PHASE 2

Australian Capital Territory Snapshot

Audience Outlook Monitor,
July 2020

Image: The Australian Dance Party performing Lake March as part of the ACT Government's Where You Are Festival, photo courtesy of Lorna Sim, 2020

Summary

The Phase 2 (July 2020) findings of the Audience Outlook Monitor in the Australian Capital Territory (ACT) show that local ACT-based audiences are beginning to return to cultural venues and events (32%). However, audiences of ACT organisations remain cautious in their overall outlook and are more similar in their attitudes to Victoria (VIC) and New South Wales (NSW) audiences than those in other states/territories.

Increased levels of comfort at a variety of venues and events suggest a favourable outlook for the gradual rebuilding of attendance in the ACT. However, the rate of growth will be affected by the presence of the virus and the rate of transmission, both locally and in NSW and VIC. ACT-based organisations may be likely to rebuild local audiences faster than interstate visitors at this stage, though in some areas NSW audiences indicate higher levels of confidence than ACT-based respondents.

Despite online participation in certain activities having declined recently, half (50%) of all audiences of ACT organisations would still select digital programs as their first preference for attending a cultural event today. Across Australia, audiences of ACT organisations (74%) are among the most engaged online right now, along with audiences in VIC (77%) and NSW (75%), compared to the national average (73%).

Frequency of online participation has also increased since May 2020, for audiences of ACT organisations (51%, up from 43%) and ACT-based respondents (53%, up from 44%). A greater proportion of audiences of ACT organisations report that they will continue engaging online after the pandemic compared to May 2020 (75%, up from 71%). This increase is even greater among ACT respondents (73%, up from 65%).

ACT audiences are also among the most likely to be discovering new work and paying for digital offerings, particularly in the form of single, pay-per view online experiences, suggesting a maturing market for digital offerings for local audiences. These findings suggest an increasingly strong market for online arts and culture, especially for ACT audiences who are demonstrating greater caution towards attending live events.

Introduction

About the ACT sample

This Australian Capital Territory (ACT) Snapshot Report analyses the data from the Audience Outlook Monitor in two ways. It identifies insights from 1,057 survey respondents connected with ACT-based arts and culture organisations ("audiences of ACT organisations"), who are drawn from the ACT (37%), NSW (49%), VIC (9%) and further afield (5%).

This report also highlights the views of 540 respondents who live in ACT themselves ("ACT-based respondents"), many of whom are connected with ACT-based organisations, but some who are audiences of organisations in VIC, NSW and elsewhere.

Where the views of these two groups are very similar, an umbrella term of "ACT audiences" is used, referring to both audiences of ACT organisations and ACT-based respondents.

About the study

Beginning in May 2020, the study involves bi-monthly data collection to track how audiences feel about attending arts and culture events in the context of the COVID-19 pandemic.

Each phase involves a cross-sector collaborative survey process involving over 150 arts and culture organisations, including museums, galleries, performing arts organisations and festivals. Participating organisations simultaneously sent a survey to a random sample of their audiences, who had attended a cultural event between January 2018 and May 2020.

Phase 2 results, from over 15,000 respondents, have been combined with Phase 1 data in a freely available dashboard. It's designed to provide insights about all different artforms, types of events and demographic groups in all parts of Australia.

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

Read on for the key Phase 2 findings relevant to the ACT.

Current conditions

ACT audiences are more confident than VIC audiences, but remain cautious about public interaction

Between May and June 2020, the number of confirmed cases of the virus nation-wide fell and restrictions on events were loosened around Australia. However, around the time of data collection (8–12 July 2020), three new cases of COVID-19 were reported in the ACT (https://www.covid19.act.gov.au/news-articles/act-covid-19-update-8-july-2020), and the border closed to Victorian travellers, following a larger outbreak in that state. Cases were also reported in NSW, where ACT organisations draw a proportion of their audiences from.

Overall, audiences of ACT organisations are showing higher levels of comfort engaging in public activities in Phase 2 compared to Phase 1. The proportion that are at least somewhat comfortable to eat at a local restaurant increased from 59% to 86%, and those that are comfortable using public transport increased from 41% to 55%.

The majority of respondents living in the ACT themselves are comfortable eating out (85%). This proportion is slightly lower than NSW audiences (88%), but larger compared to those living in VIC (80%).

A large proportion of ACT-based respondents have a Bachelor degree or higher level of education (79%), compared to NSW respondents (72%) and the national average (68%), which may be linked to some attitudes and behaviours related to the public health response to the virus.

Returning to events

ACT audiences are beginning to return to events, though some remain cautious

Around the country, audiences have begun returning to cultural events, with 24% attending at least one kind of cultural event in the fortnight before data collection.

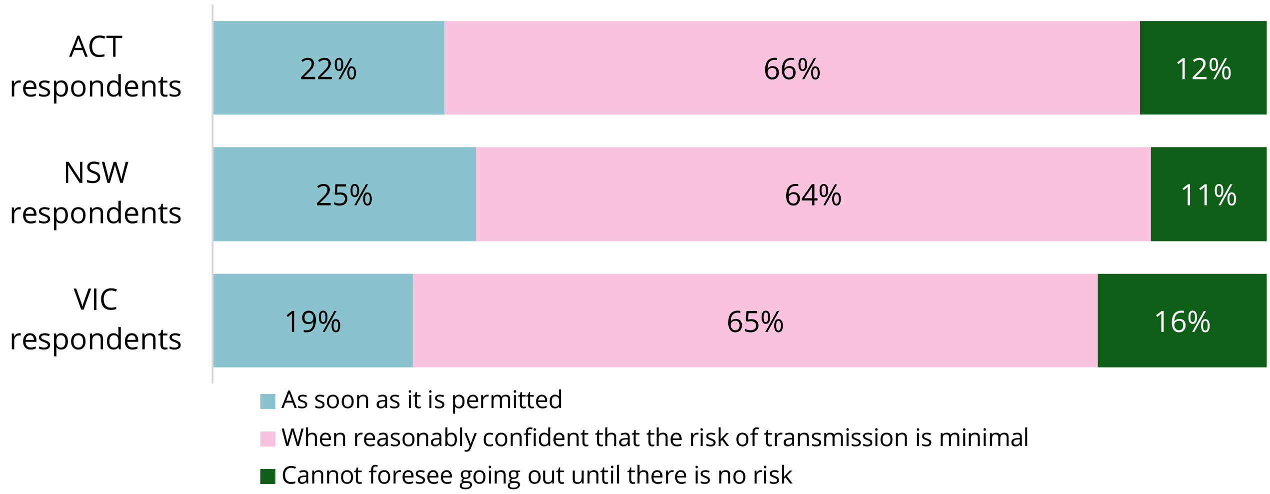
In the ACT, 26% of audiences attended a cultural event in the past fortnight, which is consistent with the national average (28%). This rate is even higher among locally-based respondents, of which 32% attended a cultural event in the past fortnight, such as a museum or gallery (24%) or a cinema (9%), which is an even more positive result.

Museum and gallery attendance rates for ACT organisations are the highest in the country (20% compared to the national average of 12%).

However, the overall attitudinal outlook for audiences of ACT organisations remains relatively cautious: 20% say they are ‘ready to attend, as soon as permitted’ stable with 19% in May 2020. ACT-based respondents (22%) are slightly more ‘ready’, although a degree of caution remains, relative to the national average (28%).

At the time of data collection, 14% of audiences of ACT organisations and 12% of ACT-based respondents say they cannot foresee themselves going out until there is no risk of transmission. This is similar to NSW respondents (11%), but a slightly lower proportion than those in VIC (16%), where concerns about community transmission were more elevated.

Figure 1: Which statement best represents how you feel about going out again? (ACT, NSW and VIC) n=8,543



A majority of ACT audiences are now comfortable to attend a range of cultural venues

When asked about their level of comfort attending cultural venues, the vast majority of audiences of ACT organisations say they are comfortable walking around a museum or gallery (94%, up from 90% in May 2020), and, to a similar degree, ACT-based respondents are also comfortable with this (95%, up from 90%).

Right now, audiences of ACT organisations are more comfortable visiting a community art space (84%, up from 82% in May 2020), and ACT-based respondents are even more comfortable with this (87%, up from 82%).

ACT-based respondents (54%) are more likely to say they feel comfortable attending seated venues such as a large theatre or concert hall, compared to VIC respondents (48%). NSW is feeling slightly more confident, with 59% feeling comfortable attending this type of venue.

In regard to attending an outdoor festival, the level of comfort among ACT-based respondents is 66%, consistent with 64% for VIC and NSW respondents.

Some ACT audience members are feeling pessimistic about returning to events long-term

Across the country, more people are now saying that they believe the pandemic will affect their attendance long-term. Both ACT-based respondents and audiences of ACT organisations have become slightly more pessimistic about future attendance over time, with 23% saying they now expect to attend less than before (compared to 17% in May 2020).

Audiences of ACT organisations are similar in their long-term outlook to those living in VIC (24%) and NSW (21%), where dense populations and concerns about community transmission are prevalent.

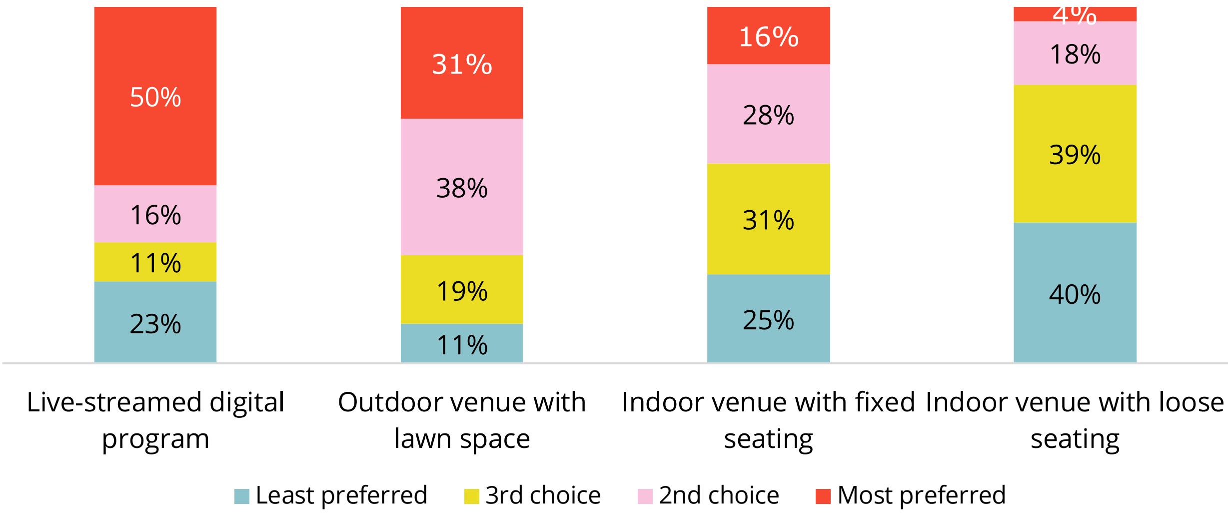
Audiences living in other states/territories, where there are no or low rates of community transmission and high levels of confidence in border controls, are feeling slightly more optimistic at present, such as the Northern Territory (NT) (17%) and Queensland (QLD) (20%).

ACT audiences have mixed views on their preferred event formats right now

For the first time in Phase 2, respondents were invited to rank a number of options for attending cultural events today (Figure 2):

- An indoor, flat-floor space with loosely placed chairs for 100 people to spread out
- An indoor hall with fixed seating for up to 100 audience members seated according to current social distancing guidelines
- An outdoor venue with lawn space only (bring your own blankets or lawn chairs), assuming there is plenty of space for 100 people to spread out
- A live-streamed digital program that you can watch from home.
- Responses from audiences of ACT organisations indicate contrasting views (Figure 3).

Figure 2: Rank the four options for attending a cultural event today (audiences of ACT organisations). n=992

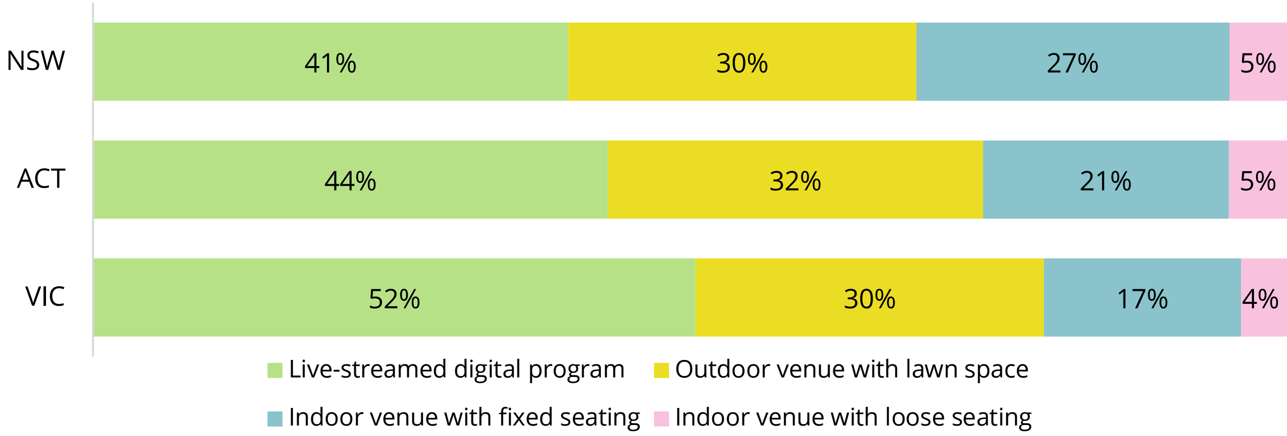


There is currently strong interest in digital programs

As shown in Figure 2, half (50%) of all audiences of ACT organisations selected digital programs as their first preference for attending a cultural event today.

Digital programs are also a first preference for the largest proportion of respondents living in ACT themselves. For their first preference (Figure 3), the largest proportions of respondents living in ACT (44%), VIC (52%) and NSW (41%) selected live-streamed digital programs as their most preferred option right now.

Figure 3: Rank the four options for attending a cultural event today (ranking of first preference for respondents living in ACT, VIC and NSW). N=8,016



Each of these states/territories are showing more favourability towards live-streamed digital programs compared to audiences nationally (39%), demonstrating that it feels safer to many people while concerns about public interaction are high.

ACT audiences are favourable to outdoor events, but many want allocated seating to ensure social distancing

Following digital programs, the second largest proportion (31%) of audiences of ACT organisations selected outdoor spaces as their first preference, similar to audiences who live in ACT themselves (32%).

This option is also a preferred option for 30% of VIC audiences and NSW audiences.

One ACT respondent shared,

> ‘Outdoors feels safer if people are spread out. If the seating is dictated then people will be more likely to follow it’.

As with many across Australia, audiences of ACT organisations would prefer assigned seating when attending indoor venues, to ensure social distancing is applied. The largest proportion of audiences of ACT organisations (31%) selected this as their third preference, following digital programs and outdoor events.

> 'Fixed seating provides proper social distancing. Moveable seats allow for others to get too close to you'.

Audience experiences

Social distancing is important for making audiences feel safe

When reporting on what worked well during their recent visit to an ACT cultural organisation, several respondents highlighted that limiting capacity assisted with social distancing.

One ACT resident mentioned,

> 'Social distancing with seating and there were very few people in the foyer waiting, scheduling of films helped with this. Also, online ticket purchase worked well'.

Another audience member shared,

> 'Our space was big enough to not be crowded (50 people). It was possible to sit alone and still listen to input from others. And possible to look at artwork spread out on large tables'.

Clear communication is integral to successful applications of social distancing

One common view in the feedback from returning ACT audiences is that their comfort was improved by clear communication. As one said,

> 'Very clear guidelines on how those facilities were meeting the prescribed health requirements for opening including social distancing. I went to a couple of galleries and a movie and all made me feel they were in control of their environments'.

When asked how venue safety could be improved, some audience members mentioned the need for social distancing to be enforced by venue and event managers.

> 'More attention needs to be paid to how visitors are moved from area to area - even with small tours there are significant bottlenecks at entrances or around exhibits/artefacts that are smaller and harder to see'.

One person mentioned that visibility of safety measures was important in helping them feel comfortable. Another person said,

> 'I could see regular cleaning and distancing of patrons'.

Future attendance

47% of ACT attendees are making firm plans to attend cultural events in future

During the two weeks before data collection, 47% of audiences of ACT organisations had made plans to attend a cultural event of some kind, and this rate is slightly higher (50%) for ACT-based respondents.

By comparison, the proportion of audiences who have made firm plans is lower for audiences in NSW (39%) and VIC (33%), where restrictions on live events have been more stringent.

Across the country, ticket-buying horizons are shorter than they were in May 2020. The largest proportion of ticket buyers are buying tickets less than one month out, both nationally (33%) and in the ACT (41%).

When they do go out again, the majority of ACT audiences plan to spend the same amount as before the pandemic

The majority of audiences of ACT organisations expect to spend the same amount when they return to cultural events (72%), consistent with respondents who live in ACT themselves (71%) and audiences generally (72%).

VIC respondents are among the most likely to say they will spend more than before the pandemic (14%), however this is a relatively similar rate compared to ACT respondents (12%).

Across ACT, VIC and NSW, 17% of audiences expect to spend less than before the pandemic, which is consistent with the national average (17%).

Among those who plan to spend more on arts and culture long term, the largest proportion of audiences of ACT organisations (46%) and ACT-based respondents (45%) plan to spend 20% higher than before the pandemic.

Participating at home

More ACT audiences are doing art and craft, creating videos and photography and creative writing

Audiences of ACT organisations are continuing to participate creatively at home to a similar extent as they did in May 2020.

There has been a slight increase in the proportion who are doing art and craft at home, for audiences of ACT organisations (46%, up from 43%) and ACT-based respondents (45%, up from 41%).

ACT-based respondents are also more likely to be making videos and doing photography (25%, up from 22%) and creative writing (22%, up from 17%) compared to May 2020.

Among ACT-based respondents, engagement in other activities has remained consistent, such as making music (26%, stable with 24% in May 2020) and collecting objects, artworks and artefacts (18%, stable since May 2020).

ACT audiences are among the most engaged online, but fewer are watching virtual exhibitions and gallery tours

A clear majority are continuing to engage with digital arts and cultural experiences, however this has dropped slightly for audiences of ACT organisations (74%, down from 80%) and ACT-based respondents (74%, down from 79%).

The proportion participating online is similar among NSW audiences (75%) and slightly higher for VIC audiences (77%). Audiences in other states/territories are showing lower rates of online participation, such as NT (63%) and Western Australia (WA) (68%), where there are more opportunities to attend live events at the current time.

While participation in most online activities has declined to some extent, the most significant change for audiences of ACT organisations appears in the proportion who are watching virtual exhibitions or museum and gallery tours (30%, down from 43% in May). This change is also evident among ACT-based respondents (24%, down from 38%), suggesting that audiences may have taken the opportunity to attend local museums and galleries that have reopened.

Albeit to a lesser degree, the proportion watching pre-recorded performances has declined among audiences of ACT organisations and ACT-based respondents (both at 50%, down from 54%).

The proportion doing online classes has also dropped for audiences of ACT organisations (29%, down from 34%) and ACT-based respondents (30%, down from 34%).

While participation in some activities has dropped, given a majority of ACT audiences are continuing to engage online, and some audience members are only participating online, planning for digital distribution long-term remains important.

ACT audiences are engaging online more frequently than before

A greater proportion of audiences of ACT organisations say they are engaging online more frequently than before the pandemic, compared to May 2020 (51%, up from 43%). This increase is also evident among ACT-based respondents (53%, up from 44%).

By comparison, the proportion who say they are engaging online more frequently is higher among NSW respondents (66%) and VIC respondents (57%).

Compared to May 2020, a slightly greater proportion of audiences of ACT organisations report that they will continue participating online after the pandemic (75%, up from 71%). This increase is even greater among ACT-based respondents (73%, up from 65%), suggesting a maturing market for digital offerings.

ACT-based respondents are among the most likely to be discovering new work online

Among audiences of ACT organisations, online discovery of new artists and work has remained stable since May 2020 (33% vs 32%).

However, the proportion discovering work online has increased among ACT-based respondents (38%, up from 32%). Along with VIC respondents (39%), ACT-based respondents are the most likely to be discovering new work online.

Slightly more ACT audiences are paying for online experiences, and more are purchasing single experiences

When asked if they had paid for a cultural experience online in the fortnight before data collection, 36% of audiences of ACT organisations said they had, which is a slight increase from 32% in May 2020.

This upswing is greater among ACT-based respondents (43%, up from 35%), indicating an increasingly strong market for paid digital offerings.

By comparison, a similar proportion of NSW respondents have paid for an online experience recently (41%), and a slightly smaller proportion of VIC respondents have done so (39%).

More ACT audiences are paying for single online experiences

When asked which methods of payment they have made, the proportion paying in the form of a donation has remained stable for audiences of ACT organisations (20% compared to 18% in May). The proportion subscribing to platforms to access arts and culture on demand has also remained stable (9% compared to 8%).

However, a greater proportion have purchased a single experience in July 2020 compared to May 2020, among both audiences of ACT organisations (15%, up from 9%) and ACT-based respondents (21%, up from 11%).

When asked to indicate their total spending on arts and culture experiences online, 41% of audiences of ACT organisations have spent more than $50, which is consistent with 39% in May 2020. However, ACT-based respondents are more likely to have paid over $50 (39%, up from 35% in May).

When asked to share what characteristics of their online experience made it worth paying for, one ACT respondent said,

> 'I wanted to support artists who derive income from music sales and gigs. Having missed the National Folk Festival, I wanted to use the money I would have spent there to support the artists I would have seen'.

What's next

To explore the data in more detail and find out how audiences are responding, visit the study's Australian homepage at: www.thepatternmakers.com.au/covid19

There, you can access a range of Fact Sheets and 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.

Each month, the researchers release new insights about key regions, artforms and topics. They also provide tips and practical steps you can think about to apply the findings in your work.

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.

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

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