (14%, down from 22% in March 2021), five months from now (3%, down from 9%), six months from now (2%, down from 12%), seven months from now (3%, down from 8%) or eight months from now or thereafter (2%, down from 10%).

Figure 5: In the past fortnight, did you purchase tickets for one or more live shows or performances that are scheduled for...? Audiences of ACT organisations (n=157) and ACT-based respondents (n=181) (July 2021).



Some audience members deal with uncertainty by making last-minute bookings and keeping it local

To avoid having events cancelled or plans changed, some audience members are electing to make last-minute bookings and prioritising events within their local area. One ACT audience member shared,

‘I am not planning to book for events unless it's short term or very clear on change options.’

Another said,

‘I am more likely to book at the last moment to events in ACT or Queanbeyan. I am unlikely to book anything in other states, e.g. events in Sydney.’

Other audience members have suggested that restrictions on interstate and international travel, and the possibility of future lockdowns or border closures, have led them to preference events in their local area. One stated,

‘They have made me more cautious about pre-booking theatre inter-state, given the frequency of lockdowns.’

Building confidence

The option to reschedule or refund tickets is giving ACT audiences the confidence to make bookings

When faced with event cancellations, the majority of ACT audiences said that they rescheduled or rebooked the event (45%). Around 3 in 10 (31%) requested a refund.

Smaller numbers (15% of audiences of ACT organisations and 18% of ACT-based audiences) donated the value of the unused tickets. Some ACT audience members suggested they would have liked to donate more frequently, but were not always given the option. One said,

‘I have never had the option to donate the value of the ticket, if I had the option, I would.’

Generally, ACT audience members were satisfied with the options made available to them in the event of cancellations – with many suggesting that the option to reschedule and rebook was giving them the confidence to continue booking.

One audience member said,

‘These days, when make a booking I go into it with the awareness that it's not set in stone and that it may get cancelled or postponed. As long as you're aware of cancellation/refund/rescheduling policies of the venue then it's no big deal. Just accept and roll with these changing times.’

Others expressed satisfaction as to how ACT venues had handled cancellations and reschedules. One audience member reported,

‘Happy with Canberra Theatre for their responsiveness to changes to artists schedules due to lockdowns in other cities.’

Audiences will be reassured by clear communication from venues around rebooking and refunds

Some audience members reported mixed experiences with rebooking and rescheduling events.

When it came to refunding versus rescheduling events, some audience members preferred events to be rescheduled rather than see them be cancelled altogether. One said,

‘I miss live theatre performances and prefer to reschedule rather than cancel.’

However, others have found that rescheduled events can be difficult to manage and prefer to have the option to refund tickets. One audience member shared,

‘I tried to attend the rescheduled events when I could but sometimes the timings are inconvenient, or I just can't be bothered buying tickets again.’

Furthermore, some audience members noted that the process of refunding or rescheduling events can be stressful – highlighting the importance of having transparent and simple processes for rescheduling and refunding, with policies outlined in advance. One audience member shared,

‘It was highly stressful. I think when there is an outbreak, contact should be made with tickets holders in a more timely fashion. A statement saying: we are working through the news from earlier today. If you have concerns please register and we will do the utmost to work with you on those.’

Similarly, some ACT audience members are concerned by the prospect of losing money from cancelled bookings – suggesting an opportunity for presenters to reassure audiences on this front. One said,

‘[It’s] made me wary of spending my money in advance if refunds will not be readily available.’

ACT audiences find check-ins, improved ventilation and mandatory mask policies encouraging amid the Delta variant outbreak

COVID-safe precautions have become particularly important for many ACT audience members, given the outbreak of the highly infectious Delta variant.

When asked what safety measures would encourage or discourage audiences of ACT organisations to attend an event, the largest proportions said they would be encouraged by improvements to ventilation systems (83%) and the presence of check-in procedures (84%). ACT-based audiences responded similarly.

7 in 10 ACT audiences (69%) also reported that they would be encouraged by requiring audiences to wear masks inside venues. Across jurisdictions, ACT audiences were some of the most in favour of mandatory mask-wearing, along with NSW (77%) and VIC (66%).

Only 13% of ACT-based audiences and 14% of audiences of ACT organisations reported that they would be discouraged by the presence of masks. In other states, mandatory mask-wearing has been more polarising, such as SA (52% encouraged, 21% discouraged) and WA (51% encouraged, 23% discouraged).

7 in 10 (69%) ACT audiences said that they would be encouraged by limiting venue seating capacity to 75% and/or limiting capacity to allow 2 square metres per person (61%).

Audiences felt less strongly about taking temperatures at the entrance to venues - although 47% of audiences of ACT organisations would be encouraged by the presence of this procedure, a further 39% felt neutral about it. ACT-based audiences responded similarly.

ACT audiences want to be informed in advance of COVID-safe policies — and want to see them in practice

In addition to the above measures, ACT audiences stressed the importance of knowing the venue's COVID-safety protocols in advance so they can make informed decisions. One said,

‘Clearly state rules regarding masks, whether there are seating limits, check in rules etc. It shows you take it seriously and makes it clear what will happen at your event. With rules changing frequently it's important to communicate what the specific expectations are at each event.’

Another called for information about,

‘What the COVID safe practices are at the time of purchasing tickets, so I can decide to go or not.’

Others emphasised that they wanted to see these protocols followed, monitored and consistently put into practice. One said,

‘[I want to see] Rigorous adherence to covid guidelines (check in, sanitising on entry, face masks worn, patrons appropriately spaced etc). The biggest of these for me is the spacing between patrons. I find a lot of places don't follow that guideline.’

ACT audiences prefer venues with fixed seating — whether they are indoor or outdoor

Audiences of ACT organisations were asked to rank their preferences for attending events over summer among a list of four different venue types. The largest proportion selected an outdoor venue with fixed seating (45%) or an indoor venue with fixed seating (33%) as their first preference, while only in five (17%) preferred an outdoor venue where audiences were free to walk around. The same trend was evident for ACT-based audiences.

One audience member stated,

‘Outdoor settings are just better in terms of providing natural ventilation. Indoor venues are still a bit concerning for me at this point of the pandemic.’

Some responses were motivated by factors other than virus transmission – such as weather, or the quality of the experience. One audience member stated,

‘Love the idea of summer & being outdoors in Canberra!’

Planning for future attendance

ACT audiences are favouring their usual programming, or light-hearted content — rather than works about the pandemic

When asked in early July about the types of arts and cultural content that they would be attracted to over the next year, the overwhelming majority of ACT audiences agreed that they wanted to see the same kinds of events they used to attend pre-pandemic (93%).

Audiences of ACT organisations were less likely than in May 2020 to agree that they wanted to see ‘works that make sense of the pandemic’ (9%, down from 28%) and more likely to be attracted to ‘light-hearted programs’ (36%, up from 19%). ACT-based audiences responded similarly.

7 in 10 ACT audiences expect to spend the same amount or more on cultural events, consistent with March

When asked about their projected spending over the next 12 months, 7 in 10 (68%) of audiences of ACT organisations said they would spend the same amount or more on arts and culture activities, compared to before the health crisis started (stable with 67% in March 2021). Similarly, 67% of ACT-based audiences expect to spend the same or more, stable with 66% in March.

The proportion of ACT audiences who planned to spend more or the same was similar to NSW (72%). By comparison, SA (78%), QLD (78%) and WA (78%) had a slightly higher proportion of audiences who expected their spending to be the same or higher than before the health crisis started.

Of the 11% of ACT audiences who expected their spending to increase, many attributed this change to a desire to catch up on lost time and a renewed appreciation of the value of the arts in their communities and lives. Others expressed a desire to support artists and venues, given the effects of the pandemic on the sector.

One ACT audience member said,

‘I am making the most of opportunities that are available, after a year where I went nowhere much, and participated in very few cultural activities.’

Another stated,

‘Because I feel bereft of any culture and I am hopeful that the arts community will come back stronger than ever and we will be spoilt for choice!’

Around a third of ACT audiences expect their spending to decrease over the next 12 months

32% of audiences of ACT organisations and 33% of ACT-based audiences suggested that they expected their spending over the next 12 months to be less than before the pandemic began.

When asked the reason for this change, some audience members cited personal circumstances such as finances or ageing. Others suggested that the recent outbreak in nearby NSW had shaken their confidence and lead to greater health anxiety, or that restrictions and lack of opportunity had made them likely to attend fewer events. One stated,

‘I imagine I won't be as comfortable attending events, especially since they require purchasing tickets in advance and not knowing what restrictions/level of transmission will be.’

Vaccination outlook

COVID-safety protocols can help build confidence in the wait for vaccination

Many ACT audience members see vaccination as a key factor in their decisions to attend cultural events. When asked what was the most essential information cultural organisations could provide to help them decide whether or not to attend an event, many ACT respondents referred to vaccination in their responses. One said,

‘There's no information that will help. No way am I going to go to any event where there are other people until I've received my 2nd vaccine shot.’

Some ACT audiences have suggested they won't return to events until vaccination rates are higher, with one commenting,

'I don't anticipate attending events due to Covid concerns. People are unvaccinated, there could be outbreaks. My family is ineligible to be vaccinated at this point so we won't risk it.'

Another said,

'I think it will be quite some time before I am comfortable to go to all of my usual preferred activities. People need to get vaccinated across the country.'

ACT arts audiences are getting vaccinated against COVID-19 at a faster rate

ACT arts audiences appear to be getting vaccinated at a faster rate than the general population - a promising sign for those audience members who are looking for high vaccination rates before they return to regular attendance.

Almost all (98%) of audiences of ACT organisations aged 75 and over had been at least partially vaccinated in early July, compared to 73% of Australians over 70 in the general population, based on figures from the Australian Government Department of Health (<https://www.health.gov.au/initiatives-and-programs/covid-19-vaccines/australias-covid-19-vaccine-rollout>).

8 in 10 (81%) of ACT respondents aged between 55 and 64 had been at least partially vaccinated, compared to around half of the general population.

Over 1 in 10 (14%) of ACT respondents under 35 had been at least partially vaccinated, compared to approximately 10% of the general population. Of the 86% of audiences under 35 who were not vaccinated, 97% stated that they would probably or definitely get vaccinated when it became available.

Similar trends were evident for ACT-based audiences, although ACT-based audiences under 35 were slightly more likely to have been at least partially vaccinated (18%).

Most ACT audiences are confident the vaccination effort will be successful

Most audiences of ACT organisations (81%, down from 90% in March 2021) and ACT-based audiences (82%, down from 90%) are at least somewhat confident that the vaccination effort will be successful in defeating the pandemic and allowing normal activities to resume within a year.

Across jurisdictions, ACT audiences were some of the least confident, along with VIC (85% at least somewhat confident). Audiences in NSW were the most confident (89% at least somewhat confident).

Online participation

4 in 10 ACT audience members had participated in an online arts and culture experience in the fortnight before data collection

4 in 10 (42%) audiences of ACT organisations were participating in digital arts and cultural experiences in early July, down from around half in March 2021.

The participation rate in ACT was higher than that of audiences in QLD (37%), SA (37%) and WA (40%), but lower than states such as NSW (50%) and VIC (47%), where digital participation rates have generally been higher throughout the pandemic.

Audiences of ACT organisations were most likely to have watched a pre-recorded video of a performance (20%, down from 24% March 2021), participated in an online class or tutorial (18%, down from 23%) or watched a live streamed performance (15%, down from 18%) in the two weeks prior to data collection. Similar patterns of participation were observed for ACT-based audiences.

Half of ACT audiences see an ongoing role for digital participation — but for most, this role will be small

In July 2021, audiences were asked, ‘When venues are open and it’s possible to attend in-person cultural experiences, what role do online arts events/experiences play in your life?’

Approximately half (53%) of audiences of ACT organisations stated they would continue to engage online when in-person attendance is possible – suggesting an ongoing role for digital arts and culture. For the majority, this role was small (43%), although 10% saw it as substantial. Similarly, 56% of ACT-based organisations say that digital programming plays a small (45%) or substantial (11%) role when in-person alternatives are available.

This proportion was one of the highest around the country, along with NSW (57%), VIC (56%) and TAS (58%).

Convenience, comfort, accessibility and safety were key factors cited by ACT audiences for whom digital played an ongoing role. Others pointed to the innovation and creativity that comes out of the digital medium. One respondent shared,

‘I love seeing how directors interpret and present classic plays online - the creativity of different set designs along with the talented delivery of nuance by actors. Nothing beats live performances but some performances I'd never get to see if they weren't online. So definitely this will be something I will continue to engage with long term.’

Digital programming can open up the range of events available to ACT audience members

Some ACT audience members pointed out that digital events are not constrained by physical distance - meaning that ACT audiences are able to participate in interstate events they couldn't otherwise attend. One audience member said they would continue to engage with,

‘Events in other cities - e.g. Australian Ballet does not often visit Canberra, hence I would watch a performance online.’

Another audience member stated,

‘If there are things I can't physically get to because of personal circumstances, I'd consider an online option. I hope online options that arose from covid continue for this reason. They've given me access to things I would otherwise never have accessed.’

7% of ACT audience members identified as a person with disability and some commented that digital participation can provide an accessible alternative to in-person attendance. One audience member with disability stated,

‘[I will continue to engage with] activities that aren't available in Canberra or aren't easily accessible for the disabled.’

Another said,

‘My mobility is decreasing due to a life-ending illness so hopefully online experiences will continue to be available as that will be the only way I can participate and enjoy.’

Most ACT audiences tune in alone, but shared viewing can be a way to connect during lockdowns and border closures

When asked how they participated in a digital event or experience, the majority of audiences of ACT organisations suggested they tuned in alone (64%), while 31% watched with other members of their household.

A further 11% gathered in public to watch a live-streamed event with an audience. One in ten (12%) audience members tuned in as part of an in-person gathering of friends and family, while another 8% connected online with friends and family who were tuning in elsewhere. Similar trends were evident for ACT-based audiences.

Some audience members commented that digital content offered them a way to connect, both with people in their households and without, during lockdowns and as other states close their borders. One audience member said,

‘If friends or others who are geographically remote from me e.g. they are overseas and they have a live streamed concert, then I might watch that.’

Another suggested they would participate in,

‘Virtual tours of arts venues that are geographically distant, probably with an eye towards sharing them with my children.’

A third of ACT audiences are paying to access online content

A third (33%) of audiences of ACT organisations are paying to access online content (down from 42% in March 2021). Similarly, 36% of ACT-based audiences are paying to participate online, down from 42%.

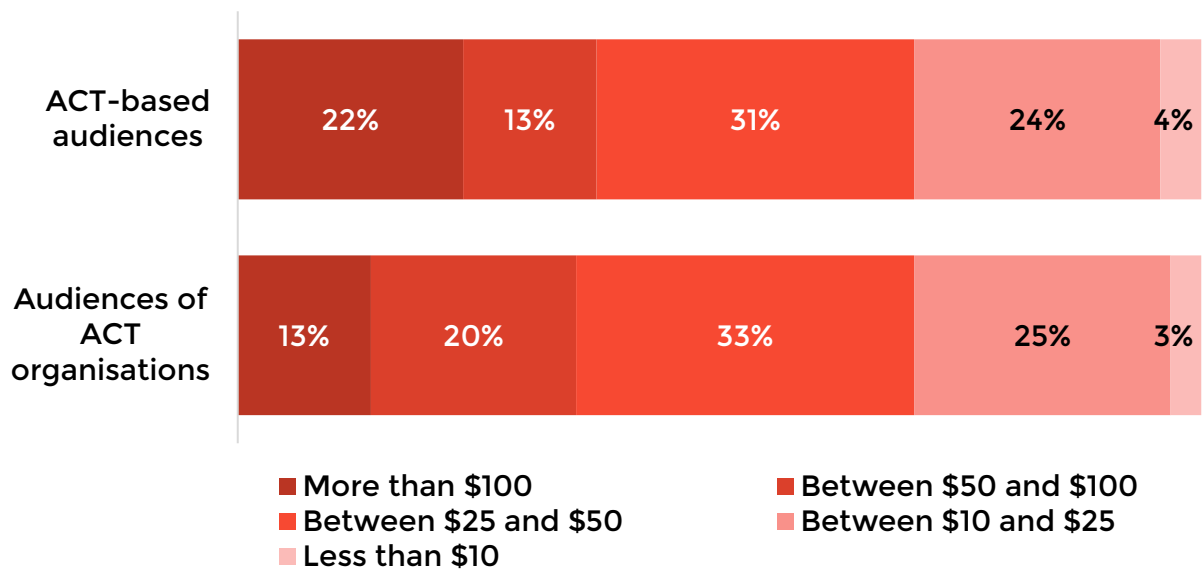
ACT audiences were in line with the national average in terms of paid online participation (33%) and were more likely to pay for digital content than audiences in QLD (30%), SA (27%) and WA (23%).

July 2021 saw audiences of ACT organisations engaging with online content in different ways – the proportion of audiences who made a one-off pay-per-view arrangement decreased (14%, down from 23% in March 2021), while the proportion subscribing to platforms to access content on-demand increased (12%, up from 4%). Audiences were also less likely to make a donation as an expression of gratitude for an online experience (9%, down from 18%). The same pattern was observed for ACT-based audiences.



When asked how much they spent on digital experiences in the past fortnight, a third (33%) of audiences of ACT organisations spent over \$50 (stable with 35% in March 2021). Similarly, 35% of the ACT-based audience members who paid to access online content spent over \$50, stable with March. This finding should be interpreted with caution due to the small sample size of the cohort, but is in line with trends observed nationally – suggesting that ‘digital devotees’ are willing to spend on quality online content as the market matures. (Figure 6).

Figure 6: Can you share with us your total spending on online arts & culture experiences in the past fortnight? Audiences of ACT organisations (n=40) and ACT-based respondents (n=54) (July 2021).



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

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.

Acknowledgment

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