

PATTERNMAKERS

JULY 2021

# Audience Outlook Monitor

Australia Snapshot Report

JULY 2021

# Live attendance outlook

Key findings from 8,728 participants  
Audience Outlook Monitor, Australia

↓ **53%** down from 71%  
in March 2021  
attended a cultural event  
recently

↓ **62%** down from 68%  
in March 2021  
are ready to attend as  
soon as permitted

**76%**  
report their plans have  
been affected by  
lockdowns/cancellations

↑ **65%** up from 36% in  
May 2020  
would be encouraged to  
attend with mandatory  
mask policies

**83%**  
would be encouraged to  
attend with upgraded  
ventilation systems

↓ **74%** down from 80%  
in March 2021  
are making firm plans to  
attend a cultural event

↑ **74%** up from 70% in  
March 2021  
will spend the same or  
more on cultural activities  
over the next 12 months

↓ **86%** down from 90%  
in March 2021  
are confident that  
vaccination will help  
things return to normal  
within 12 months

JULY 2021

# Online participation

Key findings from 8,728 participants  
Audience Outlook Monitor, Australia

↓ **44%** down from 47%  
in March 2021  
are experiencing art  
and culture online

**52%**  
see a role for digital  
events/experiences in their  
lives long-term

**70%**  
recently tuned in to a  
digital activity alone

**28%**  
watched online with others  
from their household

↓ **33%** down from 37%  
in March 2021  
have paid for an online  
experience recently

↑ **44%** up from 41%  
in March 2021  
are paying over \$50 for  
online experiences

### Summary

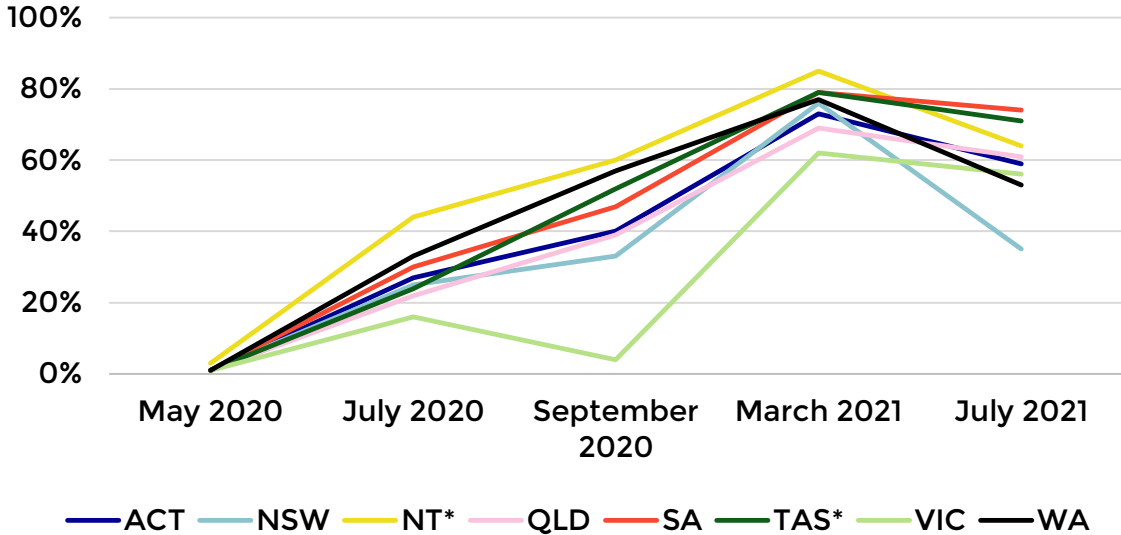
## Half of audiences attended cultural events in July, though lockdowns have affected activity around the country

The July 2021 results of the Audience Outlook Monitor indicate a setback in audience attendance, as cancellations affect events around the country. Nationally, slightly more than half (53%) of past attendees had recently attended an event, down from 71% in March 2021.

Three-quarters (76%) of audiences say their plans have been affected by lockdowns/restrictions in the past four months, whether that be because they were in lockdown (60%), the event was in an area affected (59%), or the event was cancelled due to an artist not being able to appear (62%), among other reasons. Most audiences are understanding of the forces beyond anyone’s control and feel strong empathy with artists and teams affected.

Around half (52%) now say the risk of future lockdowns and cancellations is inhibiting their attendance, while 38% are concerned about virus transmission. However, audiences remain committed to engaging with culture and 86% are at least somewhat confident that the vaccination roll-out will be successful in helping things return to normal within 12 months.

Figure 1: Proportion of past attendees who attended a cultural event in the fortnight before data collection, by state/territory. July 2021 (n=8,712)



## Check-ins, ventilation and distancing can help build confidence in the wait for vaccination

Many audiences around the country continue to make future plans to attend events of all kinds — though more people are now making plans for spring or summer when they have greater confidence events will be going ahead.

Among those affected by lockdowns and cancellations, some say the experience has made them more cautious about making plans and may opt for local events or make last-minute decisions about attending. The vast majority of audiences want to see the same things they used to in the past, though there is a segment who are attracted to more light-hearted events at present.

A majority of audiences continue to be comfortable attending most venue types and are encouraged by check-in procedures (85%), upgraded ventilation (83%) and, where needed, mandatory mask policies (65%).

In a positive sign for economic recovery, more audiences are now saying they think their spending on arts and culture events will reach pre-pandemic levels this year, compared to March 2021. While much uncertainty remains in terms of what operations will be viable in this context, audiences express a renewed appreciation for cultural events and some say they want to ‘make up for lost time.’

## Online participation is stable and 52% see a role for digital events in their lives long-term

Around 4 in 10 (44%) audience members continue to participate in online arts and cultural activities, compared to 47% in March. While participation is slightly higher in lockdown-affected states, there has not been a return to the digital participation boom of the early pandemic period and most forms of participation are stable.

When asked about the role that digital programming plays in their lives when it’s possible to attend events in-person, 1 in 10 (10%) see online arts and culture playing a substantial role, while larger proportions see it playing a small role (42%) or no role at all (47%).

Many audiences are attracted to digital events they can't access in their own communities. Others would like to see hybrid events in their area continue, affording them more certainty of being able to participate in the event of an outbreak, illness or work commitments.

While the proportion of online users paying for content has fallen slightly, a higher proportion of users say they spent over \$50 in the past fortnight and most types of payment are consistent with March levels — potentially providing a more stable basis for planning.

## Introduction

### **This report summarises insights from over 8,700 audience members**

This Snapshot Report outlines key findings from the July 2021 phase of the Audience Outlook Monitor in Australia (Phase 5), based on 8,728 respondents. Launched in May 2020, the study is tracking audience sentiment in relation to the COVID-19 pandemic. Each phase involves a cross-sector collaborative survey process involving 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. Almost 9,000 responded, providing excellent visibility of trends across the country (noting that results for the Northern Territory and Tasmania should be interpreted with caution due to a small sample size in those jurisdictions).

In addition to this Snapshot Report, the July 2021 results are freely accessible in an interactive dashboard. Users can explore the data for different artforms, types of events and demographic groups in all parts of Australia. For more information about the study, and to access resources such as the dashboard, visit: [www.thepatternmakers.com.au/covid19](http://www.thepatternmakers.com.au/covid19)

Read on for the key July 2021 findings nationally.

## Current conditions

### **Comfort levels with public activities have dropped amid recent outbreaks**

The national results show that a majority of audience members are comfortable with most types of public activities. However, following the recent cases of COVID-19 in New South Wales (NSW), Queensland (QLD), Western Australia (WA) and the Northern Territory (NT) around the time of data collection (7–11 July 2021), the latest results reveal a decrease in comfort with most public activities since March 2021.

Compared to March 2021, fewer audience members feel somewhat or very comfortable eating at a local restaurant (90%, down from 98%), going to a local cinema (80%, down from 90%), using public transport (75%, down from 85%) or flying domestically on a commercial airline (63%, down from 69%).

Audiences in NSW are the least comfortable with public activities nationally, though a majority are comfortable eating at a local restaurant (70%), going to a local cinema (57%) or using public transport (60%).

Areas experiencing lower levels of comfort in public include the Australian Capital Territory (ACT), QLD and the NT. States where audiences are most comfortable continue to be South Australia (SA), Tasmania (TAS) and WA, while Victorian (VIC) audiences are now showing greater confidence, after protracted outbreaks in 2020.

## Attending cultural events

### Live attendance levels have declined since March

While the rate of live attendance was high in March 2021 (71%) following a summer of low virus cases across the country, this rate has dropped back slightly in July 2021 (53%).

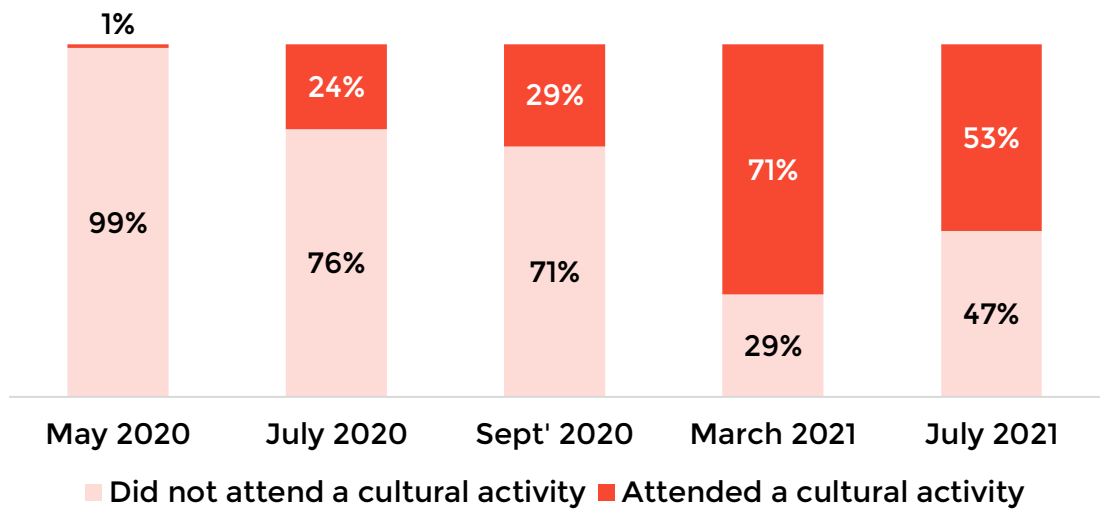
The most common activities audiences are participating in has remained consistent with previous phases, with the largest proportions attending a live performance (26%) or visiting a museum or gallery (23%) in the fortnight before data collection (7–11 July 2021).

There are slight differences between states and territories. Audiences in NSW (35%) are the least likely to have attended a live event recently, with the data collection period occurring during the second week of the July 2021 Greater Sydney lockdown.

Attendance is also lower in states affected by lockdowns in the weeks leading up to data collection, such as WA (53%), QLD (61%) and VIC (56%). This compares to SA (74%) and TAS (71%) where cases have been low and no lockdowns have taken place.



Figure 2: In the past fortnight, did you do a cultural activity in-person (not online)? July 2021 (n=8,712)



## In light of recent outbreaks, comfort at most venue types has declined slightly

On average, audiences remain largely comfortable with most venue types, though rates have declined slightly since March, including for museums or galleries (93%, down from 98% in March), community art spaces or studios (90%, down from 96%), outdoor festivals or concerts (88%, down from 93%) and large theatres (84%, down from 91%).

This is also true for venue types where audience comfort is typically lower, such as hands-on exhibits at an interactive museum (53%, down from 57% in March) or comedy clubs or live music venues (51%, down from 56%).

Comfort at different venue types has declined the most significantly in NSW, due to the ongoing COVID-19 outbreak in that state. The proportion of audiences at least somewhat comfortable has decreased by more than 10 percentage points for all venue types. However, they remain higher than in September 2020, suggesting that recent events have set back audience comfort, but not reverted it to previous levels.

In SA, where virus cases have been very low and lockdowns have not occurred, audience comfort has remained largely consistent with March 2021 levels — even increasing slightly in the case of attending interactive exhibits (66%, up from 63% in March 2021).

## Impact of lockdowns and restrictions

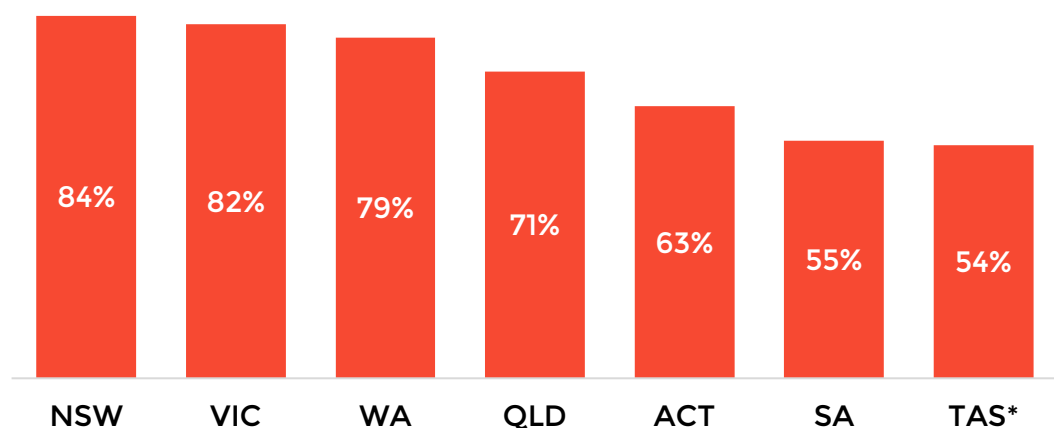
### Three-quarters of audiences have had their plans affected by lockdowns and restrictions

The majority of audiences (76%) stated that their plans to attend arts and cultural events have been affected by lockdowns and restrictions over the past four months.

This proportion is higher in areas which have recently had COVID-19 cases, such as NSW (84%), VIC (82%), WA (79%) and QLD (71%), but also notable in states/territories that have not experienced outbreaks, such as ACT (63%), SA (55%) and TAS (54%) — confirming that closures and lockdowns in one area have flow-on effects nationwide.

When asked which scenarios applied to them, the majority of respondents said that the artist they were planning to see was affected by lockdown/restrictions (62%), they lived in an area affected by lockdown/restrictions (60%), or the event or venue took place in an affected area (59%).

Figure 3: Proportion of past attendees who say their plans to attend in-person arts and cultural events been affected by lockdowns/restrictions in the past four months. July 2021 (n=8,688)



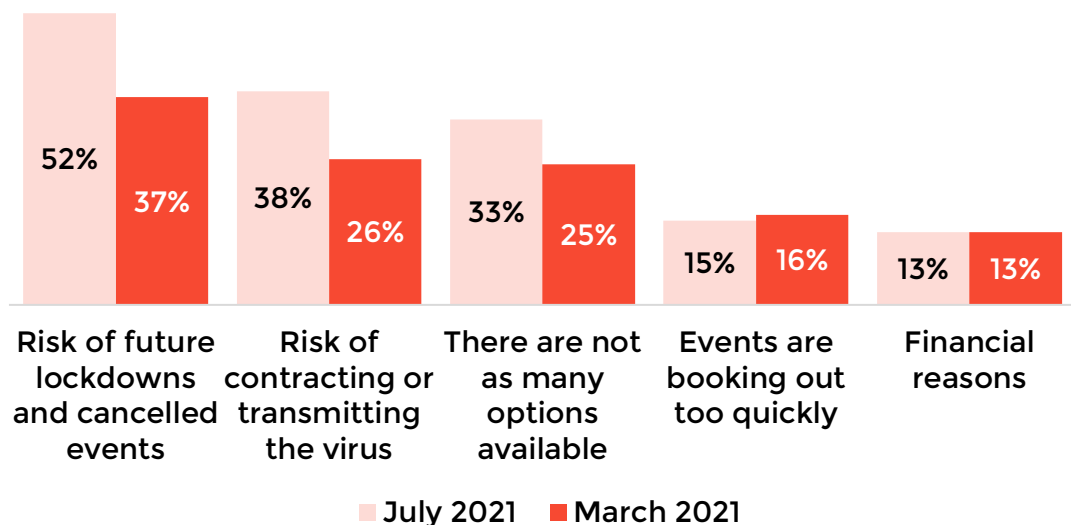
Less commonly, audiences chose not to attend planned events due to the risk of travel delays or quarantines (12%). This scenario was more common for audiences in regional/remote areas (15%) compared to those living in major cities (11%). It was also more common in the ACT (25%), SA (21%) and TAS (19%), where audiences were not experiencing lockdowns themselves — but hesitant to put themselves at risk.

## The risk of future lockdowns remains the key barrier inhibiting attendance

In March 2021, 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, they were asked whether similar factors would affect their attendance over the next 12 months. It appears that in the year ahead, more audiences will be inhibited by the risk of future lockdowns and cancellations (52%, up from 37% in March 2021). Other more common barriers now include the risk of contracting or transmitting the virus (38%, up from 26%) and the fact that there are not as many options available (33%, up from 25%).

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) July 2021 (n=8,634)



Other key factors inhibiting attendance have remained consistent since March, including the fact that events are booking out too quickly (15%, stable with 16%) and financial reasons (13%, stable).

Confidence appears to be affected by recent experiences — respondents who say that their plans have been affected by lockdowns are more likely to say that the risk of future lockdowns is preventing them from attending (53%), compared to those who have not been affected by lockdowns (48%).

## Amid uncertain times, audiences stay committed to supporting the arts

When sharing how the lockdowns/restrictions have impacted them personally, some audience members expressed disappointment, frustration and anxiety about event cancellations and the uncertainty surrounding recent outbreaks.

Some audience members suggest that having their plans changed by lockdowns has made them less willing to commit to events in the future. One said,

‘It was deeply disappointing when the event was cancelled as I had been looking forward to it for months. I was surprised by how upset I was by the cancellation. It has made me much more cautious about booking tickets to major events.’

Another said,

‘I am cautious about making plans, especially about attending cultural events out of state. If I have to travel it just isn't worth it — too hard to cancel travel plans again and again.’

However, many audience members recognised the necessity of lockdowns and the importance of supporting the artists whose events have been cancelled. One audience member suggested,

‘They have been disappointing, but the impact on me is minimal compared to the impact on artists and venues.’

## A majority of audiences continue to make future plans to attend events

Three-quarters (74%) of audiences are still making firm plans to attend in the future — though this rate has dropped slightly from 80% in March 2021.

Audiences in NSW are the least likely to be making firm plans (61%), as the extended lockdown period has made scheduling for events increasingly uncertain. SA audiences are the most likely to be making firm plans (86%), followed by those in QLD (78%) and VIC (78%).

The July 2021 results show similar trends in the types of venues that audiences are planning to attend, with the largest proportion making firm plans to attend a live performance (53%).

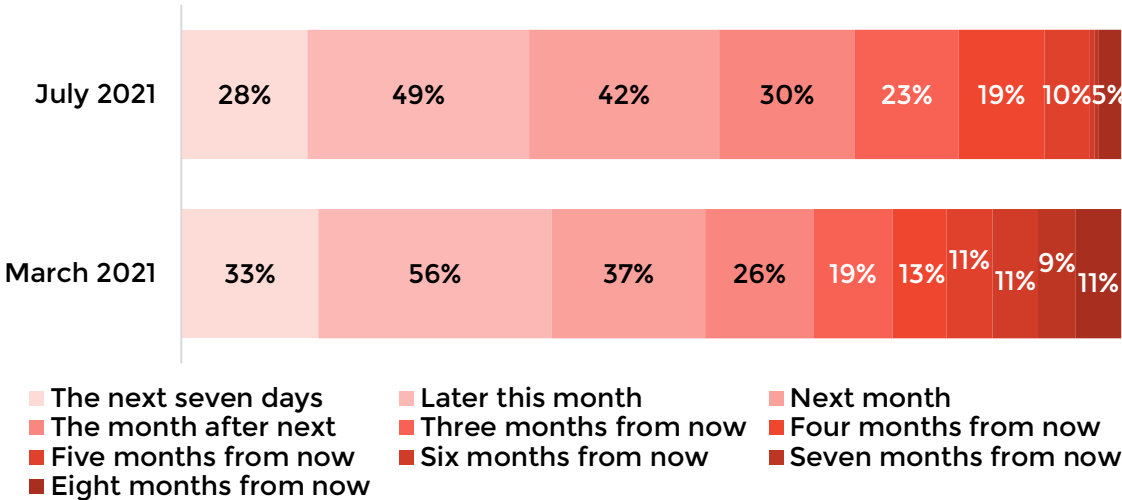
# Audiences are looking slightly further ahead to book events, given the uncertainty of restrictions

While the March 2021 results showed that audiences were commonly booking events 2–3 weeks in advance, recent data suggests that audiences are feeling cautious in the context of event cancellations and lockdowns and are now more likely to be booking for events next month (42%, up from 37%). Significant proportions are also booking for events held in September (30%) or October (23%).

Audience members who report being affected by lockdowns are more likely to be booking events further in advance, such as in September for instance (32%), compared to audiences who have not been affected by lockdowns (23%).

While audiences are planning further ahead, spending on tickets to in-person cultural activities has remained largely consistent since March 2021, though slightly fewer spent more than \$100 (25%, down from 31%). Audiences in areas affected by recent lockdowns have seen the most significant drop in spend over \$100, including WA (22%, down from 36%), as well as NSW (23%, down from 37%).

Figure 5: Proportion of audiences who say that in the past fortnight they purchased tickets for one or more live shows or performances in the future (multiple response). July (n=3,199) and March 2021 (n=5,248)



## Some audiences will opt for local events and make decisions at the last minute

Qualitative comments confirmed that the restrictions on interstate and international travel, and the risk of future lockdowns, are affecting audience choices to attend live events. While many continue to make plans, some say they will be more likely to attend local events.

Some audience members mentioned that their money saved means they are better able to support the local industry, as one commented,

‘Due to not spending money on trips due to border closures, we have the money to [do] more locally.’

Another said,

‘Those working in the arts have suffered terribly, and I want to support them. Overseas travel is off the menu, so I have more locally disposable income. I expect more events featuring local artists, and fostering Australian artists is essential to a thriving arts scene.’

Others are opting to book cultural events at the last-minute. As one person shared,

‘I like to attend ballet, museums, art galleries etc, but over the next 12 months I will be reluctant to plan too far ahead in case of last-minute cancellations.’

### Building confidence

## Clear communication about ticketing policies helps audiences to make informed decisions

Among those who have been affected by event cancellations, the largest proportion of audience members said they rescheduled or rebooked the event (58%), while a smaller proportion (29%) requested refunds.

In these instances, audience members highlighted the importance of flexibility, clear communication and explicit ticketing policies. One audience member said,

'I don't have extra money to waste, so options to reschedule or refund are important — but I always intend to 're-spend' the money in a similar way.'

Some audience members expressed satisfaction with the way organisations had handled event cancellations and rebooking policies. One audience member stated,

'I was grateful for the way in which the organisation managed to rebook my seat. Excellent service.'

Customer service in relation to ticketing helps to maintain audience confidence and maximise the potential for future bookings.

## **Venues can increase audience comfort by monitoring check-ins and improving ventilation**

Although audience comfort has been tested by recent events, the July results suggested that certain measures will encourage audiences to attend, when it is safe to do so.

When asked what safety measures would encourage or discourage them to attend an event, the largest proportion said they would be encouraged by the presence of check-in procedures (85%).

A majority of audiences said they would be encouraged to attend venues by improved ventilation systems (83%) — which may be a key concern due to the high transmission rates of the Delta variant in Australia.

Other COVID-19 safety measures, such as temperature-taking and mask-wearing, were encouraging to many but continue to be somewhat polarising. While 65% of audiences reported that they would be encouraged by mandatory mask policies, a further 15% reported that these measures would discourage them to attend. This distinction is more pronounced in certain states, such as SA (52% encouraged, 21% discouraged) and WA (51% encouraged, 23% discouraged).

Some audience members felt that wearing masks impacted upon their enjoyment of the event, with one audience member suggesting that,

'I will not go anywhere if I have to wear a mask. It totally wrecks the whole enjoyment of the experience. I'm not [an] anti-masker — I get why they have the rule — I just cannot enjoy myself at all if I have to wear one.'

Taking temperatures at the entrance of venues also received varied reactions — 48% indicated that this safety measure would encourage them to attend, whilst 16% suggested that it was a deterrent. One person shared,

'[Venues should] do away with ridiculous temperature checking which delays admission and achieves absolutely nothing.'

## **Capacity limits can help increase comfort levels — but many audiences remain concerned about social distancing**

Two-thirds (65%) said that they would be encouraged by limiting venue seating capacity to 75% and/or limiting capacity to allow 2 square metres per person (59%).

However, a sizeable number feel neutral about these measures. Several recent attendees at cultural events mentioned that social distancing approaches could be better communicated and executed during events. One person said,

'[I want more] info on capacity/spacing. If it's a multi-level venue, and they're only selling 50% capacity, I don't want to turn up and find that meant the ground floor is packed to capacity but upstairs is completely empty.'

Another audience member mentioned inconsistencies in approaches to social distancing, commenting,

'Telling us that only 75% of the seating capacity is going to be used and then packing people in next to each other without 2 or more square metres around them is not okay.'



## Audiences feel most comfortable with fixed seating — at both indoor and outdoor venues

Audiences were asked to rank their preferences for attending events over summer among a list of four different venue types. The largest proportion selected an indoor venue with fixed seating (41%) or an outdoor venue with fixed seating (40%) as their first preference, though opinions vary based on artform and respondent age.

A smaller number (17%) preferred an outdoor venue where audiences were free to walk around.

A common view was that outdoor events would be preferable for reducing the likelihood of virus transmission:

‘Fresh air and circulation are the biggest factor. Being seated doesn't mean much if there is no fresh air. Outdoors seems safer to me and until things settle down, I'm not keen to be in confined spaces with lots of people.’

Indoor venues were rated highly by a large proportion of audiences, but comments from respondents revealed that some of these decisions were driven by weather-related factors rather than safety concerns. One participant stated,

‘It's good to be outdoors in the summertime, but on hot days an indoor venue with air conditioning and proper ventilation would be [my preference].’

However, some audiences can't wait to get back to being ‘shoulder to shoulder’ in a buzzing venue, as one said, ‘nothing is better than attending a gig in person with a packed audience.’

### Planning for future attendance

## Audiences are eager to return to favourite venues — and some are seeking light-hearted experiences over the next year

Audiences were invited to share their preference for the types of arts and cultural content they would engage with over the next year.

Similar to the May 2020 results, the majority of audiences are interested in seeing the same kinds of events they used to attend, pre-pandemic (93%, stable).

Though in the minority, the proportion of audiences who say they will prefer 'light-hearted programs' has increased (34%, up from 21% in May 2020). One audience member looks forward to,

'Happy things. Lots of happy songs and dances. No Shakespeare tragedies. No woman-dying operas. Bright coloured art exhibits. Talks about penguins. Balloons. Let's all have a carefree laugh!'

The proportion who are likely to seek 'works that make sense of the pandemic' has decreased (10%, down from 24% in May 2020), suggesting a need for strategic positioning of more challenging works.

Interestingly, a sizeable number (23%) of those who are seeking works that make sense of the pandemic also express an interest in light-hearted programs.

Comments from some audience members revealed a desire to catch up on experiences that they have missed during lockdown. One person shared,

'Mostly things we missed out on during lockdown, but also special events (mostly concerts). I've already booked tickets for Phantom of the Opera and Hamilton, and I'm not a big musical theatre fan! I think it's just going out and being in a theatre that I've missed.'

## **Over the next year, most audiences say they will spend the same amount or more on cultural activities**

Looking ahead over the next 12 months, the majority of audiences say they expect to spend the same amount or more on arts and culture activities — and this rate has increased (74%, up from 70% in March 2021). However, much uncertainty remains in terms of what events will go ahead and what formats will be viable in the context of ongoing outbreaks.

When prompted to share what will influence them to spend more in future, respondents commonly cited reasons such as making up for lost time during the pandemic. Some respondents shared,

‘To make up for what I missed out on last year. To immerse myself into more positive experiences to help alleviate anxiety caused by COVID and ongoing COVID news reports.’

Others mentioned their increased appreciation and value for arts and culture experiences as a motivation for spending more in future. Some commented,

‘Because not being able to participate in an activity highlights that it is important to you. So we will do more as soon as we can.’

Similar to audience sentiments held in previous phases of data collection, many respondents shared that they would like to support the industry through a time of need. Some people shared,

‘Since the arts & culture sector has been hit hard by the pandemic, I feel it would be generous to attend more things than I usually would. Perhaps I will attend more things that I might have been on the fence about previously. Plus, I saved money over the past 16 months with reduced options.’

‘You don't know what you've lost until it's gone. The arts have suffered such a devastating blow the past 18 months and they need our financial support more than ever.’

These sentiments confirm the importance of public support for industry to continue presenting events.

## **Some audiences expect to spend less on arts experiences in the next year — and the reasons are varied**

There remains a significant proportion who say they anticipate spending less on arts and culture activities over the next year, though this has decreased since March 2021 (26%, down from 30%).

Respondents commonly cited the impact of the pandemic on their financial situation and other changes to personal circumstances — such as the pandemic ‘baby boom’. Some said,

‘Because 90% of my work was cancelled last year due to lockdowns, and now we're having another one which has cancelled 100% of my work from mid-June to probably mid-August. I can't afford as many tickets as I'd usually buy, plus of course there aren't as many shows to buy tickets for!’

‘New baby and lost the connections and routine of going out as a priority.’

Other common reasons relate to the impact of restrictions and the spread of the virus on confidence. Several audience members cited general health anxiety and a reliance on successful health policies, as some said,

‘I will be less likely to attend performances on a whim, or plan outings to performances with others. I will have to really want to see a production to attend the theatre as I am concerned about the health issues associated with COVID-19.’

## Vaccination outlook

### In making decisions about attending cultural events, vaccination is top of mind for many respondents

Many respondents cited vaccination as a key factor in their decision-making to attend cultural events. One audience member mentioned the low rates of vaccination as a barrier, stating:

‘[I would] rather stay at home, much to my shame, until I'm fully vaccinated and more people are too. The thought of the complications of long COVID-19 and unvaccinated people is putting me off resuming normal activities. If 95% people were vaccinated (dream world), it would be okay.’

Some vaccinated respondents shared their interest in seeing a wider range of cultural activities return. One audience member stated,

‘Personally, I am lucky to now be vaccinated. I am of the belief that we need to get to a COVID-present society. I want to do this without risking large portions of the community, but at what cost are lockdowns and vaccine hesitancy (or anti-vaxxing) having on industries such as culture/arts.’

While continued COVID-safe measures will help build confidence in the short term, the data suggests that for some audience members, it's vaccination that is going to have the biggest impact on attendance. As one person shared,

'I still have some reluctance to resume normal activities until I see strong evidence that we have a high level of community vaccination in place...'

## **Arts audiences are more likely to have been vaccinated against COVID-19**

Given the relationship between vaccination and confidence, it's positive to see that arts audiences are getting vaccinated for COVID-19 at a faster rate than Australia's general population.

Almost all (95%) of respondents aged 75 and over had been at least partially vaccinated, 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>).

Eight in ten (79%) of respondents aged between 55 and 64 had been at least partially vaccinated, compared to around half of the general population.

One in four (24%) of respondents under 35 had been at least partially vaccinated, compared to approximately 10% of the general population. Of the three quarters of audiences under 35 who were not vaccinated, the majority (94%) stated that they would probably or definitely get vaccinated when it became available.

## **Audiences are mostly confident that the vaccination effort will help things return to normal**

Most audiences (86%) 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. However, this is slightly lower than March 2021, when 90% were at least somewhat confident.

Confidence was higher for audiences who were partially (90%) and fully vaccinated (89%) than those who were not vaccinated (76%) at the time of data collection.

Across different jurisdictions, confidence in the vaccination effort appears highest in NSW (89% at least somewhat confident), and lowest in the ACT (81% at least somewhat confident).

## Online participation

### **Just under half of all audiences continue to participate in arts and culture experiences online**

Nationally, participation in digital arts and cultural experiences has declined slightly from 47% in March to 44% in July.

The participation rate is highest in those states most affected by protracted lockdowns, including NSW (49%) and VIC (47%). It is lowest in QLD (37%) and SA (37%).

Audiences are continuing to participate in all types of arts experiences at similar levels, including pre-recorded video (24%), online classes (19%), live-streamed events (17%) and virtual exhibitions (8%).

### **Many see a role for digital in their lives long-term, while others will revert to in-person participation**

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 1 in 10 (10%) say that online arts and cultural experiences play a substantial role, while the remainder of respondents are fairly evenly split — saying that digital plays either a small role (42%) or no role (47%) when in-person options are available.

Around the country, the patterns roughly follow the trends in current participation rates, with TAS, NSW, VIC and ACT audiences having adopted digital into their lives in larger numbers.

## Audiences that continue to engage online have discovered content and formats that suit their needs

When audiences are asked about the type of cultural activity that they are most likely to continue engaging with long-term, some key themes emerge.

Overcoming geographical barriers is commonly mentioned, with many audiences sharing examples of interstate or international events they continue to seek out.

Some say they'd be most likely to prioritise high-quality online events made exclusively for digital platforms.

Others would like to see hybrid events continue, affording them the option of participating online if they're ill or have work commitments, or feel too tired to travel home from late at night. A common theme is flexibility, as one person explained,

'Online activities give peace of mind of being safe and flexible to attend when suits.'

## Currently most audiences are tuning in alone — and there may be room to grow social viewing habits

For those who say it won't play a role for them, respondents often mention the social aspects of live events. One person said, 'Sitting in front of a computer with headphones is a joy killer.' Another said, 'I don't really like the online activities. I find it difficult to concentrate and it's harder to feel part of the event.'

When asked about different ways people may connect with others to engage online, most people indicated they tune in alone (70%), confirming an opportunity to increase social connectivity of digital events.

Audiences who are connecting socially via arts experiences appear more likely to engage long-term. One person said they'd continue with,

‘Viewing online/streamed performances simultaneously with friends in other states. This is something I’ve taken up during COVID that can’t be replaced with face-to-face.’

## Shared viewing experiences can be engaging — but technical issues can get in the way

Around one-quarter (28%) said they had recently accessed an event/experience from home with other members of their household. 1 in 10 (9%) had tuned in as part of a physical gathering and similar numbers (12%) were gathering online with others to experience the event together.

One person shared,

‘Sometimes it’s nice to have a day on the couch with family/friends, share a meal and watch an event. We live a long way from the CBD, so this makes things a little more accessible and appealing, especially in winter!’

Another said,

‘I was able to share the Digital Ballet Season with my elderly mother. I usually take her once a year to a live ballet performance, but we watched a few online together with my 20-year-old daughter as well. It was really a nice experience.’

Around the country, 12% are watching live-streams at public events — and 3% mentioned other ways of connecting such as attending lectures, workshops or talks as part of work or study. However, technical quality is key, as one person shared,

‘I paid and watched the Australian Ballet live stream from the tennis centre and the internet kept spooling so it spoiled the experience.’

Social forms of engagement are currently most common in NSW, where sizeable numbers were in lockdown at the time of data collection. In NSW 31% had accessed the event/experience from home with other members of their household and 12% had connected online with friends/family who were tuning in from elsewhere.



## Digital formats continue to offer extraordinary variety and connect audiences to events around the country

Many audiences remarked upon the wide variety of content that continues to be available — often opening up new and unique opportunities. One explained,

‘Being able to continue to ‘attend’ events such as Last Frontiers festival and Lara festival is really valuable, as they are too far and expensive to attend in person ever.’

One person said,

‘[I] just like to have the option. Basically, the world has opened up in a way thanks to digital options... [for] things that previously didn't tour Perth, it would be good if they were available digitally.’

Another said,

‘I live in Townsville and it has been great to do online activities from other states e.g. writers/book club; artist talks.’

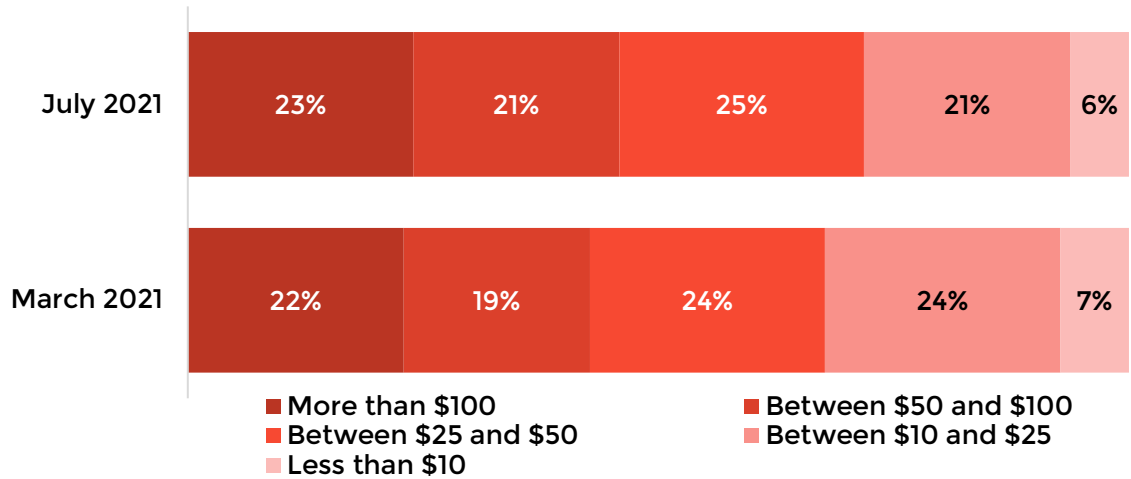
## Slightly fewer users are paying for content, but they are paying more

The proportion of audiences online who are paying for access has fallen slightly, from 37% in March to 33% in July 2021.

Most forms of payment are stable, including making a donation (13%), subscribing to online platforms (7%) and subscribing to seasons with a digital component (6%). However, slightly fewer people are engaging in the most common form of payment: one-off pay-per-view arrangements (now 16% compared to 19% in March 2021).

Interestingly, the proportion of those paying who are spending over \$50 has increased from 41% in March to 44% in July 2021, perhaps linked with the increasing amount of quality content behind paywalls.

Figure 6: Can you share with us your total spending on online arts & culture experiences in the past fortnight? July 2021 (n=951) and March 2021 (n=868)



## Some audiences are still calibrating their perception of value online

The continuing trend towards paying more online represents a positive sign for those working towards viable business models online — though audiences continue to express price sensitivity for digital experiences.

One person reflected on their purchase of an online theatre subscription to National Theatre UK, saying,

‘I’d consider something similar in Australia if the price was reasonable (a recent offer of \$60 for a single view was too much, given it is a much lesser experience than live performance).’

Another agreed, saying,

‘I’d be happy to pay a small (not the same amount as attending in person) fee for those digital experiences.’

One person commented that in the past, they had rejected online viewing of performing arts as a lesser experience — but now see it as something worth paying for:

‘Because we were able to watch it ‘on-demand’ during a 3-day window, we were able to pause and discuss what we were experiencing. This made for heightened engagement with the performances. I would be prepared to pay... \$10 to be able to

view an on-demand online performance but probably not more than this amount.'

Several comments confirmed an attractive price point in the range of \$10-\$20 to see a show on in another city, for instance:

'Musical shows or theatre that is restricted from touring (or can only be in one or 2 capital cities) could be attractive to watch online or pay a reasonable fee (closer to cinema than to live production ticket price) to be able to see.'

## Those living regionally or in other cities may represent key markets for paid experiences

One person shared,

'Living in a small rural town it is often difficult to get to events, but if it was possible online rather than not at all, I would pay to watch online. The pandemic has opened up other ideas.'

Audiences who cannot, or choose not to, attend at present also appear to be more likely to see value in digital offers. For instance, one person explained,

'I'm now living in the Blue Mountains caring for my aged mother so I'm happy to pay for online access events.'

Another agreed, reflecting,

'I believe that the pandemic has illustrated the potential for live performance to be shared with those whose location or life pattern prevents attendance. For example, a play or performance in Sydney that can be accessed by a person in the regions like me, by paying an amount that adds to the reward of the performers.'

## Audiences express ongoing interest in a wide variety of digital artforms

When asked what they'd be most likely to continue engaging with online, all forms of art and culture were mentioned — from poetry events to drawing workshops, online festivals, artist talks and theatre performances.

One person wanted to see a platform that offered a range of perspectives on key works:

‘Lectures on current exhibitions, or ‘how to do art’ courses...The add-ons — not the actual play/production/artwork — the interviews, the director’s view, the scientist, the props design... I’d probably pay for a good subscription service where I could access all of these online.’

Some gave examples of why certain forms were particularly engaging to them online. For instance, one mentioned an institution that had shared artist interviews in their studios on IGTV. They remembered,

‘I would watch these live when I was making the dinner. With a family, getting to anything at 6pm is difficult.’

One person said,

‘Any form of dance performance — I like to verbally express my admiration, hum and move along to the music which is easy to do in your lounge but not in a theatre!’

Another said,

‘I love when there are official recordings of musicals available online. Much easier and cheaper than going to see one live.’

The qualitative data confirms the range of opportunities to continue experimenting and innovating with digital events and experiences.

## 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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