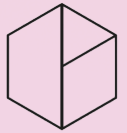


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PATTERNMAKERS



MARCH 2021

New South Wales Snapshot

Audience Outlook Monitor



Summary

NSW audiences are attending more events – though it will take time to fully rebuild the market

The March 2021 results of the Audience Outlook Monitor show an increase in attendance activity among New South Wales (NSW) audience members, following months of low virus cases and outdoor programming over summer.

Around 3 in 4 (76%) past attendees in NSW say they have recently attended a cultural venue or event and 4 in 5 (82%) are making firm plans to attend an event in future.

NSW audiences are largely comfortable attending a range of venues, such as museums and galleries (98%), large theatres (90%) and stadiums or arenas (70%) – but some say the risk of lock-downs and cancellations prevents them from attending as they used to in the past (34%).

Effective communication of COVID safety measures and ticketing policies will help to reassure audiences and build confidence in NSW.

Online participation has decreased nationally, though NSW audiences are the most likely to be paying for digital arts experiences

Consistent with national trends, the proportion of NSW audiences participating in online arts and culture has decreased from 71% in September 2020 to 49% in March 2021.

Digital participation continues to evolve and ‘screen fatigue’ is affecting some people. Many are being more selective about what they engage with online and a majority are interested in accessing experiences ‘on-demand’ (68%) at a time that suits them.

A sizeable number of NSW audiences participating online are paying for digital experiences (42%) – a rate that has been stable since September (41%) and is the highest nationally (compared to an average of 37%).

Among those paying, the proportion who are spending over \$50 has increased from 40% in September to 49% in March 2021, which could indicate an enduring market for premium and/or paid digital experiences.

Introduction

This report summarises insights from data collected in March 2021 from over 3,700 NSW audience members

This New South Wales (NSW) Snapshot Report identifies insights from 3,739 survey respondents connected with NSW organisations surveyed in March 2021 as part of the Audience Outlook Monitor. 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 3 March 2021, participating organisations simultaneously sent the Phase 4 survey to a random sample of their audience – defined as those who had attended an arts or cultural event in person since January 2018.

Throughout this report, comparisons have been highlighted between the different state and territory results. Note that the Northern Territory (NT) and Tasmania (TAS) samples in this study fall below 100 respondents, and this data has been marked with an asterisk (*) within graphs to indicate that the results should be interpreted with caution.

In addition to this report, the March 2021 results are freely accessible in an interactive dashboard. Users can explore the data for all 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

Read on for the key March 2021 findings in NSW.

Current conditions

Comfort with public activities is growing — though NSW audiences are more cautious than some other states/territories

As many restrictions have eased after low rates of community transmission over the last six months, NSW audiences are showing increased levels of confidence when interacting publicly so far in 2021.



Compared to September 2020, the proportion of NSW audiences who now feel comfortable doing a range of activities has increased, including eating at a local restaurant (97%, up from 83%), using public transport (86%, up from 58%) and exercising at a gym or fitness studio (63%, up from 41%).

NSW audiences are most similar in their comfort levels to those in Victoria (VIC), the Australian Capital Territory (ACT) and TAS. By comparison, audiences in Western Australia (WA), South Australia (SA), Queensland (QLD) and the NT are more confident interacting publicly.

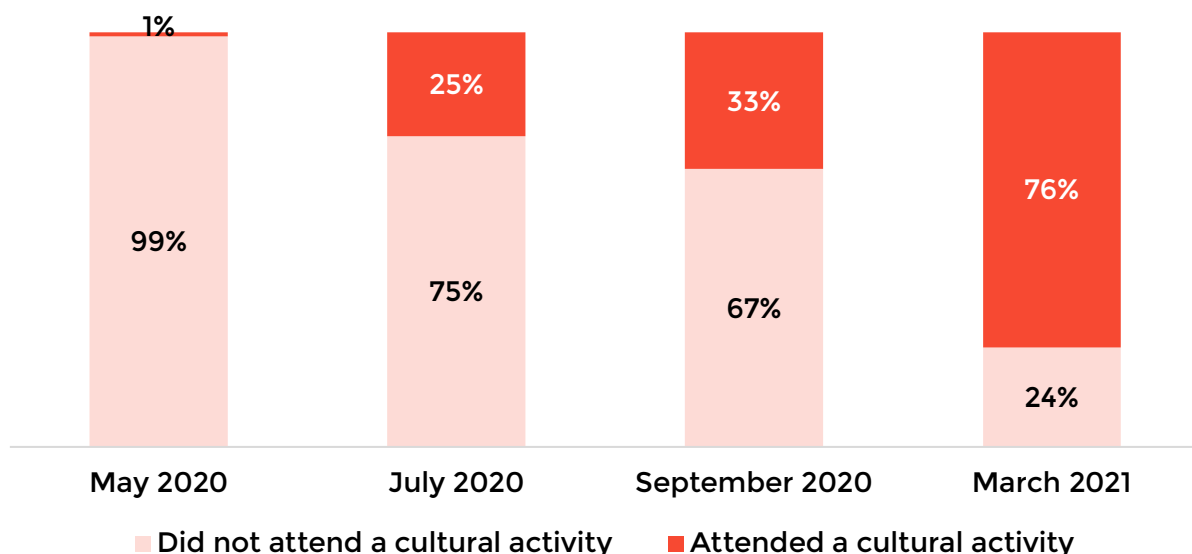
Attending cultural events

3 in 4 NSW audience members are now attending live events

Attendance at live arts and cultural events is increasing, as venues and facilities continue to reopen in accordance with COVID-safe regulations in NSW.

In March 2021, 3 in 4 (76%) NSW audience members attended a cultural activity in-person within the fortnight before data collection, a rate that has more than doubled since September 2020 (33%). In terms of the types of activities, almost half (47%) of NSW respondents said they recently attended a live performance. Many recently attended a cinema (34%), visited a museum or gallery (36%), while smaller proportions recently attended a lecture, artist talk or workshop (14%) or a fair or festival (9%).

Figure 1: In the past fortnight, did you do a cultural activity in-person (not online)? (NSW) n=3,739 (March 2021)





NSW audiences are attending events at a higher rate than other areas, such as VIC (62%), QLD (69%) and the ACT (73%), showing a desire to get back 'out and about' following outbreaks in Greater Sydney occurring over the summer holiday period.

Figure 2: In the past fortnight, did you do a cultural activity in-person (not online)? (By state/territory) n=13,836



4 in 5 are making plans to attend in future — consistent with the national average

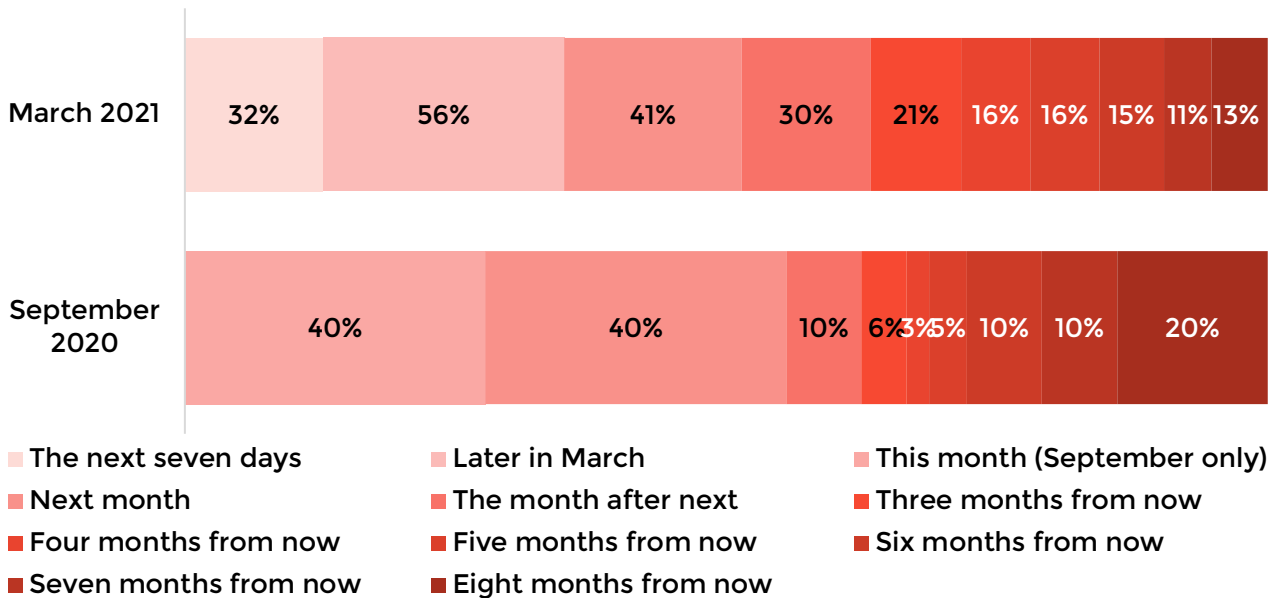
NSW audiences are signalling greater confidence in attending events in the near future, compared to September 2020. In the two weeks before data collection, 82% said they made firm plans to attend an event in future, with most planning to attend a live performance (61%), a museum or gallery (40%) or a cinema (37%).

The greatest proportion of NSW audiences are purchasing tickets for events in the month ahead – most purchased tickets for events within the seven days after data collection (32%) or later in the month (56%). Many are purchasing tickets for April events (41%).

These rates are relatively similar to VIC, where audiences have experienced extended lockdowns and are booking within shorter timeframes. VIC audiences are commonly purchasing tickets for events within seven days (27%) or later in the month (54%) and a significant number said they are purchasing tickets for April events (38%).



Figure 3: In the past fortnight, did you purchase tickets for one or more live shows or performances that are scheduled for...? (select multiple) (NSW) n=1,561 (March 2021)



For 1 in 3 audience members, concerns about virus transmission continue to inhibit attendance

Health risks and financial barriers continue to play a part in audience decision-making – though these pressures are lessening.

Over the past six months, the proportion of NSW audiences who know of someone within their social network who has been sick with the virus has been stable (at 9%, stable with 11%) and the proportion experiencing financial hardship as a result of the pandemic has dropped from 32% to 24%.

One-third (32%) say that the risk of virus transmission prevents them from attending as they did in the past – a rate that is higher than the national average (26%).

Concerns about virus transmission are highest in NSW and VIC (34%), where cases have been the highest nationally, and lowest in WA (14%), SA (20%) and QLD (21%). A small proportion of NSW audiences (2%) cannot foresee going out until there is no risk at all (down from 11%), confirming that observing COVID-safety guidelines will be important for reassuring those with a lower risk tolerance – even when the majority are more confident.

The main factor inhibiting attendance right now is the risk of lockdown and cancellations

When asked about the factors preventing audiences from attending right now, the top factor selected by NSW audiences was the risk of lockdowns and cancelled events (34%). Some NSW respondents shared,

‘Uncertainty about future makes booking in advance more risky. [I leave it] till a day or two before.’

‘Frequent changes in performance dates have made it impossible to plan ahead and I have had to abandon plans to attend events because of changes causing clashes in commitments.’

Restrictions and COVID-safe arrangements are also limiting attendance, with some audiences indicating that there are not as many options available (24%), that events are booking out too quickly (13%) and/or that the quality of the experience has changed (9%).

NSW attendees are spending more, though overall spending is not likely to fully recover this year

One-quarter (24%) of NSW audiences attending in the past fortnight said they spent between \$50 and \$100 on tickets, and 37% spent more than \$100. This represents a significant increase on levels seen in September 2020, when 12% spent more than \$50 and 11% spent more than \$100.

However, over the next 12 months, 31% of NSW audiences say they expect their overall spending on arts and culture tickets, admissions, subscriptions and memberships to be lower than before the pandemic started. This rate is consistent with the national average (30% expect to spend less over the next 12 months), confirming it will take time to fully rebuild the market.

Comfort levels

NSW audiences are growing more confident attending most venue types

Comfort levels with most venue types is growing in NSW, as restrictions have largely eased and virus cases have dropped. Almost all NSW audience members are now confident attending museums and galleries (98% are at least somewhat comfortable,

up from 93%), community art spaces/studios (95%, up from 83%) and large theatres or concert halls (90%, up from 63%).

Comfort has also increased for venues that NSW audiences were previously more cautious of, including stadiums or arenas (70% up from 44%) and comedy clubs or live music venues (49%, up from 26%).

More NSW audience members are now at least somewhat comfortable with interactive exhibitions (51%) – a rate that has a significant increase since July 2020 (28%) and September 2020 (26%).

Seating capacity inside venues is a concern for some audience members

While most NSW audiences now feel relatively comfortable attending most indoor venue types, limits on attendance numbers are an important factor.

Capacity limits affect the viability of operation, but from an audience perspective, reduced seating capacities appear to encourage people's perceptions of safety, for instance:

- Almost everyone (95%) feels at least somewhat comfortable at 50% seating capacity
- Most people (84%) feel comfortable with 75% seating capacity
- Two-fifths (43%) feel comfortable with 100% seating capacity inside venues.

As public health guidelines are gradually relaxed, there may still be a case for some large venues, festivals and arts centres to voluntarily impose capacity limits for certain events, as it would allow them to be accessible to almost twice the number of audience members.

More people are comfortable to attend if masks are mandatory, though some prefer activities that don't require them

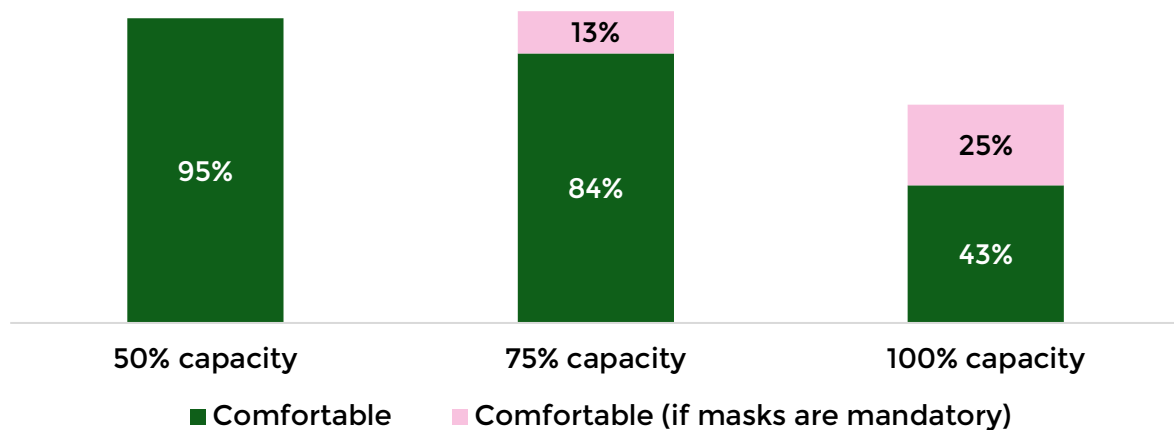
Those who said they were not comfortable at venues were asked whether their answer would change if mask-wearing was mandatory.

At an event with 75% seating capacity, the majority of those not previously comfortable said that it would improve their comfort (14% would be very comfortable and 46% would be somewhat comfortable) – meaning the overall proportion of audiences comfortable at this capacity rises from 84% to 97%.



At an event with 100% seating capacity, a significant proportion of those not previously comfortable said that it would improve their comfort (6% would be very comfortable and 37% would be somewhat comfortable) – meaning the overall proportion of audiences comfortable at this capacity rises from 43% to 68%.

Figure 4: Would you be comfortable attending an event today with 50%/75%/100% seating capacity? (With and without mandatory mask policies.) (NSW) n=3,591



One NSW respondent said,

‘I’m happy to wear a mask in the theatre if it means the capacity can increase. More bodies in the space is better for the performers and performance atmosphere.’

However many shared that they are discouraged from attending events that have mandatory mask policies, as one said,

‘I don’t enjoy wearing a mask for long periods of time so tend not to book tickets for events that require masks.’

The combination of capacity limits, social distancing and mask-wearing is confusing for some — and can affect confidence

With face mask policies, settings, capacity and social distancing all affecting people’s choices to attend events, the situation in all states and territories is complex.

It is important to clearly communicate what these policies mean, with some sharing their confusion at how capacity and distancing rules are applied in practice. For instance, one said, after attending a live performance,

‘The social distancing rules are inconsistent with the capacity rules - I see whole rows and sections of rows empty at theatres - but I am seated next to, in front of and behind people with whom I did not attend.’

Comfort with square-metre regulations has increased, but some don't see any benefit

Since September 2020, more NSW audience members are at least somewhat comfortable with 2 square metres (86%, up from 59%) and 4 square metres (96%, up from 92%) of space for each person.

However, similarly to capacity restrictions, comfort is only improved when the regulations are properly implemented by venue staff. One NSW respondent shared,

‘Audiences need continual – though gentle – reminders about masks and social distancing. Performance venue staff must display the behaviours that they expect from audiences.’

The proportion who are now comfortable with no social distancing guidelines has increased in NSW from 7% in September 2020 to 30% in March 2021. However, NSW audiences are among the least comfortable with no social distancing (compared to a national average of 37%), confirming the need for organisations to look at ways to encourage observance of guidelines inside venues for those with a higher risk tolerance.

Creative approaches to seating can help more people feel comfortable and engaged

One of the common themes in audiences responses about recent events is social distancing and the way it presents a challenge for creating a buzzing atmosphere.

Events that find ways to create a great ‘vibe’, whilst observing guidelines, will be important for NSW audiences. Some people like events with ‘pods’ or tables of 4–6 people (14%) where they can sit close to people in their immediate social circle. For instance, one NSW respondent said,

‘Given how COVID-19 has affected ability to socialise and dance, with small pods it gives an opportunity for more enjoyable social environment...’



However, this model doesn't work for everyone and an outdoor amphitheatre with fixed seating in rows ranked higher (32%). Another NSW response suggested some confusion about this structure, saying,

'I'm not sure I want to be in a 'pod' with people I don't know, relying on each to stay distanced. Fine if you're with people who get it, not fine if you're stuck with people who don't get it for a couple of hours.'

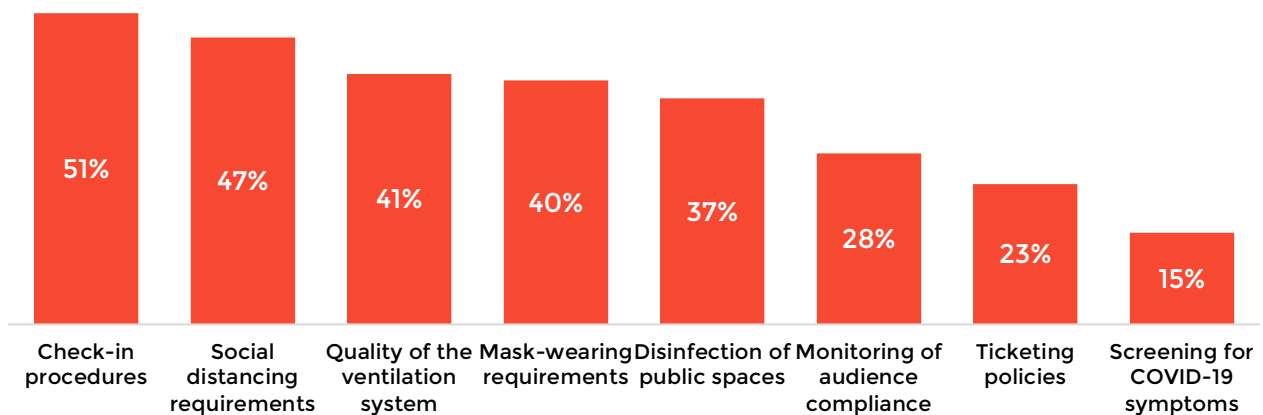
Comfort is highest at outdoor venues, which may impact attendance as winter approaches

As winter approaches, some people are concerned about the weather affecting outdoor events, as well as the potential for transmission of the virus in indoor venues – particularly in relation to ventilation and air circulation. Many NSW audience members (41%) said this topic is important in communication about venue safety. As one said, '[I want] information about how air-born/aerosol infection spread is being controlled at the venue.'

To feel reassured about safety regulations, the other common topics NSW audiences are interested in hearing about are check-in procedures for contact tracing (51%) and social distancing requirements (47%).

NSW audiences are more interested in mask-wearing requirements (40%) than audiences nationally (27%).

Figure 5: In thinking about attending cultural venues and events, which of the following topics are most important to you? (select up to three) (NSW) n=3,716



COVID-19 safety

Most NSW audiences are satisfied with COVID-safety at cultural venues

When recent attendees were asked how satisfied they are with audience safety at the venue(s) they attended, the vast majority are satisfied.

Looking at specific aspects of COVID-safety plans, there are some slight differences relevant to different venue types. For instance, on average:

- ▶ At cinemas, communication of COVID-safe practices was rated least well and limits on capacity had the highest satisfaction
- ▶ At live shows and performances, physical distancing measures rated least well, while presence of check-in procedures had the highest satisfaction
- ▶ At fairs and festivals, physical distancing measures rated below other types of safety measures.

Staff and signage continue to be important ways to reassure audiences

Audiences who are cautious about attending continue to make suggestions for improving communication of COVID-safe arrangements, and in particular signage and written instructions. One NSW audience member suggested,

‘Clear description of what (if any) COVID-19 procedures are in place. The majority of the public are too complacent and venues are too timid; indulging ignorant privileged people.’

Audiences generally also appreciate clear instructions from staff – and some believe there is a case for a stronger commitment of staff to regulate COVID-safe procedures. Another NSW respondent shared,

‘The distancing requirements and wearing of masks as advertised were not adequately monitored and people in the audience chose to disregard them. This was not followed through by those who were supposed to be monitoring them.’

Inclusive methods to COVID-19 safe procedures will ensure events are accessible to different people

Some NSW audience members expressed that while they appreciate the adherence to COVID-safety measures, policies such as check-in procedures can sometimes be inaccessible, such as for older people and those without smart phones. One person said,

‘Some people can't access the QR code as their phones aren't compatible, so there should always be the opportunity to record their details on a form.’

Another agreed with having physical sign-in options available, commenting,

‘Many mobiles are not compatible with the sign in code. Not sure how to improve this apart from having pen and paper ready.’

Some suggested having more staff available to support the check-in process,

‘More people on hand to record details of people who don't have smart phones, because they are more likely to be older people, and perhaps people with mobility problems, who find it very difficult to stand waiting.’

Longer-term outlook

96% of NSW audiences say they are likely to get vaccinated, which is likely to further improve confidence

The commencement of Australia's vaccination program is already contributing to confidence levels and the outlook is positive. Almost all NSW respondents (96%) said they are likely to get vaccinated, and most do not have major concerns about issues like the effectiveness of the vaccine.

Looking ahead, 9 in 10 NSW respondents (92%) feel confident that the vaccination effort will lead to the resumption of normal activities within 12 months. More than three-quarters (79%) of NSW audiences say that long-term, they expect to attend events just as they used to in the past.

Support and fundraising

NSW audiences remain strongly committed to supporting the arts

The proportion of NSW audiences who said they feel strongly committed to supporting arts and cultural organisations has grown slightly from 44% to 49% since May 2020. NSW audiences are also more likely to say they're strongly committed than the national average (44%).

As of March 2021, more NSW audiences are saying they're likely to purchase a subscription or membership, even if some of the events might be cancelled (73%, up from 61% in May 2020).

Likelihood to contribute other forms of support has been fairly stable among NSW audiences, including making a donation to an artist or organisation (73%, stable with 71%) or to a sector support fund (54%, stable since May 2020).

3 in 5 are subscribing or purchasing memberships in 2021

Around 3 in 5 (58%) of NSW past attendees say they have already purchased a subscription, membership or season tickets to a cultural organisation for the 2021 season. This is lower than the proportion who reported having subscribed to last year's season (69% were subscribed in September 2020).

However, among those who have purchased, 92% say they are planning to renew next year, suggesting NSW audiences are optimistic about future attendance.

The most common subscription/membership purchased by NSW audiences is to a performing arts organisation (49%) or a museum or gallery (21%), while smaller proportions purchased a subscription/membership to another type of organisation (9%).

Donating to artists and cultural organisations is stable, and most want to support those that are struggling

The proportion of NSW audiences making donations to artists or cultural organisations in the 2020/21 financial year (37%) is consistent with 2019/20 financial year (36%).

When asked what specifically prompted their donation, several NSW respondents expressed their desire to show their appreciation for artists and organisations during the pandemic. One person shared,

‘Our lives are enriched by participating in cultural activities and I was worried some organisations would fold without support.’

Another shared,

‘Appreciate the value of the theatre and the contribution it makes to the community, the enjoyment and entertainment it brings as well as the thought provoking content which promotes a more aware and compassionate society.’

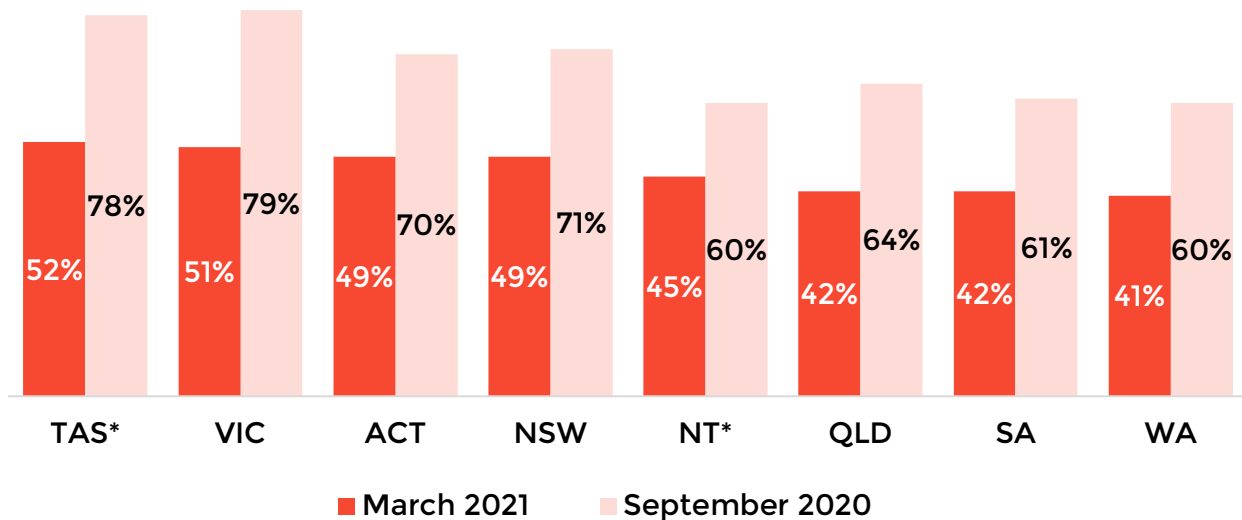
Online participation

Around half are participating online, and many more plan to continue

As opportunities for live attendance expand, fewer NSW audiences say they recently participated in digital arts experiences (49%, down from 71% in September 2020). NSW audiences are most similar in their online engagement to those in VIC (51%) and the ACT (49%). In comparison, online engagement has continued to be lower in areas with fewer restrictions on live experiences, such as WA (41%), SA (42%) and QLD (42%).

Among the 49% participating online, many say they are doing so more frequently than before the pandemic (50%) and two-thirds of those plan to continue when it ends (63%). A smaller proportion (23%) say they’re participating online less frequently, or plan not to continue post-pandemic.

Figure 6: During the past fortnight, have you participated in any of the following online or digital arts & culture experiences? (select multiple) n=13,836 (March 2021)



Video content remains key, but online courses are becoming relatively more popular

Video content of performances and events remains the most common form of digital participation, with 28% of NSW audiences recently watching pre-recorded video of a performance/event (down from 48% in September 2020 and 20% recently watching a live-streamed performance/event (down from 38%).

However, online classes and tutorials have had the smallest decreases in attendance and are now a comparatively common way that NSW audiences are choosing to participate online (24%).

Increasingly, NSW audiences are motivated to access things they can't see live

When asked about their motivations for participating online, data collected in the early stages of the pandemic (May 2020), indicated that most NSW audiences were going online to support an artist/organisation they think is important (38%) or for their own mental wellbeing (33%).

Now, the most common reasons given are seeing something you had wanted to see live (40%) and seeing something you wouldn't normally be able to see (37%).

However, a significant proportion are still motivated to go online to support an artist or organisation they think is important (29%) and some are still going online for their wellbeing (20%). NSW audiences are also now more inclined to find out more about an artist or creative work by going online (18%, up from 14% in May 2020).

As with audiences nationally, some people are tiring of digital experiences and want less ‘screen time’

Since this study first measured the barriers to online participation in May 2020, the proportion of NSW audiences who say they’re ‘not interested in online or digital arts experiences’ has risen from 16% to 26% – consistent with the national result (27%). Just 9% of NSW audiences would select a digital program as their first choice for attending a cultural event today.

Comments from NSW audiences shows that some audience members are growing fatigued with online participation and are eager to focus on live attendance opportunities. Among those participating online, fewer NSW audiences said they plan to continue post-pandemic (63%) compared to September 2020 (71%). One person shared,

‘As I work with computers all day, the online environment is tiring for additional experiences.’

There may be opportunities to grow creative technologies that are more immersive (e.g. virtual reality) or that do not involve screens (e.g. audio experiences).

2 in 5 NSW online audience members continue to pay for digital experiences

The proportion of online audiences in NSW paying for digital content has remained stable in March 2021 (42%) since September 2020 (41%). Compared to other jurisdictions, such as VIC (39%), SA (35%) and QLD (29%), NSW audiences are the most likely to be paying for online experiences nationally.

However, types of payment for digital experiences are changing, with fewer NSW users reporting having made a donation for something they consumed online (13% down from 22% in September 2020).

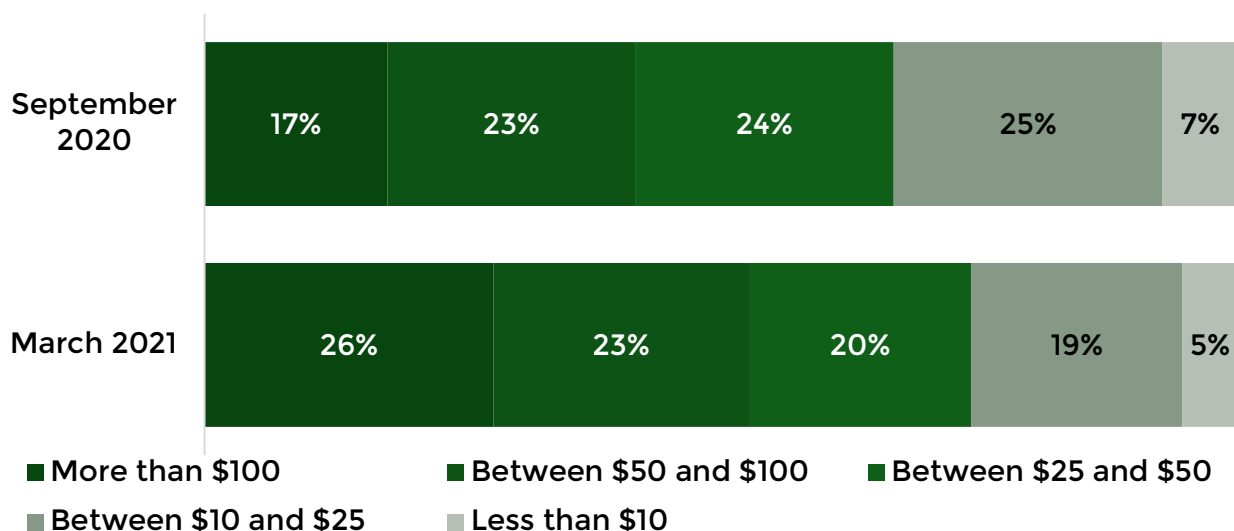
Pay-per-view remains the most common form of digital patronage, and has remained stable at 22% since September. A small number (6%) say they subscribed to a platform to access content on-demand, and 12% say they accessed digital content as a part of a program/season they subscribed to.

Paying audiences are spending larger amounts on digital experiences

The proportion of paying NSW audiences who are spending large amounts on digital experiences has increased. During the fortnight before data collection, 26% spent more than \$100 and a further 23% spent between \$50 and \$100 (compared with 17% and 23% in September, respectively).

Online, NSW audiences are spending more than the national average, whereby 22% have spent more than \$100 and 19% have spent more than \$50 recently.

Figure 7: Can you share with us your total spending on online arts & culture experiences in the past fortnight? (NSW) n=273 (March 2021)



Making content available on-demand is appealing for most audiences – and many want to hear artists talking about their work

Designing digital experiences is complex, and there are audiences for different types of experiences, though some features appear more popular than others.

Respondents were provided with a list of seven potential features of digital arts experiences, and asked to select the top two most appealing to them.

The ability to access something on-demand was the most popular choice for NSW audiences (68%) and ranked higher than seeing something live that is happening right



now (34%). Another popular feature among NSW audiences was hearing the artist or artistic leader talk about their work (42%).

Accessing short, edited segments or taster experiences was in the top two features for 14% of NSW audiences, and 11% said they want tips on how to improve their own skills or appreciation of an artform. Smaller numbers preferred connecting with other audience members during the experience (4%) or contributing to the experience themselves (3%).

Like audiences nationally, NSW audiences rely heavily on direct email marketing to find out what's available online

When asked about how they found out about their recent online experiences, the largest proportion of NSW audiences said they received an email from an artist or cultural organisation (60%). Many others said they were recommended the activity by someone they know personally (36%) or the experience appeared in their social media 'feed' (25%).

NSW audiences who have recently paid for an online experience are also more likely to rely on email marketing. Specifically, audiences making donations (75%), purchasing via pay-per-view (72%), or subscribing to a platform (70%) are finding out about experiences via email marketing from an artist or cultural organisation – more than those who have not paid for any experiences (53%).

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

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.

Acknowledgment

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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