

FACT SHEET: Disability

COVID-19 Audience Outlook Monitor
Australia, September 2020

657

survey respondents with
disability in Phase 3

28%

of audiences with disability have
attended a cultural event recently

48%

of audiences with disability are
making plans to attend a cultural
event

26%

of audiences with disability are
'ready to attend' cultural events as
soon as permitted

72%

of audiences with disability expect
to attend the same or more than
before, long-term

73%

of audiences with disability would
find face masks encouraging

80%

of audiences with disability are
participating in online arts and
culture

34%

of audiences with disability are
paying \$50 or more on online
arts and culture



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**AUDIENCE
OUTLOOK
MONITOR**

Summary

Phase 3 findings of the Audience Outlook Monitor were released on 15 September 2020. This Fact Sheet provides insights into the 657 survey respondents with disability, identified as people who responded ‘Yes’ to the question, ‘Do you have a disability and/or experience barriers which limit the activities you participate in or attend, unless access and/or support is provided?’ While there are multiple ways that individuals may identify, this Fact Sheet refers to this group of respondents as “audiences/audience members/respondents/people with disability”.

More than one quarter (28%) of audience members with disability had attended a cultural event during the fortnight before data collection (2–6 September 2020), which is comparable to the national average (29%).

When going out to events, audiences with disability are expressing slightly more caution attending venues, compared to those without disability. Attitudinally, the proportion of audience members who feel ‘ready to attend’ cultural events (26%) is slightly smaller than the national average (29%).

When ranking options for attending a cultural event ‘today’, audiences with disability are most favourable to digital arts and culture programs, where they can watch from home (47% ranked this as their first preference). Venue safety and accessibility also remains important, and many respondents with disability mentioned that they will prioritise events that provide adequate access to the venue and amenities.

Online engagement in arts and cultural activities is higher among audiences with disability (80%) compared to those without disability (70%). Participation in most online activities is higher among audiences with disability, such as watching pre-recorded video of performances and events (55%, compared to 48%). Online discovery of new work is also higher among audiences with disability (37%, compared to 31%), indicating a strong market for digital offerings, even while restrictions on live events lift.

Background

This Fact Sheet outlines key findings from 657 audience members with disability connected with cultural 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.

About audiences with disability

This Fact Sheet identifies insights from survey respondents who responded 'Yes' to the question, 'Do you have a disability and/or experience barriers which limit the activities you participate in or attend, unless access and/or support is provided?', who are referred to as "audiences/audience members/respondents/people with disability". Where relevant, comparisons to audiences who selected 'No' ("audiences without disability") have been included.

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 Phase 3 findings for audiences with disability.

Current conditions

Audiences with disability are more cautious about attending events than audiences without disability

Survey data from September 2020 shows that audiences with disability are demonstrating slightly more caution engaging in public activities, compared to those without disability.

Compared to audiences without disability, a smaller proportion of respondents with disability feel at least somewhat comfortable using public transport (55%, compared to 63% of those without disability), eating at a local restaurant (79%, compared to 86%), exercising at a gym or fitness studio (42%, compared to 53%) or flying domestically on a commercial airline (41%, compared to 49%).

Returning to events

28% of past attendees with disability have attended a cultural event recently, consistent with the national average

Nationally, attendance at cultural events, of any kind, in the fortnight before data collection (2–6 September 2020) increased since Phase 2 (July 2020) (29%, up from 26%), as more venues and facilities reopen. The proportion of past attendees with disability who attended a cultural event is consistent with the national average (28%).

The largest proportion of audiences with disability are returning to museums and galleries (12%) and cinemas (11%), which are the most common types of facilities to be open consistently. Slightly fewer attended a live performance (8%) or a lecture, artist talk or workshop (8%). These trends are similar among audiences without disability, among whom 13% have returned to museums and galleries, 13% have attended a cinema and 8% have attended a live performance.

As performances return to venues, audiences with disability are more likely to be making plans to attend an event

Audiences with disability are more likely to be making plans to attend an event, of some kind, in future. Almost half (48%) report that they made plans within the fortnight before data collection (2–6 September 2020), which is slightly higher than audiences without disability (44%).

Of audiences with disability, the largest proportion are making plans to attend a live performance (24%), similar to audiences without disability (23%). A slightly larger proportion of audiences with disability are making plans to attend a museum or gallery (24%) compared to those without disability (19%).

Among audiences both with and without disability, the proportion who are buying tickets to live events is consistent (15%). However, lead times are shorter among audiences with disability: a slightly greater proportion are buying tickets less than one month out (54%), compared to audiences without disability (51%).

Attitudinally, 1 in 4 audience members with disability are ready to attend events

In September 2020, 1 in 4 (26%) audience members with disability stated that they are ready to attend 'as soon as it is permitted', which is slightly lower than the national average (29%).

Consistent with sentiments in different states/territories generally, readiness to attend is closely linked with rates of community transmission. Audiences with disability living in the Northern Territory (NT) (43%), South Australia (SA) (35%) and Western Australia (WA) (31%) are the most 'ready to attend', compared to those in Victoria (VIC) (23%), New South Wales (NSW) (23%) and the Australian Capital Territory (ACT) (18%).

Audiences with disability are feeling cautious about attending most outdoor events

Similar to sentiments about public interaction, audiences with disability are feeling slightly more cautious about most venue types, compared to those without disability.

Audiences with disability are demonstrating lower levels of comfort attending outdoor events, with 71% feeling at least somewhat comfortable, compared to 77% of audiences without disability.

Specific outdoor activities are appearing to attract varying levels of comfort, depending on their suggested capacity and seating arrangements. Compared to audiences without disability, slightly fewer respondents with disability would feel comfortable watching a performance seated in an amphitheatre (75% with disability, compared to 81% without disability) or an outdoor music festival with no seating (34%, compared to 47% of those with disability).

Audiences with disability are more cautious about attending larger indoor venues

There is also evidence of caution attending most indoor venue types. Compared to audiences without disability, those with disability are slightly less comfortable attending a large theatre or concert hall (60% of those with disability, compared to 67%), a stadium or arena (42%, compared to 53%) or a comedy club or live music venue (27%, compared to 37%).

Among audiences with disability, comfort with attending indoor venues declines with the increase of its audience capacity. While a large proportion would feel at least somewhat comfortable attending a venue seating up to 50 people (81%), comfort drops with venues seating 100 people (65%), 250 people (52%), 500 people (38%) and 1,000 people (27% would feel at least somewhat comfortable).

Social distancing is a key factor, and audiences with disability are showing relatively similar levels of comfort attending venues with 4 square metres per person enforced (90%), compared to audiences without disability (93%). Under a scenario of 2 square metres per person, audiences with disability are showing similar levels of comfort (65%), compared to audiences without disability (68%).

A small proportion of audience members would be comfortable attending venues with no social distancing guidelines enforced, among those with disability and those without disability (both 13%).

Audiences with disability are more supportive of face masks, compared to those without disability

In Phase 1 (May 2020) national audiences were polarised about whether face masks would encourage (36%) or discourage (27%) them from attending cultural events. Audiences with disability were more supportive of face masks in May (44% felt they were encouraging), compared to those without disability (35%).

Support for face masks increased in September and is now relatively consistent between audiences with disability (73%) and audiences without disability (71%). However, it is particularly high among audiences with disability living in NSW (86%) and VIC (85%), where face masks have been more widely adopted.

Another safety measure that has received increased levels of support, nationally, is checking temperatures upon entry to venues. The proportion who find this procedure encouraging is similar among audiences with disability and those without disability (both 72%).

Audience experiences

Audiences with disability are generally satisfied with venue safety measures

When asked to reflect on their experiences returning to cultural events, most audiences with disability appear to be satisfied with the safety measures taken by venue organisers.

People who recently attended museums and galleries shared their appreciation for protocols such as pre-booking attendance and open spaces within venues. One mentioned,

‘Going early and being first in. Being happy with the degree of care taken and procedures followed by the venue. Having enough space to be able to distance oneself from the number of public who have no concept of space.’

Another person shared a similar sentiment, commenting,

‘It was an open space that could be easily walked around without having to stand close to people to view the artwork at the same time. It also wasn’t that busy.’

One person expressed their appreciation for staff and visitor cooperation in making sure social distancing is maintained,

‘All patrons and staff worked well together, keeping to social distancing while being respectful and courteous.’

Clear communication and guidance to enforce social distancing is important

When asked how their experience at a cultural event could have been improved, several respondents with disability mentioned that venue organisers could do more to enforce social distancing. Some suggested better communication from staff, as one said,

‘People reminded not to get too close. It happens. Organisations have a responsibility to do this. When people relax, they forget.’

Others shared their concerns with crowding around entry and exit points at venues. One person commented,

‘More attention needs to be paid to how visitors are moved from area to area - even with small tours there are significant bottlenecks at entrances or around exhibits/artefacts that are smaller and harder to see.’

Future attendance

Digital streaming is the most preferred option for audiences with disability

In Phase 3, audiences were asked to rank their preferred setting for a cultural event, from a list of four options. Preference for attendance varies across the country, depending on rates of community transmission.

Audiences with disability were inclined to select a live streamed digital program as their most preferred option, as they can watch from home. The largest

proportion ranked this option as their first preference, in both July (50%) and September (47%). One person said,

‘Being lung damaged, I am cautious and also disabled, so I am happier being more isolated.’

As summer approaches, preference for outdoor venues is growing, and a significant proportion of audiences with disability ranked this option as their first preference (31%), positioning outdoor venues as the second highest option overall.

Data indicates that nationally, audiences are more comfortable attending venues with fixed seating arrangements, compared to unallocated seating. Around 1 in 5 (20%) audiences with disability selected a venue with fixed seating as their first preference for attending an event. One person shared,

‘Because of [my] slight disability, I can only do things with fixed seating.’

Around 5% of audiences, both with and without disability, ranked an indoor, flat-floor venue with loose chairs and plenty of space to spread out as their most preferred arrangement.

Venues and events that are accessible for people with disability are important

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?’

Respondents with disability commonly shared that they prioritise accessible venues and events, during and after the pandemic. One person also highlighted the importance of parking options, commenting,

‘Locations which have adequate parking for my car and disability scooter. [An] accessible building in every aspect is essential — there [are] not many that are, unfortunately.’

Another person with disability shared,

‘For older people and the disabled it is difficult enough anyway, and hard to control what other people do, so it has to be seated, minimal movement and mingling, and sanitiser etc available — or not go at all.’

While audience members around Australia are becoming more favourable towards outdoor events, some people with disability expressed their preference for indoor venues. As one commented,

‘I don't like outdoor settings. [It's] usually very difficult if disabled — I need a seat to sit in as I cannot stand for any length of time. I prefer being indoors.’

Access to amenities is also key, as one person suggested, ‘To have disabled accessible bathrooms. On the same floor.’

Another person shared,

‘Accessibility and a welcoming attitude to disabled people is my main priority. Hopefully, attitudes may be improved after the pandemic.’

Audiences with disability are slightly less optimistic about returning to events, long-term

In Phase 1 (May 2020), 15% of national audiences said their future attendance will be negatively affected by the pandemic, long-term. In Phase 2 (July 2020), this had increased to 22% nationally, and it remained stable at that level in September.

In September, audiences with disability showed slightly less optimism about returning to events long-term, with 27% saying they expect to attend less than before, 65% saying they will attend the same amount and 7% saying they will attend more than before. By comparison, 21% of audiences without disability expect to attend events less than before.

When they feel comfortable going out again, audiences with disability are more likely to say they will spend less money on arts and culture than before the pandemic (18%), compared to those without disability (15%).

Participating creatively at home

Audiences with disability are more likely to be participating in creative activities at home

At home, creative participation in arts and cultural activities is slightly more common among audiences with disability, compared to audiences without disability.

The largest proportion of respondents with disability are listening to music (90%) and reading for pleasure (86%), which is consistent with the national results.

Audiences with disability are participating in most arts and culture activities to a slightly greater extent, compared to those without disability, including making art or craft (45%, compared to 41%), making videos or photography (28%, compared to 23%) and collecting objects, artworks and artefacts (19%, compared to 15%).

Creative writing is also more common among audiences with disability, with 28% participating in this activity in September, compared to 17% of audiences without disability.

8 in 10 audience members with disability are participating in online arts and culture activities

Audiences with disability are among the most likely to be participating in online arts and culture activities, with 80% participating in the fortnight before data collection (2–6 September 2020). By comparison, 70% of audiences without disability are engaging online.

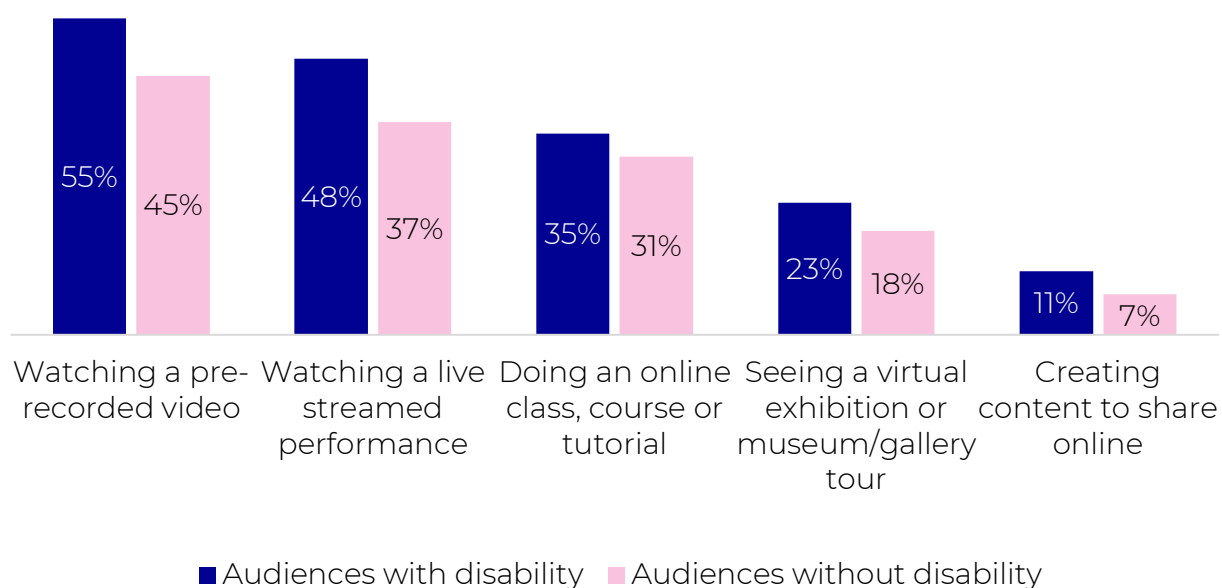
Participation in most activities is higher among audiences with disability, including online classes and tutorials (35%, compared to 31% for audiences without disability), seeing virtual exhibitions (23%, compared to 18%), and creating content to share online (11%, compared to 7%).

Online video of performances and events has consistently reached the largest proportion of audiences, nationally. More than half (55%) of audiences with disability are watching pre-recorded performances and events and 48% are watching live-streamed performances and events. By comparison, slightly smaller proportions of audiences without disability are watching pre-recorded

performances and events (45%) and live-streamed performances and events (37%).

When asked if they, or anyone they know, has discovered a new artist, artwork, or performance online, 37% of audiences with disability said they have, and 18% know someone who has. Online discovery of new work is slightly less prevalent among audiences without disability, among whom 31% have themselves, and 15% know someone who has.

Figure 1: During the past fortnight, have you participated in any of the following online or digital arts & culture experiences? (select multiple). By audiences with and without disability. n=11,297



More audience members with disability are participating online ‘much more’ frequently — 8 in 10 plan to continue

Among those who are participating online, the proportion who say they are participating more frequently is relatively consistent among audiences with disability (55%) and audiences without disability (54%). However, audiences with disability are slightly more likely to say they are participating ‘much more’ frequently (18%), compared to those without disability (14%).

Further, among audience members who are participating online more frequently overall, people with disability are more likely to say they plan to

continue engaging in online activities post-pandemic (83%), compared to people without disability (73%).

2 in 5 audience members with disability engaging online are paying for digital experiences

Of the audiences who are participating online, the proportion of those who are paying for online arts and culture is consistent among people with disability and those without disability (both 39%).

In terms of the types of payments being made, the largest proportion of people with disability are purchasing single experiences (22%), followed by making donations (19%) and subscribing to online platforms (10%). Among those who have paid for online experiences, a similar proportion of audiences with disability (34%) and audiences without disability (36%) have spent \$50 or more in the fortnight before data collection.

Audiences with disability have multiple motivations for paid online experiences

In Phase 3, audiences were asked 'Thinking about your likely future spending online, if any, can you tell us what you'd prioritise?'

When asked to describe what they'll prioritise when spending online in future, several people with disability expressed a desire to show their support for individual artists. One audience member said,

'I try to support the musicians I respect and who have made a huge effort to use social media to keep themselves connected to their audiences (so have used various versions of PayPal.Me links)...financially I can support individuals or small groups online in a way that I simply could not afford to do with a full orchestra.'

Some people shared their preference for interactive material, such as online lessons and tutorials, as one person shared,

'I've been really enjoying taking eCourses on all sorts of different topics that interest me (learning Japanese, poetry, meditation etc).'

Another mentioned receiving something tangible in return for payment, commenting,

‘Basically, anything through a screen, I perceive as ‘Should be free’ as there is so much content available. So, my online spending needs to amount to something tangible like a souvenir or interactive experience.’

Others specified that they would aim to choose programs that broaden their knowledge, as one person shared,

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

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.

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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