



PATTERNMAKERS



AUDIENCE
OUTLOOK
MONITOR

PHASE 2
**Victoria
Snapshot**

Audience Outlook
Monitor, July 2020

CREATIVE  VICTORIA



Summary

The Phase 2 findings of the Audience Outlook Monitor in Victoria (VIC) reveal similar findings as Phase 1, due to a return to stage 3 restrictions in the state in July 2020.

While the national outlook for re-engaging audiences is becoming more positive, Victorian audiences remain cautious about attending cultural venues and events. The proportion that are ready to attend live events as soon as permitted has remained stable since May at 20%, while the national average has increased by 6%.

16% of Victorian audience members had attended a cultural venue or event in the fortnight prior to data collection. For most of those audiences, procedures such as timed ticket entry, increased hygiene standards and clear communication contributed to a safe and comfortable experience.

Currently, Victorian audiences are the most pessimistic about their likely attendance at events long-term, with 23% expecting to attend cultural events less than before the pandemic. However, many Victorian audiences remain financially committed to arts and culture experiences, with many spending on digital experiences (39%), and most say they will spend the same amount (74%) or more (14%) once they can resume attending cultural events.

Digital programs are the preferred format for more than half (52%) of Victorians looking to participate in cultural activities right now, compared to audiences nationally (39%). The findings about digital participation and patronage confirm that digital distribution will continue to be important for Victorian artists and cultural organisations.

Victorian audiences are also continuing to participate creatively at home; creating music, video and photography, and practising dance and theatre, to a slightly larger extent than audiences elsewhere.

Introduction

This VIC Snapshot Report identifies insights from 3,846 survey respondents connected with Victorian organisations participating in Phase 2 of the Audience Outlook Monitor.

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 in VIC.

Current conditions

Victorian audiences are facing similar conditions between May and July 2020

While the number of confirmed cases of COVID-19 began to decline nationally between May and June 2020, an outbreak in VIC in early July 2020 led to a return to stage 3 restrictions just before data collection (8–12 July 2020).

As in Phase 2, Victorian audiences are demonstrating strong levels of caution in engaging in public activities compared to other states. When asked how they feel about engaging in public activities, Victorian audiences are signalling lower levels of comfort eating at a local restaurant (80% feeling at least somewhat comfortable, compared to 88% of audiences nationally), catching public transport (47%, compared to 61%) and flying domestically on a commercial airline (37% compared to 44%).

Returning to events

Victorian audiences are cautious about returning to cultural events in the short term

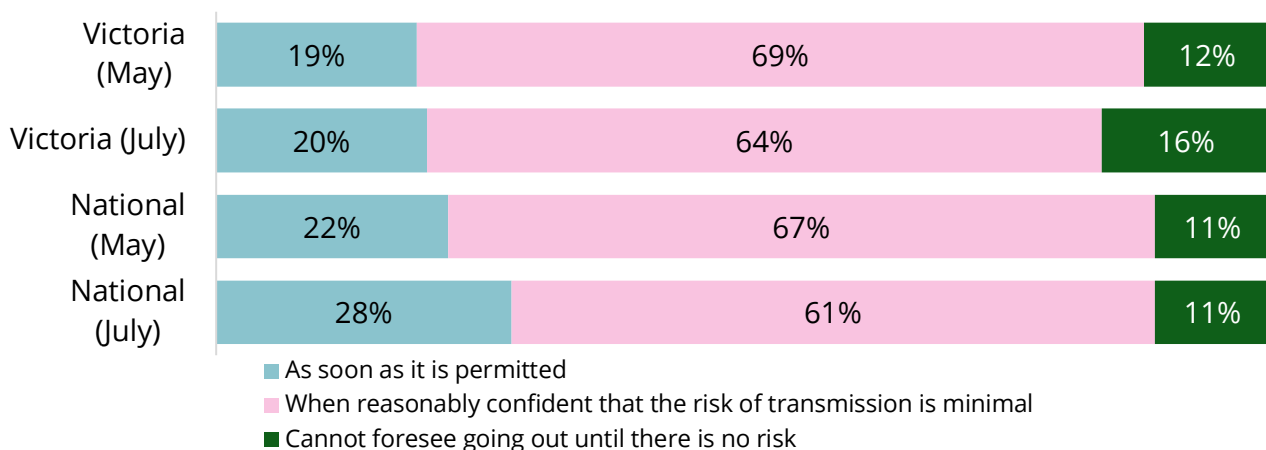
While readiness to attend cultural events increased nationally between May and July 2020, the outlook of audiences for organisations in VIC has remained stable (20%, compared with 19% in May 2020).

At this time, a greater proportion of Victorians cannot foresee themselves going out until there is no risk of transmission (16%), compared with other states, such as the Northern Territory (NT) (6%), Western Australia (WA) (7%) and South Australia (SA) (9%).

Across the country, more people are now saying that they believe the pandemic will affect their attendance long-term. Victorians are the most pessimistic about future attendance with 23% expecting to attend cultural events less than before.

Victorian audiences are most similar in their long-term outlook to those in the neighbouring Australian Capital Territory (ACT) (23%), (23%) and New South Wales (NSW) (22%), where dense populations and concerns about community transmission are more prevalent. Other states/territories, where there are no or low rates of community transmission, are feeling more optimistic, such as the NT (18%) and Queensland (QLD) (19%).

Figure 1: Which statement best represents how you feel about going out again? (Victoria and National results in May and July) n=15,594



16% of Victorian audiences returned to cultural events, before the state returned to lockdown

Of all states/territories, Victorian audiences are the least likely to have attended a cultural event of any kind recently (16% vs 24% nationally), noting the context of venue closures and restrictions in the state.

When asked about their level of comfort attending cultural venues, many Victorian audiences say they are at least somewhat comfortable walking around a museum or gallery (86%). However, only a small proportion attended a museum or gallery (9%) in the fortnight before data collection, suggesting it will take time for confidence to return.

If the outbreak can be controlled, there are signs that audiences are somewhat comfortable to return to community art spaces (78% vs 87% nationally), venues seating 50 people (69% vs 81% nationally), and venues seating 100 people (51% vs 68% nationally), assuming they were open and following safety procedures and distancing guidelines.

Digital programs are the most appealing to Victorian audiences right now

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

- ▶ 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.

Compared to 39% of audiences nationally, around half (52%) of Victorian audiences selected digital programs as their first preference for attending a cultural event today. One Victorian respondent explained this choice related to restrictions on events, saying,

'Melbourne has just gone back into lockdown so online performances are the only option today (and for at least the next month)'.

Another said that their reason related to personal safety and that the digital option allowed them to maintain their distance from others, commenting,

'Live streamed events allow me to stay away from people; hence my first choice. Following that, my choices are ranked based on my capacity to avoid people'.

When public events resume, audiences are favourable to events in outdoor, open-air spaces

When asked to select their second choice for attending a cultural event today more Victorian audiences selected outdoor venues with space to sit apart from others as their second choice (45%), compared to audiences nationally (37%).

One person shared,

'Being outside and distanced feels much safer. Online performances are great, considering the circumstances, but it is the atmosphere and in-person performances that I enjoy'.

Another agreed,

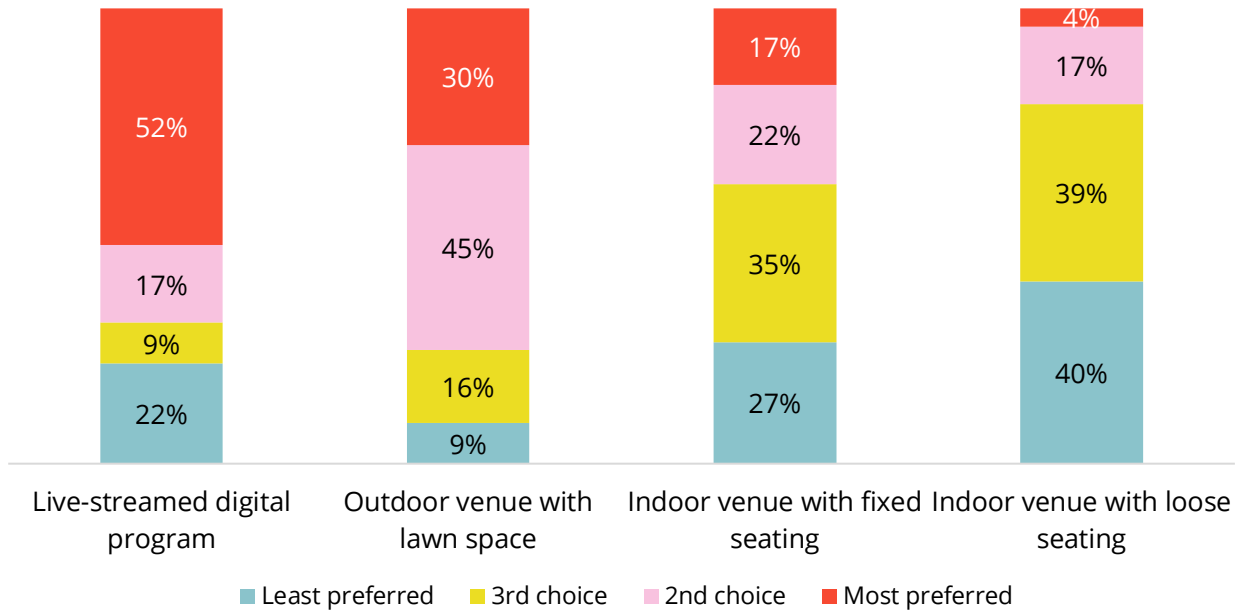
'I feel like I can spread out more in an open-air environment. Just being in the open makes me feel more confident too'.

When attending indoor venues, Victorian audiences would prefer fixed seating over loose seating

Victorian audiences, like many across Australia, would prefer assigned seating when attending indoor venues, to better control social distancing. As one person said,

'I feel safest indoors. I don't want other people to have the option to stand or put their chair close to me because I would feel awkward if they weren't following social distancing. I would prefer set seating with limited capacity'.

Figure 2: Rank the four options for attending a cultural event today (in order of preference for Victorian audiences). n=3,634



Audience experiences

By offering timed tickets, venues are making attendees in VIC feel comfortable

Social distancing enforced by timed entry and venue capacity has enabled attendees to feel more comfortable during their recent experience. When asked about what worked well in terms of venue safety, one attendee shared,

‘NGV International had timed tickets, limited numbers of guests and plenty of hand sanitiser’.

One person mentioned that limited tickets and booking ahead gave them the option of an earlier or later session, commenting,

‘I attended Jazzlab. Bookings required, and worked well, tables distanced as were musicians, all very smooth. Two sets were provided, and due to 20-person limit, choice given for first or second set’.

Strong hygiene practices are helping people feel safe attending venues

Along with social distancing, several Victorian respondents highlighted effective hygiene protocols as a critical factor in helping them feel safe at venues and events. One recent attendee mentioned,

'[There were] obvious hygiene measures. Clear countertops and surfaces. Hand sanitiser and all staff gloved and observing appropriate hygiene process'.

Others felt that there was still room to improve venue safety measures at some sites. For instance, one museum attendee suggested,

'Having doors be opened for visitors to avoid door handles be repeatedly touched. Hand sanitizer station (I can't recall seeing one)'.

Clear communication is integral to successful application of social distancing

One common view in the feedback received from returning audiences is that their comfort was improved by clear communication, such as signage and/or verbal instructions.

Another mentioned that staff assistance had compensated for a lack of visible signage, commenting,

'There was (not by design) many people at the cinema as it was quite late at night. However friendly person-to-person staff instructions on how to proceed to my seat made it easier as signage was not well lit or apparent'.

However, when asked how venue safety could be improved, some audience members mentioned the need for clearer instructions on how to maintain social distancing. One cinema attendee shared,

'There were no clear directions on where people could sit, another group sat in our row which I was uncomfortable with'.

Future attendance

1 in 3 Victorian attendees are making firm plans to attend cultural events in future

During the two weeks before data collection, around one-third of Victorian audiences had made plans to attend a cultural event of some kind (34%), which is an increase since May 2020 (14%). However, this proportion is smaller compared to audiences in other states, such as the NT (66%), South Australia (SA) (48%) and ACT (47%).

Among those who have made plans, Victorians are most likely to say they are intending to visit a museum or gallery (19%) or attend a cinema (15%) in future, which were the types of facilities most likely to be open during the time of data collection.

Victorian audiences are waiting longer to purchase tickets to live events

Among Victorian audiences, 7% have purchased a ticket to a cultural event recently, which is slightly below the national average (10%).

Across the country, ticket-buying horizons are shorter than they were in May 2020. However, by comparison, lead times for buying tickets in VIC are appearing longer than in other states, with around one-quarter (28%) purchasing tickets for events in April 2021 or thereafter, which is greater than the national average (20%). Fewer people in VIC (31%) are purchasing tickets for this month (July 2020), compared with 53% in the NT, 43% in WA and 41% in ACT.

When they do go out again, Victorians are the most likely to be spending more

Future spending is looking positive among Victorians, with 74% saying they will spend the same amount once they can resume attending cultural events. Compared to other locations, a greater proportion of Victorian audiences (14%) anticipate their spending will be higher when they return to events, compared to audiences in ACT (11%), NSW and WA (10%), QLD (9%), SA and Tasmania (TAS) (8%).

Among those who plan to spend more on arts and culture long term, the largest proportion of Victorians (42%) plan to spend 20% more than they normally would, which is consistent with the national average (40%).

However, among the 18% of Victorian audience members who plan to spend less, the largest proportion will spend 50% less (39%), which is a slightly greater proportion than the national average planning to spend 50% less (36%).

Participating at home

At home, Victorians are making art and craft, video, photography, and music more than other audiences

Victorians continue engaging in creative activities at home to a similar extent as they did in May 2020, with a majority still listening to music (90%) or reading for pleasure (84%). A smaller proportion are collecting objects, artworks, or artefacts, but this type of participation has increased slightly (15% in July 2020, up from 12% in May 2020).

While creative participation in many activities is consistent with the national average, Victorians are slightly more likely to be making art or craft (44% vs 41% nationally), making music (28% vs 25%), making videos and doing photography (25% vs 23% nationally) and practising theatre and dance (11% vs 9% nationally).

Victorian audiences are engaging online more frequently than before – and more than other states

While the proportion engaging online remains high nationally (73%), Victorian audiences are engaging online to a greater extent (77%).

Victorians, along with audiences in NSW, are the most highly engaged in watching live-streamed performances and events (45% compared to 41% nationally). Creating content to share online is also highest among Victorian audiences, with 10% doing so, compared to 5% in TAS, and 6% in ACT, NT, and QLD.

A greater proportion of Victorian audiences (57%) are engaging online more frequently than before the pandemic, compared to the national rate (54%). This rate is also much higher now than it was in May 2020 (39%).

Further, a greater proportion of Victorians report that they will continue doing so after the pandemic than in May 2020 (72%, up from 68%).

Online discovery of new artists and work has increased since May 2020 (39%, up from 32%), and it is higher among VIC respondents compared to the national average (33%).

2 in 5 Victorian audiences are paying for online experiences

When asked if they have paid for a cultural experience online in the fortnight before data collection, 39% of Victorian audiences said they have, which is a slight increase from 36% in May 2020.

The rate of those paying in the form of a donation has remained consistent (21% vs 20% in May). However more audiences have purchased a single experience in July 2020 compared to May 2020 (19%, up from 15%) or subscribed to a platform to access arts and culture content on demand (12%, up from 9%), suggesting a maturing market for digital experiences.

When asked to indicate their total spending on arts and culture experiences online, 37% have spent more than \$50, again a slight increase from 34% in May 2020.

When asked to describe the characteristics of the experience that made it worth paying for, Victorian audiences commonly mentioned good value and wanting to support creatives to keep practising during the pandemic. One shared,

‘Supporting our choir conductor by buying tickets for an online concert and making a donation to commission him to write a piece of music’.

Another commented,

‘I miss live music. Paying for tickets to watch my favourite bands play online concerts is, I hope, a way to ensure that they are able to continue performing once the pandemic is over.’

Victorian audiences who recently attended live events are continuing to engage online

Among those who attended in-person, a majority are also participating online. In fact, online participation among Victorian audiences appears to be more common in those who have recently attended a cultural event, compared to those who have not.



Further, Victorian audience members who have recently attended a live performance are more likely to be paying for digital offerings than Victorian audiences generally (59% vs 54%).

Victorian audiences who recently attended a live performance are also more likely to be discovering new artists or work (57%), compared to Victorian audiences who have not attended (37%). This proportion is also greater in comparison to national audiences who have seen a live performance recently (42%).

These findings suggest both physical attendance and online participation are driven by audiences' value systems. Digital programs will continue to play an important role in the lives of Victorians, even if they have experienced an in-person event recently.



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

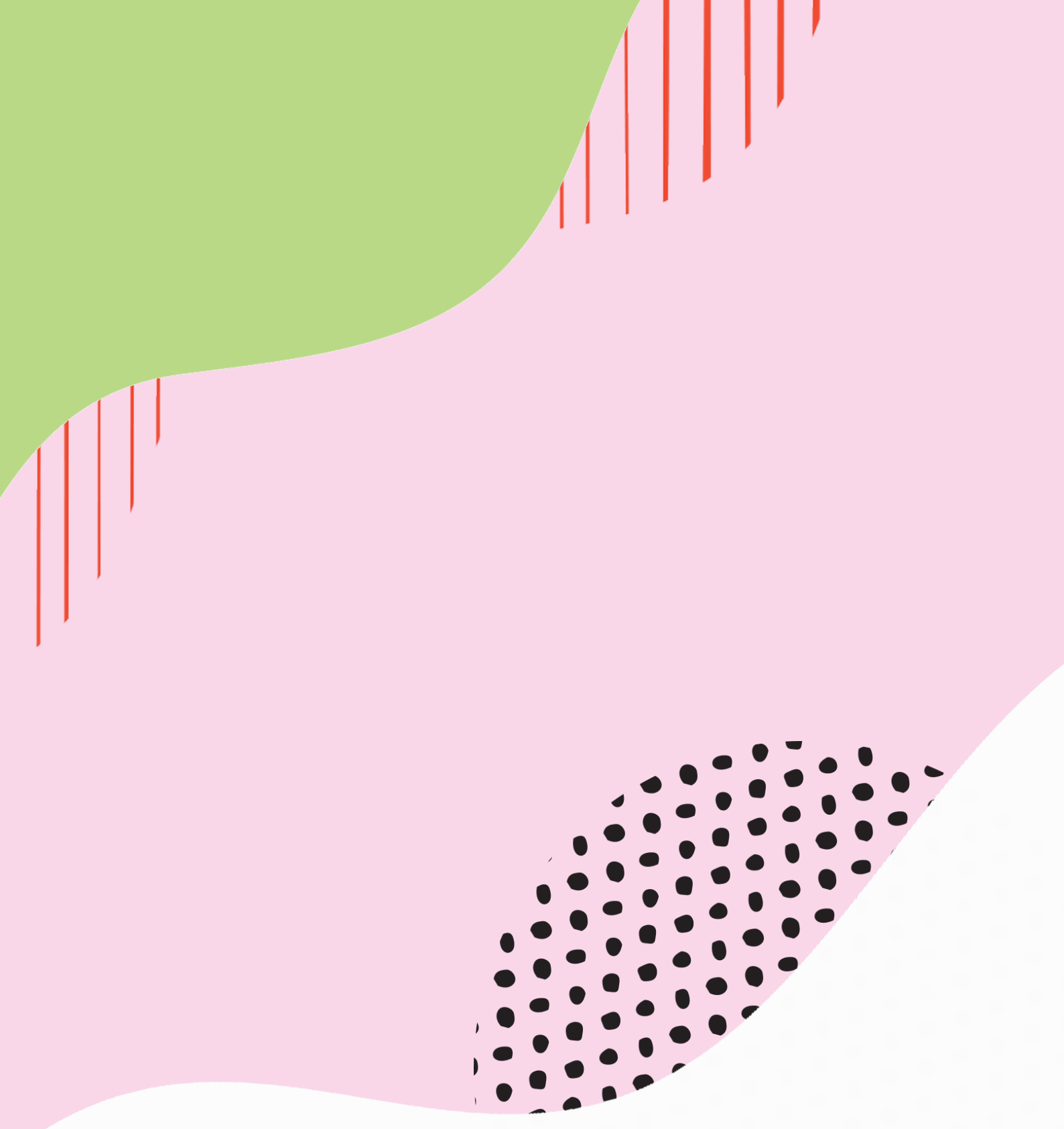
There, you can access a range of Fact Sheets and a dynamic dashboard, to help you explore the results by location, artform, and other variables. Instructions and tips for using the dashboard are available in a short video.

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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