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Audience Outlook Monitor

Victoria Snapshot Report

November 2022

Live Attendance Outlook

Victorian audiences are gradually returning, but a range of factors are affecting decisions, according to data collected in October 2022 from 1,587 Victorian past attendees.



66%

are 'ready to attend now', up from 63% in August '22, the highest since the pandemic began



47%

are still attending performing arts events less than they used to, pre-pandemic, so full recovery remains a way off



59%

are spending \$50+ on cultural events, with spending not increasing on March '22 levels (62%)



#1

financial reasons are now a main barrier to attendance (41%), equal to the risk of transmission (41%)

Key trends



53%

expect their attendance will increase over the next year, 40% say it will stay the same



21%

say there has been a change in their preferred time, day or location of cultural events



71%

will be attracted to fun, uplifting content, while 42% are drawn to challenging things



60%

want to try things they haven't experienced before – and this is higher for 16-35s (83%)

Key findings

VIC audiences are enjoying the return to arts events, but financial barriers and other hesitations are slowing recovery

- ▶ Victorians are feeling more confident than ever about attending - but improvements are gradual. In the October 2022 data, from 1,587 VIC past attendees, 66% say they are 'ready to attend now', up from 63% in August and 60% in March 2022.
- ▶ Most VIC audiences are feeling positive about greater opportunities to attend: 7 in 10 (72%) attended a cultural event recently (12-16 October 2022), consistent with August 2022 (74%) and March 2022 (72%), and many comment on the returning vibrancy of their areas.
- ▶ Attendance frequency is yet to return to pre-pandemic levels. For instance, 47% of VIC performing arts attendees are attending less often than they used to, and 34% are attending about the same amount – consistent with national trends.
- ▶ Spending levels are not increasing. The proportion spending over \$50 on arts and culture in the past fortnight (59%) is consistent with, or slightly lower than March and August 2022 – with the rising costs of living now playing a key role in purchasing decisions.
- ▶ Full recovery will take time. While most VIC audiences are feeling confident and many are optimistic about increasing their attendance in future, new barriers are emerging related to re-entry anxiety, economic factors and lifestyle changes.

VIC attendance behaviour will continue to evolve – and 6 in 10 are seeking new experiences

- ▶ VIC audiences are optimistic about future attendance, with over half of audiences (53%) saying they expect to attend more often in the next year – the highest of any state/territory.
- ▶ However, a range of barriers are at play. Some are perceiving a lack of appealing events available (30%) or are prioritising other things in their lives at the moment (26%). After prolonged periods of disruption, decision-making among VIC audiences is also being impacted by re-entry anxiety and lacking energy to go out.
- ▶ Price sensitivity may increase, as financial reasons are now just as much of a barrier to attendance as the risk of the virus – affecting 41% of VIC audiences (up from 26% in August 2022).
- ▶ Last-minute ticket purchases are here to stay, with August 2022 data revealing the majority of VIC audience members book events within the next seven days (26%) and the next 2-3 weeks (50%).
- ▶ Scheduling preferences have changed for 1 in 5 VIC audience members whether it's the time, day or location of events. Pandemic lifestyle changes – like flexible work and regional migration – are taking root and venues will likely be feeling the effects in their areas.
- ▶ [Cultural tourism is slow to recover to pre-pandemic levels](#) with local attendance the most common (66%, stable). Though in a positive sign, VIC audiences are the most likely to be travelling intrastate to attend the arts (18%, compared to 11% nationally) of any state.
- ▶ VIC audiences have an appetite for new (60%), uplifting (71%) and challenging cultural experiences (42%) – so balanced programs are key as VIC audiences re-emerge in the “new normal”.

4 in 10 VIC audience are participating in the arts online – with virtual opportunities vital for accessibility

- ▶ Online channels continue to have an elevated importance for connecting with VIC audiences and improving accessibility.
- ▶ Digital marketing is paramount for live events and 8 in 10 VIC audiences are using online channels, such as eNews (53%) and websites (48%) to find out what's on. Meanwhile, audiences under 35 are the most likely to be discovering events via Instagram (38%).
- ▶ Online participation in cultural activities is stable. 4 in 10 VIC audience members (42%) participated in some kind of online arts recently, such as pre-recorded video (23%) and online classes/tutorials (18%), stable with March 2022 (43%).
- ▶ Spending on digital activities is steady, as with stability in cultural spending overall: 34% paid for an activity recently, consistent with 36% in March 2022. However, among those paying, 34% spent over \$50, decreasing from 41% in March 2022.
- ▶ Most audiences continue to see a role for digital, with two-thirds saying that these experiences continue to play a 'small' (50%) or 'significant' (18%) role in their life – though this has declined slightly since March 2022 (down from 76%).
- ▶ Online cultural participation is highest among disabled audiences (54% in VIC participating online), as well as audiences who are more risk-averse (50%), those aged 75+ (49%) and who are vulnerable to COVID-19 (47%) – confirming digital events as a form of accessibility.
- ▶ VIC audiences appreciate the value of digital programs in overcoming barriers to live attendance – a topic that will be explored in detail in an upcoming Fact Sheet and set of case studies.

Introduction

This report summarises insights from over 1,500 audience members in Victoria

This Victoria (VIC) Snapshot Report outlines key findings from the October 2022 phase of the Audience Outlook Monitor in Australia (Phase 8), based on data collected from 1,587 audience members living in VIC.

On 12 October 2022, participating organisations simultaneously sent the Phase 8 survey to a random sample of their audience – defined as those who had attended an arts or cultural event in person since January 2018.

This report compares the new results with data collected previously in July 2021 (Phase 5), November 2021 (Phase 6), March 2022 (Phase 7) and the August 2022 'Pulse Check' to examine how things are changing over time. Where relevant, the VIC results are compared to those in other states/territories, noting that results for the Northern Territory (NT) and Tasmania (TAS) are not reported separately due to small sample sizes in those areas.

In addition to this Snapshot Report, the October 2022 results are accessible in a free 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 October 2022 findings for VIC.

Cover Image Credit: Adam Gibson, courtesy of ACMI, National Museum of Screen Culture.

Attendance outlook

The long tail of the pandemic continues to affect VIC attendance, with average participation frequency still lower than before COVID-19

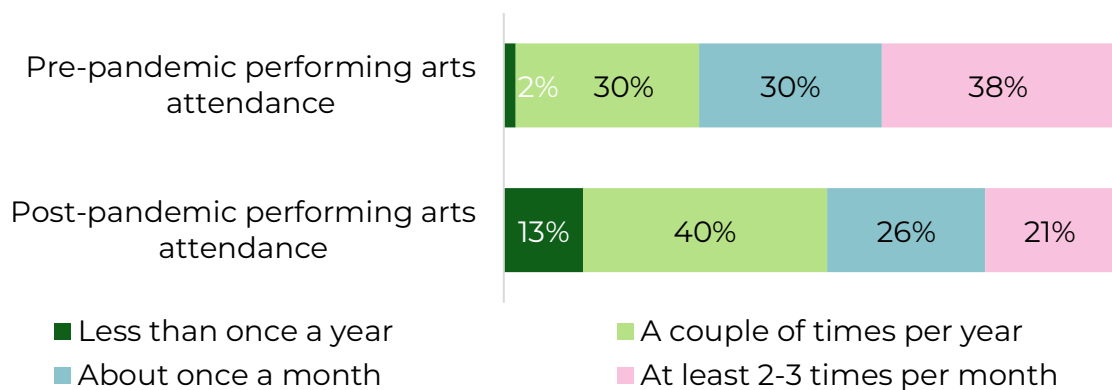
This Phase of the Audience Outlook Monitor sought to compare attendance frequency in the 'new normal' to pre-pandemic activity.

Overall, just under half (47%) of Victorian performing arts attendees are attending less than they did pre-pandemic.

Looking at it in terms of frequency levels, pre-pandemic, 7 in 10 (68%) performing arts attendees said they attended regularly (once a month or more).

Now the proportion attending the performing arts regularly (once a month or more) is only 47%. It's quite common that audiences are attending the performing arts only a couple of times a year or less (53%).

Figure 1: Pre-pandemic, roughly how often did you attend performing arts events? And now, roughly how often do you attend performing arts events? VIC audiences (n=1,561)



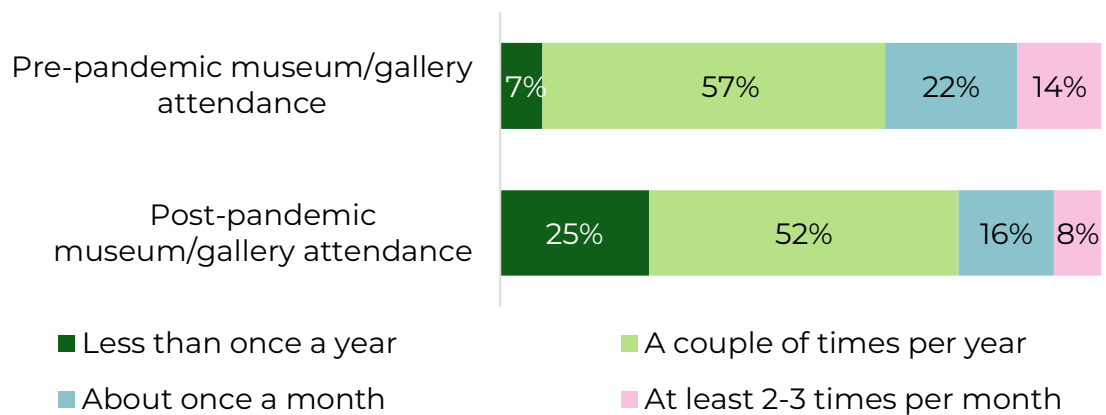
In terms of museums and galleries, 34% of museum and gallery visitors are attending less than they did, pre-pandemic.

Looking at it terms of frequency levels, 36% of audiences were regular visitors pre-pandemic – attending at least once per month (Figure 2).

Now, 24% of museum and gallery attendees are visiting regularly – and it is more common to visit a couple of times per year or less (77%).

These trends were more pronounced for risk-averse VIC audience members, who attended just as frequently as other audiences pre-pandemic but are, on average, attending significantly less frequently post-pandemic.

Figure 2: Pre-pandemic, roughly how often did you attend museums and galleries? And now, roughly how often do you attend museums and galleries? VIC audiences (n=1,382)

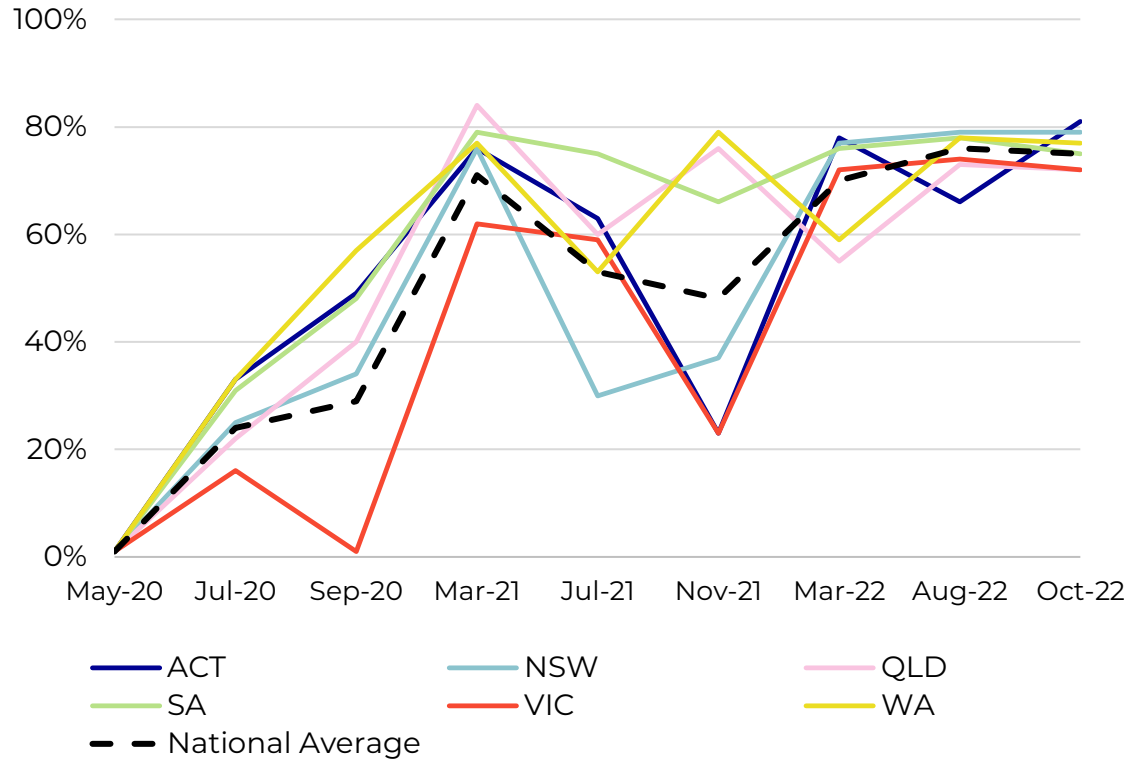


Attendance is stable, with 7 in 10 VIC audience members having attended cultural events in the past fortnight

7 in 10 (72%) VIC audience members attended a cultural event in the past fortnight, consistent with August (74%) and March 2022 (72%).

Attendance in VIC appears slightly slower to recover as the rate of attendance is slightly below the national average (75%), and lower than other states/territories, such as NSW (79%) and SA (75%). However, these rates are a significant improvement from November (23%) and July 2021 (59%) levels as VIC emerged from lockdowns (Figure 3).

Figure 3: Proportion of audiences who attended a cultural event in the fortnight before data collection, by state/territory, May 2020 to October 2022 (n=5,438)



Qualitative data suggests that some VIC audience members feel newly positive in the current context. One VIC respondent said,

‘I’m missing live shows like theatre and it was wonderful to be in a theatre in Melbourne with a big audience or enjoying the show.’

Another said,

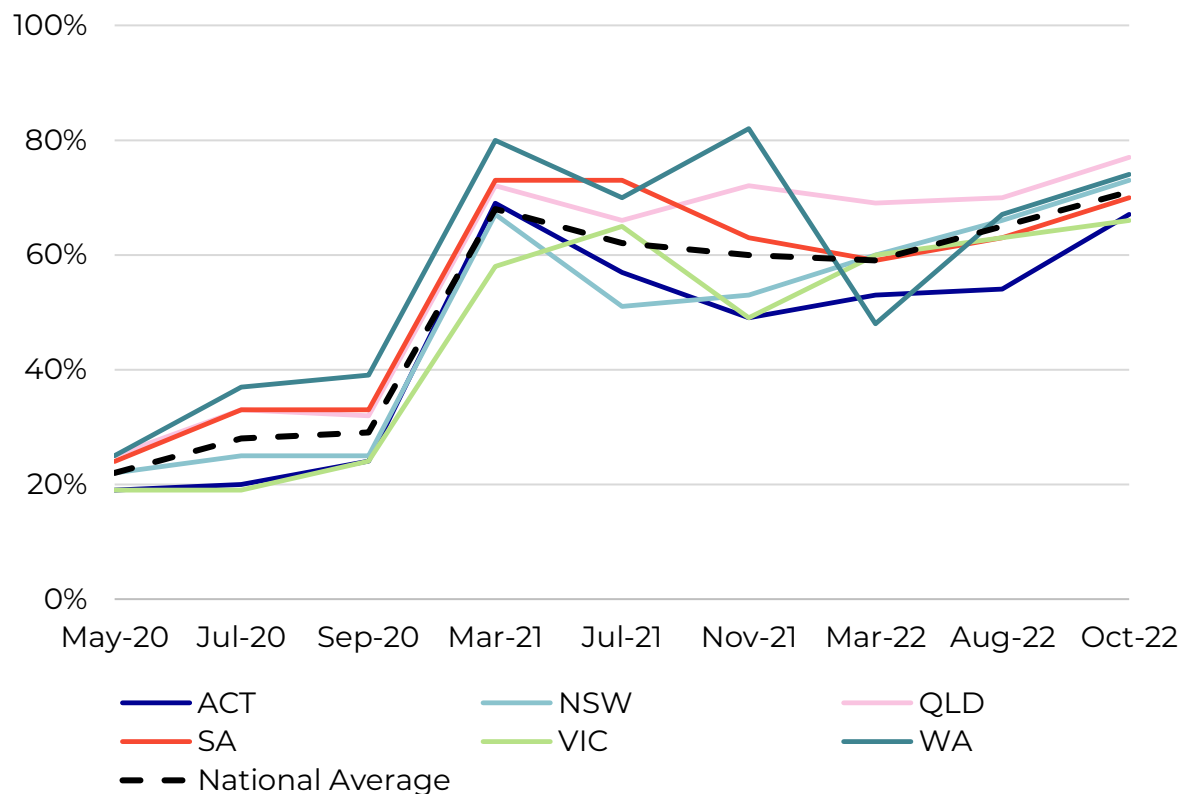
‘It’s wonderful to attend live music, dance & galleries again. I missed the occasion of going to the Arts Centre, Melbourne Recital Centre & the galleries. The buzz & the joy of it, as well as the stimulation.’

Two-thirds of Victorians feel safe attending events right now – the main challenge being building frequency, rather than converting non-attendees

Only a small proportion of VIC audience members aren't willing to go out right now (2%). Around two-thirds (66%) are willing to attend 'now', rather than when 'reasonably confident the risk of transmission is minimal', up from 63% in August and 60% in March 2022 – the highest proportion since the pandemic began.

However, while QLD (77%) and WA (74%) are the most confident, VIC audiences are currently the most risk averse of any state/territory, along with ACT audiences (67% ready to attend now) – suggesting that full recovery may take time for states/territories affected by significant pandemic disruptions.

Figure 4: Proportion of audiences who are 'ready to attend now or as soon as permitted', by state/territory, May 2020 to October 2022. n=5,438



With risk tolerance increasing as the situation changes, the main challenge now is building frequency and spending.

6 in 10 VIC audience members (59%), spent \$50 or more on arts and cultural events in the past fortnight – declining slightly since August (63%) and March 2022 (62%), with the rising costs of living likely playing a role.

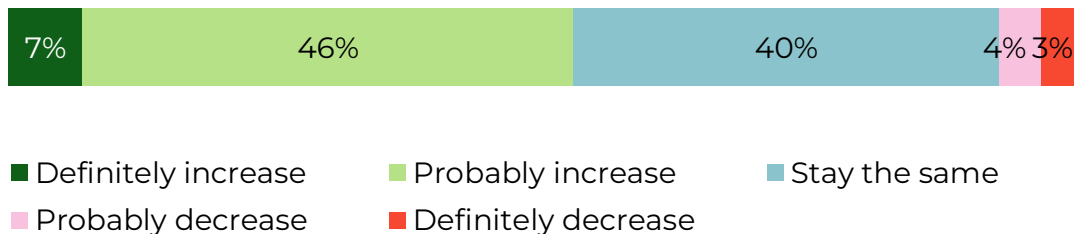
There's cause for cautious optimism: VIC audiences are among the most likely to say they expect to attend more – though 4 in 10 say it will stay the same

Things are slowly improving, and VIC audiences are much more likely to be increasing their attendances than decreasing them over the next year.

Over half (53%) said their current level of attendance will definitely (7%) or probably increase (46%) – among the highest rates of any state/territory, along with the ACT (56%) and NSW (55%). Though, plenty will be maintaining their current levels, 40% said it will stay the same.

Only 7% expect their attendance will probably (4%) or definitely (3%) decrease.

Figure 5: Over the next 12 months – do you see your current level of attendance at cultural events and activities changing? VIC audiences (n=1,581)



Audiences who are less risk-averse were the most likely to say their attendance would increase, while highly-risk averse audiences were the least likely.

Behavioural trends

1 in 5 VIC audience members said there's been a change to their preferred time, day or location of events since COVID-19 – with pandemic lifestyle changes taking root

1 in 5 (21%) VIC audience members said their preferences in the day, time or location of events have changed, consistent with the national average (19%). Meanwhile, 2 in 3 (67%) said they have not.

Scheduling events to avoid crowding was mentioned frequently, sometimes for safety reasons. One VIC audience member said,

'When attendance is quiet. I'm no longer comfortable sitting in venues where it is impossible to keep a reasonable distance. I'm not comfortable walking around crowded galleries.'

Some said they've become unaccustomed to crowds and are avoiding packed environments. One said,

'I am more likely to choose a quieter time, mainly because I am becoming less tolerant of crowd behaviours! Too many phone users and talkers during performances.'

Audiences were also likely to cite flexible work arrangements and subsequently, shifted priorities, as one said,

'Because I work from home, I am now less likely to engage with the CBD, and with venues and organisations that are based in the CBD. Despite living less than 10km from the CBD, it is currently effectively a "destination" for me, not part of my daily working and living life.'

Qualitative data suggests that last-minute ticket buying remains a trend to watch out for

Data from the August 2022 'Pulse Check' suggested that last-minute planning was likely to be another pandemic holdover – with VIC audience members most likely to be booking for events within the next seven days (26%) and the next 2-3 weeks (50%).

Indeed, qualitative data from October suggests that there's still residual anxiety around planning ahead – compounded with unpredictable weather events. One VIC audience member said,

'It feels hard to plan ahead with the risky weather, and you may not be able to go to a show if you're sick and don't want to make others sick, which you can't tell until a day or two before the event. It feels less likely that I will be able to attend any show even when I've purchased tickets.'

It seems likely that for some attendees, the changes brought about by COVID-19 will have lasting impacts on their attendance behaviours – and there may be a need to plan accordingly.

VIC audiences remain more likely to be attending local events than not – one-quarter recently attended events outside their region (18%) or state (8%)

Audiences who had attended arts and cultural events in the last fortnight were asked where these events were located.

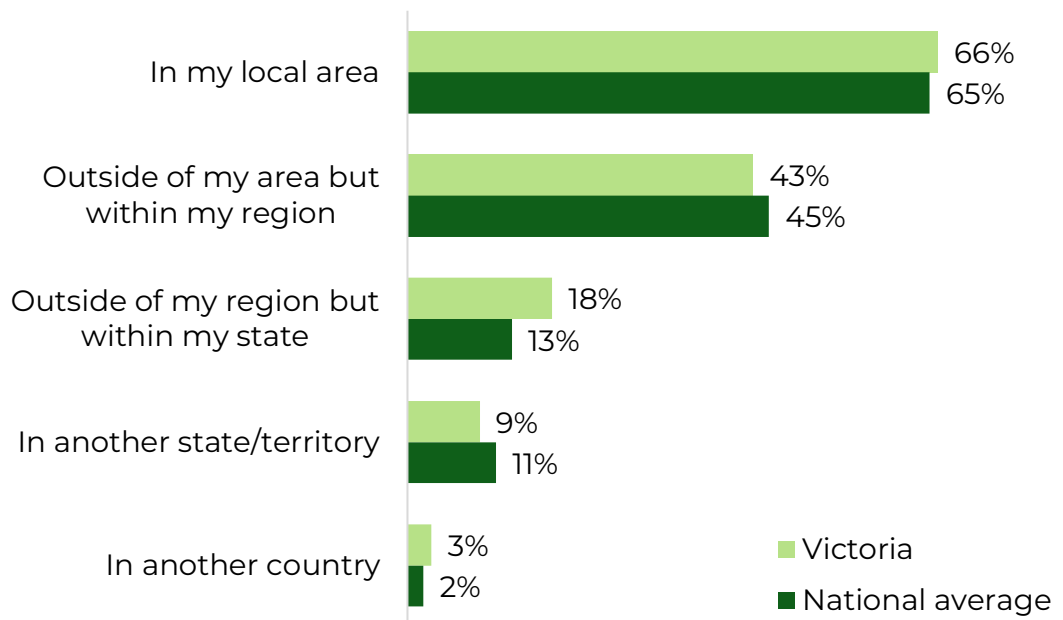
While most VIC audiences had attended events in their local area (66%), a significant proportion had attended outside their local area but within their region (43%). VIC audiences are the most likely to be travelling outside of their region but within their state (18%), compared to a national average of 13% (Figure 6).

According to [Victoria's Tourism and Events Research Unit](#), as of the financial year ending June '22, tourism is recovering slowly, but remained suppressed relative to pre-pandemic levels (FY '19) – with widespread lockdowns having a great impact on interstate movement.

In fact, data from [Tourism Research Australia \(TRA\)](#) suggests that intrastate travel fared better than interstate travel, and regional areas better than capital cities, as of June 2022 – consistent with audience trends for Victoria.

Further, Victoria saw the second-strongest growth in interstate spend (behind QLD) — up 47% or \$303 million — with travellers spending more on accommodation, dining, petrol and shopping, likely in part due to the rising cost of living.

Figure 6: Were any of the activities you attended in the past fortnight outside of your local area? (select all that apply). VIC audiences (n=1,096) and national audiences (n=3,934)



Barriers

Financial reasons are now one of the main barriers to attendance – inhibiting 4 in 10 VIC audiences

When asked if anything was likely to prevent them from attending as they used to, over the next 12 months, VIC audiences were most likely to name 'financial reasons' as a barrier (41%, up from 26% in August), along with the risks of COVID-19 (41%).

This is a departure from previous phases of data collection when the risk of the virus clearly outstripped financial barriers.

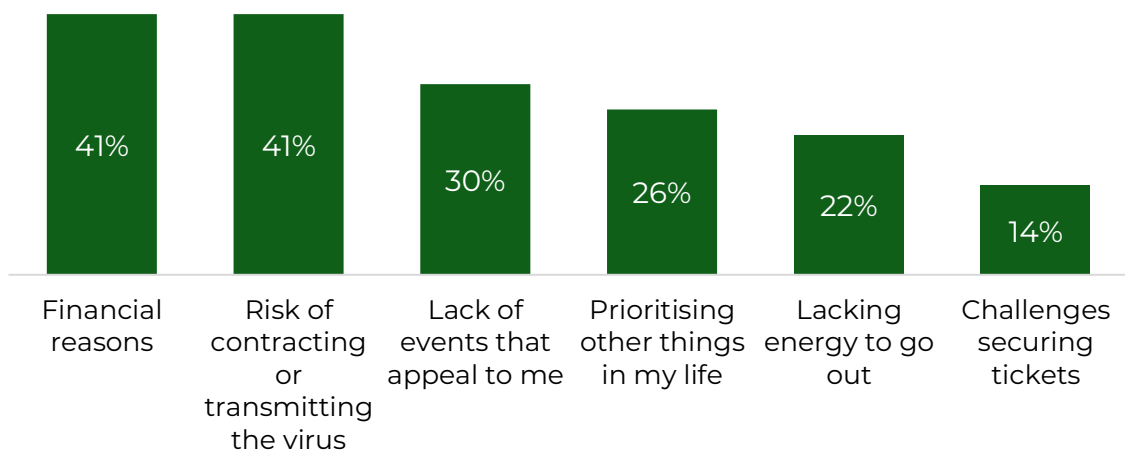
One said,

'There is less money to go round due to petrol costs and bills. I would save up for a really good show.'

Another said,

'I think that the costs of going out – with tickets, parking, food etc – are so expensive and the costs of living are so much higher, I am watching my spending. I still earn really good money and have a job, but it's incredible how much a night out can cost.'

Figure 7: Still thinking about the next 12 months... Can you tell us if anything is preventing you from attending in-person arts and culture events as you used to in the past? (select up to three). VIC audiences, October 2022 (n=1,582)



Other key factors at play are lack of appealing events (30%), prioritising other things (26%) or lacking energy to go out (22%)

New options introduced in Phase 8 explored the complex factors affecting attendance in the 'new normal': physical fatigue from COVID itself, mental fatigue from the anxiety and uncertainty of the past three years, new and competing priorities such as spending time with family or domestic/international tourism, and changes in the availability of events.

Of these options, VIC audiences were most likely to say that they perceived a lack of appealing events (30%), while one quarter said they were prioritising other things (26%). One said,

'While there have been some events I've been interested in attending, the majority have been at times/places which are not accessible and/or not child friendly.'

Others noted that the events they would like to attend are sometimes geographically inaccessible to them. One said,

'Not as many artists or shows available that appeal or are in regional areas. Plus as I live in regional Victoria it costs more to attend events in major cities due to accommodation and travel.'

Around 1 in 5 (22%) are dealing with exhaustion, lack of energy or 're-entry' anxiety. One said,

'I think the pandemic has seen a lot of people grow comfortable spending their free time in their own homes, relaxing. The desire to get dressed up and go out is no longer appealing when they can enjoy themselves just as much without leaving their own home.'

Some mentioned the challenge of building motivation to attend public events, as one said,

‘After 2 years of lockup, it has been hard to get motivated to go out again. Which is strange as I so missed attending concerts and the cinema. Hopefully I will soon get back into more normal behaviour.’

Comfort and COVID-safety

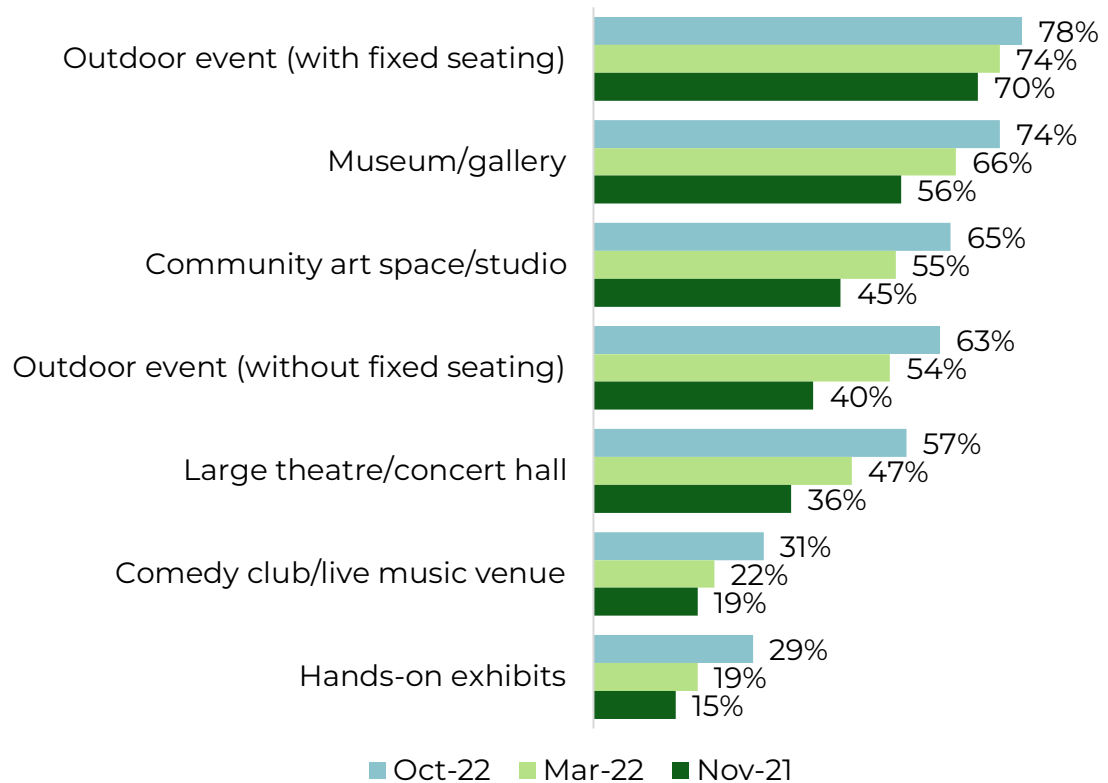
Most venues are seen as safe and comfort at live music venues and interactive exhibits is at an all-time high

Since March 2022, the majority of VIC audiences are comfortable attending all types of arts venues, including outdoor events with fixed seating (78% ‘very comfortable’, up from 74%), museums and galleries (74% ‘very comfortable’, up from 66% in March) and large theatres and concert halls (57%, up from 47%) (Figure 8).

While typically considered more risky by audiences, the level of comfort with hands-on exhibits and live music venues has increased and is now at the highest level since the pandemic began.

One-quarter (29%) of VIC audiences are now ‘very comfortable’ attending hands-on exhibits (up from 19% in March 2022) and almost one-third are ‘very comfortable’ attending comedy clubs and live music venues (31%, up from 22%).

Figure 8: Proportion 'very comfortable' attending cultural venues. VIC audiences, November 2021 to October 2022 (n=1,581)



As isolation rules relax, COVID caution continues to inhibit 4 in 10 VIC audience members

As discussed previously, (see Barriers), COVID-19 remains a significant barrier for some audience segments. While smaller than in recent phases of data collection, such as August 2022 (50%) and March 2022 (54%), a sizeable proportion (41%) of VIC audiences continue to say the risk of contracting or transmitting the virus will prevent them from attending cultural events.

There are several factors at play, including the effects of long COVID, fatigue, the possibility of cancelled events and [the newly scrapped isolation rules](#). One said,

'I'm very conscious of not going to events if I or my companions have cold and flu symptoms, so social cultural outings get cancelled a lot. I'm addition, I have long COVID so am managing the associated fatigue and not able to go out much.'

Others mentioned the hesitation of risking the virus when an important engagement is coming up. One said,

'If I had a significant event coming up (i.e. wedding) that I needed to avoid being sick for, I'd be hesitant.'

This proportion is particularly high for VIC audiences who are immunocompromised or vulnerable to COVID-19 (67%), or have someone in their household (64%) or network (58%) who is. One respondent said,

'Older people and immuno-compromised people remain at risk from COVID. Case numbers, hospital admissions and deaths remain greater than 2020 and 2021. Until these reduce I will restrict my participation in cultural events to lower risk settings.'

Another said,

'I developed health issues from a covid infection and am now high risk for another covid infection. Please increase indoor air quality and have masked sessions or timings for people like me so we can safely go back to supporting the arts!'

Most audiences are using their own discretion around COVID-safety, and opting to wear masks when necessary

In October 2022, audiences were asked, 'What are your current feelings about wearing a mask in cultural venues in your local area, where masks are optional and not required?'

The majority of VIC audiences said they 'may or may not wear a mask, depending on the situation' (64%) – signalling that despite relaxed restrictions, most audiences are willing implement safety precautions based on their perceived level of risk. One said,

'I don't think anything would really prevent me from going to any event but I will probably continue to wear a mask.'

There is a sense that most audiences would be happy to comply with mask requirements at cultural venues, as one said:

'I don't blame the pandemic. I'm comfortable with wearing a mask and taking other medical advice.'

Meanwhile, the remaining third are divided – 20% say they 'never wear a mask' and 16% say they 'always wear a mask'.

Programming preferences

Many are keen to return to the things they love, but there is an appetite for uplifting, new, or challenging cultural experiences

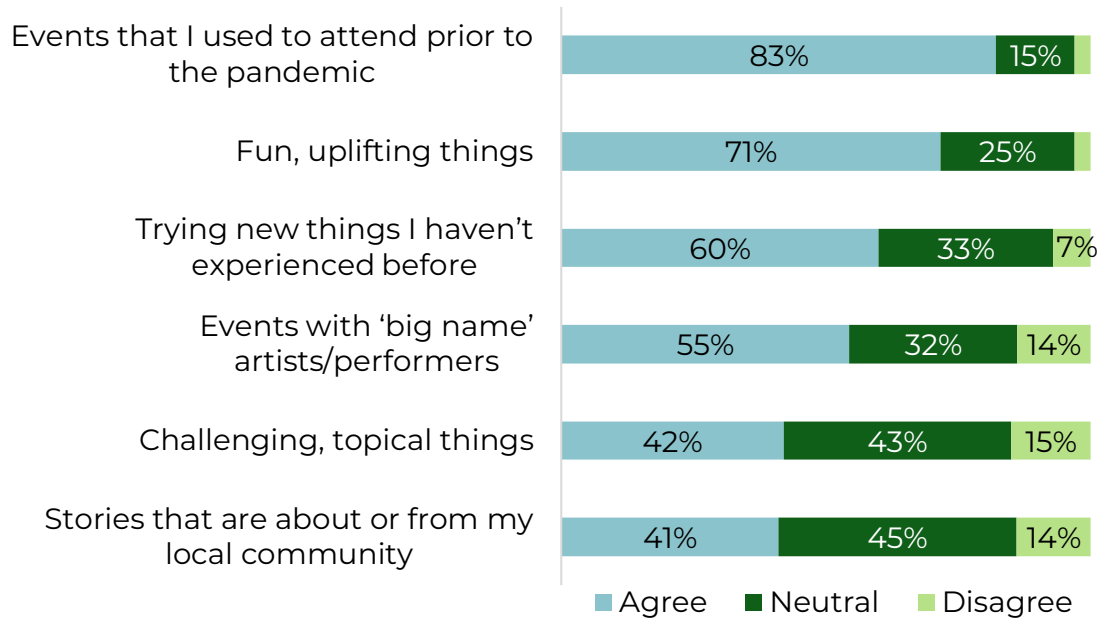
In terms of content, over the next year audiences generally agree they want to attend things that they used to attend in the past (83%), as shown in Figure 9, with many striving to make up for lost time. One said,

'I so missed the performances I used to regularly attend (orchestral and choral) and want to fill up on these before I try anything new!'

As some assess their priorities post-pandemic, some are opting for familiar cultural activities they can feel assured will be enjoyable. One said,

'COVID meant that I re-evaluated how I spend my time - going forward I will be far more selective in what I spend my time on. I will probably stay with mainstream events – plays opera etc and stay away from the more "cutting-edge". I tend to like to see things I have seen before.'

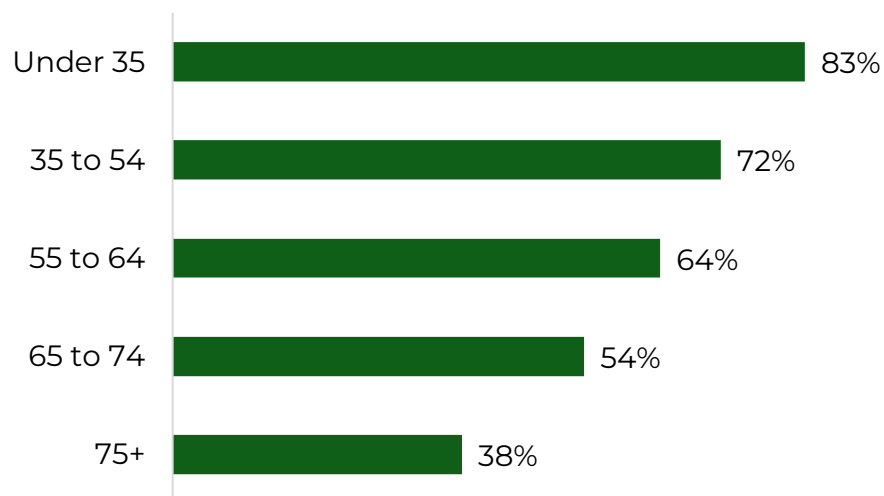
Figure 9: In the coming year, I'll be most attracted to ...VIC audiences (n=1,564)



However, there is also appetite to engage with new content. 6 in 10 (60%) VIC audiences agree that they would like to try things they haven't experienced before.

The appeal of trying new things is stronger among younger audiences, such as those under 35 (83%) – compared to those aged 75 and over (38%).

Figure 10: In the coming year, I'll be most attracted to ... trying new things I haven't experienced before, by age group. VIC audiences, by age group (n=1,564)



One VIC audience member mentioned,

'I am more open to trying new things and attending more events as I feel like I missed out over the past couple of years due to the pandemic.'

Another said,

'I find my artistic/musical tastes are broadening and forever evolving. Am going to venues I've not previously been to. I try to support local musicians as much as possible, both older and newer. I do see "big name" artists especially around the time of Bluesfest, when many of them come to Melbourne. This is a great opportunity to discover terrific supporting acts.'

Another said,

'Will continue to do more of what I used to do but also look for opportunities to attend events that have a First Nations focus.'

71% agree they'll be most drawn to fun, uplifting things and 42% to challenging things, confirming the need to continue balancing programs

As shown in Figure 9, 7 in 10 VIC audience members (71%) agree that they'll be most attracted to fun, uplifting things over the coming year. This is a continuing trend that suggests strong demand for connective, morale-boosting and light-hearted experiences, as one said,

'I want to have much more fun than I had in the last two years. Things that will make me feel good. I don't need to be emotionally challenged.'

But 4 in 10 (42%) agree that they'll be drawn to topical, challenging content, signalling that although many Victorians are seeking uplifting content that offers reprieve from a difficult few years, there is a need to continue offering varied, balanced programs. One person suggested,

'Having missed out on so many activities for the past 2+ years, I'm eager to make up for lost time with old favourites and new challenges!'

55% of VIC audiences agree they're most attracted to 'big names', but 14% disagree – with some conscious of value for money

As touring picks up, more than half of VIC audiences (55%) agree that they'll be drawn to events with 'big name' artists and performers. However, 1 in 10 (14%) disagree, and qualitative comments suggest a perception that lesser-known works could offer better value for money. One said,

'Prefer to support local organisations, learn new things & avoid big name events as these carry larger ticket prices, prefer to spread my money and go to more events than one or two big ones.'

Local loyalty continues to be important – though VIC audiences are keen to experience touring work

4 in 10 (41%) VIC audiences are also drawn to local stories from and by their local community. Some mentioned appreciation for their local areas becoming re-invigorated, post-lockdown. One VIC audience member said,

'[My] local performing arts centre has ramped up operations with many and varied things to attend. In fact many venues want us to attend concerts, live performances, museums and science activities. From famine to spoilt for choice.'

Several VIC audience members mentioned an appetite for First Nations work, as one said,

'I would very much like to see more cultural events relating to Indigenous history and arts in my local area.'

Another said,

'During the lockdowns I educated myself a bit about Indigenous arts and now I would like to support them more.'

However, while there is strong local support, many are also keen to expand beyond the local, as one said:

'In general, I'm just thrilled that cultural activities (especially live performances) have resumed! I love seeing local artists thrive, but I'm also really looking forward to more international artists (musicians, dancers, theatre companies) touring Australia again.'

Online participation

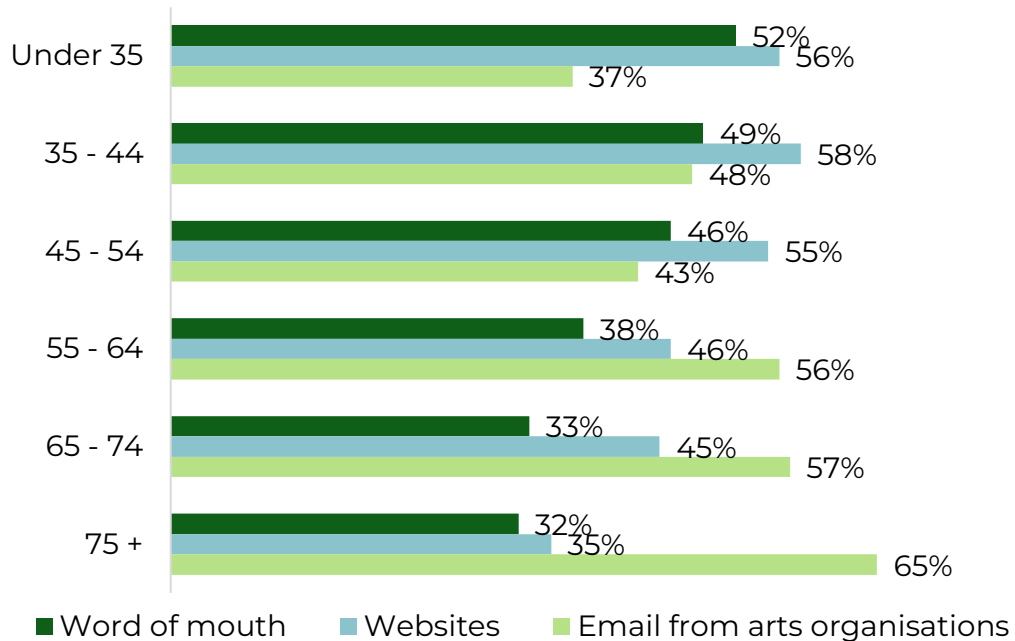
Websites, word of mouth and emails from organisations are key awareness channels for audiences of all ages

When asked how they found out about the most recent show or performance they attended in the past fortnight, 8 in 10 (81%) VIC audiences were likely to cite online channels, particularly direct emails from arts organisations (53%), websites (48%), and word of mouth (40%) – consistent with trends around the country.

For VIC audiences under 35, websites (56%) and word of mouth (52%) were the most common sources of awareness. Instagram (38%) is the third-strongest marketing channel and consistent with direct emails from arts organisations (37%), while other social media platforms like Facebook (28%) are playing a smaller, but significant role (Figure 11).

Among older segments, emails from arts organisations are the dominant source of awareness, and audiences rely less on word of mouth, websites and social media. As shown in Figure 11, two-thirds (65%) of audiences aged 75+ found out about the event they attended via email, while around one third used websites (35%) or word of mouth (32%).

Figure 11: How did you hear about the last show or performance you attended in the past fortnight? (select all that apply). VIC audiences (n=1,118)



Online participation is steady, as 4 in 10 VIC audiences continue to engage in digital arts activities – and 1 in 3 are paying

Following a decline between November 2021 (52%) and March 2022 (43%), participation in online arts and cultural activities is stable among VIC audiences in October 2022.

Around 4 in 10 VIC audience members (42%) participated in an online activity in the fortnight before data collection, including pre-recorded video (23%), followed by online classes/tutorials (18%) and live streamed performances (14%). A small proportion attended a virtual exhibition or museum/gallery tour (6%).

Online participation is highest in VIC among disabled audiences (49%), audiences who are vulnerable to COVID-19 (46%), audiences aged 75+ (45%), and those who are more cautious about the risk of the virus (45%).

This data confirms a strong case for digital events to be part of organisations' Disability Action Plans.

The proportion of VIC digital arts attendees spending online is stable, consistent with steady spending trends on cultural activities overall. One-third (34%) paid for an activity in the fortnight before data collection, stable with 36% in March 2022.

Around one third (34%) of those paying spent over \$50, decreasing from 41% in March 2022.

Two-thirds of audiences see a role for digital experiences in their life, confirming its importance in overcoming barriers to live attendance

When asked about access requirements that would be ‘helpful for attending cultural events’, 12% of all VIC audiences said that an option for digital participation would be helpful – confirming the need for digital programs to continue.

One VIC respondent said,

‘We are limited in regional areas and online things bring us into the realm of things we would otherwise miss. I’m not a big one for driving for hours and hours and then being in a crowd in a city.’

When asked about online arts and culture, overall, many VIC audiences continue to say that these experiences will play some role in their life (68%, down from 76% in March 2022) — either a small (50%) or a significant (18%) role. One said,

‘In my life, online arts and cultural events play a small role, but I know they provide significant accessibility to the disabled community, making them a very important aspect of the industry and attempting to create equity in the accessibility of work and events.’

An upcoming Fact Sheet on audience accessibility and set of case studies will explore the October 2022 findings and opportunities related to audiences with access needs.

The role of the arts in recovery

Returning to cultural events has enabled recent attendees to feel connected, inspired and enriched

In October 2022, recent attendees were asked, 'What has it been like to return to the arts after COVID? What did you discover you missed?'

VIC audiences commonly expressed their renewed appreciation for the local cultural scene. One said,

'Amazing!! I've missed seeing live performances, visiting galleries and shows and sharing these experiences with others. It made me cry hearing a live string quartet play for the first time after such a long time. I appreciate even more now the great variety of incredible arts experiences that we have on offer in Melbourne.'

Another said,

'I was overwhelmed at the end of our first post-lockdown concert - clapped and cried.'

Returning to the social aspect of cultural events has led to a recovered sense of connection. One commented:

'!!! So fantastic! I remember the first few months of going out to see a few things and it was so good to see other people, smiling and enjoying things, I felt more connected to others, I think I didn't realize how much of an impact it actually had.'

Another mentioned,

'Recently attending Picasso [at the NGV] was such an inspiration and one that I always share with friends. I have missed how art fills your soul with joy and how it broadens your knowledge and challenges your perception.'

Some respondents expressed mixed emotions about being able to re-attend, while adjusting to public life once again. One said,

'I missed feeling connected to everyone in the room through what we were watching and listening to – it's euphoric. That being said, it has been anxiety inducing, trying to readjust to big crowds, and taming my COVID fears after two years of mass panic.'

Another commented,

'It's been really nice being able to be immersed in the experience again, after the last two years. I enjoy the atmosphere, the hustle and bustle, and it's simply something that you cannot recreate at home.'

Audiences are eager to support artists and cultural organisations as they rebuild

Looking ahead to the recovery process, audiences shared a range of positive messages for arts and cultural organisations.

As audiences grow more confident in attending – though many are being selective in their decisions – there is a need for diverse programming and variety in content. One said,

'Don't give up. Don't rely on the tried and true. Be experimental. Give us new, bold, fresh works. Wake us up, shake us up, bring us joy, rigour, hope.'

Others expressed the need to continue factoring access and inclusion in programming, as one said,

'Don't forget rural people with difficulty accessing events and poor download precluding most of the alternatives!'

Some shared words of encouragement as they acknowledged the cautious optimism in the community. One suggested,

'The arts enrich my life immeasurably. Keep doing the good work you are doing. I am slowly starting to do things again after I retreated during COVID. Masks and ventilation are important to me.'

Audiences are eager to show their support – and encourage artists and cultural organisations to continue advocating for themselves and their peers as the sector rebuilds. One said,

‘I believe arts and cultural events, organisation and learning environments are hugely important to the health and wellbeing of all people. I believe the sector can emerge from this crisis together if all of the artforms work together to reclaim our value within society, and build a more adaptable art and cultural sector in the future.’

What's next

To read about the story so far, visit the study's Australian homepage at: www.thepatternmakers.com.au/covid19.

There, you can also access a dynamic dashboard to help you explore the results by location, artform and other variables. Instructions and tips for using the dashboard are available in a short video.

To receive future Snapshot Reports, Fact Sheets and resources in your inbox, as soon as they are available, you can opt in to receive Audience Outlook Monitor news at the link above.

If you have a question, or an idea to put forward, relating to this study, you can contact info@thepatternmakers.com.au.

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