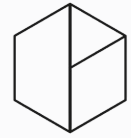


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PATTERNMAKERS



JULY 2021

# New South Wales Snapshot

Audience Outlook Monitor



## Summary

### **The July Greater Sydney outbreak is a major setback for live attendance and many wait for conditions to improve**

The latest results show that in-person attendance at arts and cultural events in New South Wales (NSW) halved in early July as increasing COVID case numbers led to lockdowns in Greater Sydney. The state average attendance declined from 76% in March 2021 to 34% in July 2021.

Audiences in NSW were the most likely in the country to have had plans impacted by lockdowns or restrictions (84%) in the past four months, and many expressed distress, disappointment and frustration over the continued impact of cancellations, while empathising with artists and teams affected.

The proportion who are ready to attend cultural events 'now or as soon as it is permitted' remains just over half (51%, down from 67% in March), while 45% state they will attend when reasonably confident the risk of transmission is minimal (up from 31% in March). Only 5% cannot foresee going out until there is no risk (up from 2% in March).

### **Audiences are eager to return – though the risk of lockdowns may affect decision-making**

Despite limitations on attendance, half (50%) of audiences reported that they had spent more than \$50 on tickets to in-person activities in the fortnight before data collection (7–11 July), which is similar to states which were not locked down at the time of data collection, such as Victoria (VIC) (47%) and Western Australia (WA) (52%) – a positive sign that the appetite for arts and culture is still present.

Nearly two-thirds (64%) of NSW audiences continue to make future plans to attend events in the next 12 months, though most are making plans for later in the Spring or Summer.

Audiences are increasingly conscious of the risk of lockdowns (54%, up from 34% in March 2021) and the risk of contracting or transmitting the virus (46%, up from 32%) and some say they'll prioritise local events or wait until the last-minute to make decisions.

In promising signs for the future, almost three-quarters (72%) expect to spend the same or more on arts and culture than they did previously – and the majority (89%) also believe that the vaccine rollout will be successful enough to allow normal activities to resume within 12 months.

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## NSW audiences are the most likely to participate in arts and cultural experiences online – and 57% see a long-term role for digital participation

Half (50%) of NSW audiences participated in an online arts or cultural activity (stable with 49% in March 2021) – the highest participation rate in the country.

With in-person attendance difficult or impossible for many NSW audience members, many audiences continue to enjoy online content – citing comfort, safety, accessibility and the ability to attend events within and outside of the state as reasons for participating. However, the data does not show a return to the digital participation boom of the early pandemic.

In early July, around a third (35%) of NSW audiences were paying to access online content (down from 42% in March). NSW audiences were among the most likely to pay for digital programming nationally, and half of these audience members spent over \$50 on online content in the fortnight before data collection (48%, stable with 49% in March) – suggesting there is an enduring market for quality digital works.

When asked what role digital participation plays in their lives when in-person attendance is possible, 57% of NSW audiences reported that digital programming plays a small (45%) or substantial (12%) role, which is among the highest nationally.

## Introduction

# This report summarises insights from almost 2,200 audience members in New South Wales

This New South Wales (NSW) Snapshot Report outlines key findings from the July 2021 phase of the Audience Outlook Monitor in Australia (Phase 5), based on responses from 2,170 audience members connected with organisations in New South Wales.

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 130 arts and culture organisations, including museums, galleries, performing arts organisations and festivals.

On 7 July 2021, participating organisations simultaneously sent the Phase 5 survey to a random sample of their audience – defined as those who had attended an arts or cultural event in person since January 2018. Data collection concluded 4 days later, on 11 July. The Greater Sydney area was two weeks into an ongoing lockdown (beginning 25 June) during the data collection period.

Almost 9,000 audience members responded across the country, allowing in-depth comparisons of trends in different jurisdictions (noting that results for Tasmania should be interpreted with caution due to its small sample size). An asterisk is used to denote small sample sizes (\*).

In addition to this Snapshot Report, the July 2021 results are freely accessible in an 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](http://www.thepatternmakers.com.au/covid19)

Read on for the key July 2021 findings in NSW.

## Current conditions

# Comfort with public activities in NSW has been shaken by the state's ongoing outbreak

Although the majority of audience members in NSW remain at least somewhat comfortable participating in public activities, confidence has been shaken by the ongoing outbreak of the Delta variant in Greater Sydney.

Audience comfort is down by around 20 percentage points for all public activities, although the majority of audience members still felt somewhat or very comfortable eating at a local restaurant (72%, down from 97% in March 2021), going to a local cinema (60%, down from 88%), using public transport (64%, down from 86%). A smaller proportion felt at least somewhat comfortable exercising at a gym (43%, down from with 63% in March 2021), or flying domestically on a commercial airline (50%, down from 68%).

At the time of data collection comfort with public activities was generally higher in regional or remote NSW than in major cities: 9 in 10 (91%) regional/remote respondents were at least somewhat comfortable eating at a local restaurant (compared to 70% of metropolitan respondents) and 79% were at least somewhat comfortable going to a local cinema (compared to 58% of audiences in major cities).

## Attending cultural events

### Live attendance in NSW has halved since March 2021, with access and opportunity impacted by lockdowns

In July 2021, a third (34%) of NSW audiences had attended an arts or cultural event in the two weeks prior to data collection (7-11 July 2021). This proportion had decreased from 76% in March 2021, with Greater Sydney audiences locked down during this two-week period, and other parts of the state affected by restrictions and the flow-on impacts of the Sydney lockdown. (Figure 1).

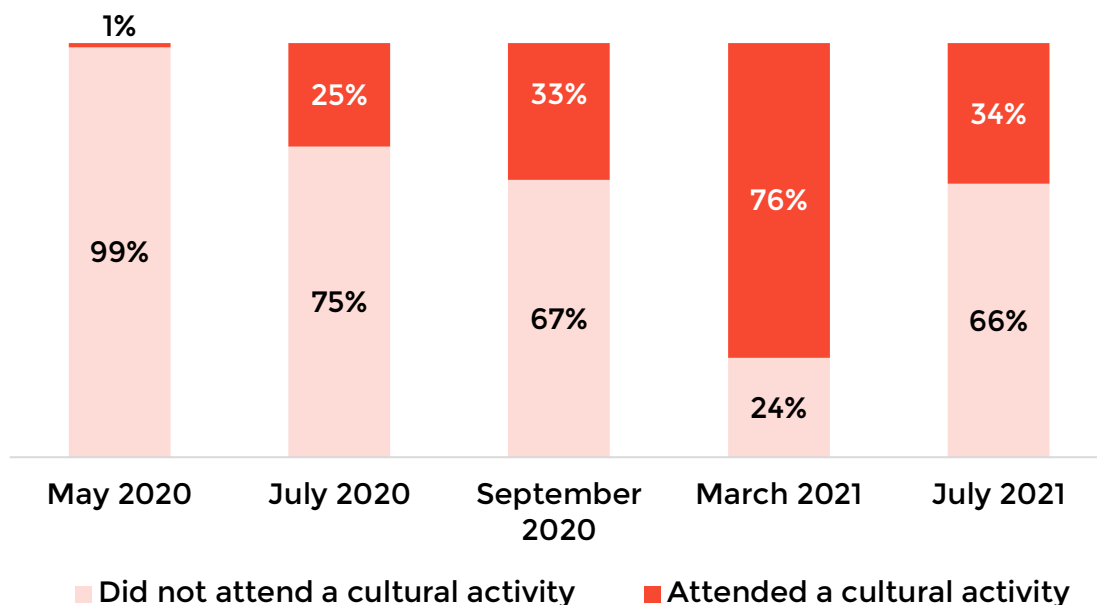
Attendance rates were higher in regional and remote NSW (56%) compared to the major cities (31%), with regional/remote attendance in line with the national average (53%).

Although opportunities to attend were fewer for NSW audiences, the kinds of events they attended were consistent with March 2021. Audiences were most likely to attend a live performance (17%), visit a museum or gallery (15%), or attend a cinema (13%).

Attendance rates in NSW were the lowest in the country, behind VIC (56%) and Western Australia (WA) (53%) – NSW being the only state to be in ongoing lockdown during data collection.



Figure 1: In the past fortnight, did you do a cultural activity in-person (not online)? (NSW) July 2021 (n=2,170)



## Half of NSW audiences spent over \$50 on tickets to cultural events in early July – suggesting the appetite for arts and culture is still present

Although live attendance has been inhibited by lockdowns, 50% of NSW audiences reported that they had spent more than \$50 on tickets to in-person activities in the fortnight before data collection.

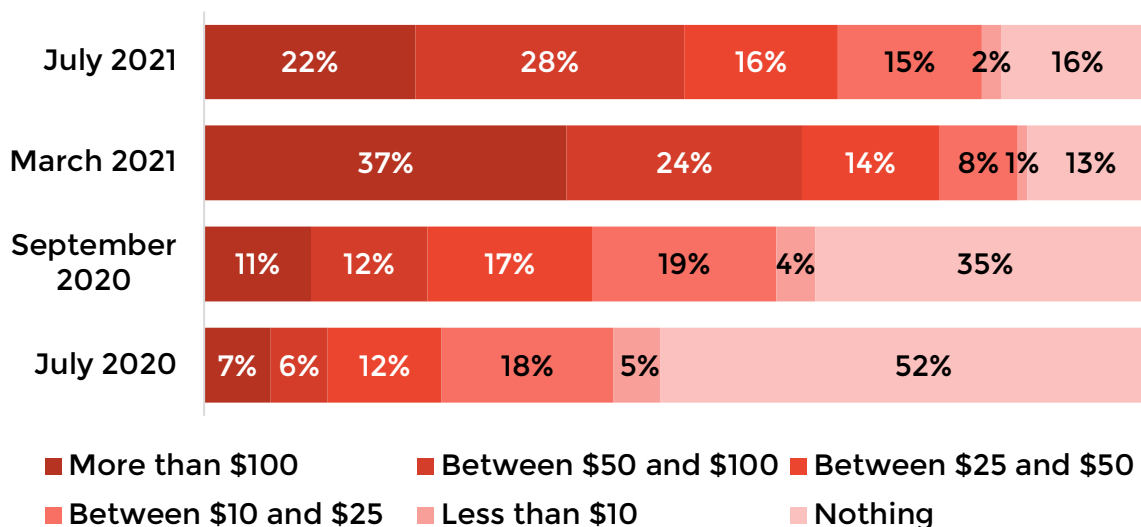
This proportion has decreased since March 2021 (when 61% of audiences spent over \$50 on tickets) but remains sizeable – especially considering that many respondents were in lockdown at this time. (Figure 2).

Surprisingly, this proportion was similar to that of audiences in states which were not locked down at the time of data collection – such as those in VIC (47%) and WA (52%).

More than 8 in 10 NSW audience members (84%) spent at least some money on tickets to arts events, down slightly from March 2021 (87%).



Figure 2: Can you share with us your total spending on arts & culture experiences in the past fortnight? (NSW) July 2021 (n=680)



## Comfort at arts venues has been affected by the outbreak - but half of audiences say they are willing to return to events as soon as they are able

Audience confidence has been affected by the recent outbreak, with comfort down from March 2021 across all venue types.

The majority of audience members remain at least somewhat comfortable at most venue types, including museums or galleries (84% at least somewhat comfortable, down from 98% in March 2021), community art spaces or studios (79%, down from 95%), outdoor festivals or concerts (78%, down from 91%) and large theatres or concert halls (72%, down from 90%).

Comfort is lower at comedy clubs or live music venues (37%, down from 49% in March), and hands-on exhibits at interactive museums (37%, down from 51%).

Confidence has been affected to a lesser extent in remote/regional NSW than in major cities – likely due to the concentration of cases in Greater Sydney – but has decreased by 5 to 10 percentage for all venue types, with the exception of hands-on exhibitions (49%, stable with 51% in March 2021). For example, the proportion of remote/rural audiences at least somewhat comfortable attending a large theatre or concert hall has declined to 79% from 87% in March 2021 but remains higher than that of metropolitan audiences (70%).

As the only state where respondents were in lockdown at the time of data collection, NSW was an outlier among the other states and territories, where comfort was generally higher.

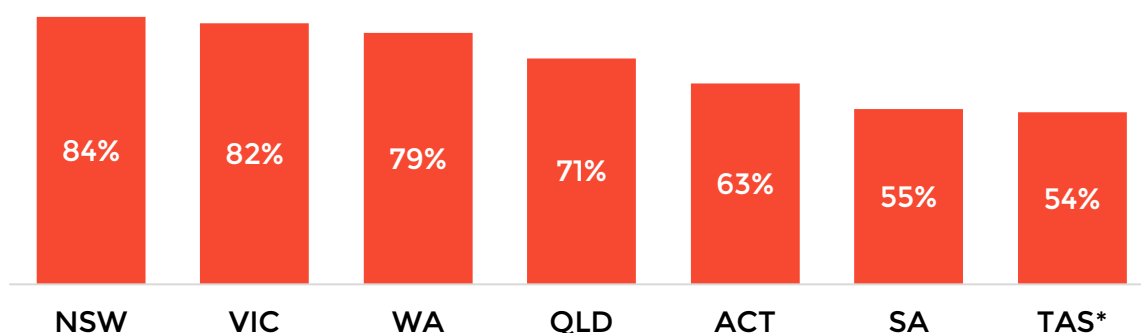
Promisingly, the proportion of NSW audiences who are willing to attend cultural events 'now or as soon as it is permitted' remains just over half (51%, down from 67% in March 2021). A further 45% state they will attend when reasonably confident the risk of transmission is minimal (up from 31% in March), and only 5% cannot foresee going out until there is no risk (up from 2% in March).

## Impact of lockdowns and restrictions

### NSW audiences are the most likely in the country to have had plans impacted by lockdowns

8 in 10 NSW audience members (84%) stated that their plans to attend arts and cultural events have been affected by lockdowns and restrictions over four months leading up to data collection (7-11 July). This was the highest proportion across the country, followed by VIC (82%), where audiences were locked down for a third time this year in May/June 2021. (Figure 3).

Figure 3: In the past four months, have your plans to attend in-person arts and cultural events been affected by lockdowns/restrictions? July 2021 (n=8,668)



When asked how they had been impacted by lockdowns, the majority of NSW respondents said that they lived in an area affected by lockdown/restrictions (73%), the event or venue was in an affected area (62%), or the artist they were planning to see was affected by lockdown/restrictions (61%). In a less common scenario, some NSW audiences chose not to attend the event due to the risk of travel delays or quarantine (10%).

These proportions were similar to other states which had been locked down prior to data collection, such as VIC, Queensland (QLD) and WA. They were least similar to states/territories which had not experienced significant outbreaks, such as South Australia (SA) and the Australian Capital Territory (ACT), where attendance was more likely to be inhibited by the risks related to travel rather than being locked down oneself.



## Audiences in regional/remote NSW experienced flow-on effects from lockdowns in metropolitan areas

NSW audiences in regional/remote areas were also much less likely to live in lockdown-affected areas themselves (21%, compared to 79% of metropolitan audiences) and more likely to say that their plans were impacted because the artist they were planning to see was affected by lockdowns (70%, compared to 61% of metropolitan audiences).

A significant proportion (52%) of regional/remote audiences stated that their plans were impacted because events took place in lockdown-affected areas - with the Greater Sydney lockdown causing flow-on disruptions for audiences around the state.

One audience member stated,

'I had to rearrange most of my plans as I live in a regional area and had to stay away from locked-down areas.'

Another said,

'I have cancelled trips to Sydney hung around various performances.'

## Risk of lockdowns and virus transmission are major barriers to attendance for NSW audiences

In March 2021, NSW audiences were asked 'Can you tell us if anything is preventing you from attending in-person arts and culture events as you used to in the past?'

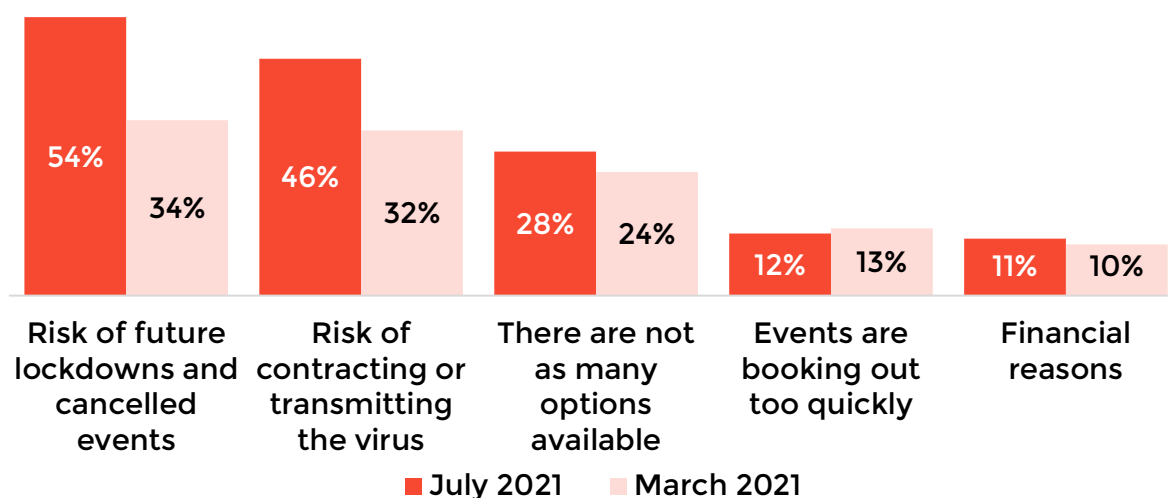
In July 2021, they were asked whether similar factors would affect their attendance over the next 12 months. In the coming year, NSW audiences are most likely to be deterred from attending by the risk of future lockdowns and cancellations (54%, up from 34% in March 2021) and the risk of contracting or transmitting the virus (46%, up from 32%). (Figure 4).

Alongside audiences from VIC (55%) and the ACT (57%), NSW audiences were the most likely to cite the risk of lockdowns as a barrier to attendance.

Audiences in NSW (46%) and the nearby ACT (48%) were the most concerned about virus transmission, while audiences in SA (27%) were the least likely to name it as a factor inhibiting attendance.

That these factors were of particular concern to NSW audiences is likely related to the ongoing outbreak of the Delta strain, but other barriers were at play as well – such as the fact that there are not as many options available (28%, up from 24% in March), that events are booking out too quickly (12%, stable with 13%) and financial reasons (11%, stable with 10%).

Figure 4: Can you tell us if anything is preventing you from attending in-person arts and culture events as you used to in the past? (select up to three) (NSW) July 2021 (n=2,154)



## Recent lockdowns and cancellations have been difficult for NSW audiences, but many are thinking of the artists and venues affected

When asked how their experiences with lockdowns had impacted them, audiences expressed a range of reactions: many were disappointed, some frustrated and others expressed anxiety about the continuing effects of the Delta strain on arts-going behaviours. One audience member shared,

‘I understand and accept the safety concerns, but can't help my ensuing disappointment and that on behalf of the performers who have invested so much.’

Another said,

‘They have made me feel more anxious and depressed, because these events give me joy and are something so vital in my life to look forward to. I don't have much money to put towards these activities, so when I book them, it's after much thought and a lot of careful saving.’

Some NSW audience members suggest that repeated lockdowns have made them more wary of booking events in the future – and it may take time to rebuild their confidence. One stated,

‘I am no longer prepared to book ahead. If things lift after the current NSW Lockdown it will be a while before I will be prepared to book in advance due to the uncertainty about lockdowns and other restrictions.’

As a positive sign, many NSW audience members took this opportunity to emphasise their continued commitment to the arts, their empathy with the artists affected and their willingness to make the best of this difficult situation. One stated,

‘Yes, it's disappointing! I feel most sorry for the venues. I have actively sought to support local arts and culture post-COVID including successfully attending a number of Sydney Festival events earlier in 2021. I would prefer to keep my tickets to a rescheduled event rather than have the event cancelled and refunded entirely.’

## Nearly two-thirds of NSW audiences continue to make future plans to attend events

Despite the disruptions and uncertainty caused by recent lockdowns, the majority (64%) of NSW audiences continue to make firm plans to attend in the future (down from 82% in March 2021).

The kinds of cultural events NSW audiences had planned to attend in July were consistent with March 2021, with the largest proportion of audiences planning to attend a live performance (50%), visit a museum or gallery (32%) or visit a cinema (24%).

## NSW audiences may be looking further into the future to book events

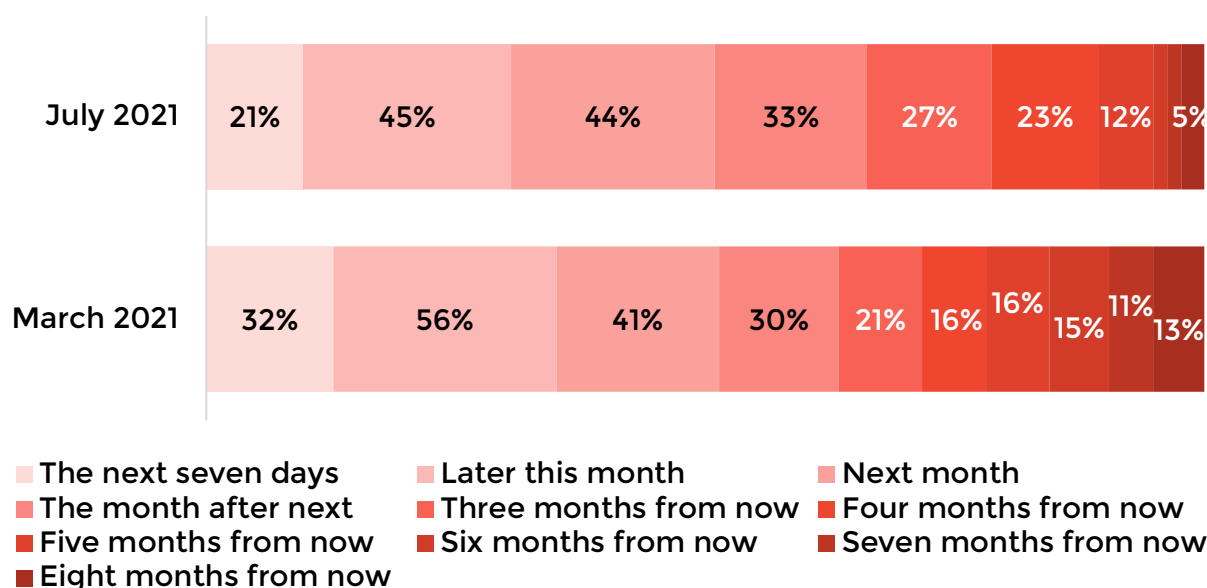
The July 2021 findings suggest that NSW audiences have changed their approach to booking future events somewhat since March.

In July, a smaller proportion of NSW audiences were booking events for the next seven days (21%, down from 32%) or next month (45%, down from 56%). Instead, audiences were slightly more likely to book events the month after next (44%, up from 41% in March) or three months from now (33%, up from 30%) – and increasingly likely to book events four months (27%, up from 21%) or five months ahead (23%, up from 16%). (Figure 5).



Given the difficulty of finding and attending events during an ongoing outbreak, it follows that fewer NSW audience members are booking events in the near future. However, the increasing inclination towards bookings later in the year suggests that audiences may be compensating for this uncertainty by looking further into the future.

Figure 5: In the past fortnight, did you purchase tickets for one or more live shows or performances that are scheduled for...? (NSW) July 2021 (n=694) and March 2021 (n=1,561)



## However, some audience members deal with uncertainty by making last-minute bookings and keeping it local

To avoid having events cancelled or plans changed, some audience members are electing to make last-minute bookings and prioritising events within their local area.

As one NSW audience member shared,

‘I will continue to wait until the last minute to book things, or go to things that don't require a booking - like going to a museum - so I can see what the conditions are at the time.’

Another said,

‘During the current Sydney lockdown three scheduled performances I had booked have been cancelled to date, one of which I had rebooked after it was also cancelled in March 2020. Makes planning ahead very difficult, and I’m now reluctant to book earlier than the day of the performance.’

Other audience members have suggested that restrictions on interstate and international travel, and the possibility of future lockdowns or border closures, have led them to preference events in their local area. One stated,

‘It’s crazy, you book something, then one state closes its borders, then another opens but won’t let you back in, then they open, but YOU are locked down - because you were 500kms away from a hotspot location.’

One said that their response to the uncertainty surrounding lockdowns has been, ‘Local events. [Being] flexible with time.’

## Building confidence

### NSW audiences are happy to reschedule or rebook events – but say this process can cause stress without clear communication

When faced with event cancellations, the majority of NSW audience members said that they rescheduled or rebooked the event (54%). Around 3 in 10 (29%) requested a refund, while 26% donated the value of the unused tickets.

When booking tickets, NSW audience members looked for clear communication from venues, flexibility, and the option to refund or rebook tickets. One NSW audience member said,

‘Knowing you can get a refund or reschedule makes a lot of difference. Often the option to get a refund, because my plans have had to change, simply does not exist.’

Some audience members preferred events to be rescheduled rather than see them be cancelled altogether,

‘It is disappointing to see a scheduled event disappear - i.e. when it cannot be rescheduled, noting that there is a bigger impact on the artist/event organisers than audience.’

However, others have found that rescheduled events can be difficult to manage and prefer to have the option to refund tickets. One audience member shared,

‘I’m starting to find rescheduled events are clashing with other bookings.’

Audiences expressed satisfaction as to how NSW venues had handled cancellations and reschedules. One audience member reported,

‘My STC subscription has been very good at finding future shows to swap to.’

Another said,

‘With all the work rescheduling involves I have been very impressed with Opera Australia’s handling of the situation and am still hoping to see Attila.’

On the other hand, some audience members noted that the process of rescheduling events can be stressful – highlighting the importance of having transparent and simple processes for rescheduling and refunding, with policies outlined in advance. One audience member shared,

‘I’m getting more reluctant to book. A reschedule date didn’t work and I’m waiting for a refund to be processed (still waiting for a response after a week) – noting for struggling small companies one feels much more generous/forgiving than commercial shows.’

## **NSW audiences find check-ins, improved ventilation and mandatory mask policies encouraging amid the Delta variant outbreak**

COVID-safe precautions have become particularly important for many NSW audience members, given the outbreak of the highly infectious Delta variant in Greater Sydney.

When asked what safety measures would encourage or discourage NSW audiences to attend an event, the largest proportions said they would be encouraged by improvements to ventilation systems (85%) and the presence of check-in procedures (86%).

Almost 8 in 10 of NSW audiences (77%) also reported that they would be encouraged by requiring audiences to wear masks inside venues. Across jurisdictions, NSW audiences were the most in favour of mandatory mask-wearing, followed by the ACT (69%) and VIC (66%).

Only 9% reported that they would be discouraged by the presence of masks – the lowest proportion in the country. In other states, mandatory mask-wearing has been more polarising, such as SA (52% encouraged, 21% discouraged) and WA (51% encouraged, 23% discouraged).

7 in 10 (71%) NSW audience members said that they would be encouraged by limiting venue seating capacity to 75% and/or limiting capacity to allow 2 square metres per person (66%) – but many called for these limits to be executed rigorously and thoughtfully. One said,

‘Many places seem to feel limited capacity means everyone crowded together at the front is fine, and rest of venue is just wasted space.’

Furthermore, some audience members are concerned that capacity limits will not be enough to prevent the spread of the Delta variant. One said,

‘Seating distances and 75% capacity seating make no difference with regard to an aerosolized virus. Ventilation and air extraction and air turnover are key.’

Audiences felt less strongly about taking temperatures at the entrance to venues – although 59% of NSW audiences would be encouraged by the presence of this procedure, a further 31% felt neutral about it.

## **NSW audiences want to be informed in advance of COVID-safe policies – and want to see them in practice**

In addition to the above measures, NSW audiences stressed the importance of knowing the venue’s COVID-safety protocols in advance so they can make informed decisions. One said,

‘[I want to know] precise information on how the event is organised: number attending, use of masks, conditions of entry. In other words, tell me how the event is being organised safely according to health guidelines.’

Another wanted to receive:

‘Information about the percentage of the theatre being used and the strategies in place to deal with COVID-19. The Sydney Theatre Company has an excellent system in place and communicates superbly.’

Others emphasised that they wanted to see these protocols followed, monitored and consistently put into practice. One said,

‘I want to know that venue staff will remove anyone who isn't compliant. What's the point of preventative measures if they aren't enforced?’

## NSW audiences prefer venues with fixed seating – whether they are indoor or outdoor

NSW audiences were asked to rank their preferences for attending events over summer among a list of four different venue types. The largest proportion selected an outdoor venue with fixed seating (42%) or an indoor venue with fixed seating (43%) as their first preference, while only in five (21%) preferred an outdoor venue where audiences were free to walk around.

One audience member stated,

‘In the Delta (or similar variants) environment, any event with free movement among participants is not my cup of tea.’

Some responses were motivated by factors other than virus transmission – such as weather, or the quality of the experience. One audience member stated,

‘Indoor venues provide for better atmosphere, productions and the like. Outdoors become limited and have issues with weather, sound etc.’

## Planning for future attendance

### NSW audiences are favouring their usual programming, or light-hearted content - rather than works about the pandemic

When asked about the types of arts and cultural content that they would be attracted to over the next year, the overwhelming majority agreed that they wanted to see the same kinds of events they used to attend pre-pandemic (93% in July 2021, stable with 94% May 2020).

NSW audiences were less likely than in May 2020 to agree that they wanted to see ‘works that make sense of the pandemic’ (10% down from 27%), and more likely to be attracted to ‘light-hearted programs’ (31%, up from 20% in May 2020). One audience member shared,

‘[I want to see] happy things. Lots of happy songs and dances. No Shakespeare tragedies. No woman-dying operas. Bright coloured art exhibits. Talks about penguins. Balloons. Let's all have a carefree laugh!’



## Three-quarters of NSW audiences expect to spend the same amount or more on cultural events, consistent with March

When asked about their projected spending over the next 12 months, almost three-quarters (72%) of NSW audiences said they would spend the same amount or more on arts and culture activities, compared to before the health crisis started.

Promisingly, this proportion is stable with March 2021 (69%), when NSW had experienced several months of few to no cases. Audiences appear to be looking beyond lockdowns and restrictions when thinking about their expected spending - however, there remains uncertainty about the kinds of events that will be available and viable.

The proportion of NSW audiences who planned to spend more or the same was similar to that of audiences in VIC (73%) and higher than that of TAS (64%) and the ACT (68%). By comparison, SA (78%), QLD (78%) and WA (78%) had a slightly higher proportion of audiences who expected their spending to be the same or higher than before the health crisis started.

Of the 13% of NSW audiences who expected their spending to increase, many attributed this change to a desire to catch up on lost time and re-engage with NSW's cultural offerings. Others expressed a desire to support artists, venues and the sector after recent disruptions.

One NSW audience member said,

'Having them taken away has made me realise in a very real sense the value and richness arts and culture events and organisations bring to my life and my family's life. I am also aware of how painful this period has been because of close friends who have been so badly affected, directly, by these COVID-19 related disruptions.'

One stated,

'I moved to Sydney in order to be able to access arts and culture - just before the pandemic - and I have been missing them!'

However, 28% of NSW audiences suggested that they expected their spending over the next 12 months to be less than before the pandemic began.

When asked the reason for this change, some audience members cited personal circumstances such as finances, or ageing. Others suggested that the recent outbreak in Greater Sydney had shaken their confidence and lead to greater

health anxiety, or that restrictions and lack of opportunity had made them likely to attend fewer events. One stated,

‘I think the experience of the pandemic and lockdowns will take a while to let go of. Staying home is safer - on many levels. Facing so much uncertainty I think leads to not just a physical lockdown (safer within four walls) but a mental and emotional lockdown.’

While another said they would spend less, ‘because it isn't so easy or certain anymore.’

## Vaccination outlook

### COVID-safety protocols can help build confidence in the wait for vaccination

Many NSW audience members see vaccination as a key factor in their decisions to attend cultural events. When asked what was the most essential information cultural organisations could provide to help them decide whether or not to attend an event, many NSW respondents referred to vaccination in their responses. One said,

‘Sadly, I think it will depend on the vaccination numbers. If we could all be vaccinated quickly, arts and cultural activities will return with a vengeance, as we are desperate for them to return to normal.’

Another responded,

‘[It's] not really something the organisation can do to reassure me - it is more about level of vaccinated people in community and rate of community transmission.’

Some NSW audiences have suggested they won't return to events until vaccination rates are higher, with one commenting,

‘I still have some reluctance to resume normal activities until I see strong evidence that we have a high level of community vaccination in place.’

Another said,

‘I probably won't be attending many performances until most Australians have been vaccinated against COVID.’

## NSW arts audiences are getting vaccinated against COVID-19 at a faster rate

NSW arts audiences appear to be getting vaccinated at a faster rate than the general population – which may help encourage those audience members who are looking for high vaccination rates before they return to regular attendance.

Almost all (96%) of NSW respondents aged 75 and over had been at least partially vaccinated, compared to 73% of Australians over 70 in the general population, based on figures from the Australian Government Department of Health (<https://www.health.gov.au/initiatives-and-programs/covid-19-vaccines/australias-covid-19-vaccine-rollout>).

8 in 10 (82%) of NSW respondents aged between 55 and 64 had been at least partially vaccinated, compared to around half of the general population.

Over one-quarter (28%) of NSW respondents under 35 had been at least partially vaccinated, compared to approximately 10% of the general population. Of the two-thirds of audiences under 35 who were not vaccinated, 95% stated that they would probably or definitely get vaccinated when it became available.

## Most NSW audiences are confident the vaccination effort will be successful

Most NSW audiences (89%) are at least somewhat confident that the vaccination effort will be successful in defeating the pandemic and allowing normal activities to resume within a year. This proportion has decreased slightly since March 2021, when 92% of NSW audiences were at least somewhat confident.

NSW audiences were the most confident around the country, with QLD (87%) and SA (87%) slightly lower. They were significantly more confident than the nearby ACT (81% at least somewhat confident).

### Online participation

## Half of NSW audiences engaged in arts and culture experiences online

Half (50%) of NSW audiences were participating in digital arts and cultural experiences in early July, stable with 49% in March 2021. The participation rate in NSW was the highest in the country, with current lockdowns and restrictions creating greater opportunity and demand for online participation.

NSW audiences were most likely to have watched a pre-recorded video of a performance (28%, stable with March 2021), participated in an online class or tutorial (23%, stable with 24%) or watched a live streamed performance (21%, stable with 20%) in the two weeks prior to data collection.

## NSW audiences are among the most likely to see an ongoing role for digital participation

In July 2021, audiences were asked, ‘When venues are open and it’s possible to attend in-person cultural experiences, what role do online arts events/experiences play in your life?’

Approximately 57% of NSW audiences say that digital programming plays a small (45%) or substantial (12%) role. This proportion was one of the highest around the country, along with VIC (56%) and TAS (58%).

Convenience, comfort, accessibility and safety were key factors cited by NSW audiences for whom digital played an ongoing role. One respondent shared,

‘Online content, especially in terms of accessibility, is a big one that I would like to see return [during this outbreak]. This will not only benefit audiences, but also give artists the work and support they need.’

Another said,

‘The pandemic has made me realise it is easier and more comfortable to stay home and watch digitally when I can.’

## Digital programming can open up access for regional and interstate attendees

Digital participation can also be a way to bridge physical distances – allowing NSW audiences to participate in interstate events or regional audiences to access intercity programming. One audience member stated,

‘I live in regional NSW so having online access to city-based events has been an unexpected gift from COVID.’

Another stated, ‘I am now living regionally although come regularly to Sydney for live events. I love it when theatre and music is live (or not live) streamed!’

While another shared,

‘One of the positives of the pandemic is the increase in live and recorded performances available internationally. Having the option domestically and internationally to engage online means being able to engage in activities that time and distance previously excluded.’

## Most NSW audiences tune in alone, but shared viewing can be a way to connect during lockdowns and border closures

When asked how they participated in a digital event or experience, the majority of NSW audiences suggested they tuned in alone (68%), while 30% watched with other members of their household.

A further 11% gathered in public to watch a live-streamed event with an audience. One in ten (9%) audience members tuned in as part of an in-person gathering of friends and family, while another 12% connected online with friends and family who were tuning in elsewhere.

Some audience members commented that digital content offered them a way to connect, both with people in their households and without, during lockdowns and border closures. One audience member reported they had been ‘zooming with my local choir’, while another had been ‘workshopping with people from other states.’

## A third of NSW audiences are paying to access online content

Over a third (35%) of NSW audiences are paying to access online content (down from 42% in March 2021). NSW audiences were among the most likely to pay for digital programming, along with TAS (42%) and VIC (37%).

Participation in some forms of paid online experiences has declined since March 2021, including one-off pay-per-view arrangements (17%, down from 22% in March) and subscribing to seasons with a digital component (6%, down from 12%). Participation in other forms is stable, such as making a donation (15%, stable with 13% in March 2021) and subscribing to online platforms (8%, stable with 6%).

Of the audience members in NSW who participated online in the last fortnight, around half (48%) spent over \$50 (stable with 49% in March 2021). (Figure 6).



Audiences appear to be prepared to pay greater amounts for online works of corresponding quality. One audience member shared,

‘I think the pandemic has actually shown us a whole new way to experience the arts. Many companies are now treating their streamed events more like films rather than just archival recordings of performance. More expensive to do, I know, but that can be great.’

Figure 6: Can you share with us your total spending on online arts & culture experiences in the past fortnight? (NSW) July 2021 (n=273)



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## What's next

To explore the data in more detail and find out how audiences for different artforms are responding, visit the study's Australian homepage at:

[www.thepatternmakers.com.au/covid19](http://www.thepatternmakers.com.au/covid19)

There, you can read about the story so far and 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](mailto:info@thepatternmakers.com.au).

## Acknowledgment

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