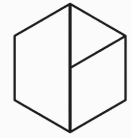


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PATTERNMAKERS



JULY 2021

Victoria Snapshot

Audience Outlook Monitor

CREATIVE VICTORIA



Summary

VIC audiences have been affected by lockdowns, but many are ready to attend when permitted

Over half (56%) of Victorian (VIC) audiences attended an arts event in-person in early July, consistent with the national average at that time. This is slightly below March 2021 levels (62%), due to disruption from COVID-19 pandemic lockdowns within the State and elsewhere around the country.

VIC audiences are among the most likely nationally to have had their plans to attend cultural events affected by lockdowns or restrictions in the past four months (82%) – similar to NSW (84%).

While outbreaks have impacted comfort levels in many states, audience comfort in VIC is consistent with March 2021 across a range of venue types, suggesting that audience mindsets may not be hugely affected by changing COVID-19 restrictions. The majority of audiences in VIC (64%) are willing to attend events now or as soon as they are able.

Lockdowns and vaccination rates are challenges for attendance - but VIC audiences are optimistic

Audience responses to lockdowns included frustration and disappointment, but generally audience members express sympathy for the artists affected and many remain committed to supporting artists and cultural venues as much as they can.

Many are actively making plans, despite the risk of future lockdowns, although some will opt for local events and make last-minute decisions. Most VIC audiences expect the amount they spend on arts and culture events to stay the same, or even increase, in the future, although uncertainty remains in terms of what events will be viable in the current climate.

Promisingly, VIC audience members are being vaccinated at high rates, and the majority (85%) believe the vaccine rollout will be successful enough to allow normal activities to resume within 12 months.

Around half of respondents participated online, and 56% are committed to continued engagement

Around half (47%) of VIC audiences participated in some form of online arts or cultural activity in early July, down slightly from March 2021 (51%). However, the



data does not show a return to the digital participation boom of the early pandemic, when 79% of VIC audiences were participating online (May 2020).

When asked what role digital participation plays in their lives when in-person attendance is possible, 56% of VIC audiences reported that digital programming plays a small (44%) or substantial (12%) role, which is among the highest nationally.

Over a third of VIC audiences (37%) said they paid to access online content in the fortnight before data collection, stable with March 2021 (39%). The proportion of VIC audiences who spent more than \$50 on this content has increased, from 35% in March to 41% in July 2021 – suggesting there is a committed cohort who are willing to pay higher amounts for quality digital content.

Introduction

This report summarises insights from over 2,500 Victorian audience members, prior to the July 2021 lockdown

This Victoria (VIC) Snapshot Report outlines key findings from the July 2021 phase of the Audience Outlook Monitor in Australia (Phase 5), based on responses from 2,540 audience members connected with Victorian organisations.

Launched in May 2020, the study is tracking audience sentiment in relation to the COVID-19 pandemic. Each phase in the Australian roll-out of the study 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. The data collection period fell between VIC's fourth lockdown (27 May to 10 June) and fifth lockdown (15 July onwards).

Almost 9,000 audience members responded across the country, allowing in-depth comparisons of trends in different jurisdictions (noting that results for the Tasmania should be interpreted with caution due to its small sample size). An asterisk is used to denote small sample sizes (*).

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

Read on for the key July 2021 findings in VIC.

Current conditions

Despite recent outbreaks, comfort levels in VIC are consistent with March 2021

The majority of audience members in VIC are comfortable participating in public activities, with comfort levels generally consistent with March 2021.

The May/June VIC lockdown appears to have had a minimal effect on comfort, suggesting that, after experience with multiple outbreaks, VIC audiences are less likely to lose confidence in response to lockdowns.

In fact, comfort levels for most public activities are now higher than the national average. For example, most audience members feel somewhat or very comfortable eating at a local restaurant (95%, stable with 97% in March 2021), going to a local cinema (84%, stable with 85%), using public transport (79%, stable), exercising at a gym (64%, stable with 65%), or flying domestically on a commercial airline (63%, stable with 62%).

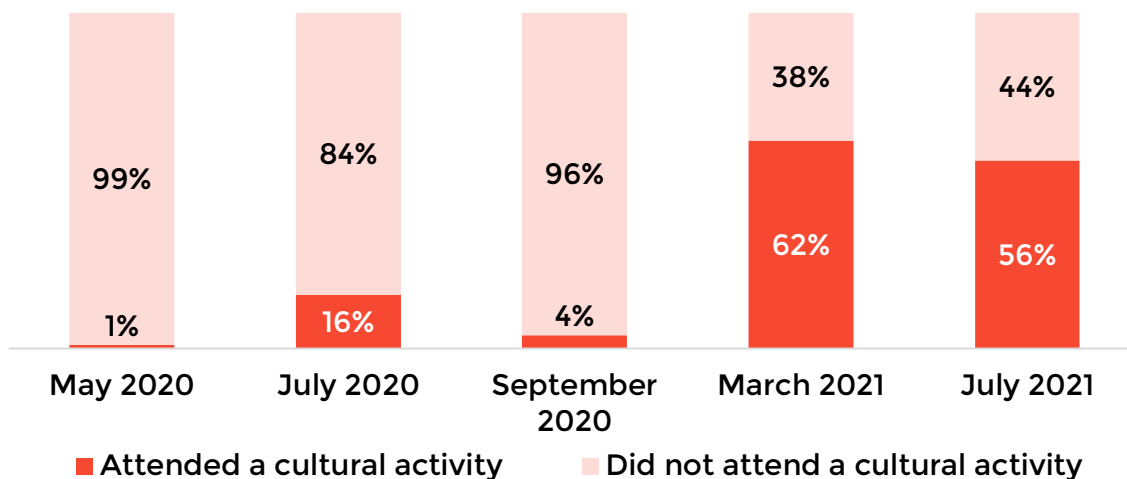
Attending cultural events

Live attendance has dropped back slightly since March

While the live attendance rates in VIC jumped dramatically in March 2021 (62%, up from 4% in September 2020) as venues and facilities re-opened, they were set back slightly in July 2021 (56%) after disruption from lockdowns within the State and elsewhere around the country.

In early July, VIC audiences were attending at a similar rate to audiences in WA (53%), the ACT (59%) and QLD (61%) and were more likely to have attended an event than audiences in NSW (34%), where Greater Sydney was in lockdown (Figure 1).

Figure 1: In the past fortnight, did you do a cultural activity in-person (not online)? (VIC) July 2021 (n=2,540)



VIC audiences were most likely to visit a museum or gallery (28%, stable with 26% in March 2021) or attend a cinema (22%, down from 26%) in the fortnight before data collection (7–11 July 2021). Attendance at live performances (21%) had decreased somewhat in July, down from 29% in March.

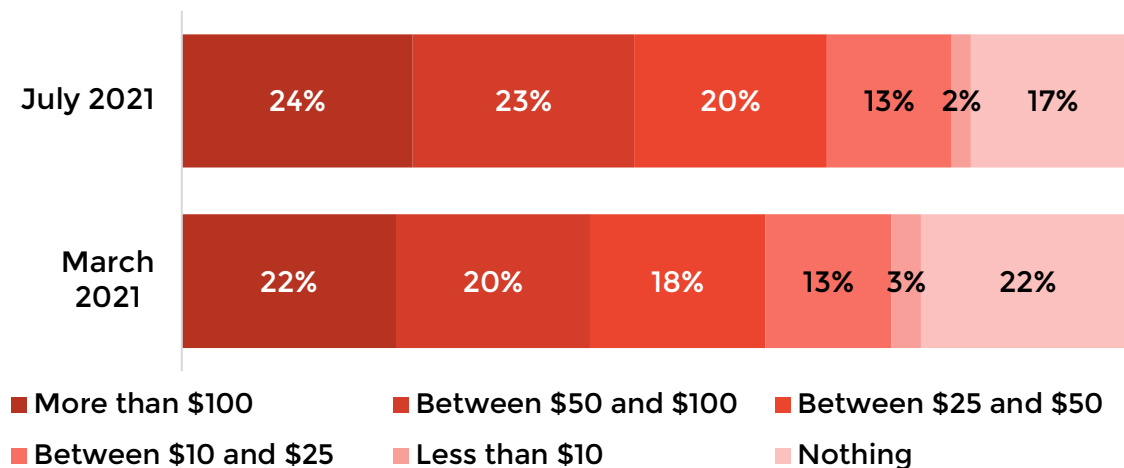
VIC audiences are spending more on tickets to in-person events

Although live attendance has declined slightly, VIC audiences appear to be spending more on tickets to in-person cultural activities, with 47% of audiences spending more than \$50 on tickets in the fortnight before data collection (up from 42% in March 2021). The proportion of audiences who had not spent any money on tickets to arts events also decreased by 5 percentage points, from 22% in March to 17% in July. (Figure 2).

VIC audiences had a similar spending profile to audiences in NSW, 50% of whom recently spent more than \$50 on tickets.



Figure 2: Can you share with us your total spending on arts & culture experiences in the past fortnight? (VIC) July 2021 (n=1,272)



Comfort at most arts and cultural venue types remains stable

Outbreaks across the country have affected comfort at arts venues in many states, but the comfort levels of VIC audiences remain generally stable with March 2021.

Comfort levels are consistent at museums or galleries (96% at least somewhat comfortable, stable with 97% in March 2021), community art spaces or studios (93%, stable with 94%), outdoor festivals or concerts (93%, stable with 94%), concert halls and large theatres (85%, stable with 86%), and comedy clubs or live music venues (56%, stable with 54%).

Comfort has increased for hands-on exhibits at interactive museums (57% at least somewhat comfortable, up from 50% in March).

The proportion of VIC audiences who are willing to attend cultural events 'now or as soon as it is permitted' has increased to 64%, up from 59% in March 2021. A further 33% state they will attend when reasonably confident the risk of transmission is minimal, down from 38% in March 2021.

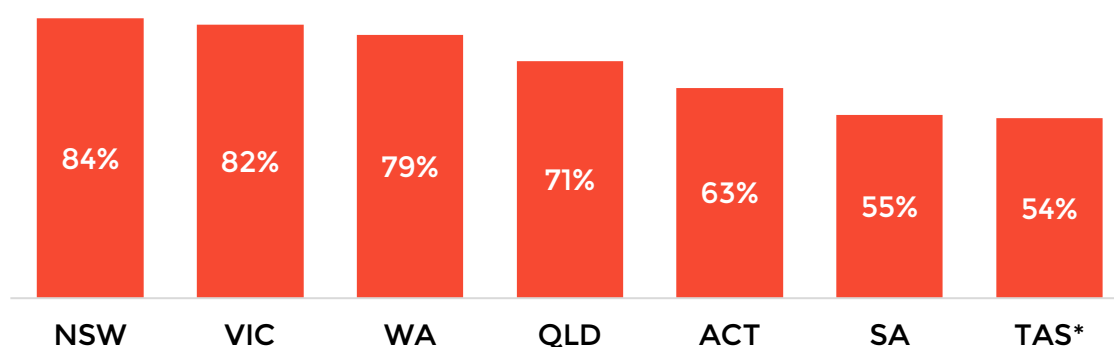
Comfort levels at arts venues in VIC are higher than those of outbreak-affected NSW, and the nearby ACT. VIC audiences are most similar to QLD audiences in their attitudes towards most venues, but are somewhat more comfortable with comedy clubs or live music venues (56% at least somewhat comfortable, compared to 51% in QLD) and with outdoor festivals and concerts (93%, compared to 89% in QLD).

Impact of lockdowns and restrictions

VIC audiences are among the most likely to have had their plans affected by lockdowns and restrictions

8 in 10 VIC audience members (82%) stated that their plans to attend arts and cultural events have been affected by lockdowns and restrictions over the past four months. This proportion was one of the highest across the country, second only to NSW (84%), which has recently experienced an outbreak of the Delta variant after many months of low or no cases.

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=8,688)



When asked how they had been impacted by lockdowns, the majority of VIC respondents said that the artist they were planning to see was affected by lockdown/restrictions (64%), they lived in an area affected by lockdown/restrictions (63%), or the event or venue was in an affected area (62%).

In a less common scenario, some VIC audiences chose not to attend the event due to the risk of travel delays or quarantine (12%). One audience member cited the possibility of border closures as a factor preventing them from booking interstate events, citing the 'risk of being unable to return to VIC if an outbreak occurs.'

These proportions were similar to other states which had been locked down prior to data collection, such as NSW, QLD and WA. They were least similar to states/territories which had not experienced significant outbreaks themselves, such as SA and the ACT, where attendance was more likely to be inhibited by the risks related to travel rather than being locked down oneself.

VIC audiences in regional areas were also less likely to live in lockdown-affected areas themselves (43%, compared to 72% of metropolitan audiences), and slightly more likely to say that their plans were impacted because the artist they were planning to see was affected by lockdowns (67%, compared to 64% of metropolitan audiences).

Some (11%) regional audiences also cited the risk of travel delays or quarantine as a reason their plans had been affected. Comments from these audience members suggested that travelling from regional areas to attend events can be especially challenging in the pandemic context. One audience member stated,

‘Travel from a regional area [in Victoria] to Sydney was fraught [with] too many challenges.’

Another commented,

‘I now live in regional Victoria and most of the activities I participate in are in Melbourne. The lockdown restrictions vary between the two, [preventing me from attending as I used to].’

For VIC audiences in particular, the risk of future lockdowns is the primary barrier to attendance

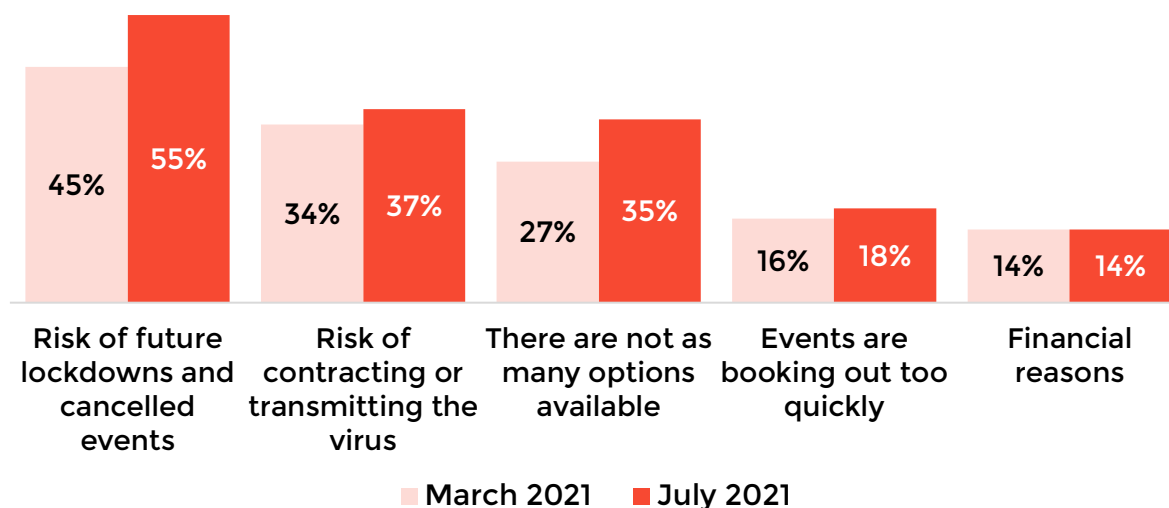
In March 2021, VIC audiences were asked ‘Can you tell us if anything is preventing you from attending in-person arts and culture events as you used to in the past?’

In July, they were asked whether similar factors would affect their attendance over the next 12 months. In the coming year, VIC audiences are most likely to be deterred from attending by the risk of future lockdowns and cancellations (55%, up from 45% in March 2021).

Other common factors inhibiting attendance include the risk of contracting or transmitting the virus (37%, up from 34%) and the fact that there are not as many options available (35%, up from 27%). Some less common barriers are stable with March 2021, such as the fact that events are booking out too quickly (18%, stable with 16%) and financial reasons (14%, stable). (Figure 4).

Alongside audiences from NSW (54%) and the ACT (57%), VIC audiences were the most likely to cite the risk of lockdown as a barrier to attendance. For VIC audiences in particular, lockdowns stood out as the key factor inhibiting attendance, more so than the risk of the virus itself. Compared to audiences in NSW and the ACT, VIC respondents were less likely to cite the risk of the virus as a deterrent (37% VIC, compared to 46% NSW and 48% ACT).

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) (VIC) July 2021 (n=2,519)



VIC audiences are disappointed but largely supportive in the face of lockdowns and cancellations

When asked how their experiences with lockdowns had impacted them, some VIC audiences shared disappointment and frustration in response to repeated outbreaks and ensuing cancellations. One audience member said,

‘[I’m] very disappointed by the cancellations as I am currently very starved of cultural activities - so far this year 3 concerts and 3 ballet performances have been cancelled on me.’

Some VIC audience members suggest that repeated lockdowns have made them more wary of booking events in the future. One stated,

‘It discourages me from planning things ahead because it’s stressful to rebook, or upsetting if the whole thing is cancelled. So “planning” ahead can actually be a bit emotional!’

Another audience member said,

‘We used to travel to Melbourne/around Victoria about 6 or 7 times a year for opera, theatre, Woodend Winter Arts Festival, and other events. Now we are much less likely to book as far in advance or travel as often (by plane) until things have settled down, with 70%-ish of the population vaccinated.’



As a positive sign, many VIC audience members took this opportunity to emphasise their continued commitment to the arts, their empathy with the artists affected and their willingness to ‘take things as they come’ – suggesting that VIC’s experience with protracted lockdowns has led to greater resilience in the face of ongoing uncertainty.

One said,

‘It’s disappointing to have events cancelled, but even more so for the performers. When an event is cancelled there should be an option to donate the refund to the band/performers. I keep on booking tickets, as our local music industry needs support, and I love music/theatre/arts.’

Another commented,

‘I’ve got to the point where you just roll with it. If something is cancelled or rescheduled, I just adjust it in my diary. I feel for the musicians and performers though – it’s not quite so easy for them and it must be affecting both their mental health and bank balances.’

Three-quarters of VIC audiences continue to make future plans to attend events

The majority (76%) of VIC audiences continue to make firm plans to attend in the future, consistent with March 2021 (76%). However, as confidence has declined around the country, audiences in VIC have gone from being the least likely to make future plans in March 2021 to now being among the most likely, along with SA (85%) and QLD (78%).

This is consistent with a theme in the qualitative data, which suggests that some audiences are actively booking to ‘make up for lost time’.

The kinds of cultural events VIC audiences planned to attend in July were consistent with March 2021, with the largest proportion of audiences planning to attend a live performance (50%), visit a museum or gallery (41%) or visit a cinema (31%).

Compared to the other states, VIC audiences were among the most likely to be museum-goers, along with SA (42%). They were slightly less likely to plan to attend a live performance (compared to 60% of SA audiences and 58% of QLD audiences), noting that the volume of events in the performance sector may be more affected by lockdowns.



VIC audiences may be looking further into the future to book events

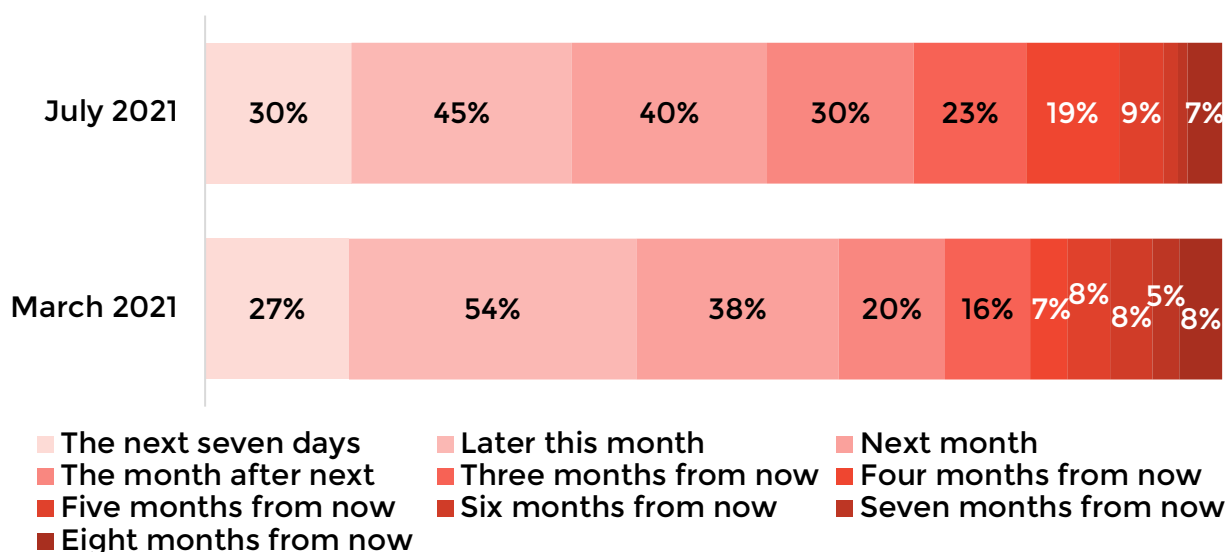
The July 2021 findings suggest that VIC audiences have changed their approach to booking future events somewhat since March.

In March, VIC audiences were commonly booking events 2–3 weeks in advance. In July, the proportion of VIC audiences who booked events for the next seven days had increased slightly (30%, up from 27% in March 2021), but the proportion booking later in the month had decreased (45%, down from 54%). Audiences were increasingly likely to book events the month after next (30%, up from 20% in March), three months from now (23%, up from 16%) and four months from now (19%, up from 7%).

This shift may suggest that VIC audiences are feeling cautious given lockdowns within the state and elsewhere around the country, and becoming increasingly inclined to look further into the future for bookings. One audience member reported,

‘I decided not to travel interstate to see a live theatre production but purchased tickets locally for a date next year when hopefully the situation will be more predictable.’

Figure 5: In the past fortnight, did you make future plans to do any of the following activities outside of the home, whether free or ticketed? (select all that apply) (VIC). July (n=909) and March 2021 (n=1,169)



However, 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.

As one VIC audience member shared,

‘[Lockdowns have] made me less confident about booking tickets to events as things change so rapidly. [I] would rather book something the week of the event.’

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 local events. One stated,

‘Planning is very difficult so my circle of ‘active interest’ is within Victoria - no interstate options are being considered.’

Building confidence

VIC audiences are happy to reschedule or rebook events – but want ticketing policies to be clearly communicated in advance

When faced with event cancellations, the majority of VIC audience members said that they rescheduled or rebooked the event (61%). Around a third (31%) requested a refund, while 17% donated the value of the unused tickets.

When booking tickets, VIC audience members looked for clear communication from venues, flexibility, and the option to refund or rebook tickets. One VIC audience member said,

‘As long as tickets can be refunded or a show can be rescheduled, I’m happy to buy tickets.’

Another said,

‘It’s about reassuring me that I can easily get a refund of money in the event that COVID impacts on a paid event. Clear policies on refunds and

allowing for a refund rather than trying to reschedule in the first instance as other dates and times may not always work.'

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

'I had a dozen tickets to RISING Festival. It was very sad, but they were clear in their communications and refunded tickets immediately.'

However, others stressed the importance of clear, upfront statements about refund policies - with one audience member reporting,

'I have applied for refunds because COVID-19 restrictions have impacted my plans. Mainly my experiences have been positive except for one which is refusing to refund a \$200 deposit. Not happy!'

VIC venues can increase audience comfort with check-ins, improved ventilation and mandatory mask policies

Despite setbacks in audience comfort, certain COVID-safety measures like mandatory check-ins, improved ventilations and mask-wearing will improve the confidence of VIC audiences.

When asked what safety measures would encourage or discourage VIC audiences to attend an event, the largest proportions said they would be encouraged by improvements to ventilation systems (85%) and the presence of check-in procedures (85%).

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

Only 13% of VIC audiences reported 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).

Furthermore, two-thirds (66%) of VIC 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%). One audience member stated,

‘As a theatre maker, I completely understand how much we all rely on achieving 100% capacity again but we aren’t ready to go and sit next to each other. We need to return to having a spare seat between each group in the theatre. We need some space.’

Temperature-taking was a less popular COVID-safety measure – although 44% of VIC audiences would be encouraged by the presence of this procedure, a further 39% felt neutral about it.

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

In addition to the above measures, VIC audiences stressed the importance of knowing the venue’s COVID-safety protocols in advance. One said,

‘[I want to know] the details on how [it is run]. E.g. spaces between guests, use of masks, stand/sit, available option for drinks and food/or non. Expectation on arrival – for example, will I have my temperature taken? How is it COVID-safe or how will COVID change my experience?’

Another suggested,

‘[I’d be encouraged to attend by venues] clearly stating what restrictions/requirements are in place. Too often lately it’s not been clear what is required from a customer/consumer.’

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

‘[I want to know] that there are COVID-safe protocols in place and that the safety of both staff and patrons has been considered. It’s also important that the COVID-safe protocols are followed as much as possible and don’t fall by the wayside.’

VIC audiences prefer venues with fixed seating – whether they are indoor or outdoor

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 outdoor venue with fixed seating (40%) or an indoor venue with fixed seating (38%) as their first preference, while only a small proportion (15%) preferred an outdoor venue where audiences were free to walk around.

One audience member stated,

‘I don't mind indoor/outdoor depending on the type of performance etc and the weather, but I'd prefer there being fixed seating either way.’

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

‘Nothing beats indoor venues in Melbourne - they have world-class acoustics.’

Planning for future attendance

VIC audiences want to see a return to pre-pandemic content, but some will favour light-hearted experiences

When asked about the types of arts and cultural content that they would be attracted to over the next year, the overwhelming majority agreed that they wanted to see the same kinds of events they used to attend pre-pandemic (91% in July 2021, stable with May 2020).

VIC audiences were less likely than in May 2020 to be attracted to ‘works that make sense of the pandemic’ (9% down from 25%) - perhaps suggesting that they are experiencing ‘pandemic fatigue’ after the state’s protracted battle with outbreaks.

The proportion of VIC audiences who agree that they will be attracted to ‘light-hearted programs’ has increased (37%, up from 21% in May 2020). One audience member shared,

‘We used to enjoy the plays which challenged us as much as the plays we nodded with. We both now feel bruised and exhausted, and shall look for more comforting fare.’

Three-quarters of VIC audiences expect to spend the same amount or more on cultural events

When asked about their projected spending over the next 12 months, three-quarters (73%) of VIC audiences said they would spend the same amount or more on arts and culture activities. This proportion has increased by almost ten percentage points since March 2021 (65%), noting however that much uncertainty remains in terms of what events will be viable in the current climate.



The proportion of VIC audiences who planned to spend more or the same was similar to that of audiences in NSW (72%) and higher than that of TAS (64%) and the ACT (68%). 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 14% of VIC audiences who expected their spending to increase, many attributed this change to a desire to catch up on lost time and re-engage with VIC's cultural offerings. Others expressed a desire to support artists, the sector and even their cities by maintaining a thriving arts and culture scene.

One VIC audience member said,

'I have realised how valuable the arts is and I want to take any opportunity I can to go to things. You never know when you will be stuck at home again.'

One stated,

'Will probably take out an annual subscription to Melbourne Cinematheque again for 2022 because it's important to support cultural organisations that you want to remain around, especially small, independent ones. Also, because I value being out of the house more now.'

Another shared,

'I am worried that small businesses/organisations that allow these events to happen may not be able to support them (either because of the financial losses they have suffered or the reduced financial capacity of their usual patrons). Extra support now feels like an investment in maintaining a Melbourne that I love.'

However, 28% of VIC 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 changes to their mobility. Others suggested that restrictions, border closures, uncertainty around booking, and health anxiety had made them likely to attend fewer events. One stated,

'Anticipating a slow rebound for arts organisations. Anticipating a slower 're-entry' and cautious about public events after being locked down. A little fatigued with the booking-cancelling-rescheduling round about.'

Vaccination outlook

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

Many VIC 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 VIC respondents referred to vaccination in their responses. One said,

‘Encourage vaccination! It’s the only way we open up fully, literally.’

Another responded,

‘The organisations are not the problem. I feel for the industry. I believe they are doing all they can. Until we are all vaccinated, every one of us, COVID will always be just around the next corner.’

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

‘[I am] not ready to attend events yet - need to see a greater vaccination roll-out first.’

Another said,

‘Without vaccination of the public at large, I remain hesitant to attend any event.’

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

VIC arts audiences appear to be getting vaccinated at a faster rate than the general population - a promising indicator for the cohort of VIC audiences who consider vaccination a key factor in their attendance decisions.

Almost all (96%) of VIC 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>).



8 in 10 (80%) of VIC respondents aged between 55 and 64 had been at least partially vaccinated, compared to around half of the general population. This proportion (80%) is consistent with the national average (78%) for July 2021.

Around 4 in 10 (41%) of VIC respondents aged between 35 and 54 had been at least partially vaccinated, in line with approximately 39% of the general population.

One in five (21%) of VIC respondents under 35 had been at least partially vaccinated, compared to approximately 10% of the general population. Of the two-thirds of audiences under 35 who were not vaccinated, 93% stated that they would probably or definitely get vaccinated when it became available.

Most VIC audiences are confident the vaccination effort will be successful

Most VIC audiences (85%) 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. This proportion has decreased since March 2021, when 89% of VIC audiences were at least somewhat confident.

VIC audiences were similarly confident to audiences in WA (85% at least somewhat confident), QLD (87%) and SA (87%), but slightly less confident than audiences in nearby NSW (89%). However, VIC audiences were more confident than audiences in the ACT (81% at least somewhat confident).

Online participation

Almost half of VIC audiences engaged in arts and culture experiences online

Around half (47%) of VIC audiences are participating in digital arts and cultural experiences, down from 51% in March 2021.

The participation rate in VIC is among the highest in the country, second only to NSW (50%) – with many VIC audience members taking up digital participation as a way to stay connected to arts and culture amid continued lockdowns.

VIC audiences were most likely to have watched a pre-recorded video of a performance (25%, down from 27% in March 2021), participated in an online class or tutorial (21%, down from 25%) or watched a live streamed performance (19%, down from 22%) in the two weeks prior to data collection.

VIC audiences are among the most likely to see an ongoing role for digital

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 56% of VIC audiences say that digital programming plays a small (44%) or substantial (12%) role. This proportion was one of the highest around the country, along with NSW (57%) and TAS (58%).

Convenience, comfort, and safety were key factors cited by VIC audiences for whom digital played an ongoing role. One respondent shared,

'MTC broadcast one of their plays, Berlin, online. We enjoyed watching whilst feeling safe - I think we are both reluctant to re-engage in external events.... Not attending is our current default - we are both in our late sixties.'

Another said,

'I think we've all discovered what we can enjoy online, so to have the occasional option to do things online (as a working mum) would be great - but obviously nothing beats in-person.'

Digital programming can open up access for regional and interstate attendees

Digital participation can also be a way to bridge physical distances - allowing VIC audiences to participate in interstate events or regional audiences to access intercity programming. One audience member stated,

'I have recently moved to regional Victoria and used to be an MSO subscriber and regularly attended performances at the Melbourne Recital Centre. It is not as easy to do this now, particularly weekdays, so digital is a good alternative.'

Another stated,

'I live outside the city - MTC plays being online mean that I will purchase more to view, than the one or two per year that I actually travel to the city to see.'

Another said,

‘I’ve been attending virtual Book Clubs run by Bri Lee with NSW State Library, which I would never have had access to before as I live in Melbourne. Online events enable more diverse range of attendees, they are critical.’

Most VIC 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 VIC audiences suggested they tuned in alone (70%), while 27% watched with other members of their household.

A further 13% gathered in public to watch a live-streamed event with an audience. One in ten (9%) audience members tuned in as part of an in-person gathering of friends and family, while another 9% connected online with friends and family who were tuning in elsewhere.

Some audience members commented that digital content offered them a way to connect, both with people in their households and without, during lockdowns and border closures. One audience member took part in,

‘Art tutorials offered by The Art Room, Zoom sessions with remote friends where we view each other’s latest art work.’

Another said,

‘It has been fun tuning in to events with friends in Canada.’

Online audiences in VIC are spending greater amounts on online content

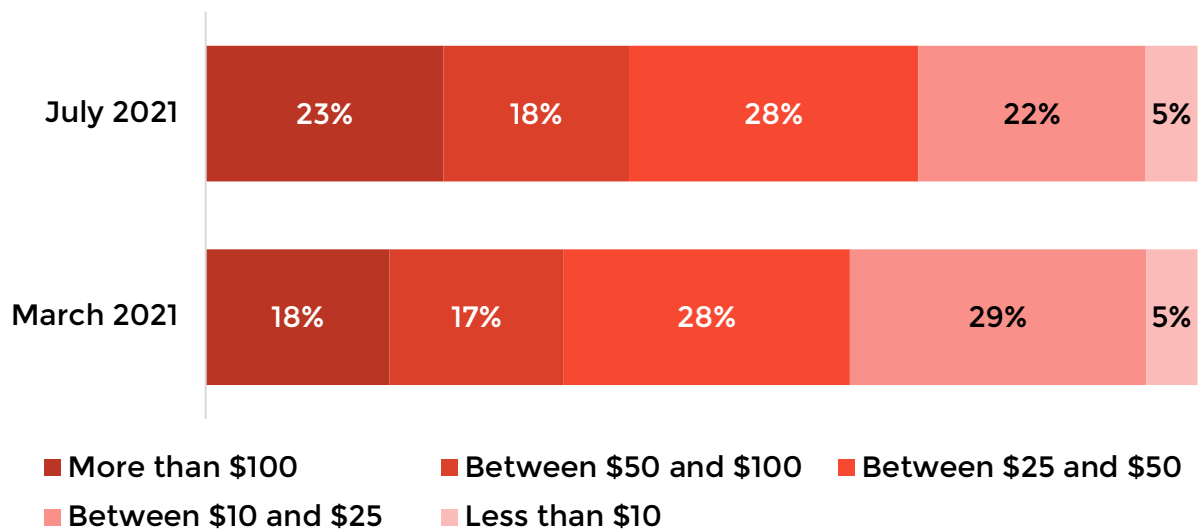
Over a third of VIC audiences are paying to access online content (37%, stable with 39% in March 2021). VIC audiences were among the most likely to pay for digital programming, second to TAS (42%) and slightly ahead of NSW (35%).

Participation in the main forms of paid online experiences is stable with March 2021, including one-off pay-per-view arrangements (21%, stable with 20% in March), making a donation (14%, stable), subscribing to online platforms (8%, stable with 9%) and subscribing to seasons with a digital component (7%, stable).



Promisingly, the proportion of VIC audiences who are spending over \$50 on online content has increased from 35% in March to 41% in July 2021 – suggesting that the cohort of VIC audiences who pay for online experiences are committed to digital participation and may be prepared to spend larger amounts for digital content in line with quality and value improvements.

Figure 6: Can you share with us your total spending on online arts & culture experiences in the past fortnight? (VIC) July 2021 (n=344) and March 2021 (n=277)



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

Patternmakers acknowledges Aboriginal and Torres Strait Islander peoples as the traditional custodians of our land – Australia. We acknowledge the Gadigal people of the Eora Nation as the traditional custodians of the place where Patternmakers is based, and we pay our respects to Elders past, present and emerging.

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