



PATTERNMAKERS



NOVEMBER 2021

New South Wales Snapshot

Audience Outlook Monitor



Summary

NSW audiences are cautiously optimistic after the state's reopening, but confidence is expected to fluctuate in the coming months

- ▶ Data from 1,735 past attendees of NSW arts organisations suggests that audiences are cautiously optimistic after the state's reopening.
- ▶ NSW arts audiences are getting vaccinated at a faster rate than the state-wide population, reaching 97% fully vaccinated in November, and 4% have already received booster shots.
- ▶ With case numbers down and vaccination rates climbing in the wider population, confidence has increased slightly since October, with around half (52%) ready to attend now or as soon as is permitted (up from 46%).
- ▶ Only 37% attended in the fortnight before data collection, suggesting it will take time for attendances to reach pre-Delta levels (76% were attending in March 2021). However more NSW audiences are making longer-term plans, with a third (33%) booking for events as far away as July 2022.
- ▶ Upcoming changes to restrictions, planned for mid-December, are likely to cause further fluctuations in comfort and risk-averse audiences are likely to continue being selective about their public activity for the time being. The news of new variants could also challenge confidence.
- ▶ Overall, NSW audiences are increasingly confident that the vaccination effort will allow things to return to normal within a year (95%, up from 89% in July 2021).

COVID-safety remains paramount, and easing of restrictions in December may cause audience confidence to wane

- ▶ NSW audiences – like those in other outbreak-affected states (VIC and ACT) – are relying on COVID-safety measures more so than those in the rest of Australia, where the virus is not yet circulating.
- ▶ The results confirm that COVID-safety will play a pivotal role in stabilising confidence as NSW's reopening plan progresses and Australia faces the prospect of new variants.
- ▶ Audiences continue to be overwhelmingly encouraged by proof of vaccination at entry to arts venues (89%), with only 5% discouraged, and most (83%) won't attend large theatres and concert halls unless it is required.
- ▶ A majority also say check-ins (78%) and mask mandates (60%) need to be in place for them to attend large theatres and concert halls.

- ▶ With case numbers trending downwards in November, audience views could relax, however there may be apprehension to attend if these measures are eased too soon, while uncertainty persists.
- ▶ Overall the data confirms that COVID-safety measures are playing a pivotal role in rebuilding attendances, especially at indoor venues. Staying vigilant will ensure more audiences feel confident in their decisions.

NSW audiences are looking for ways to show their support – with ‘local loyalty’ on the rise

- ▶ After the hardship faced by the sector during the pandemic, NSW audiences are eager to support organisations and artists, particularly those local to them.
- ▶ The future outlook for loyalty programs is more positive than 2021, with half (53%) indicating they are at least somewhat likely to purchase a subscription or membership in 2022.
- ▶ As people weigh up the risks of attending amid further uncertainty, 7 in 10 (71%) of NSW audiences agree that they’ll be attracted to events in their local area over the next year.
- ▶ An increasing number of audiences say they will be interested in ‘light-hearted programs’ (40%, up from 31% in July) – with some seeking escapism and uplift after the cumulative impacts of the pandemic.

NSW audiences are becoming more likely to see a role for online arts and culture in their lives

- ▶ After several quarters of slight declines in online participation, digital engagement has increased again for NSW audiences – from 49% in July 2021 to 55% in November 2021.
- ▶ Despite some reports of ‘screen fatigue’, overall NSW audiences are significantly more likely to see an ongoing role for digital arts experiences in their lives (77%) compared to July (56%).
- ▶ Audiences can be divided into three groups for the purposes of marketing digital arts experiences: ‘digital devotees,’ the 28% of audiences who see a substantial role for digital in their lives, ‘selective but supportive’ audiences, the 49% who see a small role, and ‘tired of tech’ audiences, the 23% of audiences who see no role at all outside of lockdown.
- ▶ Many audiences support hybrid models that offer greater flexibility and accessibility as we transition to a ‘COVID-normal’ Australia. When asked if they would attend a digital program in place of a cancelled live event, 38% of NSW audiences said they would be likely to attend.
- ▶ It is clear that digital marketing and online experiences are playing a key role in keeping audiences engaged with arts organisations as uncertainty continues.

Introduction

This report summarises insights from over 1,700 audience members in New South Wales

This New South Wales (NSW) Snapshot Report outlines key findings from the November 2021 phase of the Audience Outlook Monitor in Australia (Phase 6), based on data collected from 1,735 audience members connected with organisations in NSW.

Launched in May 2020, the study is tracking audience sentiment in relation to the COVID-19 pandemic. Each phase involves a cross-sector collaborative survey process involving over 100 arts and culture organisations, including museums, galleries, performing arts organisations and festivals.

On 3 November 2021, participating organisations simultaneously sent the Phase 6 survey to a random sample of their audience – defined as those who had attended an arts or cultural event in person since January 2018. This data provides excellent visibility of trends across the country, noting that results for the Northern Territory (NT) and Tasmania (TAS) are not reported separately due to small sample sizes.

This report compares new results with data collected previously in July 2021 (Phase 5) and October 2021 (Pulse Check), to examine how things are changing over time.

In addition to this Snapshot Report, the November 2021 results are accessible in a free interactive dashboard. Users can explore the data for different artforms, types of events and demographic groups in all parts of Australia. For more information about the study, and to access resources such as the dashboard, visit: www.thepatternmakers.com.au/covid19.

Audiences in outbreak-affected states/territories are reported separately to the rest of Australia

At the time of data collection (3–7 November 2021), outbreak conditions varied significantly by jurisdiction: NSW, Victoria (VIC) and Australian Capital Territory (ACT) were transitioning out of extended lockdowns, while in the rest of the country, audiences were enjoying minimal restrictions.

The three outbreak-affected states/territories of NSW, VIC and the ACT (referred to in this report as ‘**outbreak-affected states**’) share similar trends – and are grouped together, where relevant, for reporting purposes. However, it should be noted that ACT audiences tend to be slightly less tolerant of risks than audiences in NSW and VIC.

States/territories across the ‘rest of Australia/rest of the country’ – Queensland (QLD), South Australia (SA), Western Australia (WA), NT and TAS – also share many similarities, with border closures helping to suppress the virus and minimise risks for audiences. These jurisdictions are also grouped together in places – noting that confidence levels in WA tend to be higher than in SA and QLD, where border restrictions were beginning to lift at the time of publication.

Read on for the key November 2021 findings for NSW.

Current conditions

Vaccination rates in NSW continue to climb and 97% of arts audiences are now fully vaccinated

As of 7 November 2021, 97% of NSW arts audiences say they are now fully vaccinated (up from 92% in October), with another 1% partially vaccinated (down from 6%). Among those fully vaccinated, 4% have had a booster shot.

The proportion fully vaccinated has increased significantly since July 2021, when 23% of audiences were fully vaccinated and 52% had received their first dose.

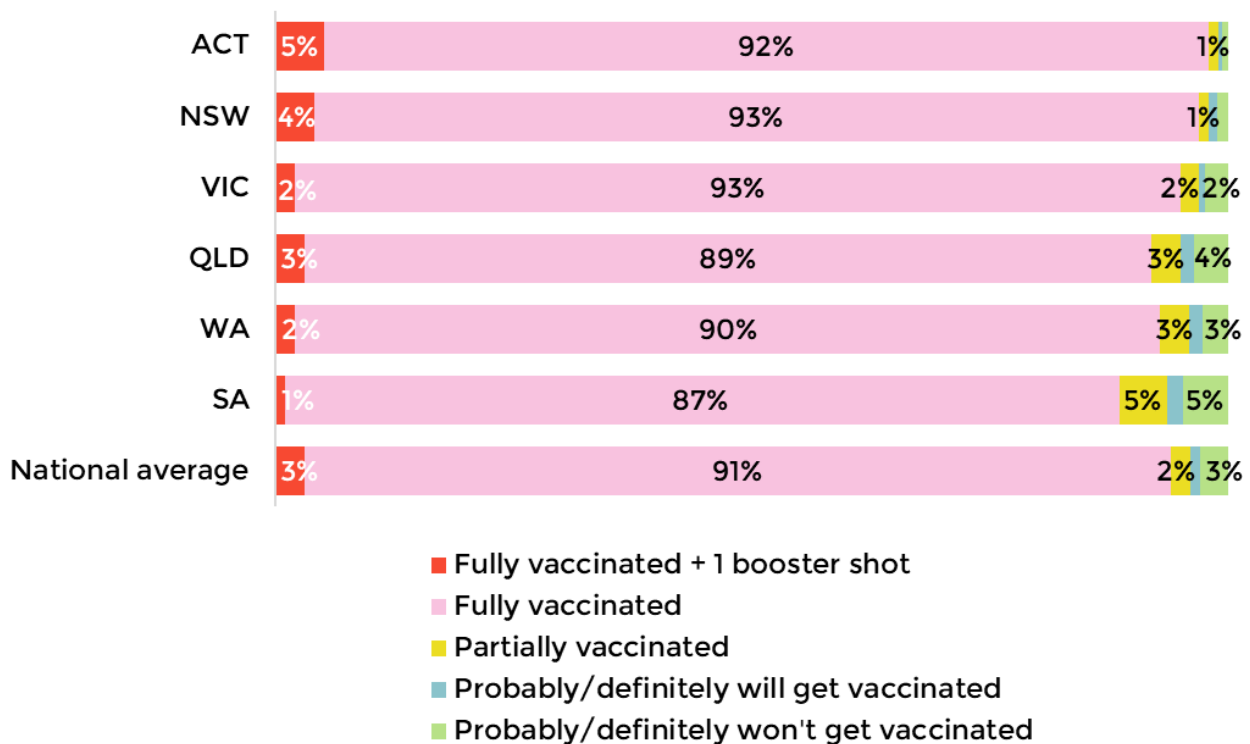
NSW arts audiences remain slightly ahead of the state-wide curve, with almost 93% of people in NSW aged 16+ vaccinated at the time of this report’s publication.

Of the 2% of audiences who are not vaccinated, most (79%) say they will probably or definitely not get vaccinated, suggesting that vaccine supply issues have now largely been addressed for those audiences participating in the study.

Vaccination rates vary by state, with uptake highest in NSW and the neighbouring ACT (97% fully vaccinated). Rates are slightly lower in VIC (95% fully vaccinated), QLD (92% fully vaccinated), WA (92% fully vaccinated) and SA (88% fully vaccinated) – as shown in Figure 1.

Vaccination rates also increase with age, with 99% of NSW audiences aged 75+ fully vaccinated, compared to 94% of audiences under 35 or between 35 and 54.

Figure 1: Proportion of audiences who are vaccinated, November 2021, by state/territory (n=7,484)



NSW audiences are increasingly optimistic that vaccination will allow normal activities to resume within a year

With major freedoms put in place over a month ago, vaccination rates climbing and case numbers stabilising in the low hundreds, NSW audiences appear increasingly optimistic about the prospect of a 'COVID-normal'. Compared to July 2021, NSW audiences are significantly more confident that vaccination will allow normal activities to resume within a year.

Nearly half (47%, up from 31% in July) are very confident in the vaccine effort, and only 4% (down from 11%) are not confident at all. One audience member says,

'As NSW is approaching the 90% fully vaccinated target I am feeling confident that most normal activities will be resumed, but that certain restrictions may still be in place.'

Some qualify that, rather than resuming 'normal' attendance, the next year is more likely to usher in a 'new normal', with some safety measures still in place.

One said,

‘It depends on your definition of "normal." My expectation is that we will be back to our old activities soon but with modifications (such as requiring proof of vaccination, or certain safety adaptations in venues).’

Many audience members, however, are still exercising caution – and suggest it is still too early to say how things will play out in the long term. One said,

‘I want to feel more confident, but you never know what's round the corner...’

Another said,

‘We don't yet know what "normal" will be like. We know nothing about how this virus will behave in future.’

Confidence in the success of the vaccination program tends to be higher in outbreak-affected states like NSW, VIC (45% very confident), and the ACT (45% very confident) – where vaccine rates are higher and audiences are seemingly acclimatising to the idea of a ‘COVID-normal’ world.

With high vaccination coverage in NSW, many audiences are now looking to booster shots to provide additional confidence

With almost all NSW audiences vaccinated, respondents were increasingly likely to be thinking about the next step: booster shots.

Many NSW audiences report they will get a booster shot as soon as they are eligible. Some are cautiously optimistic about the roll-out of booster shots and say it will improve confidence, with one NSW audience member saying,

‘Hopefully booster vaccination will become a mandatory part of being "fully vaccinated" sometime in 2022 which will give an extra level of confidence in attending cultural events.’

Another said,

‘I can't wait for myself & everyone else to get the booster shot.’

However, some fear that booster shots will present another barrier to entry to the vaccine-hesitant, and are concerned about the logistics of rolling out boosters. One said,

‘I have confidence in the vaccines but am sceptical about the uptake, particularly boosters.’

Others worry that protection against the virus will be insufficient without boosters, saying,

‘I will get a booster when I'm able to (in February 2022). As I wrote before, friends in the US, who were vaccinated with Pfizer at the beginning of the year, already have experienced "breakthrough" COVID-19. I would be confident if a 3-dose vaccination was standard, not just the current 2.’

Audience comfort in NSW is in a state of flux, with further restrictions set to ease in late December

Audience comfort in NSW is in a state of flux as restrictions change, and remained below pre-Delta levels as of early November. Around half of audiences are ready to attend ‘now or as soon as it is permitted’ (52%, down from 67% in March) – as shown in Figure 2.

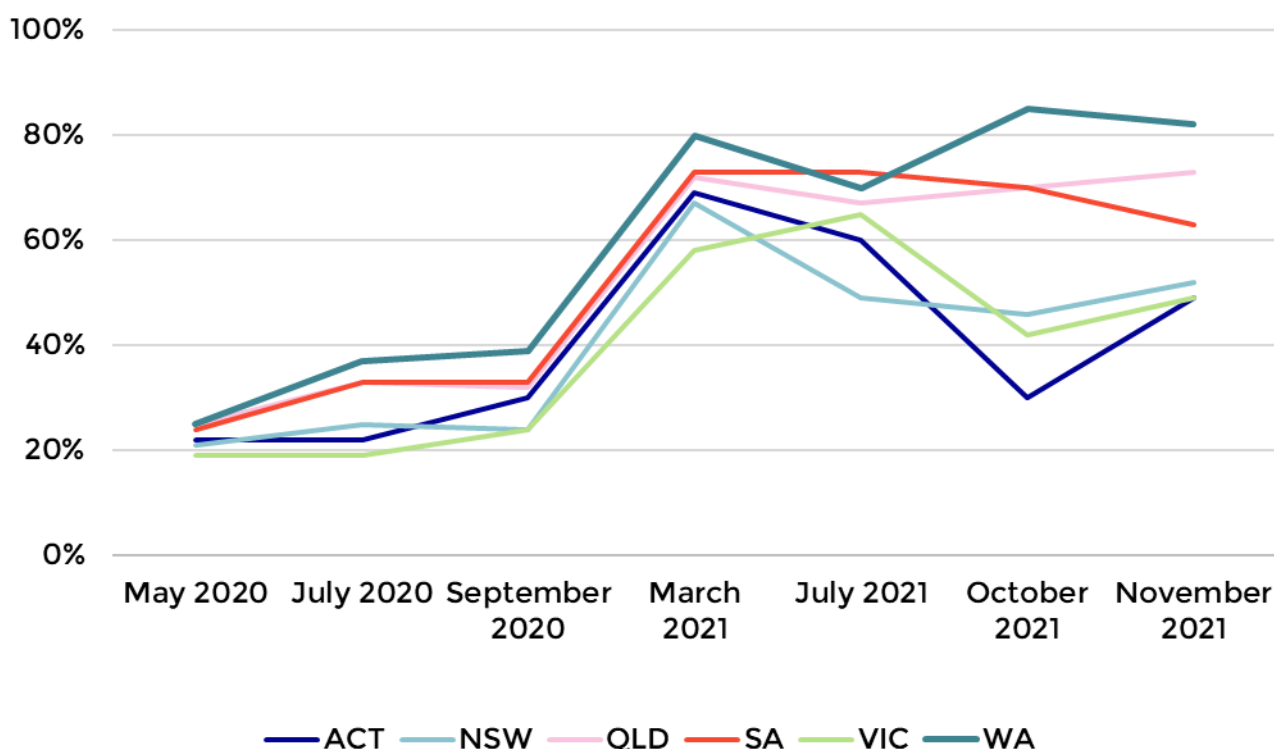
The other half (45%) say they will attend ‘when reasonably confident that risk of transmission is minimal.’ The next phase of NSW’s reopening is likely to pose a challenge to some of these audiences, with mask mandates being removed and venues opened up to all audiences. One NSW audience member said,

‘I really miss theatre, galleries, concerts, and museums – but I still need a bit of time to see how we go in Australia. I would like to be more optimistic about outcomes, but I'm just not there yet. Sadly, I think we're in for waves of covid for a while and need to stay prepared for it.’

Another said,

‘I think I will get more comfortable with doing these things after a few months – I want the infection spike resulting from opening borders & reducing restrictions to have a chance to work its way through before I go back to theatre, concerts etc.’

Figure 2: Proportion of audiences who are 'ready to attend now or as soon as permitted', by state/territory, May 2020 to November 2021 (n=7,637)



NSW audiences are equally, if not more, comfortable with arts attendance than other public activities

In a positive sign for arts and cultural venues, NSW audiences are equally, if not more, likely to be 'very comfortable' with arts attendance than with many other public activities.

The majority of NSW audiences feel very comfortable at outdoor events with fixed seating (64%) and museums and galleries (57%) - while 4 in 10 feel very comfortable at community art spaces (44%) and large theatres and concert halls (41%). NSW audiences are less likely to be very comfortable at outdoor events without fixed seating (33%) - and only a small proportion are very comfortable at comedy clubs (14%) and hands on exhibits (13%).

By comparison, half of NSW audience members feel very comfortable eating at a local restaurant or bar (53%), and less than half feel very comfortable going to a local cinema (38%), using public transport (33%) or attending a sporting event (30%). Even smaller numbers feel very comfortable exercising at a gym (22%) or flying domestically on a commercial airline (24%).

Some audience members have suggested this relates to high vaccination rates among arts audiences, with one saying,

‘Comfortable attending indoor or outdoor cultural events with masks, check in and 2 x vaccinations. People attending cultural events are more likely to be vaccinated.’

Live attendance

Current attendance levels are low, but NSW audiences are making plans for summer and 2022

When asked about their attendance behaviours in the fortnight before data collection, 37% of NSW audiences reported they had attended an in-person arts or cultural event. This proportion is lower than pre-Delta levels, with 76% of NSW audiences attending in March.

However, NSW audiences were more likely to have attended in-person compared to audiences in other outbreak-affected states, like the ACT (23%) and VIC (23%).

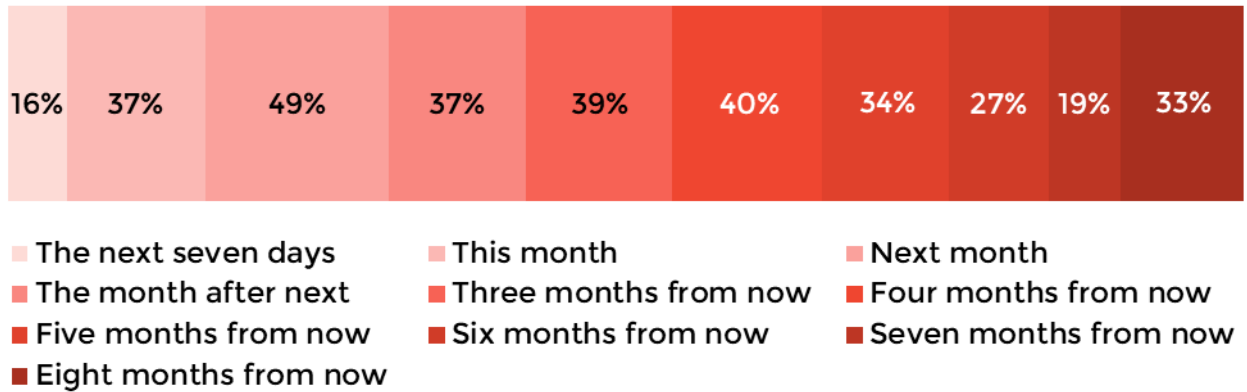
NSW audiences were also more likely than other outbreak-affected audiences to be making plans to attend in the future – with around 3 in 4 NSW audience members (74%) making plans for in-person attendance.

In a positive sign for the long-term outlook, these bookings are fairly evenly distributed across time, with NSW audiences equally likely to be booking later this month (37%), in January (37%), February (39%) and March (40%) – and only slightly less likely to be making bookings as far away as April (34%), May (27%), June (19%) and July (33%) – as shown in Figure 3.

Bookings peak in December (49%), with audiences apparently eager to get out and enjoy arts and culture with the approach of summer and the holiday season. Risk-averse audience members may also be more inclined to book for dates before further restrictions are eased.



Figure 3: In the past fortnight, did you purchase tickets for one or more live shows or performances that are scheduled for...? NSW (n=740).



NSW audiences are wary of the risk of transmitting the virus or being a close contact and needing to isolate

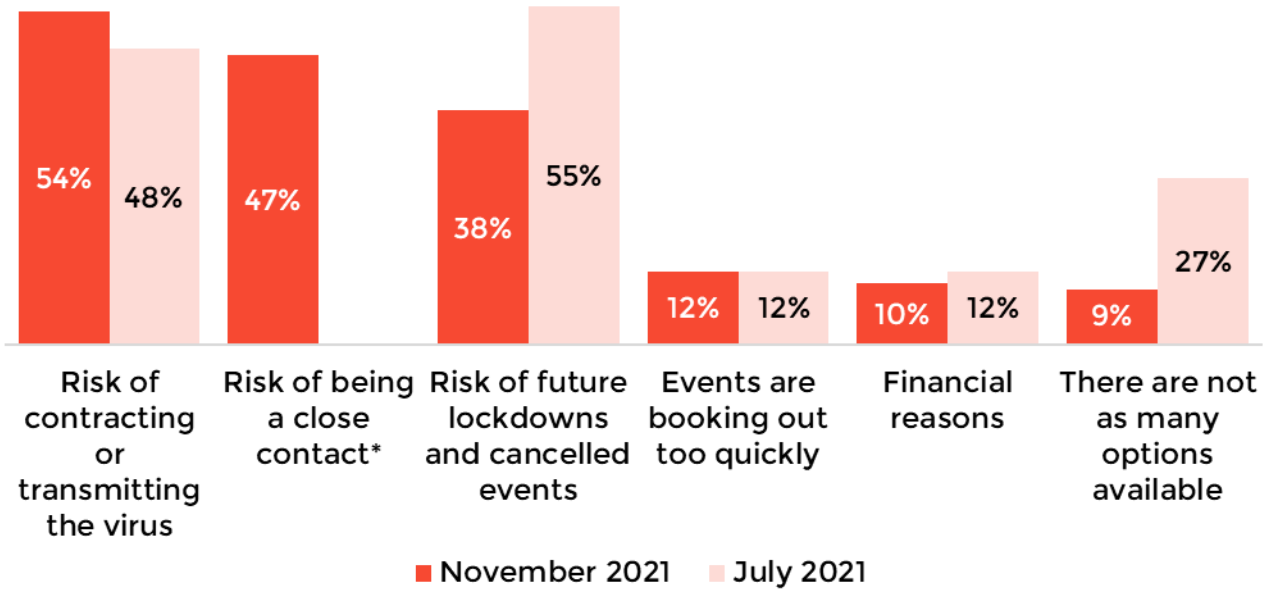
When asked what would prevent them from attending arts and cultural events in the next year, NSW audiences were most likely to name risks arising from virus circulation – such as the risk of contracting or transmitting the virus (54%, up from 48% in July 2021) or the risk of being a close contact and needing to isolate (47%) – as shown in Figure 4.

Given that the virus continues to circulate in NSW, audiences are understandably conscious of the risks which arise when the virus is active in the community.

Overall, the outlook is different from July, when the main barrier to attendance was the risk of lockdowns and cancelled events (38% in November, down from 55%). Audiences were also much less likely to report being prevented from attending because there were ‘not as many options available’ – only 9% of audiences as opposed to 27% in July.



Figure 4: Proportion of NSW audiences who say these factors will preventing them from attending in-person arts and culture events as they used to in the past, July 2021 (n=2,218) and November 2021 (n=1,720)



*Option introduced in Phase 6 - no historical comparison available

COVID-safety

The most widely encouraging COVID-safety measures are proof of vaccination, check-ins and mask-mandates

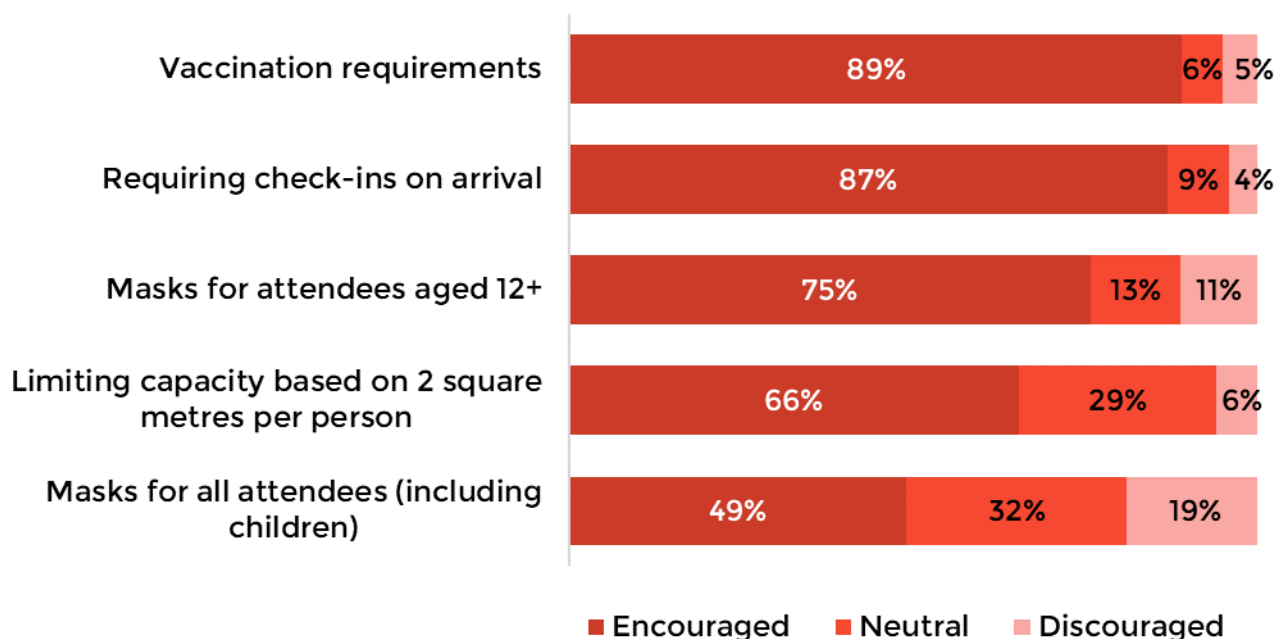
With a degree of uncertainty persisting, it is clear that COVID-safety will be critical for maintaining confidence. When asked about a list of potential COVID-safety measures at cultural venues, most NSW audiences say they would feel encouraged to attend by the majority of safety measures.

The largest proportion of audiences said they would be encouraged by proof of vaccination required at entry (89%, stable with 90% in October 2021). In spite of the debate surrounding vaccine passports, only 5% of audiences say this measure would discourage them from attending.

The next most widely encouraging COVID-safety measure was requiring check-ins on arrival (87%, stable with October).

Significant proportions of NSW audiences feel encouraged by mandating face masks for people aged 12 and over (75%, down from 79% in October), while 1 in 10 (11%) would be discouraged. When it came to mandating masks for all attendees, including children, audiences were more polarised – with half (49%, down from 57%) encouraged and 19% (up from 14%) discouraged.

Figure 5: How much would each of the following steps discourage or encourage you to attend? Audiences in NSW, November 2021 (n=1,649)



Vaccine passports, check-ins and masks are ‘must-haves’ for many NSW audience members, and upcoming changes to restrictions may make some audiences apprehensive

When asked whether any COVID-safety measures absolutely need to be in place to attend a large theatre or concert hall, 83% of NSW audiences named proof of vaccination, 78% named check-ins and 60% named mandatory mask-wearing.

Given that the recovery milestone planned for 15 December will involve the removal of these measures at almost all arts venues, these audience members may become apprehensive at this point. One said,

‘When I say I’m comfortable doing things now, that’s because I am vaccinated and unvaccinated people cannot participate in the things I’m comfortable with. Once they can, I will be less comfortable.’

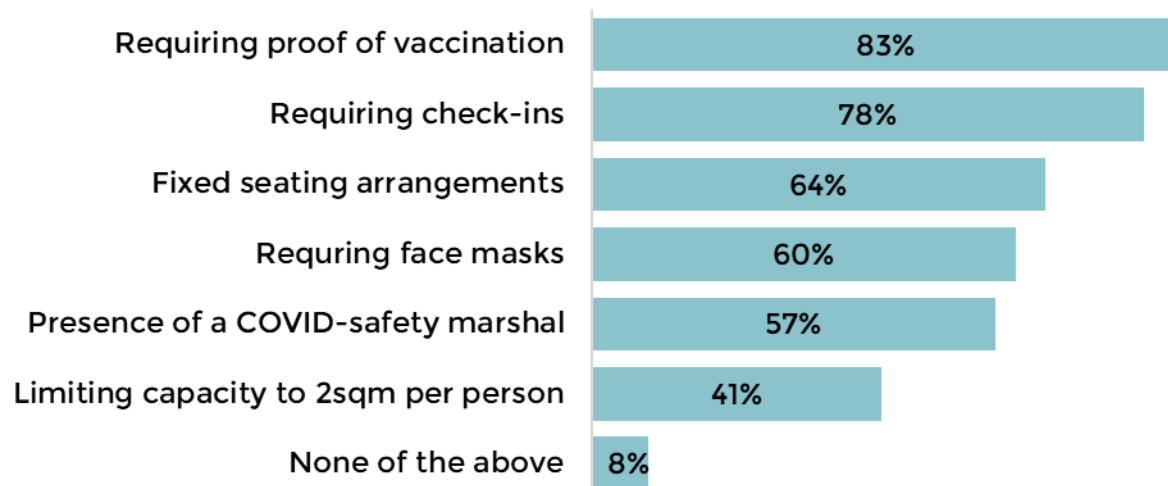
Another said,

‘I am comfortable being in public places and at events now as they require vaccination. I am terrified about December when people without vaccinations are no longer under restrictions.’

Conversely, these NSW audience members are likely to be encouraged by theatres and concert halls who are mandating masks and vaccination passports on an organisational basis—[for example, the Sydney theatres who recently made a joint commitment to continue these COVID-safety measures.](#)

Other COVID-safety ‘dealbreakers’ for the majority of NSW audiences include fixed seating arrangements (64%) and the presence of a COVID-safety marshal (57%).

Figure 6: Would any of the following measures absolutely need to be in place for you to attend an event in a large theatre/concert hall today? (select multiple) November 2021 (n=1,729)



Only 8% of audiences would be willing to attend a large theatre or concert hall without any safety measures in place. This proportion was similar to that of audiences in VIC and the ACT, but much lower than parts of the country that have not been affected by prolonged outbreaks, such as WA (31%).

NSW audiences are more comfortable at outdoor venues, but proof of vaccination is still equally important

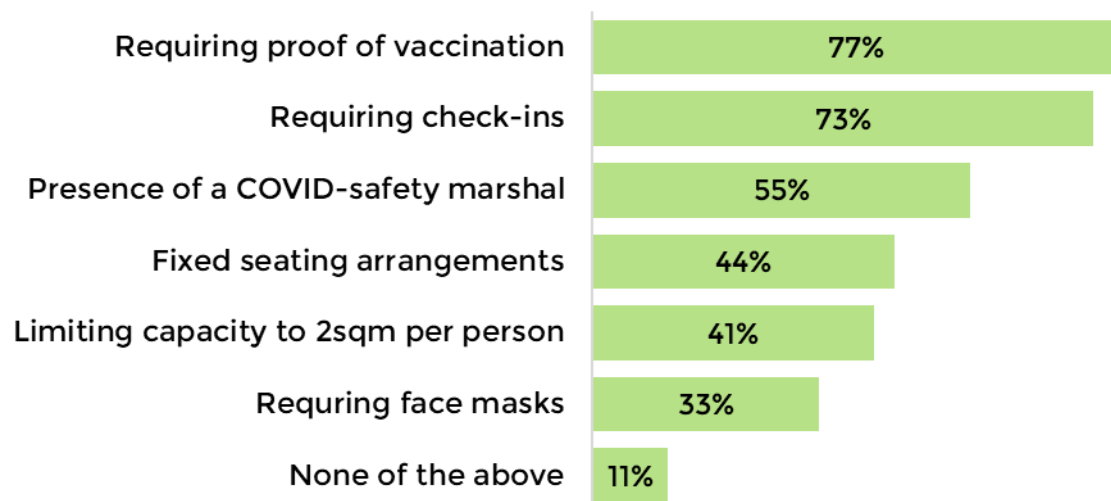
Proof of vaccination is almost equally important at outdoor events, with 77% of NSW audiences saying they wouldn't attend without this measure. One audience member said,

'If it's an outdoor event I would attend if it's not crowded, vaccination was mandatory and checked.'

Similarly, the majority of audiences still say check-ins (73%) absolutely need to be in place at outdoor events.

However, audiences are relying on other COVID-safety measures to a slightly lesser extent, with open-air venues alleviating some of the risks associated with virus transmission – such as capacity limits (41%), fixed seating arrangements (44%) and masks (33%).

Figure 7: Would any of the following measures absolutely need to be in place for you to attend an outdoor event today? (select multiple) November 2021 (n=1,618)



Air circulation and the freedom to move around plays a key role for some audiences' decisions, and many perceive outdoor venues to be safer than indoor venues. One NSW audience member said,

'I feel differently about not wearing masks outside in fresh air as opposed to indoors/recycled air.'

Another said,

‘I am currently still avoiding indoor settings as much as possible, despite being double vaccinated.’

Some NSW audiences see rapid testing as an additional or alternative measure to proof of vaccination

Qualitative data suggests that audiences are starting to see rapid antigen testing as an important addition to COVID-safety measures like vaccine passports. One NSW audience member says,

‘I agree that proof of vaccination AND a negative rapid antigen test result taken that day would make me 100% confident to attend anything.’

Furthermore, although the proportion of NSW audiences discouraged by proof of vaccination requirements is small (5%), some of them have suggested that proof of a negative test result could be a way of ‘splitting the difference’ and allowing unvaccinated patrons to attend safely. One NSW audience member said,

‘I don't agree with banning unvaccinated people from cultural, or any venues. I feel face masks indoors with large numbers of people should continue for some time. Offering rapid antigen testing could also be of use.’

As rapid tests become more widely available, it is likely they can be introduced as an alternative or additional measure, similar to policies in Europe and North America.

Outlook for comfort levels

Conditions in NSW are changing rapidly, and will continue to do so as restriction change in mid-December.

To understand how readiness to attend may change, audiences were asked to consider a hypothetical ‘**COVID-normal**’ scenario for attending events in which the following conditions were in place:

- ▶ interstate and international borders are open
- ▶ at least 90% of the population over 12 is vaccinated
- ▶ proof of vaccination or a negative test result is required at entry
- ▶ seated venues are operating at 100% capacity

When NSW reaches ‘COVID-normal’, comfort at arts venues will improve upon current conditions

Reaching a ‘COVID-normal’ scenario will likely increase the proportion of NSW audiences ‘very comfortable’ at arts venues (as shown in Figure 8) – with the increase in vaccination coverage to people aged 12+ playing a large role.

However, this data also suggests that COVID-safety measures will play a key role in the ‘COVID-normal’ – with many audience members stressing the important role that proof of vaccination/negative test requirements played in their response to this scenario. One said,

‘The big clincher is needing to show a vaccination certificate or negative test here. That is very persuasive.’

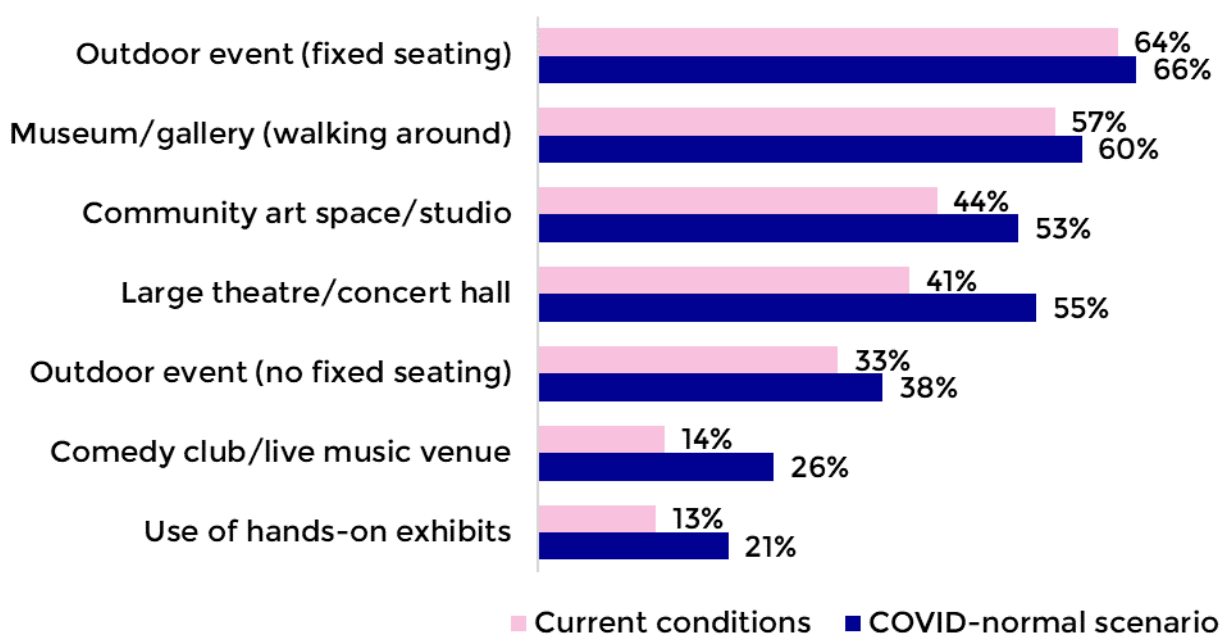
Another said,

‘Proof of vaccination is the key for me.’

The greatest increases were observed for large theatres and concert halls (+14%) and comedy clubs and live music venues (+12%). This data suggests that reaching ‘COVID-normal’ will be hugely beneficial for NSW’s live music sector.

Large increases were also observed for community art spaces (+9%) and hands-on exhibits (+8%).

Figure 8: Proportion of audiences in NSW who would be ‘very comfortable’ to attend selected cultural venues in current conditions and COVID-normal scenario, November 2021 (n=1,721)



However, some NSW audience members noted that after dealing with protracted lockdowns and widespread outbreaks, it could take some time for them to adjust to this new 'COVID-normal.' One said,

'It's too early to see how covid "happens/behaves" - more time needed, as we can see overseas.'

Some audience members remain uncertain about how the vaccination effort will proceed in the long term

While high vaccination coverage is an important aspect of this '**COVID-normal scenario**' for most NSW audiences, some are conscious of factors that could complicate the vaccination effort - such as the risk of new variants, breakthrough infections, or complications caused by existing health vulnerabilities. One NSW audience member said,

'With new variants rearing their heads frequently I am not confident that we will be able to resume normal activities as there is the continually looming threat of new variants impacting people. I care for vulnerable family members and have an underlying health condition so this is a contributing factor.'

Another said,

'I am waiting for my booster - due in December. Overseas countries are not showing "normal life" safely yet: e.g. England etc. I think here it will be an altered life with care for next 18 months.'

While another said,

'It only takes one variant that the current vaccinations aren't effective against to cripple the entire world population. This is as much of a risk to Australia now as the leap from Alpha (2020) and Delta (2021) was.'

Buyer behaviour

7 in 10 NSW audience members say they'll be attracted to events in their local area in the next 12 months – with 'local loyalty' being both a response to pandemic hardship and a way to alleviate risk

When asked to what extent audiences would be attracted to events in their local area in the next 12 months, 7 in 10 (71%) NSW audience members agreed that they would be looking local – while only 4% disagreed. As one NSW audience member said,

'Local is good, local is accessible, local has all the variety I need.'

Some audience members suggested that restrictions on travel had made them more aware of and connected to arts and culture in their local area, with one NSW audience member stating,

'I've become more interested in exploring my local area; I'd love to be able to walk or ride my bike to events.'

A desire to support local acts and venues after a long period of hardship was also a factor, with one NSW audience member saying,

'I will continue to go to a range of arts performances but I feel even more strongly now about putting my money where my mouth is and buying tickets for smaller, local events. Not so much because of any concern about COVID but because I recognise how important these smaller local venues and companies are and I want to see them thrive.'

Others say that local events feel 'safer' – from both the risks of virus transmission, and complications arising from cancellation. One said,

'I feel less inclined to circulate outside my local areas due to the continued risk of cross transmission and especially in crowded environments in venues.'

Another said,

'I think twice now about where I am going, physical set up of the place (airflow, space etc), what the vax rates are in that area, if there is a local opportunity that is comparable I will probably choose that for now.'

Some NSW audiences are looking for uplifting events – and most say they’re not drawn to works that explore the pandemic just yet

When asked to share their preference for the types of arts and cultural content they would engage with over the next year, NSW audiences said they were interested in seeing the same kinds of events they used to attend, pre-pandemic (93%, stable with July). One said,

‘I am looking forward to the ‘new normal’, whatever that is. I don’t want more light-hearted, or more pandemic-introspection events.’

However, 4 in 10 NSW audiences do say they will prefer ‘light-hearted programs’ (40%), with this proportion steadily increasing since last year (it was 20% in May 2020 and 31% in July 2021). It appears that the cumulative impacts of the pandemic have left some audiences seeking escapism and uplift. One said,

‘The last two years have left people with a lot of anxiety, depression and disease. I have found myself naturally leaning toward more light-hearted, fun activities rather than depressing, serious or introspective pieces.’

Another said,

‘My mental health suffered during the pandemic so I am being kinder to myself and lightening the sort of things that I will expose myself to.’

The proportion of NSW audiences likely to seek ‘works that make sense of the pandemic’ remains low (13%, up from 10% in July), with 44% disagreeing that they will be attracted to these kinds of works.

When explaining their answers, some expressed ‘pandemic fatigue’ and/or an aversion to didactic works, for example:

‘Have heard far too much about the pandemic, cannot think of a worse way of getting back into the theatre / arts / exhibitions than having to look at pandemic woes, worries and re-working.’

Other NSW audience members said they felt these works should be positioned strategically, perhaps at a later date, saying,

‘Feelings of reconnecting, escapism, but also of place seem important. Work that reinforces that opportunities & life are fleeting, so enjoy them. It’s too soon for pandemic reflection – though it’s 100% important.’

Another said,

‘We cannot ignore the lessons of the last awful two years. There is a lesson and reason we have all been through this. Especially in the arts. Everything must change - not just pandemic measures but how we make theatre and how we tell stories and who gets to tell those stories. We need true diversity. Please.’

Consistent with the [Visions for Culture](http://www.thepatternmakers.com.au/visions-for-culture-analysis) (www.thepatternmakers.com.au/visions-for-culture-analysis) in late 2020, this data confirms that many audiences see a role for the arts in the recovery process - and will turn to trusted organisations for connection, joy and healing.

There are some positive signs for subscriptions and memberships, with NSW audiences wanting to keep supporting artists

When asked whether they were going to purchase a subscription or membership in 2022, over half (53%) of NSW audiences said they were likely, pointing to an opportunity area for further investigation.

These audiences acknowledged that there are risks involved with subscription models when the future remains uncertain, but suggest they want to support arts organisations and performers regardless. One said,

‘It's been up and down and we've not seen much but I love theatre and use it as an excuse to socialise with friends too.’

While another said,

‘I purchased subscription tickets for the SWIFF film Festival in Coffs Harbour in 2021 and have done so again for 2022. I regard it as something of a risk but it is a calculated one.’

However, another 1 in 3 (30%) NSW audience members said they were unlikely to subscribe next year - with many pointing to the inconvenience or disappointment of cancellations as a reason. One said,

‘2 years of cancellations had a really big negative impact on my mental health. I am just not there yet in being willing to take the risk of yet more cancellations. I would rather pay more and book closer to the event.’

Another said,

‘I prefer to avoid the chaos of booking and then managing crossed out bookings, to be honest. Then ending up donating quite big sums.’

Over the course of the pandemic, the proportion of NSW arts audiences purchasing subscriptions and memberships has fallen – likely due to the difficulty of planning ahead. A smaller proportion of audiences said they purchased a subscription or membership for the 2021 season (50%), compared to the 2020 season (60%).

Around 1 in 4 (23%) NSW audience members have already made a donation to an arts or cultural organisation for the 2021/22 financial year – a slightly smaller proportion than those who donated in the 2020/21 financial year (33%), though more than half of the fundraising year remains.

Online participation

Half of NSW audiences are participating in arts and culture online – and they are more likely to be paying for their experiences

In the first half of 2021, participation in online arts and cultural activities trended downwards after an early pandemic ‘boom’ in 2020 – with many audience members reporting ‘screen fatigue’ and an eagerness to return to regular, in-person attendance.

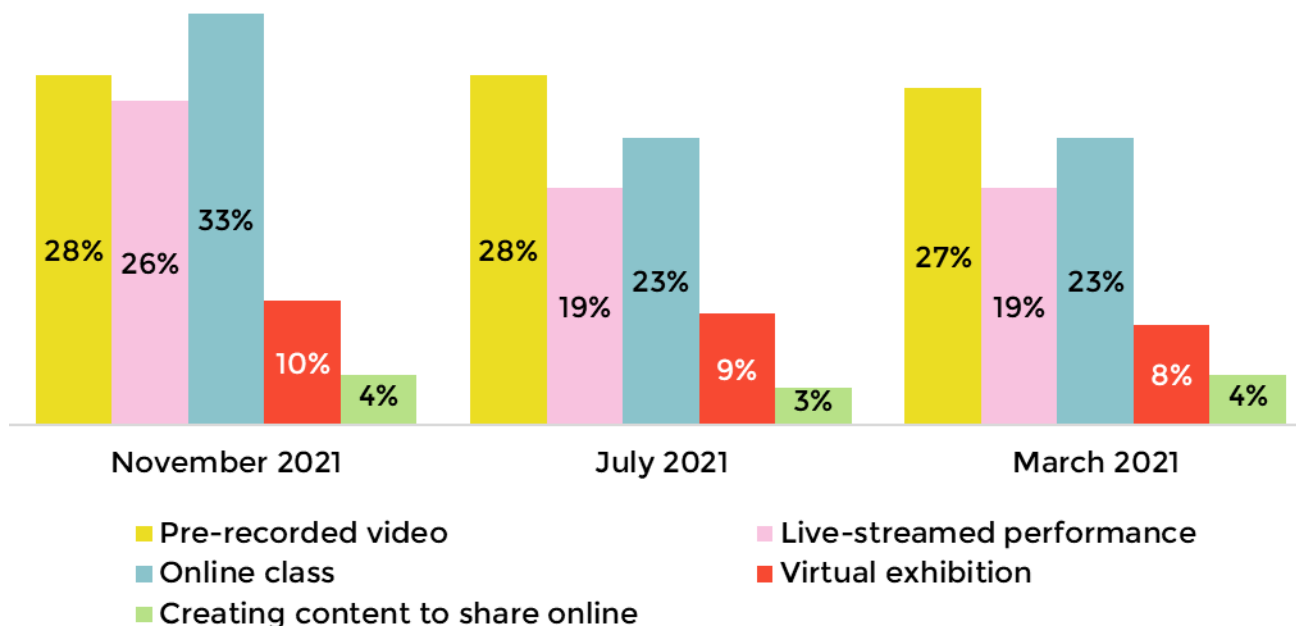
In light of extended lockdowns in NSW, November saw an uptick in online participation, with 55% of audiences (up from 49% in July) participating in an arts or cultural activity in the fortnight before data collection.

Specifically, the proportion participating in online courses (33%, up from 23% in July) and watching live streams (26%, up from 19%) has increased. Participation in other activities is consistent, such as watching pre-recorded video (28%, stable), attending virtual exhibitions (10%, stable with 9%) and creating content to share online (4%, stable with 3%).

Audiences in outbreak-affected states, such as VIC (52%) and ACT (51%) are the most likely to engage with digital programming nationally, particularly during prolonged outbreaks where in-person attendance is limited.



Figure 9: During the past fortnight, have you participated in any of the following online or digital arts & culture experiences? (select all that apply). NSW audiences, November 2021 (n=1,735)



Furthermore, in November, 45% of NSW audiences participating in online arts and culture paid for an experience, increasing from 35% in July 2021. Audiences were most likely to purchase a single, pay-per-view experience (23%) or make a donation for something seen online (15%).

Donating as an expression of gratitude for an online experience was more common among NSW and other outbreak-affected audiences, suggesting that a shared sense of hardship may have made them more inclined to donate in support. One NSW audience member said,

‘We need to keep supporting the arts industry. They do so much for us.’

4 in 10 NSW audiences would be happy to attend a digital alternative to a cancelled event

In November 2021, audiences were asked ‘In the case of a future live event being cancelled due to COVID-19, how likely would you be to attend a digital program featuring elements of the planned event?’

Nationally, half say they are unlikely to attend a digital program (50%), though a significant proportion say they are likely (29%) – while 23% are neutral.

NSW audiences were some of the more likely to say they were interested in attending a digital alternative (38%), along with audiences in outbreak-affected states like VIC

(35%) and the ACT (38%). Audiences in the rest of the country, such as those in WA (30%) and SA (28%), were less likely.

Those who were likely to seek out digital alternatives said they would do so because they'd prefer not to miss out in the event of cancellations or sold-out events. One NSW audience member said,

'I've loved online performances as they give me a chance to attend events that otherwise I would not have been able to. If I had tickets to a live event and it was cancelled, I would still like to be able to view an online version. This means I can still get most of the experience of the event plus the organisation hosting it can still get the revenue.'

The viability of digital alternatives may depend on the type of event – and in some cases, hybrid options are appealing

Some audiences qualified that their interest in a digital alternative to a cancelled event depended on the nature of the event, saying that some translate to the virtual medium better than others. One said,

'It depends on the event. If it seems like it would transfer to a digital format well, I'd "attend". I've seen some decent theatre streaming during COVID.'

Another said,

'Film festivals streamed online are great. Other event types may not be as good.'

Some respondents advocated for hybrid models, saying they would appreciate the flexibility of a digital option. One said,

'I like having online options for some of these arts events. Obviously nothing beats attending in person but I have attended some great online sessions in lockdown and would love to combine it with attending live events. Often online is cheaper and more convenient too.'

Another said,

'Most companies have set up online streaming of their events, and as some people won't ever be comfortable going back to live in person events for a while I see no reason to exclude them if the technology is readily available. Advertise "live and online" but live is always better.'

A greater proportion of NSW audiences see an ongoing role for digital in their lives

Overall, the proportion of NSW audiences who see a role for digital arts experiences in their lives outside of lockdown has increased since this sentiment was first measured in July 2021.

A larger proportion of NSW audiences now see a ‘substantial role’ for digital arts experiences in their lives (28%, up from 11% in July 2021), or even a ‘small role’ (49%, up from 44%). The proportion who sees ‘no role’ declined significantly between July and November (23%, down from 44%).

Some NSW audiences suggested that prolonged lockdowns have led them to incorporate online experiences into their arts-going habits, and that they were likely to continue into the future. One NSW audience member said,

‘I attended several online events and performances during 2020 & 2021 lockdowns and enjoyed it. MTC, Old Fitz, events from London, classes, talks, etc.’

Marketing of digital experiences can be targeted to three groups




NSW audiences were asked about the role that digital arts experiences play in their lives outside of lockdown. Based on their responses, NSW audiences can be divided into three groups:

- ▶ **Digital devotees** are the 28% of NSW audiences who see a ‘substantial role’ for digital experiences in their lives. They can be expected to show deeper and more dedicated engagement. Two-thirds (66%) participated in arts and cultural activities online in the fortnight before data collection – and on average are more averse to attending in-person right now. Half (52%) are paying for online experiences and 63% of those spent more than \$50 in the past fortnight.
- ▶ **Tired of tech** audience members are the 23% who see ‘no role’ for digital in their lives and are generally more eager to return to in-person attendance. Some report being ‘screen-fatigued’ and others say that after trying digital events, they just aren’t that interested. However, during stay-at-home orders, some may still be willing to participate online in the absence of in-person alternatives.
- ▶ **Selective but supportive** audience members are the 49% that see a ‘small role’ for digital in their lives. They feel favourably about online offerings but will generally only participate in the right events and under the right conditions. They are likely to






favour digital events that are more convenient, more accessible or less risky than in-person alternatives. 6 in 10 (58% in November 2021) participated in the fortnight before data collection, while around 43% of those paid to access online content.

Table 1: Key segments for digital audiences, NSW audiences, (n=1,735)

	Digital devotees 	Supportive but selective 	Tired of tech 
Proportion of audiences	28%	49%	23%
When live attendance is possible, the role of digital in their lives is...	Substantial	Small	None
Online participation rate	66%	58%	28%
Live stream participation	36%	25%	9%
Most interested in	Quality, high-production digital programming	Hybrid events	Live performance
Spending behaviours	52% of those participating online are paying	43% of those participating online are paying	24% of those participating online are paying
Demographic features	<ul style="list-style-type: none"> • More likely to have a disability (7%) • More likely to earn income performing art (15%) 	<ul style="list-style-type: none"> • More likely to have children under the age of 6 (4%) 	<ul style="list-style-type: none"> • More likely to be a parent (20%)



	Digital devotees 	Supportive but selective 	Tired of tech 
Proportion of audiences	28%	49%	23%
Other arts behaviours	<ul style="list-style-type: none"> • More likely to attend a digital alternative to a cancelled event (48%) • Typically attend performing arts very frequently (87% attend once a month or more) • Most likely to be donors to arts organisations (47%) 	<ul style="list-style-type: none"> • Typically attend performing arts frequently (76% attend once a month or more) 	<ul style="list-style-type: none"> • Most unlikely to attend a digital alternative to a cancelled event (71% unlikely) • Least likely to be donors to arts organisations (38%) • Typically attend performing arts less frequently (22% attend a couple of times per year or less)

What's next

To read about the story so far, visit the study's Australian homepage at: www.thepatternmakers.com.au/covid19.

There, you can also access 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.

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Patternmakers acknowledges Aboriginal and Torres Strait Islander peoples as the traditional custodians of our land – Australia. We acknowledge the Gadigal people of the Eora Nation as the traditional custodians of the place where Patternmakers is based, and we pay our respects to Elders past, present and emerging.

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