



PATTERNMAKERS



AUDIENCE
OUTLOOK
MONITOR.

Victoria Snapshot

Audience Outlook
Monitor, May 2020



Summary

The findings of the Audience Outlook Monitor in Victoria broadly follow the national results, which point to a positive long-term outlook for re-engagement of audiences.

However, right now Victorian audiences are more cautious about attending events relative to those in other States/Territories. 19% of Victorian audiences say they are ready to attend arts and culture events as soon as it's permitted, relative to 22% nationally.

Meanwhile, Victorian audiences are highly engaged online, with 79% having participated in digital arts and culture activities, compared with the national average (75%).

Victorians are slightly more likely to have paid for an online experience compared to other Australian audiences (34%) but not to be spending more, suggesting there may be room to develop more paid offers for the Victorian market.

Introduction

This Victoria Snapshot Report identifies insights from 5,869 survey respondents connected with Victorian organisations participating in the Audience Outlook Monitor. The Audience Outlook Monitor 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 44 Victorian arts and culture organisations, including museums, galleries, performing arts organisations and festivals. These organisations (totalling 159 nationally) simultaneously sent a survey to a random sample of their audiences, who had attended a cultural event since January 2018. Read more about the [methodology](#) and the types of events that are included.

Data from over 23,000 respondents nationally 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 all participating organisations, this study provides a detailed resource with insights about all different artforms, types of events and demographic groups in all parts of Australia. Find out [how to use the dashboard](#) to access results relevant to you, or read below for the key findings about audiences in Victoria.

Returning to events

84% of attendees plan to return to cultural events in Victoria

- ▶ Overwhelmingly, Victorian audiences plan to return to arts and culture events in future (84%), with 76% planning to attend just as they did in the past and 8% even more often.
- ▶ On average, 19% of audiences are comfortable attending as soon as restrictions are lifted, which is slightly fewer than the national average (22%). 69% will attend when they deem the risk of transmission to be minimal, while 12% won't be back until there is no risk at all.
- ▶ The results show that the pandemic will affect who comes back when, the types of events they attend, and the size of events that they feel comfortable with, but few say that they want to choose more light-hearted programs, or works that help make sense of the pandemic, when venues re-open.
- ▶ The vast majority agree they will be most interested in the same types of events they used to attend (91%). Read on for more information about who will be back and when.

Frequent attendees will be back sooner than others

- ▶ Some groups in Victoria are more likely to attend as soon as restrictions are lifted. This includes:
 - People who previously attended the performing arts more than once a week (33%, compared to the Victorian average of 19%)
 - People who feel strongly committed to supporting arts and culture organisations (25%)
 - Subscribers to performing arts organisations (22%).
- ▶ In contrast, the groups that are more likely to stay away until there is no risk at all include:
 - People with a disability (20%, compared to the national average of 11%)
 - Those who attend the arts a couple of times per year or less (13%)

- Those aged over 65 (18%) and over 75 (19%).
- People who are self-employed (20%), unemployed (19%) or not in the labour force (19%).

Safety measures like hand-sanitiser will make a difference for some attendees

- ▶ There are a wide range of views about public health measures, and whether safety measures are essential or excessive.
- ▶ Most Victorian audiences would generally feel encouraged by safety measures like disinfecting public areas (87%) and providing hand sanitiser (87%). 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 (25%) saying they would actually be discouraged if they had to wear a face mask compared to those who would be encouraged (39%) by this measure. A proportion would also be discouraged by mandatory temperature checks at entry (11%).
- ▶ Generally, audience views about venue safety are consistent with, or slightly more cautious, than the national average. 96% of Victorian audiences say these types of safety measures will positively influence their decision to attend, with 33% influenced 'a little' and 63% 'a lot'.
- ▶ In Victoria, like in other parts of Australia, over 55s are more likely to say that safety measures would positively influence them 'a lot' (67%). However over 65s with a disability are less likely to be influenced by safety measures 'a lot' (57%), with some preferring to simply stay away.

Shows and performances

Audiences are not yet ready to return to large performance venues

- ▶ Looking more closely at performance venues, audiences' comfort-levels depend on the size of the venue, and Victorian audiences are among the most cautious nationally right now.

- ▶ Even if they were open, and following recommended safety guidelines, 12% of Victorian audiences say they would be 'very comfortable' attending a venue seating 100 people today, and 28% say they would be 'somewhat comfortable'.
- ▶ Just 7% would be 'very comfortable' at venues seating 1,000 or more, which is consistent with the national average, and similar to the proportion that would be very comfortable flying domestically on a commercial airline (9%) right now.
- ▶ Smaller venues of 50 people or less are the most likely to attract audiences in the near future, with 58% of audiences saying they would be at least somewhat comfortable attending today, if they were open and following relevant guidelines (compared with 62% nationally).
- ▶ Outdoor programming may be viable sooner than indoor programming, with a greater proportion of audiences feeling comfortable attending an outdoor festival or event at present (64% in Victoria and nationally).
- ▶ As is shown in the national data, only small numbers of Victorian audiences are actively making plans to attend live shows or performances in future (14%), and among those that are buying tickets, the largest proportion are doing so for events in January 2021 or thereafter (43%).

Exhibitions

Victorian audiences would largely be comfortable visiting museums and galleries, but not using interactive exhibits

- ▶ The outlook for museums and galleries is looking more positive and most Victorian audiences say they would be at least somewhat comfortable walking around a museum or gallery (84%) or visiting a community art space (76%) today, if they were open and following recommended safety procedures.
- ▶ Among frequent museum-goers and those aged between 55 and 64 the numbers that feel comfortable visiting museums are even higher (88% and 89% respectively).
- ▶ However, few Victorian audiences, of any age, would feel comfortable using hands-on exhibits at a museum (20%), confirming the need to rethink visitor experience design while health risks remain.

Creativity at home

Many Victorians have taken up creative hobbies in isolation and most plan to continue after the pandemic

- ▶ A high proportion of Victorian respondents (50% compared with 46% nationally) are being creative at home more frequently than before the pandemic, and most of those being more creative are planning to continue doing so after the pandemic (88%).
- ▶ Even among those who rarely attend arts events, a sizeable proportion (47%) are doing creative activities more frequently. One person shares that it has helped them navigate the period: 'Painting has provided me with an artistic outlet that has been calming in these stressful times'.
- ▶ On average, 7% say they are doing creative activities less frequently, and one person explains, 'I have a busy household with children so haven't had time for my own creative pursuits. If I didn't have children, I would have certainly used the time practising musical instruments and writing music.'
- ▶ Reading for pleasure and listening to music are common ways people are engaging with art and culture at home, but many audiences are also doing things like making art or craft (44%), making music (27%), making videos or doing photography (26%) and creative writing (19%).
- ▶ When asked to share an example, many say that they've had a chance to resume long-forgotten hobbies, or finally had time to progress a creative project. One person said, 'I started editing a long-finished draft of a novel that has sat untouched for a couple of years.'
- ▶ Others shared examples of how their creative interests extend to online and offline environments, 'I've done a bit painting during this time at home... I've been learning more about Melbourne's visual art scene, going on journeys through artists Instagram accounts.'

Online engagement

4 in 5 Victorian respondents are participating in arts and culture online

- ▶ Victorian audiences are highly engaged online, with 79% having participated in digital arts and culture activities compared with the national average (75%).
- ▶ Victorian audiences are commonly watching arts video content (55%), watching live-streamed events (47%), or doing online classes or tutorials (38%).
- ▶ Online participation is occurring in all age groups in Victoria: 55% of audiences aged over 75 have watched a pre-recorded performance in the past fortnight, similar to the proportion of under 35s (58%).
- ▶ In giving examples of what they're doing online, people shared that digital participation has helped with their wellbeing, for example, 'I took online dance classes and learnt routines. The movement and creative output was really mood lifting.'
- ▶ Many audience members (39%) say they are doing online arts and culture activities more frequently than before the pandemic. Among those who frequently attend the performing arts, this rate is even higher (54%).

Online participation is allowing audiences to discover new works

- ▶ Interestingly, one-third say they are motivated to engage online to support an organisation they feel is important (40%), while others say they are engaging online for their own wellbeing (35%), or to see things that they wouldn't normally be able to see (30%), which is similar to the national picture.
- ▶ Confirming the audience development potential of this time, a sizeable proportion (32%) have discovered a new artist, artwork or performance online, or they know someone who has (14%). Online discovery is particularly high in frequent attendees who usually attend weekly or more (51%) and under 35s in Victoria (42%).
- ▶ Several Victorian respondents shared examples of exploring new works with their children, for example, 'my son did an online class with Complete Works Theatre Co and it led us both to explore some spoken word poetry via youtube.' Another shared, 'My daughter has taken an interest in beatboxing and we are going to have an online lesson.'
- ▶ There are signs that digital participation could translate to attendance at live events after the pandemic. For instance, one person said, 'Pre-recorded content has made me revisit arts organisations (ie The Australian Ballet) which I hadn't

engaged with in years. It would make me more likely to attend a performance of the Australian Ballet in the future when I'm able to.'

- ▶ Streamed performances are also fuelling discussion and interpretation of works. For instance, one Victorian respondent said, 'My friends have been suggesting theatre shows that are now online. We have an email group and send links and then talk about the shows in a chat room. We are loving the opportunity to see National Theatre productions from London.'

Digital distribution will continue to play a role for Victorian audiences after the pandemic

- ▶ Among those Victorians who are participating online more frequently than they used to, most (68%) think they will continue doing so when the pandemic is over, suggesting there will be a long-term role for digital distribution of cultural content.
- ▶ The intention to continue participating online is higher among some groups, such as people with a disability (75%), those who are caregivers to older adults (70%) and parents of children aged under six (68%). It is weaker among those who usually attend performing arts events once a week (64%), suggesting that frequent attendees may return to their usual patterns, at least to an extent.
- ▶ One Victorian respondent said, 'I like the increased connectivity and accessibility of many different types of visual and performance culture and online workshops', while another shared that, 'Online participation is increasingly the only way that I will be able to enjoy these activities.'
- ▶ Some Victorian respondents say that after the pandemic, they would like a choice of attending in-person or watching a livestream (36%). Again, people in Victoria who live with a disability are more likely to want this option available (46%), confirming the role for digital in expanding access to the arts.

The Victorian market for digital work could be developed further

- ▶ In Victoria, most audiences engaging online say they have not paid for any online arts or culture experiences in the past fortnight (64%), though a significant minority have (36%).
- ▶ Victorians are slightly more likely to have paid for an experience compared to the national average (34%) but not to be spending more.

- ▶ Among those that have paid for an online arts experience nationally, 36% has spent more than \$50 in the past fortnight (34% in Victoria). Nationally, older audiences over 75 years have spent the most (49% have spent over \$50), while under 35s have spent the least (19% have spent over \$50).
- ▶ Over two-thirds say they are at least somewhat likely to pay a small amount for access to digital programs in future (70% relative to 68% nationally).
- ▶ At this point, the most common form of payment has been via donation, with smaller proportions paying for a single online pay-per-view event or purchasing an ongoing subscription for an arts platform. However, these rates could change as the pandemic goes on, and will be measures to watch closely in future data collection phases of this study, planned for July and September 2020.
- ▶ People are experiencing a variety of barriers to engaging online, but most commonly Victorian respondents report that they either have other priorities for their time (33%) or generally don't know what is on offer (34%), suggesting there could be a role for greater investment in content discovery and digital marketing.
- ▶ With high rates of online engagement, and a suggested willingness to pay, there may be opportunity to develop more paid offers for the Victorian market. One Victorian respondent gave an example: 'I discovered a new Australian artist on Instagram and bought one of her paintings.'

Support

Victorian audiences want to support arts and culture through the pandemic, but not everyone feels able to financially

- ▶ Most audiences surveyed in this study (who are recent attendees of cultural organisations) say they are moderately (53%) or strongly (37%) committed to supporting arts and culture organisations, though some people note that they feel like they are not in a position to do so financially right now.
- ▶ One respondent in Victoria shared, 'Now more than ever our community will look towards this sector to relieve them of the stresses associated with the pandemic. Whilst our business has been impacted, we will continue to support the industry in some way.'

- ▶ Many respondents note a connection to the sector in some way, through friends, family, or their work. It's perhaps then unsurprising that respondents say they are more likely to donate to a specific artist or organisation that is important to them (67%), rather than a general sector support fund (50%).
- ▶ There is a segment who would be willing to participate in other forms of support, like buying vouchers that can be redeemed for future programs (67%) or purchasing a subscription or membership, even if some of the events might be cancelled (55%).
- ▶ Artists and cultural organisations can use the dashboard to see what demographic groups are most likely to participate in different forms of support, and identify audience segments to develop new offers for.
- ▶ In terms of organisations' communications with audiences, Victorian respondents are most interested to hear about upcoming online events and digital offerings (58%), and plans for future live events, post pandemic (49%). These tend to rank higher than general communications about how organisations are faring.

What's next

To explore the data in more detail and find out how audiences for your work are responding, visit the [dashboard](#). Instructions and tips for using the dashboard are available in a short [video](#).

In the coming weeks, more Fact Sheets will be released, to provide you with insights about key regions, artforms and topics. You can also expect tips and practical steps to apply the findings in your work.

To receive future snapshots, fact sheets and resources in your inbox, as soon as they are available, you can opt in to receive Audience Outlook Monitor news directly from the researchers [here](#).

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



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