



PATTERNMAKERS



AUDIENCE
OUTLOOK
MONITOR

Sydney Audience Snapshot

2020 and beyond

September 2020



Sydney Audience Snapshot

Data from COVID-19 Audience Outlook Monitor
September 2020

2,304

Sydney audience members surveyed

↑ 51% up from 39% in July 2020

are making plans to attend a cultural event

↑ 33% up from 25% in July 2020

attended a cultural event in the past fortnight

↑ 18% up from 8% in July 2020

are purchasing tickets for shows or performances

→ 73% stable with 73% in July 2020

expect to attend the same or more than before, long-term

↑ 81% up from 70% in May 2020

say face masks would encourage them to attend

↓ 72% down from 78% in July 2020

are participating in online arts and culture activities

→ 42% stable with 44% in July 2020

of those online are paying for digital experiences



PATTERNMAKERS



AUDIENCE
OUTLOOK
MONITOR



Summary

Right now, most Sydney audiences are at least somewhat comfortable to attend most types of cultural venues, but particularly museums and galleries (93%), community art spaces (83%) and outdoor events (69%).

Qualitative feedback shows that safety measures implemented by cultural venues are helping Sydney audiences feel safe, particularly social distancing.

While there are cases of community transmission in New South Wales (NSW) and Victoria (VIC), audiences remain cautious about spaces with dense or large crowds, and many currently prefer digital programs. 10% of Sydney audiences say they can't foresee attending until there is no risk to them at all.

When ranking their preferences for attending a cultural event today, the largest proportion (37%) of Sydneysiders selected digital programs as their first preference right now, however this option is polarising. Many prefer outdoor events (33%) as summer approaches, but some point out that they remain concerned about social distancing in open-air venues too. A sizeable proportion would select indoor venues with fixed seating as their preferred mode of attendance (28%), as this ensures social distancing is enforced among patrons.

While not everyone enjoys digital programs, across the country Sydney audiences remain among the most highly engaged online and are the most likely to be paying for online experiences, indicating a strong market for digital offerings in future.

When reflecting on how the sector can assist in the community's recovery from the pandemic, key themes include reanimating public places, connecting socially and processing their experiences. Long-term, Sydneysiders feel hopeful about the role of arts and culture in social change and widening inclusion in cultural experiences.

Introduction

This report has been prepared by research agency Patternmakers, with support from City of Sydney. It is based on data collected in September 2020 from 2,304 past attendees of cultural events in Sydney, as a part of the Audience Outlook Monitor.

Beginning in May 2020, the Audience Outlook Monitor 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 data from Phases 1 and 2 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.

Specific insights from Sydney audiences are presented online at:
<https://www.thepatternmakers.com.au/sydney-needs-culture>

Read on for the key Phase 2 findings related to Sydney audiences.

Current conditions

Sydney audiences are growing accustomed to restrictions, but remain cautious about some types of public interaction

Between July and September 2020, many Sydneysiders became slightly more cautious about visiting public places. The proportion who are at least somewhat comfortable using public transport decreased from 66% to 61%, and those who are comfortable eating at a local restaurant decreased from 88% to 82%.

They are also among the most cautious nationally. For instance, Sydney audiences are less likely to feel comfortable eating at a local restaurant (82%, compared to 85%

nationally), going to a local cinema (61%, compared to 70% nationally) and exercising at a gym (40%, compared to 53% nationally).

This level of caution is expected to continue while the state works at controlling local outbreaks. However, cultural venues stand out as places that many Sydneysiders feel comfortable in.

Returning to events

The proportion of Sydneysiders attending cultural events has increased

Around the country, audiences are increasingly returning to cultural events, with 29% attending at least one kind of cultural event in the fortnight before data collection (increasing from 24% in July 2020).

In Sydney, 33% of audiences attended a cultural event in the past fortnight, which is slightly higher than the national average.

However, some remain committed to isolating themselves. At this time, the proportion of Sydney audiences who cannot see themselves going out until there is no risk of virus transmission has remained relatively stable (10% compared to 11% in May 2020).

Some Sydney audience demographics are more ready to attend than others

The overall risk tolerance for Sydney audiences has remained consistent since July 2020, with 25% saying they are 'ready to attend, as soon as permitted'. This proportion is slightly lower compared to audiences in inner regional NSW (28%), in line with concerns about community transmission in metropolitan areas at present.

Key demographic groups in Sydney that are less 'ready' to attend right now include:

- ▶ People with a disability — 19% are ready to attend, compared to those without a disability (26%)
- ▶ People over 75 — 22%
- ▶ Parents and caregivers to children — 24%



Groups that are more ready to attend include:

- ▶ People who speak another language — 30%
- ▶ Young audiences (Under 35) — 29%

Only a small sample of First Nations respondents is available to analyse in Sydney. National analysis conducted earlier in the year with a larger sample showed that First Nations audiences see culture as more important to their lives, on average, and are more likely to be ready to attend. However, there is a group of First Nations respondents that feel vulnerable due to underlying health conditions. They are therefore also more likely to say they'll stay away until there is no risk to them.

A majority of Sydney audiences are now comfortable to attend a range of cultural venues

Compared with attitudes in July 2020, Sydney audiences are feeling consistent levels of comfort walking around a museum or gallery (93%, stable since July) visiting a community art space (83%, stable with 85%) and attending a comedy club or live music venue (24%, stable with 26%).

They are also demonstrating similar rates of confidence in attending venues seating 50 people (83%, stable with 81%), 100 people (70%, stable with 68%), 250 people (51%, stable since July) or even 500 people (37%, stable with 38%), assuming they were open and following safety guidelines.

However, Sydney audiences (26%) are showing a similar level of caution to Melbourne audiences (26%) in visiting hands-on exhibits at an interactive museum.

Further probing about social distancing in Phase 2 showed that different social distancing arrangements had a greater effect on attendance. In September, 93% of Sydney audiences would be at least somewhat comfortable to attend venues with 4 square metres per person enforced. This drops to 69% under a scenario of 2 square metres per person, and just 7% with no social distancing at all.

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

In May 2020, face masks were a polarising issue, with audiences divided on whether this measure would encourage (36%) or discourage (27%) them from attending cultural events.

Now, in September 2020, support for face masks is particularly high among Sydney audiences, with a clear majority (81%) saying they would feel encouraged to attend an event if they were mandatory. By contrast, comfort with face masks is lowest in Perth (47%) and Adelaide (47%).

Another safety measure with higher levels of support is temperature checking upon entry to venues, with 78% of Sydney audiences now saying this would make them more comfortable, compared to 70% in May 2020.

When they do go out again, the majority of Sydney audiences plan to spend the same amount as before the pandemic

In September 2020, the majority of Sydney audiences expect to spend the same amount or more on tickets, admissions, subscriptions and memberships when they return to cultural events (85%), and 15% expect to spend less (Figure 1).

The proportion of Sydneysiders who say they intend to spend more than before the pandemic (10%) has remained stable since July 2020 and consistent with inner regional NSW audiences (10%).



Figure 1: When you feel safe going out again, do you anticipate your overall spending on arts & culture tickets, admissions, subscriptions and memberships will be ...(Lower than before the pandemic) By major city. (September 2020) n=8,626



There are mixed views about what spaces feel safest to Sydney audiences right now

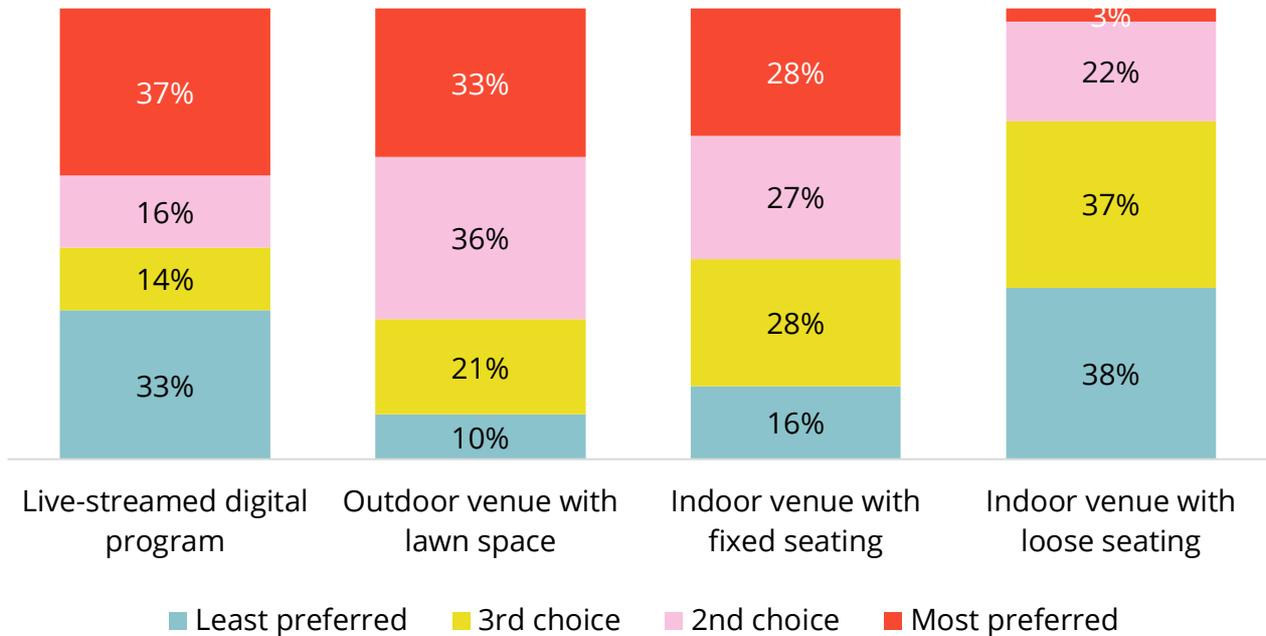
Respondents were invited to rank a number of options for attending cultural events today:

- ▶ An indoor, flat-floor space with loosely placed chairs for 100 people to spread out
- ▶ An indoor hall with fixed seating for up to 100 audience members seated according to current social distancing guidelines
- ▶ An outdoor venue with lawn space only (bring your own blankets or lawn chairs), assuming there is plenty of space for 100 people to spread out
- ▶ A live-streamed digital program that you can watch from home.

The results from September 2020 (Figure 2 & 3) show that not everyone agrees on their preferred choice.



Figure 2: Rank the four options for attending a cultural event today (in order of preference for Sydney audiences). n=2,181



Sydney audiences are favourable to both outdoor events and digital streaming

The largest proportion (37%) of Sydney audiences selected digital programs as their first preference for attending a cultural event today, as this feels the safest.

One Sydney respondent shared,

‘Digital live stream is definitely most comfortable at the moment, but I’m happy to attend events that are socially distanced’.

Another person shared,

‘More online interactive events — great for people who cannot afford or access [live events] e.g. [people in] aged care’.

While digital programming feels safest, one-third (33%) of Sydney audiences selected this option as their least preferred mode of engagement.



One person said,

‘While the digital platforms offer the safest option, they do not provide the same experience as in-person shows’.

Compared to sentiments in July 2020 (28%), a slightly higher proportion (33%) of Sydney audiences now rank an outdoor venue with open lawn space as their first preference for attending a cultural event today. Many people said that open-air, outdoor spaces feel safer by enabling more ventilation.

As one person shared,

‘Outdoor, free-range seating would provide more people options to feel safe in enjoying a performance than traditional indoor fixed seating concert halls’.

Another said,

‘The trip on the ferry to Cockatoo Island had enough room to feel safe. The openness of the venues helped to make me feel safe. The closed rooms were limited to the appropriate number of people and this was controlled by volunteers. The open-air cafe and restaurant had sanitizers and felt safe’.

When attending indoor venues, audiences prefer fixed seating arrangements

Sydney audiences, like many across Australia, would prefer assigned seating over loose or no seating when attending indoor venues, to better control social distancing.

As one person shared,

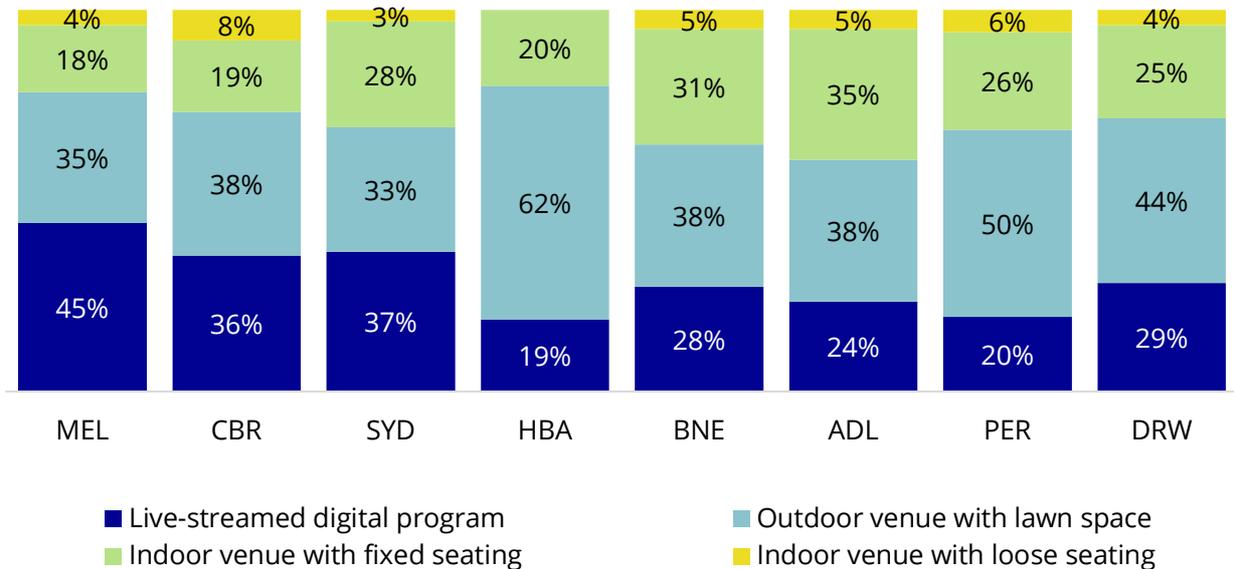
‘I think fixed seating provides the least room for human error or flippancy around the guidelines. I would be willing to trust a venue to fix seats at appropriate distance and limit the number of tickets for that performance’.

Another agreed, sharing,

‘It is embarrassing/uncomfortable to have ask people to keep their distance, so I prefer to have the seating organised by the venue to avoid difficult conversations’.



Figure 3: Rank the four options for attending a cultural event today (First preference) (by major city). n=8,229



Audience experiences

Safety measures are helping Sydney audiences feel safer attending venues

Safety measures have helped reassure audiences who have returned to cultural events in Sydney recently. Reflecting on their experiences, several people shared their appreciation for the procedures implemented by event and/or venue organisers.

As one respondent commented,

‘[I] went to the MCA - they had everything well organised and well thought out. [I] felt very comfortable being there’.

Social distancing guidelines have received the most positive feedback, particularly from attendees who had visited seated venues.

As one said,

‘The space. It was at Cockatoo Island for [the] Biennale’.

Clear communication ensures social distancing is successfully applied

Clearly communicated guidelines were mentioned by several respondents as important in helping them have a safe and enjoyable experience.

As one person shared,

‘Clearer guidance on mingling in foyer, some people do not respect the need for space’.

When asked how their experience could have been improved, one NSW respondent would have liked more verbal instruction from staff,

‘Decent signage - simple language, even multiple languages’.

Future attendance

51% of Sydney audiences are making plans to attend cultural events

In September, around half (51%) of Sydney audiences are making plans to attend an event of any kind (increasing 39% in July 2020). Among those who have made plans, Sydney audiences intend to visit a museum or gallery (27%) or attend a cinema (18%) in future, which are the types of venues most likely to be open.

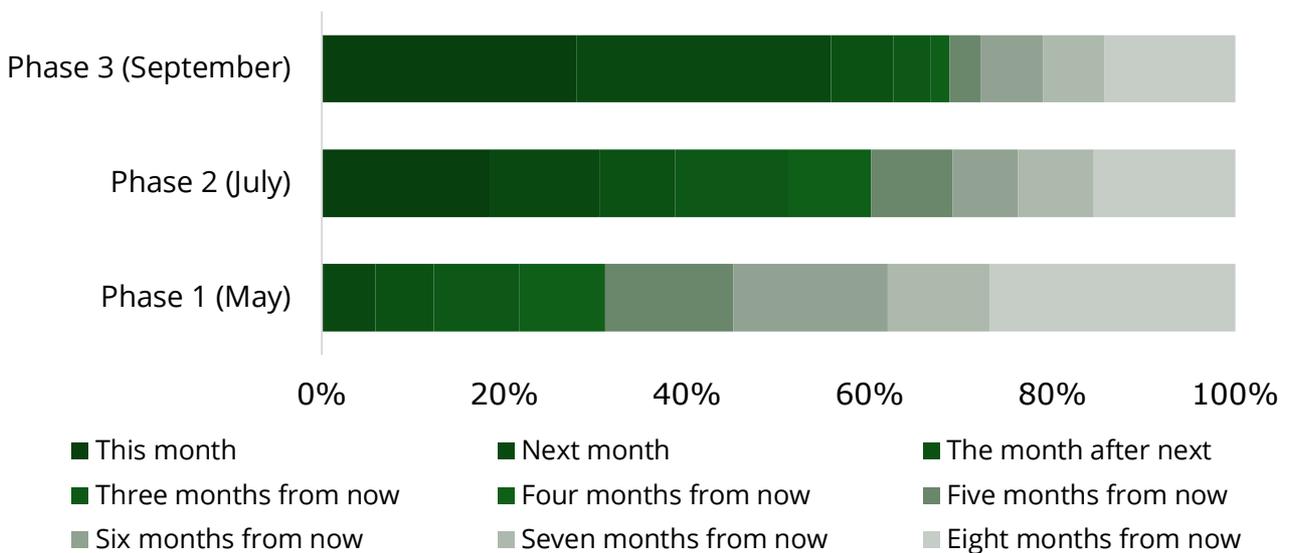
In particular, the proportion who plan to attend a live performance has increased significantly (26%, up from 12% in July 2020), consistent with trends nationally.

Around the country, the proportion making plans to attend cultural events broadly follows consumer confidence about public interaction in general. For instance, the proportion making plans at present is highest in major cities with no or low recent cases of the virus, such as Perth (67%) and Adelaide (63%).

Across the country, ticket-buying horizons are shorter than they were in both May and July 2020. The largest proportion of ticket buyers are buying tickets less than one month out, both nationally (52%) and in Sydney (41%) (Figure 4).



Figure 4: In the past fortnight, did you purchase tickets for one or more live shows or performances that are scheduled for...? (Sydney audiences, May, July & September 2020) n=887



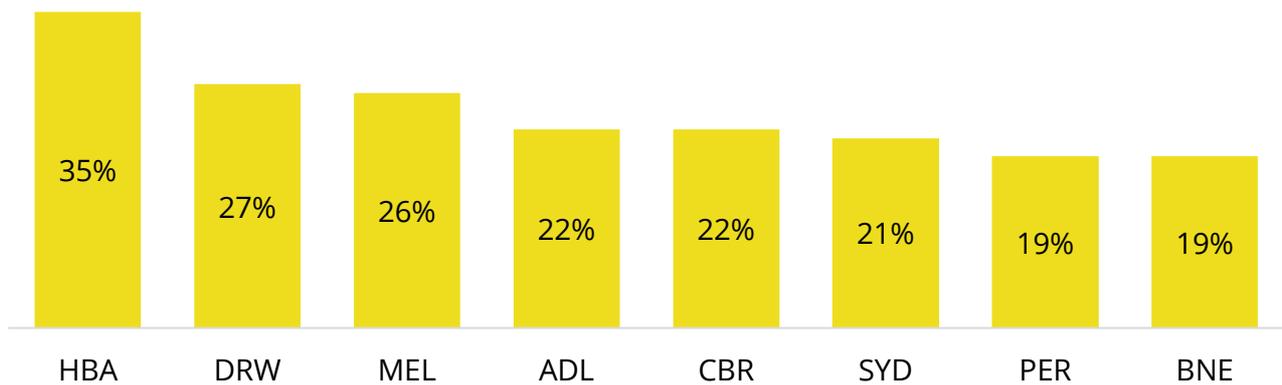
Some Sydney audiences remain slightly pessimistic about returning to events long-term

In Sydney, the proportion of past attendees who believe the pandemic will negatively affect their attendance long-term increased between May (14%) and July (21%) and has remained stable at that rate in September 2020 (Figure 5).

The views of Sydney audiences are consistent with the national average for audiences in major cities (22% expect to attend less).



Figure 5: How will your attendance at arts and cultural activities be affected by the pandemic in the long-term, given your personal circumstances? (Proportion who expect to attend less) (By major city) n=8,681



Participating at home

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

Past attendees in Sydney are continuing to participate in creative activities while at home, such as listening to music (90%, stable since July 2020) and reading for pleasure (91%, up from 88%).

Smaller, but consistent, proportions are making art or craft (35%, stable with 36% in July), making music (23%, stable with 23%) and making videos or doing photography (21%, stable with 22%).

Participation in some online activities has decreased, while other activities are steady

In terms of the types of online experiences people are engaging with, most types of experiences are attracting similar rates of engagement to July 2020. Participation in pre-recorded performances and events continues to reach the largest proportion of audiences, though this rate has fallen slightly from 56% to 48%.

The proportion of audience members who are doing online classes or tutorials (33%) and seeing virtual exhibitions or tours (18%) has remained stable.

When asked if they, or anyone they know, has discovered a new artist, artwork, or performance online, 28% said they had, a slight drop since July 2020 (33%), and 13% say they know someone who has, down from 16% in July.

When asked if they are doing online arts and cultural activities more or less frequently than before the pandemic, 56% of Sydney audiences say they are engaging online more frequently, consistent with July (57%). Compared with July, a similar proportion expect to continue to do online arts and cultural activities after the pandemic ends (70%, stable with 69%).

Sydney audiences are the most likely to be paying for digital offerings

When asked if they have paid for an experience online, 42% of Sydney respondents said they have, compared with 44% in July and 39% in May 2020.

The rate of donation appears stable (23% compared to 25% in July), as is the proportion subscribing to digital platforms (10%, compared with 12%). The proportion paying for single pay-per-view experiences increased between May (14%) and July (23%) and has remained stable in September (23%).

The proportion of those paying who have spent over \$100 in the fortnight before data collection (2–6 September), has remained stable (40%, compared to 41% in July).

Describing the characteristics of the experience that made it worth paying for, many people express a desire to show their support. One person shared,

‘I paid for a couple of films as part of the Sydney Film Festival. The Film Festival is normally one of my highlights each year and I'd usually spend a few hundred \$ on it. Buying a couple of films was the least I could do’.

Another audience member commented,

‘I donated my Belvoir Theatre tickets as I have been a subscriber for a number of years, and I want to show my support. The arts industry has been so hard hit during COVID-19 that we should all be contributing if we can. I'm fortunately still in paid full-time work and can afford to support artists and the arts industry in some small ways’.

The role of the arts in rebuilding community

Arts and culture can rebuild connections by bringing people together

In July 2020, respondents were asked, 'Thinking about the future, what role can arts & culture organisations play in your community, to assist with recovery from the pandemic?'

Several people noted that arts and culture organisations will play an important role in rebuilding connections between people. As one commented,

'Providing a space for people to meet and see each other. Be an affordable distraction or tell a story to give us hope. Allow us to express ourselves'.

Another agreed, commenting that shared experiences through art and culture will be vital,

'They are a great way for the community to come together after being so isolated. They are a way to tell and share stories we all have of living in such a changeable world. They are a way of reassuring us that we are human and experience similar things e.g. through a theatre performance, film or art show'.

Another thought that community spirit could also inspire content of new works,

'It would be good to reflect the quality of people's positive reactions to their fellow neighbours, where many checked on the elderly if they needed anything: ..shopping...food...company from a window etc.'

Art and culture will help audiences process the pandemic

Some feel that storytelling will help audiences make sense of the pandemic. As one said,

'I think that people will look to the arts community to express the experiences of people during the pandemic in a way that we can access and use to help process our own experiences. It's necessary for the mental recovery of society'.

Another audience member agreed, suggesting,

‘Performances or exhibitions of works from the pandemic era and other major events of the year (such as the bushfires and farming drought). Many people appreciate artists being able to express the feelings of the community in ways we cannot’.

Similarly, one said,

‘I’m hoping arts & culture will tell some stories that both reflect the pandemic and post pandemic world, but also [works] that don’t, so there is distraction and a break from that. It’ll especially be a time for happy, joyful, positive, kind content’.

Organisations and artists can work to amplify and celebrate marginalised voices

Some audience members encourage organisations to amplify marginalised voices, such as those from Black and First Nations communities. One person shared,

‘More work from First Nations artist. Inclusive work, stories, creative leaders, admin staff etc. who are Black POC.’

Another suggested,

‘Arts organisations provide community forums for meeting people, sharing resources and stories. They can encourage participation in current affairs and culture. For example, good First Nations programming at Sydney Festival has inspired some people including myself to become more involved in protesting black deaths in custody and other violence against oppressed groups’.

Affordable activities and events will widen access to arts and culture post-pandemic

The financial impact of the pandemic means audiences will be looking for affordable options for attending venues and events. On how organisations can assist in the recovery period, one person said,



'...Making theatre more accessible to people. Theatre tickets are expensive. Different price points. Earlier start times for people travelling from e.g. Western Sydney'.

Another shared,

'Perhaps discount tickets to get people back in. Not speaking for myself, but I imagine many people are struggling financially right now and may not be able to fork out \$100 for a show at the Opera House, for instance'.

Audiences want organisations to support artists and creatives in the recovery

Many audience members highlighted that supporting artists and creatives coming out of the pandemic will be vital to rebuilding the community. Some mentioned supporting local artists,

'It would be great to see a focus on local works, even if they're not super refined'.

'Our arts should be local artists as a priority!'

Others noted that emerging artists will need assistance, as one said,

'More funding for emerging artists to create content/art more relevant for the community....Mentorship programs for emerging artists'.

Some will seek comedy to alleviate stress, fear, and uncertainty

When reflecting on types of events they would support and see, several people mentioned comedy as a relief from the stress, fear, and uncertainty of the pandemic. One commented,

'More comedy shows for overall morale and wellbeing'.

Another shared,

'Just start running [events] again. Maybe some comedy shows based loosely on the pandemic and how everyone panicked and bought toilet paper etc.'.



Sydney audiences are favourable towards public art in public places

Some specified that they would be favourable to outdoor events when programming resumes. One mentioned,

‘Exhibitions like Sydney Biennale feel like a safe return to art with open air spread out across the city’.

Another encouraged,

‘Make art available 24/7, in broad daylight. Don't hide it away in buildings. Make it a part of everyday life. More art in cafés on rotation. In shopping centres’.

Audiences are looking forward to arts and culture that will lift their mood

There is a view among audiences that arts and culture is integral to the mental health and wellbeing of the community. One shared,

‘The arts help with mental wellbeing, which results in physical wellbeing, which helps to fight diseases in general’.

Another agreed, commenting,

‘Arts and culture organisations play a big role in a community: meeting people, taking you to another place, laughter, appreciating art and culture in a beautiful way’.

When sharing how arts and cultural organisations can assist in recovering from the pandemic, one said,

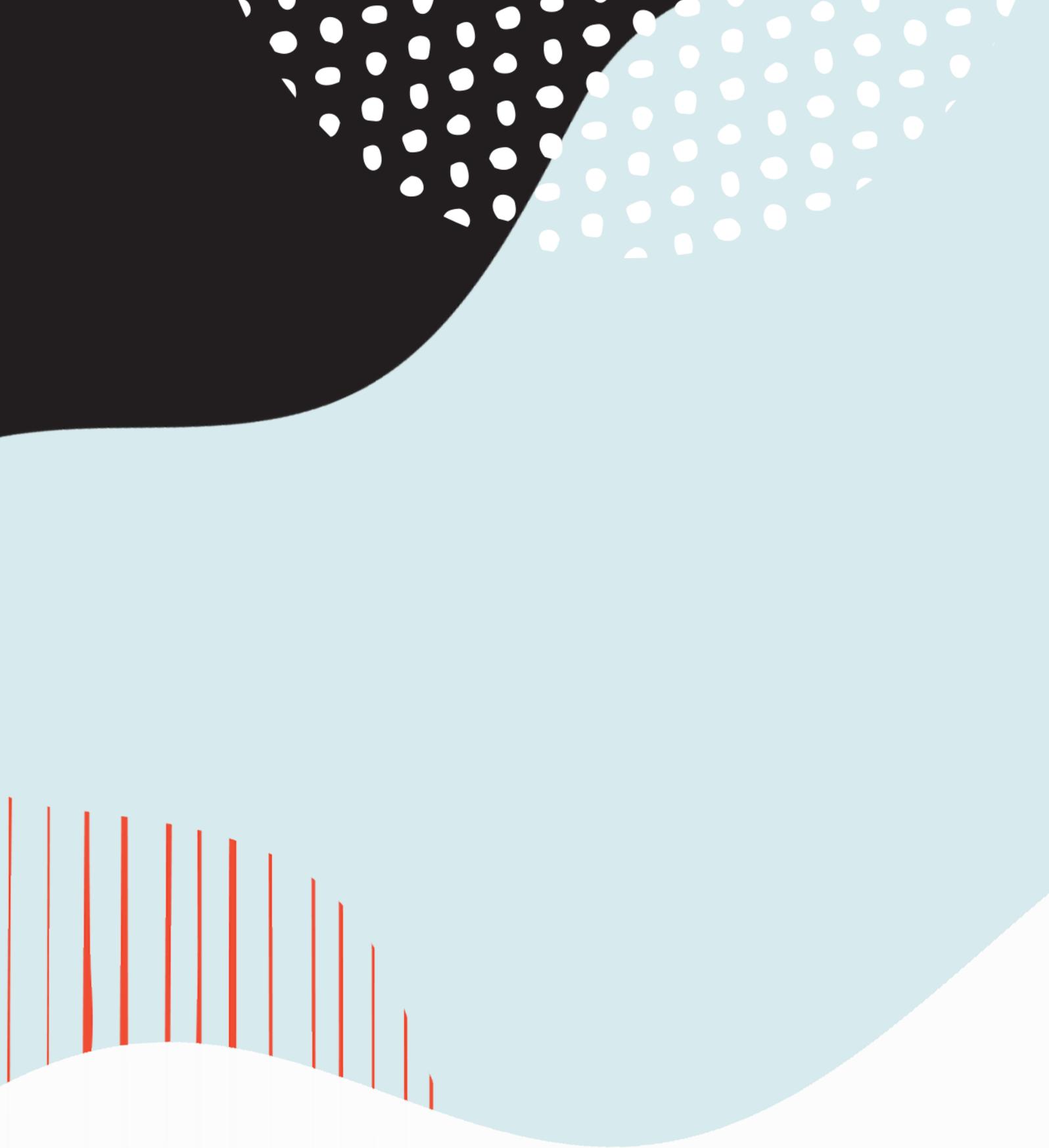
‘Celebrating community identity, bringing people together, distracting from COVID-19/bad news stories and assist with mental health/wellbeing’.

Another said,

‘To give us some happiness, joy, laughs. To bring us together. To help us understand what happened, what we learnt, what's important, what changes we need to make’.



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.



AUDIENCE
OUTLOOK
MONITOR

