



FACT SHEET: Museums and galleries

COVID-19 Audience Outlook Monitor
Australia, May 2020

18,775

museum and gallery attendees
across Australia

36

museums and galleries

88%

are comfortable walking around
a museum or gallery today

23%

are comfortable using hands-on
exhibits

22%

of museum goers ready to attend as
soon as restrictions are lifted

84%

say social distancing
guidelines would encourage
them to attend

96%

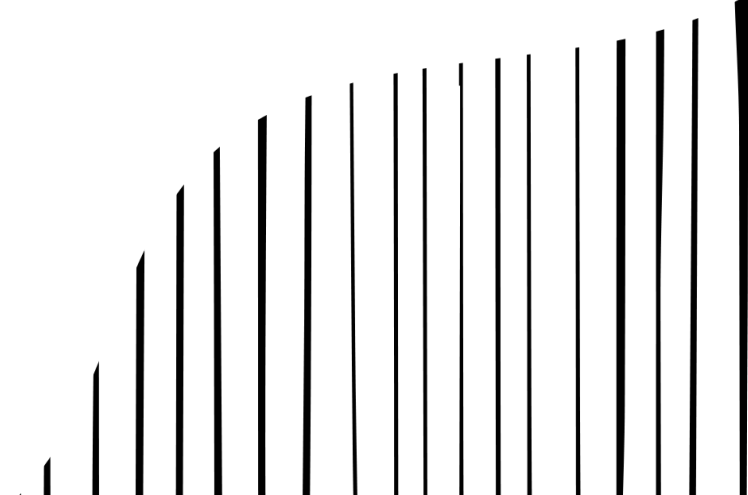
say venue safety measures will
influence attendance decisions



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AUDIENCE
OUTLOOK
MONITOR.



Summary

Initial findings of the Audience Outlook Monitor were released on 18 May 2020, suggesting that Australian audiences are optimistic about attending exhibitions. Among a variety of cultural venues, museums and galleries are seen as safe starting points for re-engaging with public events.

This Fact Sheet goes deeper into the qualitative data from 18,775 museum-goers to provide insight into attendance decisions, and the important role of venue preparation and audience communications.

While 22% of museum-goers are ready to attend as soon as it's permitted, venue safety measures and in particular, social distancing, will be critical for welcoming back those who feel cautious about attending again.

Overall, the results suggest that museums and galleries will have an important role to play in establishing a new set of social conventions related to attending events. While some audience members are relaxed and perceive little risk to themselves personally, others are extremely cautious. Consistent application of safety policies is needed to ensure that the broadest possible audience have access to arts and culture as soon, and as safely, as possible.

Background

This Fact Sheet outlines key findings about museums and galleries, based on the Audience Outlook Monitor in Australia, a study that is tracking how audiences feel about attending arts and culture events in the context of the COVID-19 pandemic.

It's part of an international study being delivered in Australia by Patternmakers (Australia) and WolfBrown (USA), with support from the Australia Council for the Arts and State Government agencies around Australia.

Baseline data was collected in May 2020 in a cross-sector collaborative survey process involving 159 arts and culture organisations, including 36 museums and galleries. These organisations simultaneously sent a survey to a random sample of their audiences, who had attended a cultural event since January 2018.

Results from over 23,000 respondents 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 159 organisations, this study provides a detailed resource with insights about all different artforms, types of events and demographic groups in all parts of Australia.

To access the dashboard, or read more about the study, visit the study's Australian homepage: <https://www.thepatternmakers.com.au/covid19>.

Read on for the key findings about museums and galleries nationally.

Exhibitions

Audiences are increasingly comfortable visiting museums and galleries

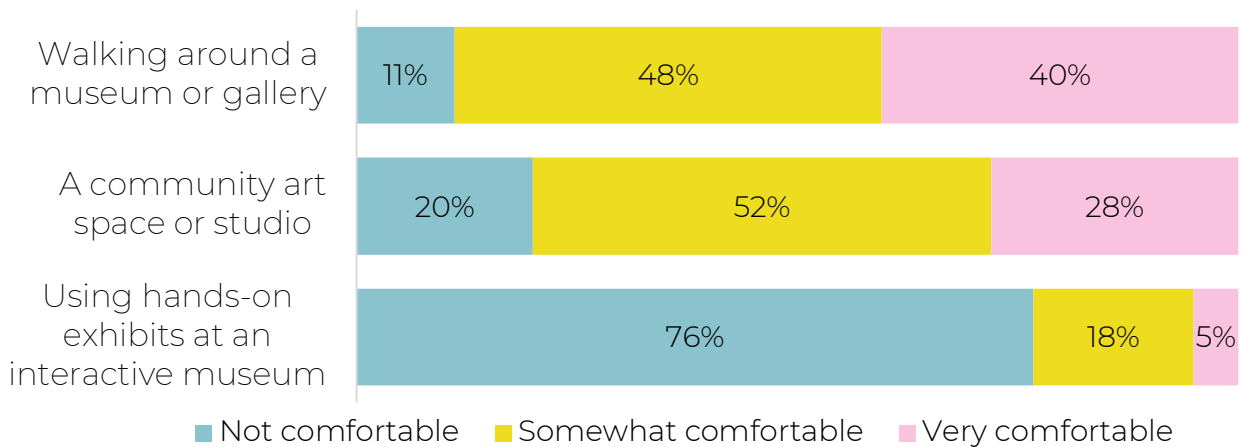
- ▶ The outlook for museums and galleries is looking positive and most attendees say they would be very comfortable (40%) or somewhat comfortable (48%) walking around a museum or gallery, if they were open and following recommended safety procedures (Figure 1).
- ▶ One-fifth (22%) of past museum-goers say they are ready to attend as soon as it's permitted, while 68% are slightly more cautious, saying they'll attend



when they're reasonably confident the risk of transmission is minimal. 10% say they cannot foresee attending until there is no remaining risk to them.

- ▶ People feel more confident about visiting a museum or gallery than they do about eating at a local restaurant (21% very comfortable, 44% somewhat comfortable), or using public transport (13% very comfortable, 38% somewhat comfortable).
- ▶ They are also more comfortable attending museums than performing arts events right now, as one person explains, 'The events I'll be going back to first will be those where I can simply walk out if the situation becomes uncomfortable, without there being a degree of loss involved. In other words, art galleries.'

Figure 1: How comfortable would you feel attending the following types of cultural facilities today, assuming they were open and following recommended safety procedures?



Some groups will return to events sooner than others

- ▶ The data shows that some people are more likely to attend cultural events as soon as restrictions are lifted, including people who previously visited museums weekly (26%, compared to the national average of 22%), and those who feel strongly committed to supporting arts and culture organisations (28%)
- ▶ The results show that peoples' readiness to attend is partially influenced by their values, and the role that attending the arts played in their lives prior to the pandemic. One person said 'I'm DYING to come back to the Art Gallery of NSW and the Australian Art Gallery. I've missed this cultural

outlet so much. My creativity is stimulated by attending exhibitions. I saw Japan Supernatural four times.'

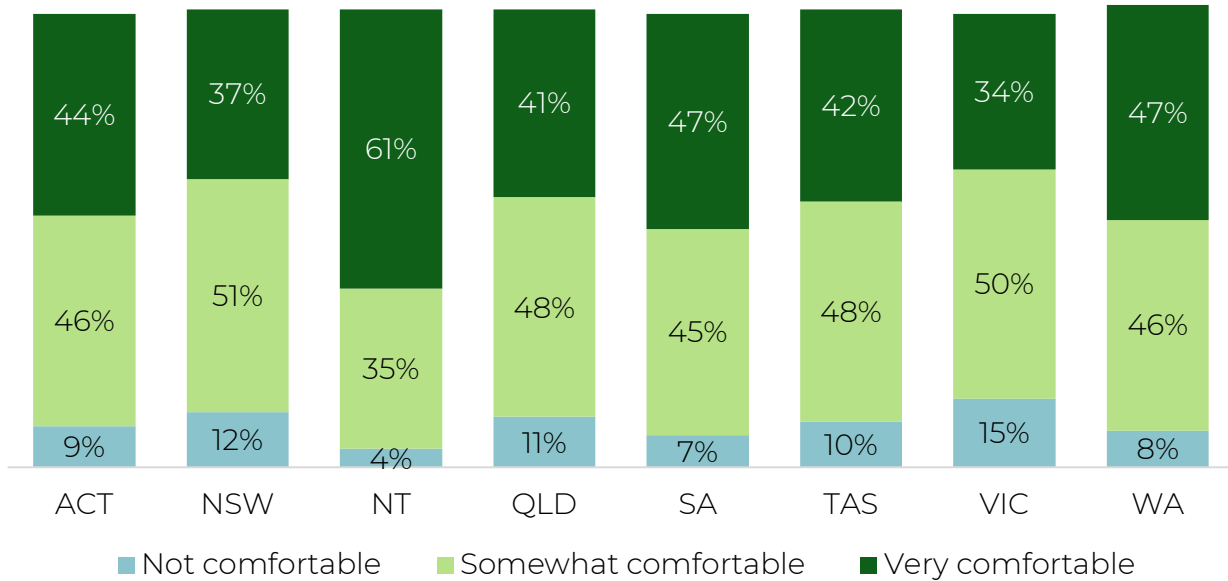
- ▶ Age and access are also shown to be important factors. For instance, 17% of people over 75 cannot foresee going out until there is no risk at all, compared with just 6% of under 35s. Additionally, people who live with a disability are more likely than average to stay away (20%, compared to the national average of 11%).

Audiences in NT, SA, WA and ACT are more comfortable to attend museums and galleries, compared to other States

- ▶ Audiences in the Northern Territory (NT), South Australia (SA), Western Australia (WA) and the Australian Capital Territory (ACT) are showing higher levels of comfort attending museums and galleries, compared with other States/Territories — this is likely to be linked with low transmission rates in these regions.
- ▶ Audiences in Victoria (VIC), Tasmania (TAS), Queensland (QLD) and New South Wales (NSW) are more cautious about attending museums and galleries right now (Figure 2).
- ▶ At the time of data collection (6-14 May 2020), which was prior to the announcement of some institutions re-opening, only small numbers said they are actively making plans to attend museums or galleries in future (7%).
- ▶ Those who previously attended museums weekly are the most likely to be making plans (19%), along with people in the ACT (15%) and holders of museum memberships or passes (12%).



Figure 2: How comfortable would you feel attending the following types of cultural facilities today, assuming they were open and following recommended safety procedures? (Walking around a museum or gallery) by State. n=23,574



People prefer to avoid hands-on exhibits and touching surfaces

- ▶ As shown in Figure 1, few people would feel comfortable using hands-on exhibits at a museum (23%) right now, confirming the need to rethink visitor experience design while health risks remain.
- ▶ In general, there is a reluctance to engage in activities that involve touching public terminals or buttons.
- ▶ When asked about venue safety measures, 72% of museum goers say they would be encouraged to visit if the facility only allowed cashless, no-touch transactions and 81% would be encouraged if they were assured they won't have to touch doors or other surfaces.

Audiences are concerned about the size and density of crowds

- ▶ Respondents' comfort level not only relates to the size of the venue but also the density of attendees and likelihood of encountering crowds.
- ▶ One person explained, 'I feel it is the density of attendees that is the issue. Social distancing will always be in the back of our minds until a vaccine or no cases exist. Space within a facility is great but avoiding touching anything or anyone hinders full relaxation. Museums and spaces where you can manage yourself would be preferred for a while I feel.'
- ▶ Venue safety is critical in making visitors comfortable to attend. As noted in the national Snapshot Report (<https://www.thepatternmakers.com.au/blog/2019/4/5/audience-outlook-monitor-wave1-keyfindings>), venue safety measures are critical, and overall 96% say they would positively influence a decision to attend.
- ▶ Most audiences would generally feel encouraged by safety measures like disinfecting public areas (89%) and providing hand sanitiser (89%).
- ▶ Social distancing is seen as critical, and 84% of museum goers would be more comfortable visiting if current distancing guidelines were enforced inside the facility (e.g. timed ticketing, controlling traffic flows in public areas, bathroom queues).

Timed tickets and managing visitation levels will be important for some people

- ▶ One of the most important factors for achieving social distancing is managing the overall volume of visitors. There appears to be widespread support for timed tickets – and some even commenting that they preferred this before the pandemic.
- ▶ One person asked, 'Please can you employ timed tickets as then the social distancing can be accomplished in museums and galleries. I'd gladly forego the crush of opening events for a timed and distanced experience in a gallery any day.'
- ▶ Others said they would only feel comfortable visiting at quiet times, suggesting there may be a case for 'quiet hours', as previously trialled in supermarkets, to allow for vulnerable segments of the community to attend.

- ▶ One person said, 'I would encourage longer opening hours from 5am to 11pm and a booking system to visit galleries and exhibits to keep number of visitors low.'

Audiences expect to see social distancing enforced in a variety of ways inside museums

- ▶ Inside museums, the qualitative data suggests that visitors want to see social distancing applied throughout the premises. One respondent suggested, 'Mark floors to guide distance and have it monitored... Ask the ones not complying to leave - be strict.'
- ▶ Another person said they felt different approaches would be needed in different museums: '[The] actual venue I would be attending would have a major influence on whether I attended - not a one size fits all. The layout etc of some galleries/theatres would inspire more confidence.'
- ▶ Another explained, 'I think I would start most comfortably with large art galleries who restrict numbers, have hand sanitiser and show leadership in directing the visiting public very clearly about how to behave appropriately in relation to whatever the current health situation is.'

Some are concerned about how safety measures will impact the experience

- ▶ Some respondents were wary about how the application of safety measures would impact their experience.
- ▶ One person said, 'I dread going to an event or gallery etc and be treated like I'm a walking viral spore, much like we were all treated at supermarkets in the early days of the virus in Australia.'
- ▶ Another said, 'I would like to take my child to the museum, however, I do not want him to be scared of strict distancing measures, masks, equipment to measure temperature etc.'
- ▶ Face masks are polarising, with 36% saying they would be encouraged to visit, if face masks were mandatory, and 27% saying they would be discouraged (36% were neutral). In NSW, views on face masks are slightly more positive, whereas in SA and WA, the views tend to be more negative.
- ▶ One person explains that 'I am not in favour of compulsory masks but think that people should feel free to use them if they want to.'

Some audiences express a preference to ‘wait and see’

- ▶ While many are eager to attend events in future, even those not financially impacted say they may be cautious about committing.
- ▶ One person said, ‘I am in the vulnerable age group with lung issues, so would be very cautious about relaxing physical distancing for some time after the rules are relaxed. I would wait for several weeks after the relaxation & would refrain from most activities if there was a significant spike in infections.’
- ▶ Another explained, ‘I was a person who booked ahead - concerts, tennis, comedy, dining, running events etc. I don't expect to be pre-sale booking anything like I used to, given chance of not being able to travel or higher chance of cancelled events and concerns during events of people not socially distancing.’

More than 1 in 3 are experiencing a loss of income, and expect to be more price-sensitive

- ▶ Among those surveyed, 38% of museum-goers say that they, or someone in their household, has experienced a drop in income due to the pandemic.
- ▶ In the short- and medium-term, some of those affected say they will approach their attendance decisions with more caution.
- ▶ However, free museum attendance is less likely to be affected, compared to other arts and cultural events. One person explained, ‘I have been ineligible for JobKeeper and JobSeeker. So, until I am re-employed and find a job, we won't be spending money on attending extra-curricular activities unless they are free like a gallery or a museum.’
- ▶ While attendance at free exhibitions may not be affected, ticketed exhibitions and paid products (e.g. museum shops and cafes) may experience reduced sales.
- ▶ One person said, ‘Loss of personal finance will affect my ability to attend arts events for at least 2 years as I have less discretionary income. ... I will be unlikely to travel interstate purely to attend an art event, which I previously did most years. I am unlikely to purchase visual art for some time although going to galleries is one area I would feel very comfortable participating in.’

Small galleries and studios in local communities may have an important role to play

- ▶ Community spaces may have a special role to play in the recovery, with a large proportion of audiences saying they feel comfortable visiting a community art space or studio (80%) today.
- ▶ With audiences perceiving a level of risk around buying tickets and travelling to attend events, cultural tourism may be slow to resume. One respondent said, 'I will be more reluctant booking tickets to events outside of my region because of the risks (health and financial) if events need to cancel or there is an outbreak there.'
- ▶ Audiences of regionally-based organisations are slightly more comfortable to attend most types of events, compared to metropolitan audiences, suggesting they may return first to their local facilities.
- ▶ One respondent said, 'My preferences will shift from live larger performances to small intimate recitals or galleries. E.g. no longer at Melbourne Arts Centre but small rooms of Melbourne Recital Centre, not NGV but Monsalvat, or evening outside coffee cafe with performance.'
- ▶ This is consistent with research in the UK (<https://www.artsprofessional.co.uk/news/local-venues-could-be-key-keeping-audiences-engaged>), which suggests that the type of venue that arts attenders would feel most comfortable walking into first would be a village hall.

Audiences expect high standards from cultural facilities, but they worry about other audience members

- ▶ In terms of which safety measures should be communicated to audiences and when, it appears that it is important at all stages of the audience journey.
- ▶ Some audiences say they want to see vigilance in how measures are applied by institutions. One respondent said, 'As someone in a high-risk group (both age and other health conditions) and given that going out is meant to be a pleasurable experience, I'd need to be confident that whatever safety measures are put into place are managed without any gaps.'



- ▶ Another said, 'I am interested in small size events, no crowds, excellent social distancing, scrupulously cleaned and I want to see that in action.'
- ▶ The policies and visible actions of cultural facilities are important, though as one person said, 'I am sure that the hygiene of the museum will be of a very high standard.'
- ▶ In contrast, some respondents explain that they mainly have doubts about the behaviour of other audience members. One respondent said, 'I am over 70. I have seen how the current very good precautions have been ignored by a section of the community who in my opinion should know better. Therefore, at this stage, I plan to stay away until vaccination has been perfected.'
- ▶ Another person also shared, 'It is not the venue, artists or events that concern me but the public that actually attend. A lot are totally oblivious of social distancing. Further education is required to ensure personal awareness of the pandemic.'
- ▶ The results confirm that as restrictions lift, museums and galleries will have an important role to play in establishing new social conventions for attending events.
- ▶ One person explained that re-engaging with museums may be a gateway to other events, saying: 'Staggered opening might encourage people to dip their toes in and try the safer spaces... to build up confidence for the longer term when larger scale events and small bars can be considered safe.'
- ▶ Implementation of safety measures is critical in ensuring that the broadest possible audience can re-engage with arts and culture as soon, and as safely, as possible.



What's next

To explore the data in more detail and find out how audiences for your work are responding, visit the dashboard at the link below. You can also browse the existing resources or sign up to receive future releases as soon as they are available.

<https://www.thepatternmakers.com.au/covid19>.

In the coming weeks, we'll be analysing other breakdowns in more detail, to provide you with more insights about key regions, artforms and topics.

We'll also provide tips and practical steps you can think about to apply the findings in your work.

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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and Cabinet



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