



MARCH 2021

Victoria Snapshot

Audience Outlook Monitor



Summary

Live attendance in Victoria is growing and COVID-safe procedures will help to continue building confidence

The March 2021 results of the Audience Outlook Monitor reveal a dramatic increase in attendance activity among Victorian (VIC) audience members after months of lockdown, border closures and restrictions in late 2020.

Almost two-thirds (62%) of VIC audiences say they have recently attended a cultural venue or event, up from just 4% in September 2020 when the state was still in lockdown. A majority of VIC audiences are now comfortable attending a range of venues, such as museums and galleries (97%), large theatres (86%) and live music venues (54%).

However, some people remain cautious about attending events where COVID-safety measures are not properly adhered to, and the risk of virus transmission continues to inhibit attendance for one-third of audiences (34% compared to 26% of audiences nationally). Active enforcement of social distancing and effective communication of safety measures will help to continue building confidence.

Online participation has declined nationally, though VIC audiences are among the most engaged

Consistent with national trends, the proportion of VIC audiences participating in online arts and culture has declined from 79% in September 2020 to 51% in March 2021. However, VIC audiences remain some of the most highly engaged online, compared to the national average (47%).

Among VIC audiences there is strong appeal for content to be accessible on-demand (63%) and for content to feature artists or artistic leaders talking about their work (38%).

While some VIC audiences express 'screen fatigue' and are becoming more selective about digital experiences, 39% of those online continue to pay for content (compared to 44% in September). The proportion of those paying who are spending over \$50 has also remained stable at 35%, suggesting there is a continuing market for premium and/or paid digital experiences.

Introduction

This report summarises insights from data collected in March 2021 from over 3,500 Victorian audience members

This Victoria (VIC) Snapshot Report identifies insights from 3,573 survey respondents connected with Victorian organisations surveyed in March 2021 as part of the Audience Outlook Monitor. 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 3 March 2021, participating organisations simultaneously sent the Phase 4 survey to a random sample of their audience – defined as those who had attended an arts or cultural event in person since January 2018.

In addition to this report, the March 2021 results are freely accessible in an interactive dashboard. Users can explore the data for all different artforms, types of events and demographic groups in all parts of Australia.

For more information about the study, and to access resources such as the dashboard, visit: www.thepatternmakers.com.au/covid19

Read on for the key March 2021 findings in Victoria.

Current conditions

A growing number of VIC audiences are comfortable in public places right now

After a series of lockdowns, border closures and restrictions in late 2020, VIC audiences are showing increased levels of confidence when interacting publicly so far in 2021.

Compared to September 2020, the proportion of VIC audiences who now feel comfortable doing a range of activities has increased, including eating at a local restaurant (97%, up from 77%), using public transport (79%, up from 55%) and exercising at a gym or fitness studio (65%, up from 44%).



VIC audiences are most similar in their comfort levels to those in New South Wales (NSW), the Australian Capital Territory (ACT) and Tasmania (TAS)*. By comparison, audiences in Western Australia (WA), South Australia (SA), Queensland (QLD) and the Northern Territory (NT)*¹ remain more confident interacting publicly.

Attending cultural events

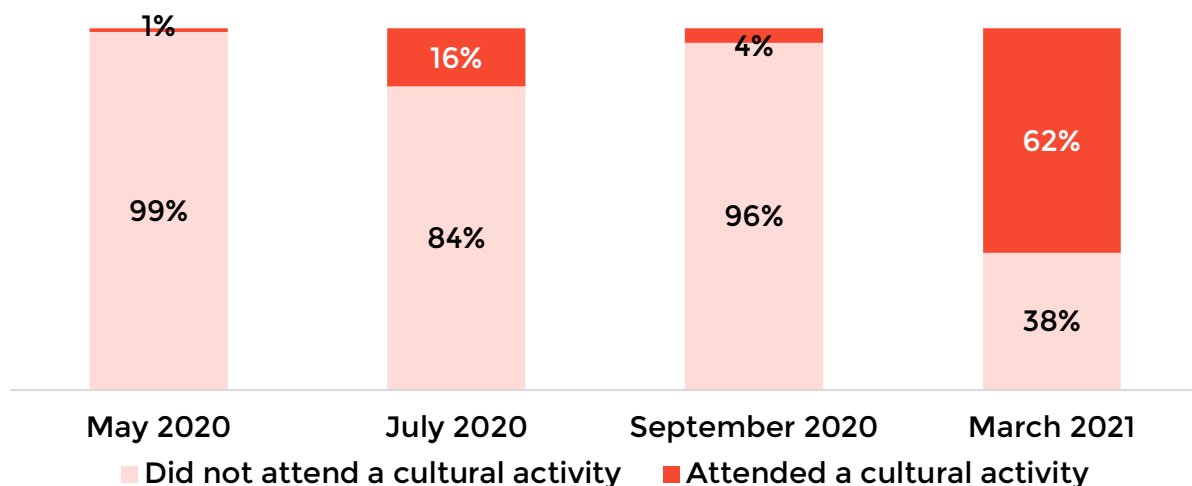
Live attendance rates have increased significantly since September

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

In March 2021, 62% of VIC audiences attended a cultural activity in-person within the fortnight before data collection, compared with just 4% in September 2020, when Victoria was experiencing an extended lockdown period.

In terms of the types of activities, one-quarter (29%) of VIC audiences said they recently attended a live performance. Many recently attended a cinema (26%) visited a museum or gallery (26%), attended a fair or festival (10%) or a lecture, artist talk or workshop (11%).

Figure 1: In the past fortnight, did you do a cultural activity in-person (not online)? (VIC) n=3,573 (March 2021)

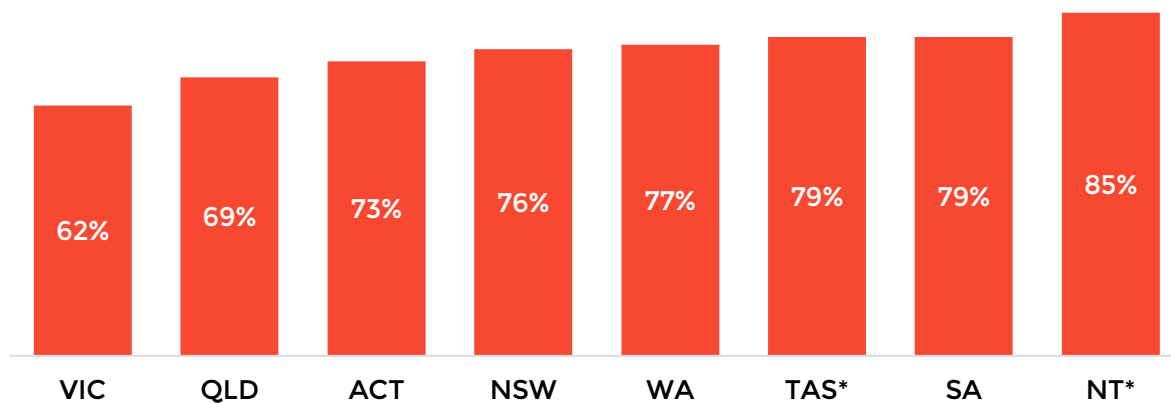


¹ The Northern Territory and Tasmania samples in this study is small (<100 respondents each), so the results should be interpreted with caution.



While VIC audiences are eager to return to events, they are slightly less likely to have attended an event recently, compared to those in nearby NSW (76%), the ACT (73%) and SA (79%) for example.

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



Three-quarters are making plans to attend in future, commonly booking 2–3 weeks in advance

VIC audiences are signalling greater confidence in attending events in the near future. In the two weeks before data collection, three-quarters (76%) said they made firm plans to attend an event in future, with most planning to attend a live performance (49%), a museum or gallery (36%) or a cinema (32%).

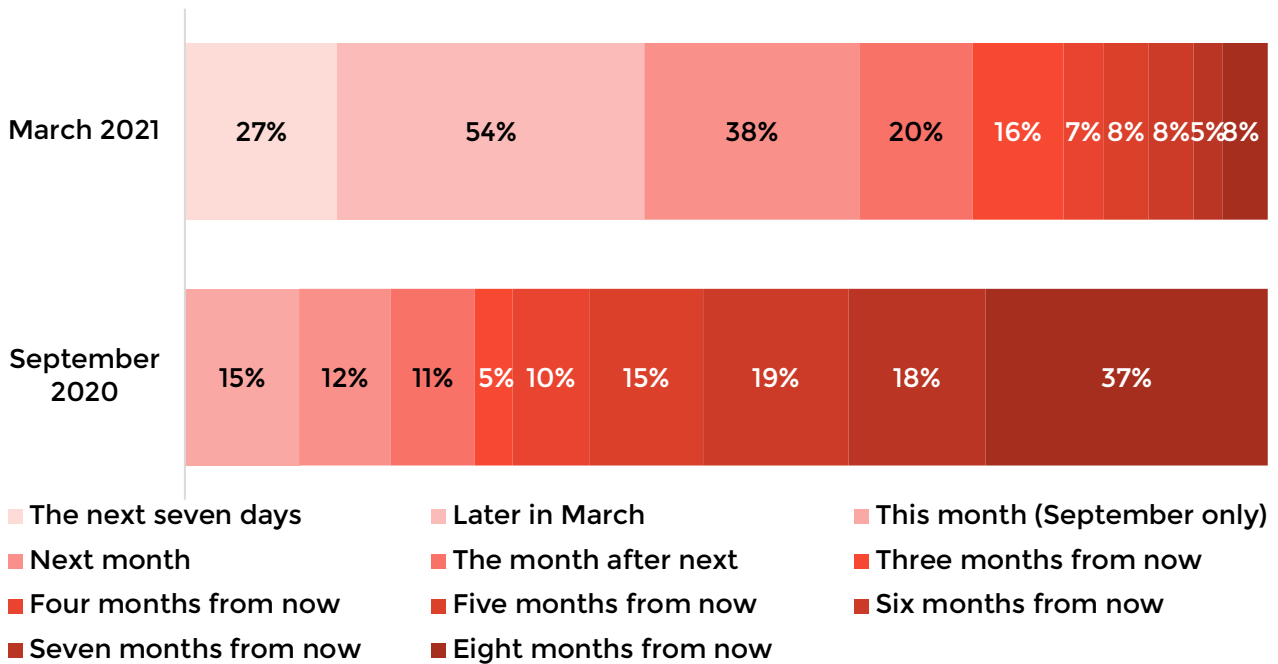
While this rate has increased, it has not yet reached the levels seen in other states/territories, such as the ACT (85%), SA (85%), WA (83%) and NSW (82%).

The greatest proportion of VIC audiences are purchasing tickets for events in the month ahead – either in the next seven days (27%) or later in March (54%) – while a significant number are purchasing tickets for April (38%). One VIC audience member shared,

‘I am less willing to plan further into the future, given the unknowns of whether restrictions will come back. Therefore, cancellation policies are very important.’



Figure 3: In the past fortnight, did you purchase tickets for one or more live shows or performances that are scheduled for...? (select multiple) (VIC) n=1,169 (March 2021)



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

Health risks and financial barriers continue to play a part in audience decision-making – though these pressures are lessening.

Over the past six months, the proportion of VIC audiences who know of someone within their social network who has been sick with the virus has been stable (at 8%) and the proportion experiencing financial hardship as a result of the pandemic has dropped from 39% to 30%.

However, one-third (34%) say that the risk of virus transmission prevents them from attending as they did in the past – a rate that is higher than the national average (26%). A small proportion (3%) cannot foresee going out until there is no risk at all (down from 13% in September). One VIC audience member explained,

‘Contracting COVID-19 would be life threatening to me.’

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



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

When asked about the factors preventing VIC audiences from attending right now, the top factor selected was the risk of lockdowns and cancelled events (45%) which is consistent with the top factor selected by national audiences. Some VIC respondents shared,

‘After going through the intense lockdown in Victoria I am ready to grab any arts activities by the horns and go for a fabulous ride! Life is too short and lockdown could happen again at any moment!’

‘I’m less inclined to commit to more expensive events, or travel interstate to events, because changing lockdown arrangements mean I may lose my booking.’

Restrictions and COVID-safe arrangements are also limiting attendance, with some audiences indicating that there are not as many options available (27%), that events are booking out too quickly (16%) and/or that the quality of the experience has changed (10%).

VIC attendees are spending more, though overall spending is not likely to fully recover this year

Two-fifths (42%) of VIC audiences attending in the past fortnight said they spent more than \$50 on tickets, and 22% spent more than \$100. This represents a significant increase on levels seen in September 2020, when 20% spent more than \$50 and 7% spent more than \$100.

However, over the next 12 months, 36% of VIC audiences say they expect their overall spending on arts and culture tickets, admissions, subscriptions and memberships to be lower than before the health crisis started.

VIC audiences are the most likely to say they’ll spend less in the next 12 months, along with those in the ACT (33%) and NSW (31%) – while this rate is lower in WA (22%), QLD (26%) and SA (28%), confirming it will take time to fully rebuild the market.

Comfort levels

VIC audiences are growing more confident attending most venue types

Comfort levels with most venue types continue to be lower relative to other states and territories, however confidence among VIC audiences is growing. This is evident for museums and galleries (97% are at least somewhat comfortable, up from 89%), community art spaces/studios (94%, up from 81%) and large theatres or concert halls (86%, up from 60%).

While VIC audiences have been generally less confident nationally, due to the state's high number of cases in 2020, they are demonstrating more confidence in some areas today. For example, comfort is highest in VIC at outdoor festivals (94%, compared to 91% in NSW) and comedy clubs and live music venues (54%, compared to 49% in NSW).

By limiting seating capacity, venues may reach more audience members

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

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

- Almost everyone (95%) feels at least somewhat comfortable at 50% seating capacity
- Most people (78%) feel comfortable with 75% seating capacity
- One-third (35%) feel comfortable with 100% seating capacity inside venues.

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

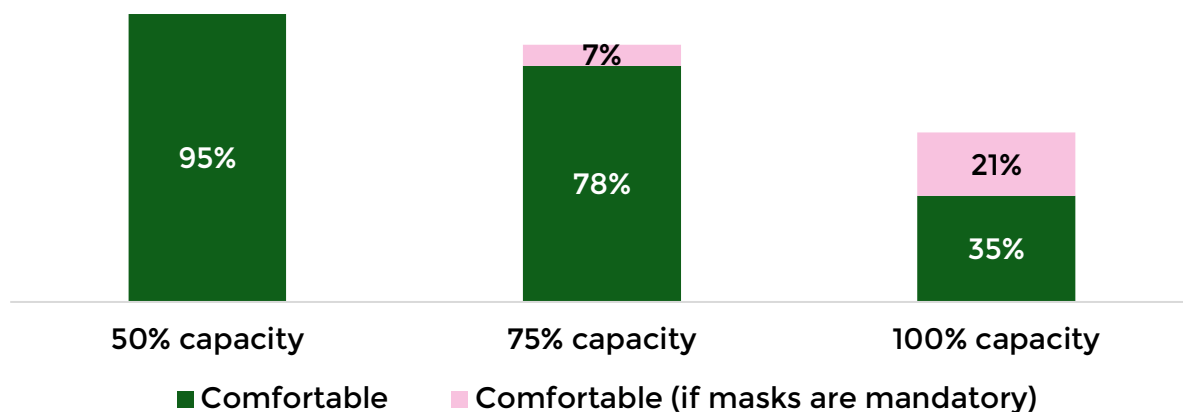
More people are comfortable to attend if masks are mandatory, though some prefer activities that don't require them

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

At an event with 75% seating capacity, the majority of those not previously comfortable said that it would improve their comfort (5% would be very comfortable and 52% would be somewhat comfortable) – meaning the overall proportion of audiences comfortable at this capacity rises from 78% to 85%.

At an event with 100% seating capacity, a significant proportion of those not previously comfortable said that it would improve their comfort (4% would be very comfortable and 28% would be somewhat comfortable) – meaning the overall proportion of audiences comfortable at this capacity rises from 35% to 56%.

Figure 4: Would you be comfortable attending an event today with 50%/75%/100% seating capacity? (With and without mandatory mask policies.) n=3,471



However, the qualitative data suggests the situation is complex. One VIC respondent said,

'I'm not confident that all other members of audiences will respect and adhere to social-distancing protocols. Where venues don't mandate social-distancing and mask wearing, then I probably won't attend particularly if indoors.'

Another shared that they would be discouraged from attending if masks were mandatory, commenting,

'Wearing masks discourages me to attend any concerts and other arts events.'

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

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

For VIC audiences it is important to clearly communicate what these policies mean, with some sharing their uncertainty at how capacity and distancing rules are applied in practice. For instance, one said, after attending a live performance,

'Audience requirement for mask wearing was very widely ignored. The excuse was doubtless 'I'm having a drink', but this was untrue, as hardly anyone was actually doing so.

I don't know how you enforce that in a darkened room with a crowd mid-performance.'

VIC audiences mostly appreciate stronger safety regulations, but some don't see any benefit

Since September 2020, more VIC audience members are at least somewhat comfortable with 2 square metres (84%, up from 69%) and 4 square metres (95%, up from 88%) of space for each person.

VIC audiences have shown appreciation for the safety regulations put in place, though some remain vigilant, as one said,

'It's all about risk. Personally, I think the Victorian government's response to many COVID-19 issues has been spot on...Transmission rates are very low. But as I care for elderly parents I take my own precautions.'

Similar to capacity restrictions, comfort is only improved when the regulations are properly implemented by venue staff, as one said,

'Surprised at lack of social distancing in foyer and lots of rows fully vacant and then row after row full of people – I guess [that is] the theatre's way of adhering to limited numbers [rather than space between patrons].'

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

Events that find ways to create a great ‘vibe’, whilst observing guidelines, will be highly attractive to VIC. Social distancing has presented a challenge for creating a buzzing atmosphere.

Some VIC audiences like events with ‘pods’ or tables of 4–6 people (21%) where they can sit close to people in their immediate social circle. For instance, one person said,

‘The pods are likely to be more discretely located, and easier for people to get to them, and more space for passers-by to get to their pod.’

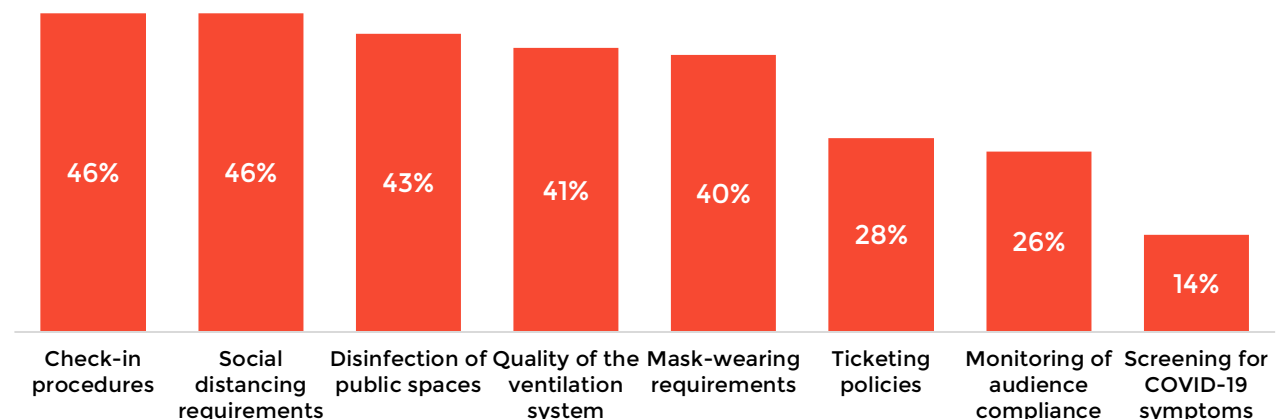
However, this model doesn’t work for everyone, with another person reporting, ‘I often end up going to things alone so a pod would not be relevant to me.’

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

As winter approaches, some VIC audiences are concerned about the weather affecting outdoor events, as well as the potential for transmission of the virus in indoor venues – particularly in relation to ventilation and air circulation. Many (41%) said this topic is important in communication about venue safety. As one said, ‘I feel much safer where there is fresh air or good ventilation.’

To feel reassured about safety regulations, the other common topics VIC audiences are interested in hearing about are check-in procedures for contact tracing (46%), social distancing requirements (46%) and disinfection of public spaces (43%).

Figure 5: In thinking about attending cultural venues and events, which of the following topics are most important to you? (select up to three) (VIC) n=3,553



COVID-19 safety

There continues to be a wide range of views about public health policies

Qualitative comments from VIC audience members reveal a diverse range of perspectives. Some people remain highly cautious and want COVID-safe procedures in place long-term, while others say that certain safety measures deter them from attending. For example, one person said,

[Long term] I think indoor capacity will return to 100% with no mask-wearing and I am not comfortable with that scenario (e.g. sitting next to an unmasked stranger, indoors, for the duration of a concert).'

Others said that they would be discouraged by enduring safety procedures, for example,

'I hate wearing a mask in general, but indoors and at a venue specifically - and as I travel on public transport, that doubles the amount of time in a mask...'

Most VIC audiences are satisfied with COVID-safety at cultural venues

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

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

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



Staff and signage continue to be important ways to reassure VIC audiences

Audiences who are cautious about attending continue to make suggestions for improving communication of COVID-safe arrangements, and in particular signage on-site. One suggested,

‘Very clear instructions should be on the ticket [buying] page, in mail outs and re-enforced at venues, e.g. if masks are required or if [we need to] stay in assigned seats, to sanitise hands on entry, or to sign in with a QR code and show your ticket...’

Audiences generally also appreciate clear instructions from staff – and some believe there is a case for a stronger commitment of staff to regulate COVID-safe procedures. One person shared,

‘That there are staff specifically employed to manage COVID-safe measures, and that the venue will not go over-capacity.’

Longer-term outlook

94% of VIC audiences say they are likely to get vaccinated, which is likely to further improve confidence

The commencement of Australia’s vaccination program is already contributing to confidence levels and the outlook is positive. Almost all VIC respondents (94%) said they are likely to get vaccinated, and most do not have major concerns about issues like the effectiveness of the vaccine.

Looking ahead, 9 in 10 VIC respondents (89%) feel confident that the vaccination effort will lead to the resumption of normal activities within 12 months. Almost three-quarters (72%) of VIC audiences say that long-term, they expect to attend just as they used to in the past.

Support and fundraising

VIC audiences remain strongly committed to supporting the arts

The proportion of VIC audiences who said they feel strongly committed to supporting arts and cultural organisations has grown slightly from 37% to 40% since May 2020. One person said,

‘I felt the need to donate to a recent artist because I understand how this current pandemic has been affecting them. Being able to give something back to them in their time of need when they’ve, albeit indirectly, was very rewarding.’

More VIC audiences say they’re likely to purchase a subscription or membership, even if some of the events might be cancelled (61%, up from 55% in May 2020).

Likelihood to make a donation to an artist organisation has decreased slightly (64%, down from 67% in May). Consistent proportions are likely to donate to a sector support fund (52%, stable with 50%) or to buy ticket vouchers redeemable for future events (67%, stable since May).

Fewer VIC audiences are subscribing or purchasing memberships so far in 2021

This year, 37% of VIC audience members say they have already purchased a subscription, membership or season tickets to a cultural organisation for the 2021 season. This is lower than the proportion who reported having subscribed to last year’s season (51% were subscribed in September 2020).

However, among those who have purchased, 88% say they are planning to renew next year, which is an increase since July 2020 (when 70% had planned to), suggesting VIC audiences are optimistic about future attendance.

This year, the most common subscription/membership purchased by VIC audiences are to a performing arts organisations (19%) or a museum or gallery (16%), while slightly fewer purchased a subscription/membership to another type of organisation (10%).



Donating to artists and cultural organisations is stable, and most want to support those facing adversity

In March, the proportion of VIC audiences making donations to artists or cultural organisations in the 2020/21 financial year (24%) is consistent with 2019/20 financial year (25%).

When asked what specifically prompted their donation, several VIC respondents explained that they wanted to support artists and organisations that were struggling, for example,

‘The recognition that the arts is a vital part of community well-being. In terms of theatre, supporting the theatre and those whose employment may have been compromised.’

‘Supporting music in Victoria, even though I can't afford much at the moment!’

Online participation

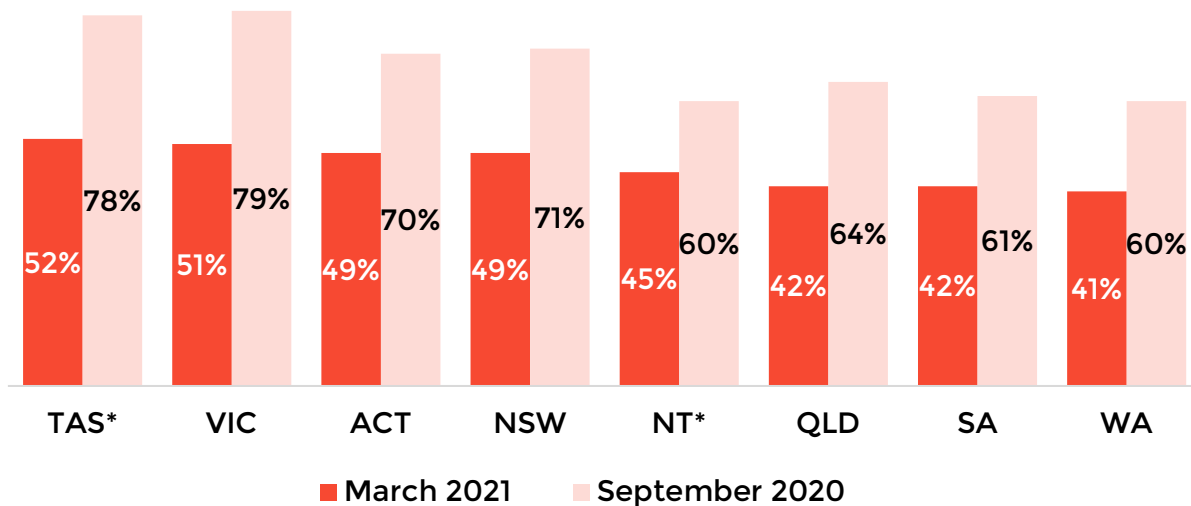
Nationally, VIC audiences are among the most engaged in online arts and culture — though this is declining

As more people return to live events, fewer VIC audiences say they recently participated in digital arts experiences. In VIC, the proportion participating online in the two weeks before data collection was 51%, compared to 79% in September 2020.

However, nationally VIC audiences are the most engaged online right now, along with those in the ACT (49%) and NSW (49%). In comparison, online engagement has continued to be lower in areas with fewer restrictions on live experiences such as WA (41%), SA (42%) and QLD (42%).

Among the 51% participating online, many say they are doing so more frequently than before the pandemic (50%). A smaller proportion (25%) say they're participating online less frequently, or plan not to continue post-pandemic.

Figure 6: During the past fortnight, have you participated in any of the following online or digital arts & culture experiences? (select multiple) n=13,836 (March)



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

VIC audiences are participating in all online activities to a lesser degree. Video content of performances and events remains the most common form of digital participation, with 22% of VIC audiences recently watching a live stream (down from 47% in September 2020) and 27% recently watching pre-recorded video (down from 53%).

However, online classes and tutorials have had the smallest decreases in attendance and are now a comparatively common way VIC audiences are choosing to participate online (25%). This rate is also higher than the national average (21%).

Increasingly, VIC audiences are motivated to access things they can't see live

When asked about their motivations for participating online, data collected in the early stages of the pandemic (May 2020) indicated that most VIC audiences were going online to support an artist/organisation they think is important (40%) or for their own mental wellbeing (35%).

However, now the most common reasons given are seeing something you had wanted to see live (38%) and seeing something you wouldn't normally be able to see (37%).



A significant proportion are still motivated to go online to support an artist or organisation they think is important (33%) and some are still going online for their wellbeing (21%). The motivation to support an artist or organisation online is stronger among VIC audiences than others, such as WA (25%), SA (26%) and QLD (28%).

Online continues to offer a good alternative, where physical attendance is restricted

The data shows that live and digital attendance are linked. For instance, VIC audiences who have recently participated in an in-person cultural activity are also more likely to be participating online (55% compared to 51% generally), as both behaviours are driven by strong engagement in arts and culture.

Some audiences see a role for digital experiences in their lives long-term, while others see it as their preferred option where physical attendance is limited. For instance, one person described living in a regional area and needing teaching support,

‘I live in a regional city, so online classes have helped me attend things which just aren't on offer here. I hope online classes continue and support is provided to art teachers to have skills and equipment to do this.’

As with audiences nationally, some people are tiring of digital experiences and want less ‘screen time’

Since this study first measured the barriers to online participation in May 2020, the proportion of VIC audiences who say they are ‘not interested in online or digital arts experiences’ has risen from 15% to 26% – consistent with the national result (27%). Just 12% of VIC audiences would select a digital program as their first choice for attending a cultural event today.

The qualitative data suggests that after months of lockdown, some VIC audience members are growing fatigued with online participation and are eager to focus on live attendance opportunities. Among those participating online, fewer VIC audiences said they plan to continue post-pandemic (64%) compared to September 2020 (73%). One person,

‘I feel ‘screened out’ after work and don't really want to sit in front of the computer again unless it is REALLY compelling.’

There may be opportunities to grow creative technologies that are more immersive (e.g. virtual reality) or that do not involve screens (e.g. audio experiences) to continue engagement with VIC audiences.



More than a third of VIC audiences online continue to pay for digital experiences

While VIC audiences are most likely to be participating online nationally, the proportion of VIC users paying for digital content decreased from 44% in September 2020 to 39% in March 2021.

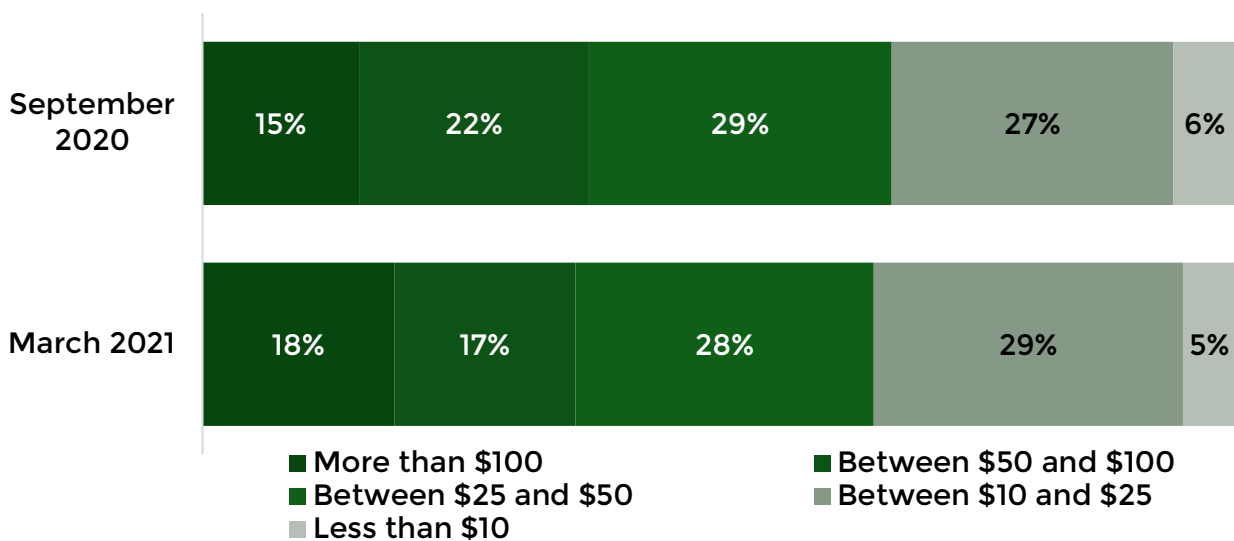
However types of payment for digital experiences are changing, with slightly fewer VIC audience members making a donation for something they consumed online (14% compared to 23% in September).

Pay-per-view remains the most common form of digital patronage, although this has decreased slightly in VIC (20% relative to 27% in September). A small number (9%) say they subscribed to a platform to access content on-demand, and 7% say they accessed digital content as a part of a program/season they subscribed to.

The proportion of paying VIC audiences who are spending large amounts on digital experiences has been stable: during the fortnight before data collection, 18% spent more than \$100 and a further 17% spent between \$50 and \$100 (compared with 15% and 22% in September, respectively).

Online, VIC audiences are spending less than the national audiences, among whom 22% have spent more than \$100 and a further 19% have spent more than \$50 recently.

Figure 7: Can you share with us your total spending on online arts & culture experiences in the past fortnight? (VIC) n=277 (March 2021)



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

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

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

The ability to access something on-demand was the most popular choice for VIC audiences (63%, consistent with 64% nationally) and ranked higher than seeing something live that is happening right now (39%, consistent with 37% nationally). Another popular feature among VIC audiences was hearing the artist or artistic leader talk about their work (38%).

Accessing short, edited segments or taster experiences was in the top two features for 13% of VIC audiences, and 14% selected tips on how to improve your own skills or appreciation of an artform. Smaller numbers preferred connecting with other audience members during the experience (5%) or contributing to the experience themselves (4%).

VIC audiences rely heavily on direct email marketing to find out what's available online

When asked about how they found out about their recent online experiences, the largest proportion of VIC audiences said they received an email from an artist or cultural organisation (55%). Many others said the experience appeared in their social media 'feed' (37%) or they were recommended the activity by someone they know personally (34%).

VIC audiences who have recently paid for an online experience are also more likely to rely on email marketing. Specifically, audiences making donations (72%), purchasing via pay-per-view (71%), or subscribing to a platform (64%) are finding out about experiences via email marketing from an artist or cultural organisation more than those who have not paid for any experiences (49%).



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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