



PATTERNMAKERS



AUDIENCE
OUTLOOK
MONITOR

PHASE 3
**Victoria
Snapshot**

Audience Outlook Monitor,
September 2020

CREATIVE VICTORIA

Summary

Phase 3 findings of the Audience Outlook Monitor in Victoria (VIC) reveal a slight increase in confidence about returning to events, as audiences look forward to reduced restrictions as Stage 4 lockdown nears its end.

Having grown accustomed to face masks and other public health measures, more people are now feeling confident about public interactions, such as using public transport (55%, up from 47%) and flying domestically (46%, up from 37%).

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 distancing guidelines.

Although confidence to return is growing after months of being locked down, more VIC audiences now say that the pandemic will negatively affect their attendance long-term, pointing to people's concerns about their financial capacity to reattend.

Victorian organisations are continuing to connect with audiences via digital offerings, while venue closures remain. Across Australia, Victorians are still the most highly engaged online, and participation in most online activities has increased, including online classes (38%, up from 33%) and virtual exhibitions (25%, up from 19%). The proportion paying for experiences has increased (43%, up from 36%), with more people purchasing single pay-per-view experiences (27%, up from 15%).

Introduction

This VIC Snapshot Report identifies insights from 3,940 survey respondents connected with Victorian organisations participating in Phase 3 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 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 Phase 1 and 2 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 3 findings for VIC.

Current conditions

Victorian audiences are becoming more comfortable about public interaction

In September 2020, levels of comfort participating in public events vary markedly around Australia, based on rates of community transmission. Victorian audiences continue to be the most cautious, on average, along with those in New South Wales (NSW) and Australian Capital Territory (ACT). However, in some ways, widespread use of face masks and other public health measures means that audiences can navigate public places with more confidence.

Compared to July, in September VIC audiences are exhibiting increased levels of comfort with using public transport (55%, up from 47% in July 2020) and flying domestically on a commercial airline (46%, up from 37%).

However, some activities are now viewed with more caution, such as exercising at a gym or fitness studio (44% feel comfortable, compared to 46% in July) and eating at a local restaurant (77%, down from 80%), potentially due to these settings being the source of recent outbreaks interstate.



Returning to events

VIC audiences remain cautious, but confidence is growing as people look forward to reduced restrictions

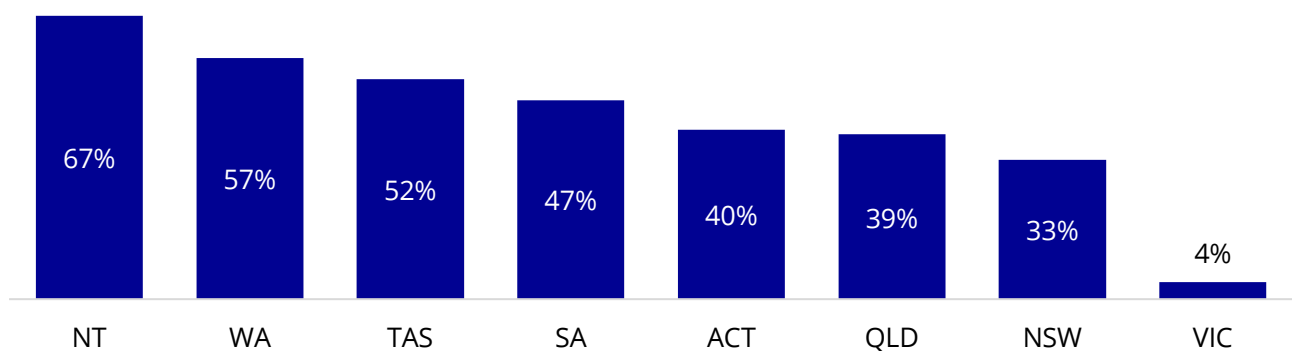
In September 2020, the Audience Outlook Monitor shows that 24% of past attendees in VIC are ready to attend cultural events as soon as permitted, an increase from that observed in May 2020 (19%) and July (20%).

In NSW and ACT, around 25% are 'ready to attend', similar to that of VIC. In Queensland (QLD) and South Australia (SA), confidence is stable or slightly lower than it was in July, with 32% 'ready to attend'. In Western Australia (WA), Northern Territory (NT) and Tasmania (TAS), confidence is increasing, with now around 40% of attendees saying they are 'ready to attend as soon as permitted'.

Although there is little to no activity in the Victorian market right now, the situation in other states/territories may provide an indication of how this could change in the coming months.

While audiences across Australia are returning to events, just 4% of respondents associated with VIC organisations attended in the fortnight before data collection. Figure 1 displays the proportion who have attended a cultural event recently in each state/territory.

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



VIC audiences are more comfortable attending large venues following social distancing guidelines

As summer approaches, there has been a slight increase since July 2020 in the proportion of VIC audiences at least somewhat comfortable to attend outdoor events (75%, up from 65%), including street markets (78%, up from 64%), performances in outdoor amphitheatres (75%, up from 65%) and outdoor music festivals (47%, up from 36%).

Comfort levels have also increased with a range of performance venues, such as stadiums (49%, up from 36%), large theatres and concert halls (60%, up from 49%) and comedy clubs or live music venues (35%, up from 27%).

Even with recent examples of community transmission in VIC, 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. The comfort level in VIC has increased for venues up to 250 people (48%, up from 35%), 500 people (36%, up from 27%) and even 1000 people (30%, up from 22%).

Further probing about social distancing in Phase 2 showed that different social distancing arrangements would also have a greater effect on attendance. In September 2020, 88% of VIC audiences would be at least somewhat comfortable to attend venues with 4 square metres per person enforced. This drops to 59% under a scenario of 2 square metres per person, and just 9% with no social distancing at all.

Victorian audiences are among the most supportive of the use of face masks

In May 2020, face masks were a polarising issue nationally, while VIC audiences widely encouraged (62%) their use when attending cultural events.

Now, in September 2020, support for face masks is particularly high in VIC (84%), confirming widespread adoption and support of face masks in public. By contrast, it is lowest in WA (46%) and SA (49%).

Another safety measure with higher levels of support is temperature checking upon entry to venues, with 74% now saying this would make them more comfortable, compared to 66% in May 2020.

Future attendance

Victorian 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.

VIC audiences continue to show strong support for live-streamed digital programs that they could watch from home, as this feels the safest. As one survey respondent expressed,

‘It is too early for Victorians to come together at any venue at this moment in time’.

However, the proportion who put this as their first choice has dropped back slightly (44%, down from 52%), reflecting a similar drop across Australia (35%, down from 39%). A slightly greater proportion of VIC audiences now rank outdoor venues more highly (37%, up from 30%) where there is enough lawn space to spread out. One person explained,

‘I feel quite comfortable that the risk of transmission of COVID-19 is quite low in outdoor space where there is no recirculated air and you are only in close contact with people you know’.

Just 17% (stable since July 2020) ranked an indoor, 100-seat venue following social distancing guidelines highest, and only 4% (also stable) ranked an indoor, flat-floor venue with loose chairs and plenty of space to spread out highest. One person explained,

‘For social distancing to be assumed, chairs need to be fixed, and areas cleaned. These are less likely where customers create their own space’.

After considering second and third preferences, outdoor venues now have the highest levels of support on average in VIC, followed by digital streaming. This is reflected in the comments from Victorians, who are living under lockdown:

‘I’ve been inside for too long and would like outdoor time! Also, a bit over live streaming and would love to attend a live event’.



As summer approaches, preference for outdoor events has also grown significantly elsewhere in Australia, such as nearby TAS (up 20%) and ACT (up 8%).

Some audiences express a desire to support more local venues and grassroots events

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?'

Safety is one priority that will significantly influence the decision to attend events in future for VIC audiences, as survey respondent said,

'I will prioritise venues that actively promote cleanliness protocols and limit overcrowding'.

Aside from safety precautions, many say they want to support local, 'homegrown', independent and grassroots community events once it is safe to do so. One said,

'I will prioritise smaller local venues as they often require more community support in order to stay afloat'.

Other people also mentioned increased concerns around spending due to financial hardship as a result of the pandemic, as one shared,

'The biggest constraint will be on \$\$'s of tickets as I have been cut back to 20 hours a week and my husband has been stood down from his job'.

VIC audiences are slightly more pessimistic about returning to events long-term

In May 2020, 16% of VIC audiences said their future attendance will be negatively affected by the pandemic long-term. In July 2020, this had increased to 23% and it remains stable at 25% in September, which is the highest rate of this outlook nationally.

By comparison, the lowest proportion of audiences saying their attendance will be negatively affected by the pandemic are in the NT (16%), WA (18%) and QLD (19%), 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 VIC audiences expect to spend the same as they did before (68%), 18% expect to spend less and 14% expect to spend more, consistent with the July results.

Participating at home

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

Past attendees in VIC are continuing to participate in creative activities while at home, such as listening to music (90%) and reading for pleasure (85%).

Smaller, but consistent, proportions are making art or craft (45%, stable with 44% in July), and making videos or doing photography (26%, stable with 25%). A slightly smaller proportion are making music (25%, down from 28%).

8 in 10 (79%) are participating in online arts or cultural experiences (consistent with the result of 77% in July and 79% in May 2020).

VIC audiences are the most highly engaged online and most likely to continue post pandemic

While there have been declines in participation in some online activities nationally, VIC audiences remain the most highly engaged online. Participation in most activities has increased since July 2020, and is now consistent with May results.

A few months into lockdown, participation in most activities has increased again in September, including the proportion watching virtual exhibitions and tours (25%, up from 19% in July) and doing online classes, courses and tutorials (38%, up from 33% in July).

Across the country, the most consistent levels of participation have been in online video of performances and events, but this is highest in VIC, with 47% watching live-streamed performances and 53% watching pre-recorded performances. This result demonstrates a positive outlook for organisations seeking to deepen the engagement of their audiences during lockdown.

When asked if they, or anyone they know, has discovered a new artist, artwork, or performance online, both rates are among the highest nationally. Two-fifths (39%) of

VIC audiences say they themselves have made a discovery in the past fortnight, compared to 31% nationally, and 17% say they know someone who has, compared to 15% nationally.

Further, when asked if they are doing online arts and cultural activities more or less frequently than before the pandemic, 59% say they are engaging online more frequently, compared to 54% nationally.

Plans to continue engaging online post-pandemic have remained stable among VIC audiences (73%, compared to 72% in July) and interestingly, are slightly lower than audiences elsewhere in Australia, such as in the ACT (79%), SA (78%) and WA (80%).

More Victorians are paying for online experiences, and they are spending slightly more

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

When asked if they have paid for an experience online, 44% said they have, compared to 36% in May 2020. A slightly greater proportion are making donations for online experiences (23%, up from 20% in May), and more people are paying for single experiences (27%, up from 15% in May). The proportion subscribing to digital platforms has remained relatively consistent (11%, stable with 9% in May).

Respondents' spending on online experiences has also risen slightly, with 37% having spent more than \$50 in the past fortnight, compared with 34% in May 2020.

When asked to describe what they'll prioritise when spending online in future, VIC audiences commonly mentioned supporting local and emerging artists, work that replicates the live experience, as well as interactive, educational, and on-demand content.

One person explained that on-demand content will be important while looking after children, commenting,

'I'm more inclined to spend on local artists. Interactive classes for my kids such as art dance or music. I can't compare stage shows online because the experience is lost in translation. Would definitely pay for beginner classes in all areas. Especially aimed at kids'.



Some mentioned an interest in engaging in educational or socially conscious material, as one said,

‘More culturally engaged programs and events that expand my knowledge and teach me something new, from often underrepresented communities’.

Further to findings in Phase 1 and 2, VIC audiences continue to express a desire to help and support struggling artists during the pandemic. For instance, one person said,

‘Supporting artists and venues for the immediate future to assist them recover from the pandemic. I would foresee that decreasing over time as I would always prefer live performance’.



What's next

To explore the data in more detail and find out how audiences for your work 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.



Made possible with support from



Queensland Government



ACT Government



Department of Local Government, Sport and Cultural Industries



Government of South Australia
Department of the Premier and Cabinet