



PATTERNMAKERS



AUDIENCE
OUTLOOK
MONITOR



PHASE 3

Australian Capital Territory Snapshot

Audience Outlook Monitor,
September 2020





Summary

Phase 3 findings of the Audience Outlook Monitor in the Australian Capital Territory (ACT) reveal an increase in confidence about returning to events, as restrictions on public gatherings have lifted.

In September 2020, the proportion of ACT audiences that attended a cultural event, of any kind, in the fortnight before data collection (2–6 September) has increased. Almost half (49%) of ACT-based respondents and 40% of audiences for ACT organisations have returned, as more venues and facilities reopen.

More ACT audiences are now feeling confident about most forms of public interaction, such as using public transport (up 6% for audiences of ACT organisations and up 10% for ACT-based respondents).

ACT audiences are signalling higher levels of comfort with outdoor events, as well as indoor venues of all sizes, assuming they were open, following safety procedures and observing social distancing guidelines.

Cultural organisations are continuing to connect with ACT-based audiences via digital offerings, even while restrictions on public gatherings have lifted locally. Participation in most activities has remained stable, and pre-recorded performances and events continues to reach the largest proportion of audiences. However, this rate has fallen slightly among both audiences of ACT organisations (42%, down from 50%) and ACT-based respondents (45%, down from 50%).

When asked if they have paid for an experience online, 39% of audiences of ACT organisations said they have, compared with 36% in July and 32% in May 2020. A greater proportion of ACT-based respondents are also paying for online experiences, increasing between May (35%) and July (43%) and remaining stable in September (42%).



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 540 survey respondents connected with ACT-based arts and culture organisations (“audiences of ACT organisations”), who are drawn from the ACT (54%), New South Wales (NSW) (37%), Victoria (VIC) (5%) and further afield (4%).

This report also highlights the views of 384 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 around 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 3 results, from over 12,000 respondents, have been combined with data from Phase 1 and Phase 2 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 3 findings relevant to the ACT.

Current conditions

Confidence is growing in ACT, but a proportion are still cautious about engaging in some public activities

In September 2020, levels of comfort participating in public events vary markedly around Australia, based on rates of community transmission. Although confidence has increased in some public activities, ACT audiences continue to be the most risk-averse nationally, on average, along with those in NSW and VIC.

Compared to July, audiences of ACT organisations audiences are now exhibiting increased levels of comfort with using public transport (61%, up from 55% in July), flying domestically on a commercial airline (45%, up from 39%). The proportion who feel comfortable exercising at a gym or fitness studio (45%) and eating at a local restaurant (87%) has remained stable.

Comfort levels have also increased among ACT-based respondents, in using public transport (66%, up from 56% in July), flying domestically on a commercial airline (48%, up from 39%), and eating at a local restaurant (89%, up from 85%). Similar to audiences of ACT organisations, the proportion who feel comfortable exercising at a gym or fitness studio (52%) has remained stable since July (50%), potentially due to these settings being sources of recent outbreaks nearby.

Returning to events

Around half of ACT-based respondents have returned to a cultural event recently

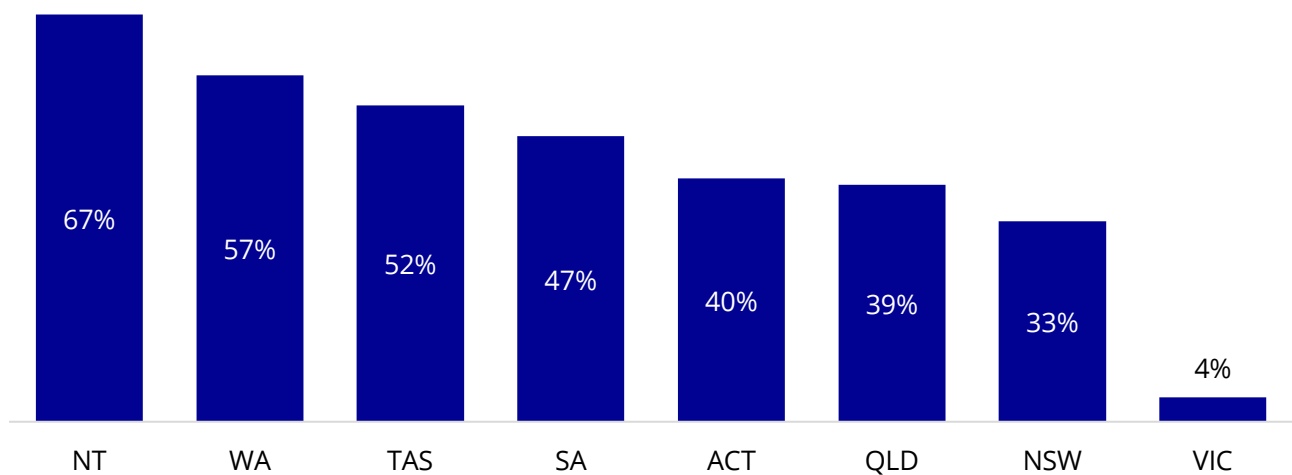
Between July and September 2020, the proportion of ACT audiences that attended a cultural event of any kind in the fortnight before data collection has increased. Almost half (49%) of ACT-based respondents and 40% of audiences for ACT organisations have returned, as more venues and facilities reopen (**Figure 1**).



The most common settings that people are reattending are museums and galleries (23% of audiences of ACT organisations and 30% of ACT-based respondents) and cinemas (15% of audiences of ACT organisations and 19% of ACT-based respondents) which are currently the most common types of facilities to be open consistently.

Rates of attendance at live performances have grown since July, as more events have returned to stages and venues, for both audiences of ACT organisations (9%, up from 2% in July) and ACT-based respondents (11%, up from 3%).

**Figure 1: In the past fortnight, did you do a cultural activity in-person (not online)?
By state/territory of participating organisations.**



As performances return to venues, more people are buying tickets

Across most parts of Australia, more past attendees are making plans to attend an event, of some kind, in future. While the proportion making plans to attend has dropped in nearby VIC, ACT audiences are feeling more optimistic, potentially due to confidence in border controls and other health policies. Among audiences of ACT organisations, the proportion making plans increased from 47% in July to 55% in September, and among ACT-based audiences, it increased from 50% to 59%.

In terms of artforms, the proportion making plans to attend a live performance has grown the most strongly in the past two months, with 20% of audiences of ACT



organisations (up from 9%) and 21% of ACT-based respondents (up from 14%) planning for this right now.

The proportion who are buying tickets for live events has grown for audiences of ACT organisations (12%, up from 6% in July) and ACT-based respondents (13%, up from 10%).

More ACT audiences are spending above \$50 on tickets to live events, which is an increase for audiences of ACT organisations (19%, up from 11%) and ACT-based respondents (19%, up from 13%).

Lead times are short around the country right now and, since July, they have become shorter for ACT audiences. Two-thirds (62%) of ACT-based respondents, and over half (55%) of audiences of ACT organisations are buying tickets for events this month.

Attitudinally, 1 in 3 ACT-based respondents are ready to attend whenever permitted

In September 2020, confidence has grown among ACT-based respondents, with 30% saying they are ready to attend whenever permitted, compared with 22% in July 2020.

Around one-quarter (24%) of audiences of ACT organisations are ready to attend cultural events as soon as permitted, an increase from May 2020 (19%) and July (20%).

ACT-based respondents are demonstrating higher levels of confidence than audiences based in VIC (24%) and NSW (24%) organisations and are closer in their outlook to audiences in Queensland (QLD) (32%) and South Australia (SA) (33%), where audiences are becoming more comfortable.

There is increased appetite among ACT audiences for outdoor events

As summer approaches, there has been a slight increase, since July, in the proportion at least somewhat comfortable attending most venue types, for both ACT-based audiences and audiences of ACT organisations.

Among audiences for ACT organisations, comfort has increased with attending outdoor events (72%, up from 60%), including street markets (76%, up from 67%),

performances in outdoor amphitheatres (77%, up from 65%) and outdoor music festivals (39%, up from 29%).

This change is also observed among ACT-based respondents, of which more people are comfortable attending outdoor events (76%, up from 66%), including street markets (80%, up from 70%), performances in outdoor amphitheatres (82%, up from 71%) and outdoor music festivals (45%, up from 38%).

More ACT audiences are comfortable attending a range of indoor venues

Although slightly smaller, the proportion of ACT audiences who are more comfortable with a range of indoor performance venues has increased, too.

Among audiences of ACT organisations, more people are feeling comfortable attending stadiums (44%, up from 35%), large theatres and concert halls (56%, up from 47%) and comedy clubs or live music venues (30%, up from 22%).

Similarly, among ACT-based respondents, there has been an increase in comfort levels attending stadiums (48%, up from 40%), large theatres and concert halls (61%, up from 55%) and comedy clubs or live music venues (36%, up from 30%).

ACT audiences are now more comfortable with larger venues

In terms of venue seating capacity, ACT audiences are signalling higher levels of comfort with venues of all sizes, assuming they were open and following the necessary safety procedures and observing distancing guidelines.

Comfort level among ACT-based audiences has increased for venues seating up to 250 people (54%, up from 42%), 500 people (37%, up from 31%) and 1,000 people (30%, up from 24%).

This is also evident with audiences of ACT organisations, among whom comfort has increased for venues seating 250 people (46%, up from 35%), 500 people (31%, up from 24%) and even 1000 people (25%, up from 19%).

Further probing about social distancing in Phase 2 showed that different social distancing arrangements would also have a significant effect on attendance. In September, 94% of audiences of ACT organisations and 93% of ACT-based



respondents would be at least somewhat comfortable to attend venues with 4 square metres per person enforced. This drops to 60% for audiences of ACT organisations and 67% for ACT-based respondents under a scenario of 2 square metres per person.

Fewer people are comfortable with no social distancing guidelines at all, for both audiences of ACT organisations (9%) and ACT-based respondents (12%).

A majority of ACT audiences are supportive of the use of face masks

In May 2020, face masks were a polarising issue, with audiences divided on whether this measure would encourage (36%) or discourage (27%) them from attending cultural events.

Support for face masks has grown among audiences of ACT organisations (72%, up from 39% in May) and ACT-based respondents (64% up from 38%), who now say they would feel encouraged to attend an event if face masks were mandatory.

Another safety measure with higher levels of support is temperature checking upon entry to venues, with 72% (up from 65%) of audiences of ACT organisations and 66% (up from 63%) of ACT-based respondents now saying this would make them more comfortable.

Future attendance

ACT audiences are favourable to both outdoor events and digital streaming

Again, in Phase 3, audiences were asked to rank their preferred setting for a cultural event, from a list of four options.

Some ACT audiences continue to show support for live-streamed digital programs that they could watch from home, as this feels the safest. One ACT-based respondent expressed this view, while sharing that they still missed live experiences,

‘I’m not comfortable yet to attend indoor events with many other people. Have attended quite a few live streams at home of events and really enjoyed them. I am missing the arts though’.



However, the proportion who put this as their first choice has dropped back slightly for audiences of ACT organisations (36%, down from 50% in July 2020) and ACT-based respondents (34%, down from 44%).

A greater proportion of people now rank outdoor venues most highly, among both audiences of ACT organisations (39%, up from 31%) and ACT-based respondents (39%, up from 32%), where there is enough lawn space to spread out.

One-fifth (20%) of audiences for ACT organisations ranked an indoor, 100-seat venue following social distancing guidelines the highest, which is a slight increase from 16% in July 2020. This rate has remained stable among ACT-based respondents, (22%, compared to 21% in July).

Just 6% of audiences for ACT organisations and 7% of ACT-based respondents ranked an indoor, flat-floor venue with loose chairs and plenty of space to spread out highest. One ACT-based respondent explained,

‘In the current conditions in the ACT it is sufficiently safe to go out to a concert - but one must ensure that social distance is maintained, and I believe [arranged seating] gives the best order of the risks with the benefit of a live performance’.

After considering second and third preferences, outdoor venues now have the highest levels of support on average among audiences of ACT organisations, followed by digital streaming. This is reflected in the comments from audience members of ACT organisations:

‘My preferences are for events outside of the home. I feel getting out is good for mental health and wellbeing and more pleasurable. With warmer weather coming and daylight savings, events outside would be great’.

ACT audiences express a desire to support more local venues and independent artists

In Phase 3, audiences were asked ‘Is there anything you can tell us about the types of venues or events you’ll prioritise, and how they may differ from prior to the pandemic?’



While some people mentioned crowds and venue safety as the key factor driving their attendance decisions, others say they want to support local, struggling artists. As one said,

‘Small independent artists will be prioritised, as they have less of a safety net’.

Others expressed a need to be financially cautious about their future attendance and said they will prioritise artforms and experiences that are important to them. As one said,

‘I will financially prioritise taking my children to events over my own events, as they've missed out so much and it's important to us that to instil a love of performing arts from an early age’.

Another person commented,

‘I am heavily involved in music events and community theatre so I will probably prioritise those as I am involved or am close with those who are, and then art shows or shows in my local vicinity’.

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

In May 2020, 17% of audiences of ACT organisations and 16% of ACT-based respondents said their future attendance will be negatively affected by the pandemic long-term.

In July 2020, this had increased for audiences of ACT organisations (23%) and has remained stable at this rate in September. This rate increased among ACT-based respondents between May and July (23%) but has decreased slightly in September (20%). In turn, the proportion of ACT-based respondents who plan to attend the same amount as before the pandemic has increased slightly from 71% to 75%.

By comparison, the lowest proportion of audiences expecting that their attendance will be negatively affected by the pandemic are in the Northern Territory (NT) (16%) and Western Australia (18%), where audiences are reporting a sense of relative normalcy after months with no or only small numbers of cases.



When they feel comfortable going out again, most audiences of ACT organisations (74%) and ACT-based respondents (73%) expect to spend the same amount as they did before, around 13% expect to spend less and around 13% expect to spend more, consistent with the July results.

Audience experiences

People in the ACT are satisfied with venue safety, and there is a sense of goodwill

When asked to reflect on their experiences returning to cultural events, most audiences appear to be satisfied and have no or only minor suggestions for improving.

Many acknowledged the circumstances and expressed appreciation where social distancing was enforced by limiting capacity and clear guidelines, particularly in museums and galleries. One said,

‘NGA's limit on audience numbers. Not only gave a sense of safety but better access to each work’.

Several people shared their appreciation where venue staff had made extra efforts to make people comfortable and make the experiences as ‘normal’ as possible. As one ACT-based respondent commented,

‘Everything about the experience worked well. I booked a time slot to attend, and that was a smooth and easy process. The visit itself felt normal and not restricted’.

Finding ways to gently enforce social distancing is important

Among ACT-based respondents who recently attended a live performance, those who suggested areas for improvement were inclined to mention enforced social distancing by staff and signage. Some people noted clear signage and instructions from staff, crowd control and spaced seating.

After attending a live performance recently, one ACT-based respondent said,



‘Everything was distanced and organised well. In and out was not a problem, and all the people understood what was required’.

Integrating health and safety practices seamlessly into an event is key to ensuring attendees feel safe while still being able to have an enjoyable time. One person shared,

‘Getting on with an enjoyable event! Clearly important to have the appropriate spacing and temperature checks in place, but it was only a minimal inconvenience. The organisers understood these are supposed to be enjoyable experiences and smoothly integrated COVID protocols to the point where it was only minimally noticeable’.

Participating at home

ACT audiences remain engaged with creative activities at home, both on- and off-line

ACT audiences are continuing to participate in creative activities while at home, with around 9 in 10 listening to music and reading for pleasure.

Among audiences of ACT organisations, smaller, but consistent, proportions are making art or craft (46%, stable since July), and making videos or doing photography (26%, stable with 24%). A slightly larger proportion are making music (24%, up from 20%).

Similarly, among ACT-based respondents, the proportion who are doing creative activities at home has been relatively consistent, particularly those doing photography or making videos (26%, stable with 25% in July) and making music (25%, stable with 26%). A slightly smaller proportion are making art or craft (42%, down from 45% in July),

ACT audiences are continuing to engage online to a consistent extent – even while venues have reopened

In September, the proportion who are participating online decreased slightly among audiences of ACT organisations (70%, down from 74%), consistent with declines in online activity nationally. However, this rate has remained stable among ACT-based

respondents (74%), signalling a positive outlook for local organisations seeking to deepen engagement, even while restrictions are lifted in the ACT.

In terms of the types of online experiences people are engaging with, most types of experiences are attracting similar rates of engagement to July 2020. Participation in pre-recorded performances and events continues to reach the largest proportion of audiences, though this rate has fallen slightly among both audiences of ACT organisations (42%, down from 50%) and ACT-based respondents (45%, down from 50%).

When asked if they, or anyone they know, has discovered a new artist, artwork, or performance online, 35% of audiences of ACT organisations and 38% of ACT-based respondents say they themselves have made a discovery in the past fortnight, consistent with these rates in July 2020. For both segments, 16% say they know someone who has, which is stable with the result in July.

The proportion who are doing online arts and cultural activities more or less frequently than before the pandemic has increased, among audiences of ACT organisations (55%, up from 51%) and ACT-based respondents (59%, up from 53%).

Plans to continue engaging online post-pandemic have also increased for both audiences of ACT organisations (79%, up from 75% in July) and ACT-based respondents (78%, up from 73%).

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

The data shows that the market for digital offerings in ACT is growing, in line with trends nationally.

When asked if they have paid for an experience online, 39% of audiences of ACT organisations said they have, compared with 36% in July and 32% in May 2020. The proportion of ACT-based respondents who have been paying for online experiences increased between May (35%) and July (43%) and has remained stable in September (42%).

The rate of donation appears consistent among audiences of ACT organisations (18%, stable with 20% in July), but has decreased slightly among ACT-based respondents (19%, down from 24%).



Similarly, the proportion subscribing to digital platforms has remained consistent among audiences of ACT organisations (10%, stable with 9% in July), as well as for ACT-based respondents (12%, stable since July).

The most significant change can be seen in the proportion paying for single online experiences. This proportion increased for audiences of ACT organisations between May (9%) and July (15%) and again in September (21%). It can also be observed among ACT-based respondents, increasing between May (11%) and July (21%), and again in September 2020 (24%).

For audiences of ACT organisations, the proportion who have spent over \$100 on digital experiences in the fortnight before data collection (2–6 September), has decreased since July (29%, down from 41%). Similarly, fewer ACT-based respondents are spending over \$100 online (30%, down from 39%).

When asked to describe what they'll prioritise when spending online in future, ACT audiences express a desire to show their support for local talent. One audience member of an ACT organisation said,

'Live streaming musos [especially good local ones] and theatre [again local if possible]. I like to support local artists and I have two patron accounts for local artists'.

Some people expressed an interest in prioritising interactive material, such as lessons and tutorials, as one person shared,

'Things that would upskill me — make me more marketable or count as professional learning for my job'.

Others would simply prioritise online experiences that they could not have in person in the near future. One audience member of an ACT organisation commented,

'Events which are remote (interstate/overseas) e.g. Met Opera. Events that cannot be replicated by live attendance or purchase of CD/DVD or on-demand streaming e.g. This could include art lectures from ADFAS'.



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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