

FACT SHEET: Performing Arts

COVID-19 Audience Outlook Monitor
Australia, May 2020

22,791

performing arts attendees
across Australia

94

performing arts
organisations

62%

are comfortable attending small
venues (seating up to 50)

19%

are comfortable attending large
venues (seating 1000+)

14%

are actively making plans to attend
live shows and performances

JAN-21

most common month to be
purchasing tickets

96%

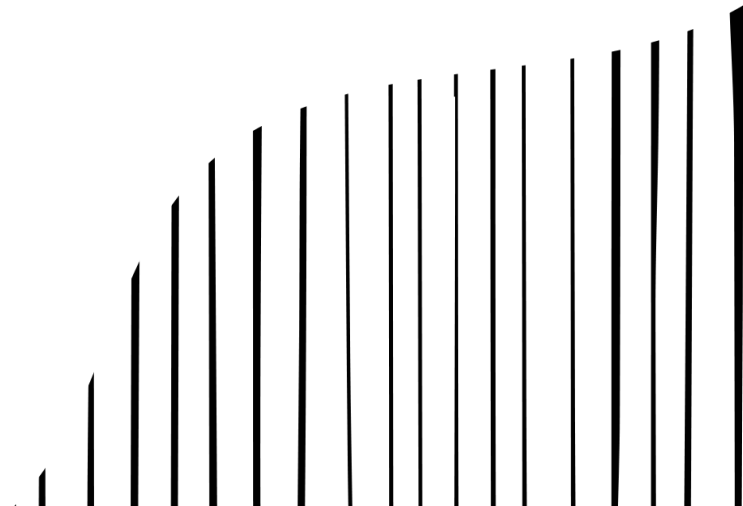
say venue safety measures will
influence attendance decisions



PATTERNMAKERS



**AUDIENCE
OUTLOOK
MONITOR.**



Summary

Initial findings of the Audience Outlook Monitor were released on 18 May 2020, confirming the challenging conditions for re-engaging audiences with performing arts events.

This Fact Sheet provides further insight into the 22,791 respondents who attend performing arts events, and their feelings on ticket pricing, refund policies, venue safety measures and audience communications.

Venue size and density of crowds are critical factors affecting attendance decisions. While some audience members are relaxed about safety measures, others are very cautious.

Small, community-based venues may be the first to welcome audiences back to cultural events and have an important role to play in establishing a new set of social conventions related to attending shows and performances.

Consistent application of safety measures is needed to ensure that collectively, the sector welcomes back the broadest possible audience as soon, and as safely, as possible.

Background

This Fact Sheet outlines key findings about the performing arts, based on the Audience Outlook Monitor in Australia, a study that is tracking how audiences feel about attending arts and culture events in the context of the COVID-19 pandemic.

Baseline data was collected in May 2020 in a cross-sector collaborative survey process involving 159 arts and culture organisations. A large number (94) of them operate in the performing arts in some way, including theatre (55), music (40), dance (33) and other performing arts (33). They include creative producing organisations, event and festival organisers and venue-based presenters. These organisations simultaneously sent a survey to a random sample of their audiences, who had attended a cultural event since January 2018.

Results from over 22,971 performing arts attendees (23,730 respondents in total) have been aggregated in a freely available dashboard, to assist artists and cultural organisations of all kinds to understand how audiences feel about attending events again. By aggregating the data from 159 organisations, this study provides a detailed resource with insights about all different artforms, types of events and demographic groups in all parts of Australia.

To access the dashboard, or read more about the study, visit the study's Australian homepage: <https://www.thepatternmakers.com.au/covid19>

Read on for the key findings about the performing arts nationally.

Returning to performances

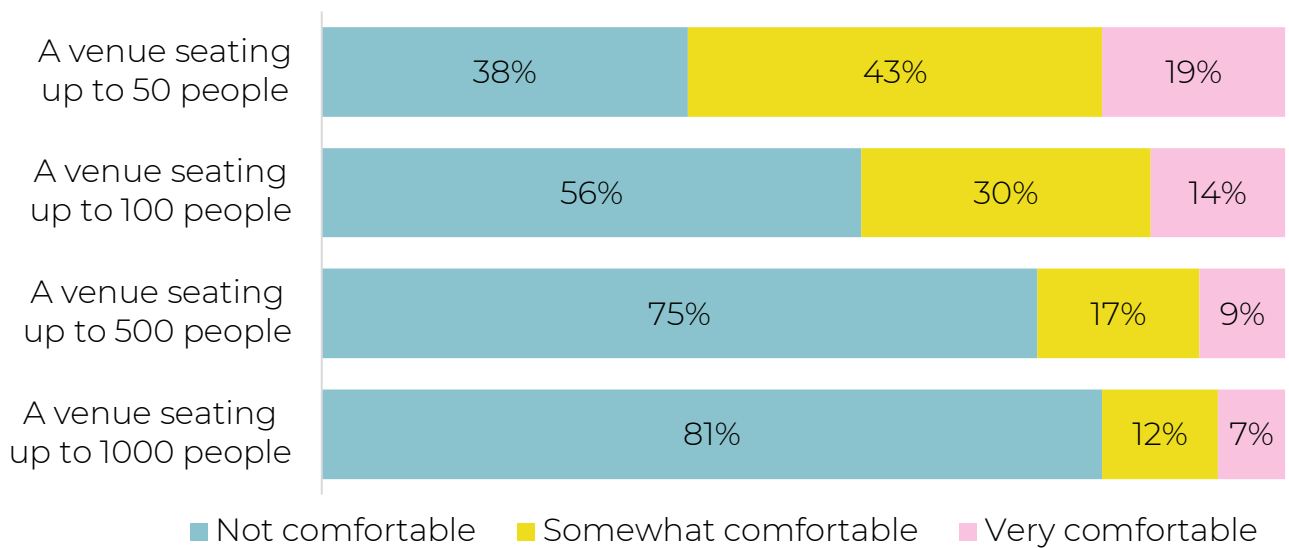
Most people are not yet ready to return to large performance venues

- ▶ Many audiences are eager to start attending events again and 22% say they are ready to attend as soon as restrictions are lifted.
- ▶ However, generally audiences are not yet comfortable attending large performance venues. Even if they were open, and following recommended safety guidelines, only 14% of audiences say they would be 'very comfortable' attending a venue seating 100 people today, and 30% say they would be 'somewhat comfortable'.



- ▶ Just 7% would be 'very comfortable' at venues seating 1,000 or more, which is less than the proportion that would be very comfortable flying domestically on a commercial airline (10%) right now.

Figure 1: How comfortable would you feel attending the following types of cultural facilities today, assuming they were open and following recommended safety procedures?



Audiences are concerned about the size and density of crowds

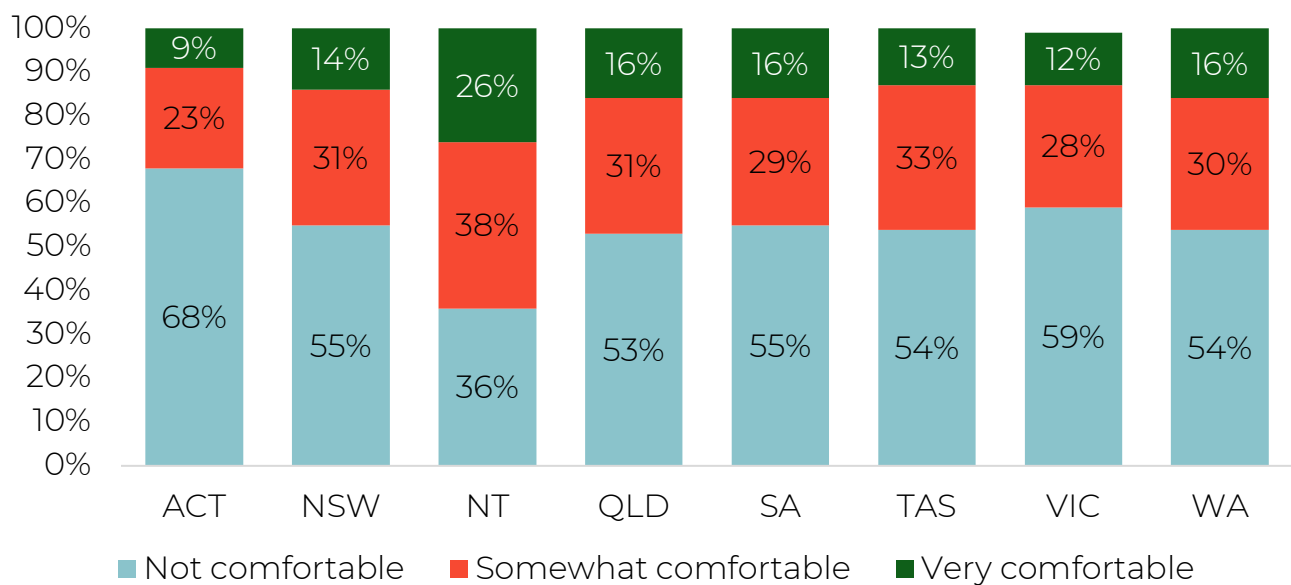
- ▶ Peoples' comfort level relates to the size of the venue, but also the density of attendees and likelihood of encountering crowds.
- ▶ Smaller venues of 50 people or less are the most likely to attract audiences in the near future, with 62% of audiences saying they would be at least somewhat comfortable attending right now, if they were open and following relevant guidelines.
- ▶ However, as one South Australian respondent explains, large venues may actually allow for better social distancing: 'My husband is immune compromised so I would still hope to attend the theatre and symphony as long as we can choose seats away from other patrons. I would suggest moving events from the smaller venues (Town Hall) to the Festival Centre to allow better social distancing.'



Readiness to attend varies across the country

- ▶ Audiences in the Northern Territory (NT), Queensland (QLD), South Australia (SA) and Western Australia (WA) are showing higher levels of comfort attending performance venues compared with other jurisdictions – likely to be linked with low transmission rates in these regions.
- ▶ Audiences in Victoria (VIC), Tasmania (TAS), the Australian Capital Territory (ACT) and New South Wales (NSW) are more cautious about attending.

Figure 2: How comfortable would you feel attending a venue seating 100 people, assuming they were open and following recommended safety procedures? (by State) n=23,574



Audiences are cautious about buying tickets, but people are optimistic about events in spring and summer

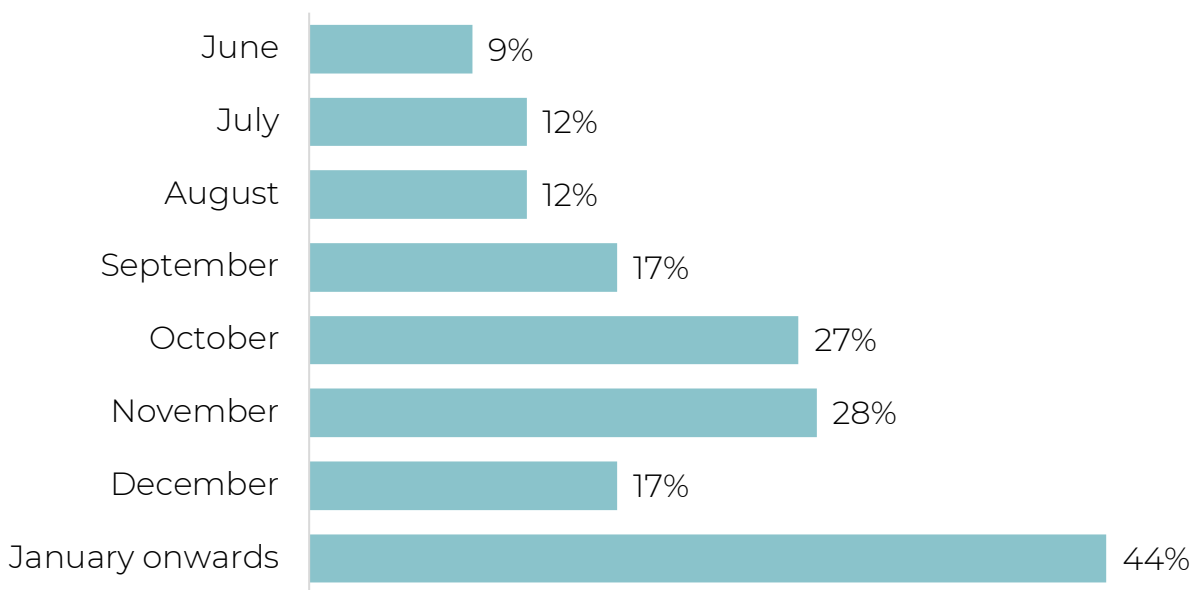
- ▶ At the time of data collection (6-14 May 2020), only small numbers said they are actively making plans to attend live shows or performances in future (14%).
- ▶ Among those that are buying tickets, the uncertainty of future restrictions and suspended arts programming mean that few are making commitments during the winter months. While some are buying tickets for



events in the spring, most are doing so for events in January 2021 or thereafter (44%).

- ▶ One person said, 'I am in [an] at risk group, so I am very concerned about attending again. I have booked one performance so far for QSO in February. I have a ticket for another event which was postponed and is now in November. I am unsure whether I will want to attend in November.'
- ▶ Another said, 'Don't think it should happen until after winter - cool temperatures are perfect breeding grounds for not only the virus but the flu as well. Getting both at the same time could be fatal.'

Figure 3: Ticket purchasing horizon, for those currently buying tickets (national) n=1,213



More than 1 in 3 attendees are experiencing a loss of household income

- ▶ Among those surveyed, 38% of audiences say that they, or someone in their household, has experienced a drop in income due to the pandemic.
- ▶ This group are just as likely to say they are ready to attend as soon as restrictions are lifted, compared to those not financially affected, and many say that in the long-term, they expect to attend just as they did before the pandemic.



- ▶ However, in the short- and medium-term, some of those affected say they will approach their attendance decisions with more caution.
- ▶ Among those who are buying tickets for events, those who have experienced financial hardship from the pandemic are planning to attend later, with a majority (49%) purchasing tickets for January 2021 or later, compared to 41% who have not experienced financial hardship.
- ▶ One person explained, 'Loss of income and job will mean that I will not buy as many tickets to shows as previously attended. I previously would have "had a go" at bands or events that I didn't know too much about but will now have to more cautious as to what I go to.'
- ▶ Another said, 'As a self-funded retiree, I get a significant portion of my income from share dividends... I will act cautiously with regard to spending on luxury items such as theatre tickets until such time as I am more certain that I can afford to do so.'

Some audiences express a desire to 'wait and see'

- ▶ While many are eager to attend events in future, even those not financially impacted say they may be cautious about committing.
- ▶ One person said, 'I am in the vulnerable age group with lung issues, so would be very cautious about relaxing physical distancing for some time after the rules are relaxed. I would wait for several weeks after the relaxation & would refrain from most activities if there was a significant spike in infections.'
- ▶ Another explained, 'I was a person who booked ahead - concerts, tennis, comedy, dining, running events etc. I don't expect to be pre-sale booking anything like I used to, given chance of not being able to travel or higher chance of cancelled events and concerns during events of people not socially distancing.'

Presenters may see lower frequency of attendance in the foreseeable future

- ▶ In combination, the health, logistical and financial impacts of the pandemic suggest that ticketed arts events will see reduced frequency of attendance in the short-term.

- ▶ Some audiences are already anticipating an increase in ticket prices for live events – and although many say they are willing to shoulder higher prices, some say it will affect how much they can attend:
 - ‘I would consider going to a play or film if there was a serious effort at socially distancing patrons in the seated area. I would also consider paying slightly more for tickets, in the short term, to assist with this sort of transition.’
 - ‘I expect that these [safety] measures are going to create higher overheads to run events, thereby driving ticket prices higher. If this does happen, I will have to reduce the number of events that I attend due to the affordability of such events.’

Small venues in local communities may have an important role to play, but there are challenges for touring

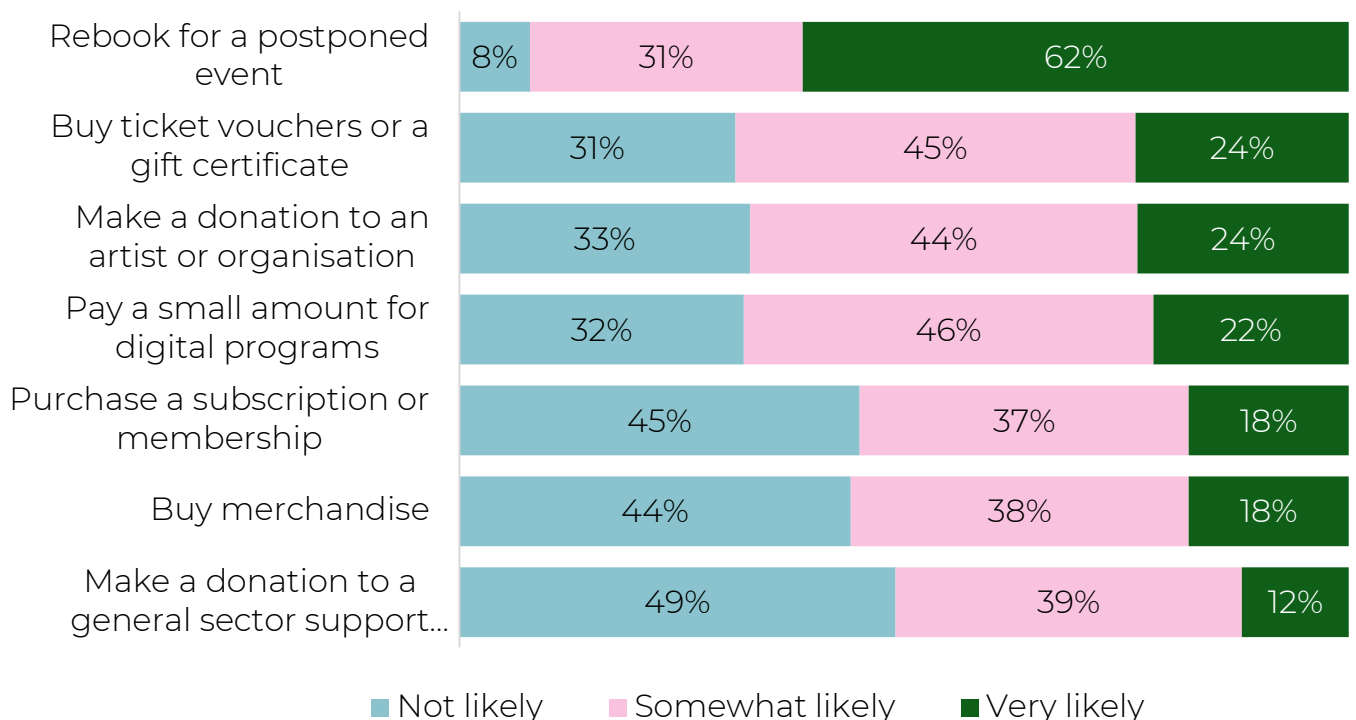
- ▶ With audiences perceiving a level of risk around buying tickets and in particular, travelling to attend ticketed events, cultural tourism may also be slow to resume. One respondent said, ‘I will be more reluctant booking tickets to events outside of my region because of the risks (health and financial) if events need to cancel or there is an outbreak there.’
- ▶ Audiences of regionally-based organisations are slightly more comfortable to attend most types of events, compared to metropolitan audiences, suggesting they may return first to their local performing arts centre or community hall.
- ▶ One regional Australian respondent explained their view, and highlighted the challenge for regional touring: ‘If my town doesn't have the disease, we can go about our business freely. The only restriction needs to be regarding who you let into town. So if you're bringing in performers from somewhere that hadn't isolated their town, I'd have them quarantined 2 weeks before I'd let them in. Then we can freely attend, no worries at all.’
- ▶ Another respondent affirmed the importance of regional programming for communities: ‘Performance is a real game changer for peoples attitudes and feelings. Accessing these in remote rural areas is challenging. However it is still very important to bring theatre and art to regional spaces.’



Refund and exchange policies will be critical to future ticket sales

- ▶ While many want to return to events, and to support arts organisations, the uncertainty around ticketing policies is leading some audience members to hesitate.
- ▶ One person said, 'I am extremely disappointed that tickets I purchased to cancelled shows have not been refunded yet. It has been months I have been waiting and is putting me off purchasing tickets when restrictions lift.'
- ▶ Many audience members are willing to rebook for a postponed event (62% very likely and 31% somewhat likely), and subscribers to performing arts organisations are the most likely to rebook (74% very likely and 22% somewhat likely).
- ▶ The findings suggest there is a case to explore other forms of support like vouchers and memberships, but generally there is desire to support specific causes they care about rather than industry funds (Figure 4).

Figure 4: How likely or unlikely are you to do each of the following to support one or more organisations in your community? n=23,730



- ▶ Many audience members felt that refund and exchange policies need to be adapted to the changing conditions, and if designed correctly can help induce ticket sales. For instance:
 - 'People should be offered a refund on a ticket if they have a doctor's note. I love the theatre but have noticed people attend if they are sick because they can't get a refund for an expensive ticket.'
 - 'Perhaps you could introduce a free ticket swap up until one hour before the performance, subject of course to availability, to encourage people to stay home if they have any symptoms. Sometimes symptoms come on quickly and there is a feeling that you should pop a couple of Codral Cold & Flu's to pull yourself together, so you don't waste your money.'
 - 'Maybe a standby/resell/swap ticket system so that people who aren't feeling well don't push themselves to attend because they've paid already, but also not missing out on having as many guests as possible.'

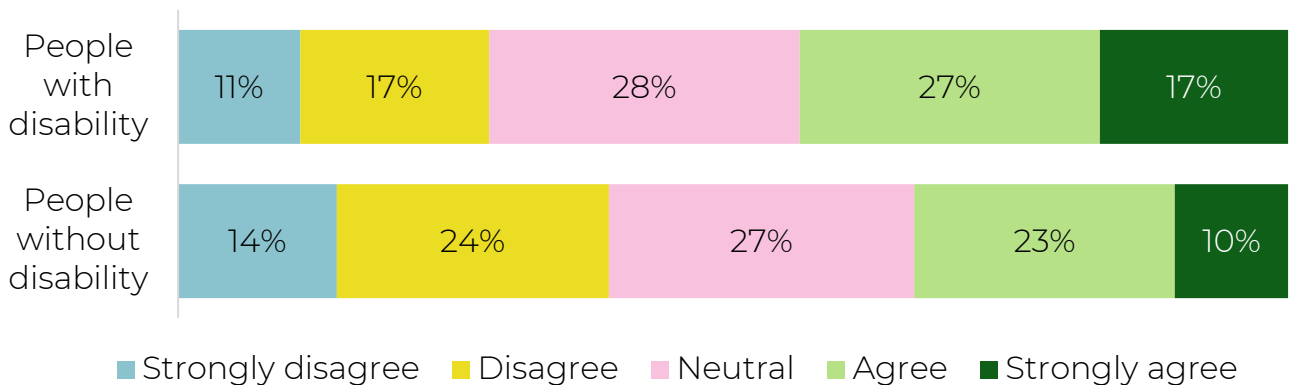
Some want the option of attending in-person or online

- ▶ Audiences generally agree that there is no substitute for live experiences. However, currently, many are engaging in recorded performances (52%) and live-streamed events online (36%).
- ▶ A sizeable number are engaging in arts and culture online more often than they used to (37%) and most say they plan to continue participating online after the pandemic (67%).
- ▶ Frequent attendees of the performing arts are among the most engaged online (90% are engaging in online activities), however they are less likely to say they'll continue engaging online after the pandemic.
- ▶ For many people, live-streaming provides a 'good enough' alternative, and they want to see it continue to be provided during and after the pandemic. Over one-third would like a choice of attending in-person or watching a livestream (35%) when they buy a ticket.
- ▶ People who live with a disability are more likely to want this option available (44%), along with those who feel especially vulnerable to COVID-19 (39%) and parents/carers of children under 6 (38%), confirming the role for digital in expanding access to the arts.



- ▶ One person said, 'Living with a high risk partner we may never attend live theatre again, which is truly devastating to both of us; but if we had the option to see streamed live performances at a discounted ticket price we would jump at that!'

Figure 5: Would like the choice of attending in-person or watching a live-stream, by experience of disability. n= 22,575



Audiences see live-streaming as part of the ticket mix, but some say it needs to be discounted

- ▶ Among those who feel cautious about attending performing arts venues, there has been positive feedback about offering live-streamed attendance.
- ▶ One person explains, 'The option of choosing in-person, live stream, or either-or tickets would be good to allow for attendance when health and community circumstances change rapidly or unexpectedly. Being able to choose on the day of an event whether to attend in person or via live stream would mean people wouldn't miss out, having spent (from reduced income) money on tickets.'
- ▶ 'It will be of benefit especially if you have general mild cold symptoms, or other illness, and have paid to see a performance, you can do so responsibly at home without risk of loss of money/forfeiting tickets.'
- ▶ Some respondents believe that discounting would be needed. One person said, 'If I purchased a live stream event I would expect the ticket to cost a little less - or be viewable in one's own time.'

- ▶ Another suggested, 'to encourage those with mild viral symptoms to stay home an incentive to attend online instead of in person may be a good idea e.g. 10% discount off next ticket'.

Venue safety measures are seen as critical and will positively influence audiences to attend

- ▶ As noted in the national Snapshot Report, venue safety measures are critical, and 96% say they would positively influence a decision to attend.
- ▶ One person said that reassurance is important as venues re-open, 'Once the 'all-clear' is given to attend cultural events I think some attention needs to be given to safety measures to ensure cautious folk are made to feel reassured.'
- ▶ Most audiences would generally feel encouraged by safety measures like disinfecting public areas (89%) and providing hand sanitiser (89%). There is also general support for social distancing measures, and most performing arts subscribers would be encouraged to attend if patrons were seated apart according to social distancing guidelines (83%).
- ▶ However, some measures may be polarising with a proportion saying they would actually be discouraged if they had to wear a face mask (27%) or have mandatory temperature checks at entry (11%).
- ▶ One person explains that 'I am not in favour of compulsory masks but think that people should feel free to use them if they want to.'

Safety measures needs to be reinforced at all stages of the audience journey

- ▶ In terms of what venue safety measures should be communicated to audiences and when, it appears that it is important at all stages of the audience journey. For instance, respondents say:
 - 'Measures adopted should be published when tickets become available.'
 - 'I'd want to know about the seating arrangements and physical distancing while in the process of buying a ticket. The size of the venue doesn't bother me as much as whether the number of people in the relative size will feel crowded.'

- 'People need continual reminders and prior to performance including signage about proper hygiene practices (i.e. cough/sneeze in a tissue or upper arm). Good posters are available from state health websites.'
- 'I would like venues... to publish a guideline that reminds people to be considerate and kind and that if they are unwell or have any symptoms, they should refrain from attending the venue.'

Audiences have confidence in venues, but are concerned about other audience members

- ▶ Some audiences say they want to see vigilance in how measures are applied by venues. One respondent said, 'As someone in a high-risk group (both age and other health conditions) and given that going out is meant to be a pleasurable experience, I'd need to be confident that whatever safety measures are put into place are managed without any gaps.'
- ▶ While the actions of the venue are important, some respondents explain that they mainly have doubts about the behaviour of other audience members:
 - 'I am over 70. I have seen how the current very good precautions have been ignored by a section of the community who in my opinion should know better. Therefore, at this stage, I plan to stay away until vaccination has been perfected.'
 - 'It is not the venue, artists or events that concern me but the public that actually attend. A lot are totally oblivious of social distancing. Further education is required to ensure personal awareness of the pandemic.'
- ▶ The results confirm that as restrictions lift, presenters will have an important role to play in establishing new social conventions, to ensure that as a sector, we welcome back the broadest possible audience as soon as possible.



What's next

To explore the data in more detail and find out how audiences for your work are responding, visit the dashboard at the link below. You can also browse the existing resources or sign up to receive future releases as soon as they are available.

<https://www.thepatternmakers.com.au/covid19>

In the coming weeks, we'll be analysing other breakdowns in more detail, to provide you with more insights about key regions, artforms and topics. This includes Fact Sheets about online participation, and museums and galleries.

We'll also provide tips and practical steps you can think about to apply the findings in your work.

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



Australia
Council
for the Arts



Department of
Local Government, Sport
and Cultural Industries



Government of South Australia
Department of the Premier
and Cabinet



Queensland
Government