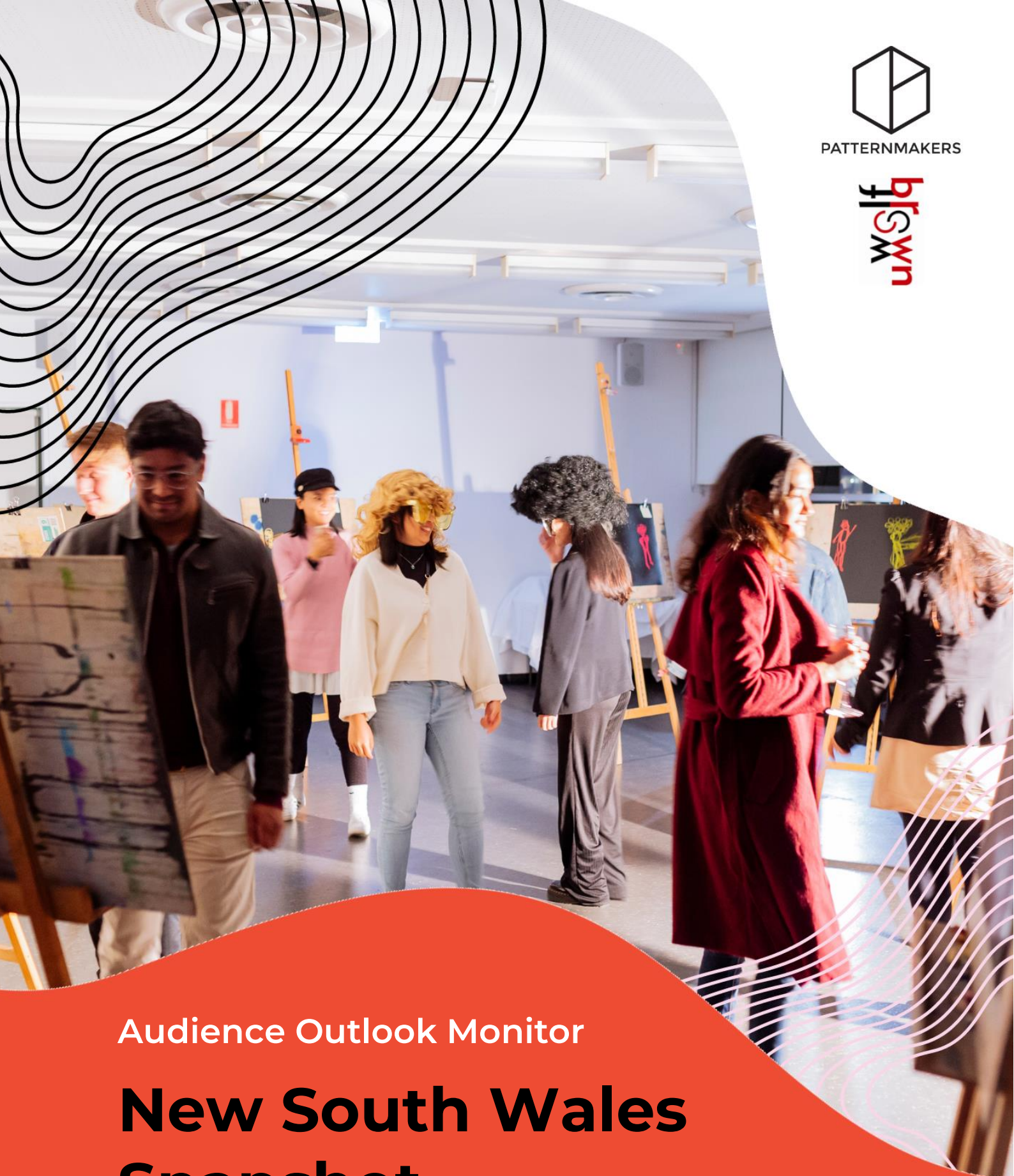




PATTERNMAKERS



Audience Outlook Monitor

# New South Wales Snapshot

November 2022



# Live Attendance Outlook

Audience behaviour will continue to evolve as new factors impact the path to recovery, according to data collected in October 2022 from 1,301 New South Wales past attendees.



**73%**

are 'ready to attend now', up from 66% in August '22, the highest since the pandemic began



**46%**

are still attending performing arts events less than they used to, pre-pandemic, so full recovery remains a way off



**71%**

are spending \$50+ on cultural events, with spending not increasing on March '22 levels (70%)



**#1**

financial reasons are now one of the top barriers to attendance – on par with the risk of transmission

## Key trends



**55%**

expect their attendance will increase over the next year, 39% say it will stay the same



**20%**

say there has been a change in their preferred time, day or location of cultural events



**73%**

will be attracted to fun, uplifting content, while 45% are drawn to challenging things



**60%**

want to try things they haven't experienced before – and this is higher for 16-35s (69%)

## Key findings

# NSW audiences are attending more than other states, but a range of factors will influence recovery

- ▶ NSW audiences are feeling more ready to attend than ever - but improvements are gradual: 73% say they are 'ready to attend now,' up from 66% in August and 60% in March 2022. Another 26% are being more selective, and say they'll attend events or venues where they're reasonably confident the risks of transmission are minimal.
- ▶ NSW audiences are some of the most likely to be attending right now: 8 in 10 attended a cultural event recently (12-16 October 2022), one of the highest rates in the country, along with the ACT.
- ▶ Attendance frequency is yet to return to pre-pandemic levels: 46% of NSW performing arts attendees are attending less often than they used to, and 51% are attending about the same amount – consistent with national trends.
- ▶ Spending levels are not increasing, perhaps due to increasing financial pressures as the costs of living rise: 71% spent over \$50 on arts and culture in the fortnight before data collection, consistent with March and August 2022.
- ▶ Full recovery will take time: while most NSW audiences are feeling confident and optimistic, there are complex factors at play, including economic barriers, re-entry anxiety, and lifestyle changes. Some are anticipating a full slate of events over the holiday season, but the possibility of extreme weather events is a concern for audiences in parts of the state.

# Behaviours, tastes and lifestyles continue to evolve – and 6 in 10 NSW audiences say they will be drawn to new experiences

- ▶ NSW audiences are optimistic about future attendance. Over half (55%) expect to attend more often in the next year.
- ▶ However, a range of barriers are preventing NSW audiences from attending. Some are perceiving a lack of appealing events available (32%) or are prioritising other things in their lives now (22%). Some are experiencing ‘re-entry anxiety’ after changing their lifestyles during the pandemic, and are lacking energy to go out (19%).
- ▶ Price sensitivity may increase, as financial reasons are affecting 38% of NSW audiences - just as much of a barrier to attendance as the risk of the virus (37%)
- ▶ Last-minute ticket purchases are here to stay, with August 2022 data revealing the majority of NSW audience members book events within the next seven days (27%) and the next 2-3 weeks (46%).
- ▶ Scheduling preferences have changed for 1 in 5 NSW audience members, whether it’s the time, day or location of events.
- ▶ Cultural tourism is slow to recover to pre-pandemic levels with local attendance the most common (58%, stable). Around 1 in 10 NSW audiences are travelling intrastate (13%) or interstate (11%) for events.
- ▶ NSW audiences have an appetite for new (60%), uplifting (73%) and challenging cultural experiences (45%) – so balanced programs are key as audiences re-emerge in the ‘new normal’.

# 4 in 10 are participating in the arts online – with virtual opportunities vital for accessibility

- ▶ Online channels continue to be immensely important in connecting with NSW audiences and improving accessibility.
- ▶ Digital marketing is paramount for live events and the majority of NSW audiences of all ages are using online channels, such as eNews (61%) and websites (54%) to find out what's on.
- ▶ Online participation in cultural activities is stable. 4 in 10 NSW audience members (42%) participated in some kind of online arts recently, such as a pre-recorded video of a performance or event (23%), online class/lecture/tutorial (20%), and a live-streamed performance or event (15%).
- ▶ Spending on digital activities is steady, consistent with the stability in cultural spending overall: 38% paid for an activity recently, consistent with 36% in March 2022. Among those paying, 46% spent over \$50 (steady with 47% in March 2022).
- ▶ Most audiences continue to see a role for digital, with 7 in 10 NSW attendees saying these experiences continue to play a 'small' (50%) or 'significant' (21%) role in their life – though this has declined slightly since March 2022 (down from 75%).
- ▶ Digital events are vital to accessibility, with online cultural participation higher among audiences who are more risk-averse (50% in NSW participating online), as well as those aged 75+ (46%), and those who are vulnerable to COVID-19 (48%). Accessibility will be explored in detail in an upcoming Fact Sheet and set of case studies.

## Introduction

# This report summarises insights from over 1,300 audience members in NSW

This New South Wales (NSW) Snapshot Report outlines key findings from the October 2022 phase of the Audience Outlook Monitor in Australia (Phase 8), based on data collected from 1,301 audience members living in NSW.

On 12 October 2022, participating organisations simultaneously sent the Phase 8 survey to a random sample of their audience – defined as those who had attended an arts or cultural event in person since January 2018.

This report compares the new results with data collected previously in July 2021 (Phase 5), November 2021 (Phase 6), March 2022 (Phase 7) and the August 2022 'Pulse Check' to examine how things are changing over time. Where relevant, the NSW results are compared to those in other states/territories, noting that results for the Northern Territory (NT) and Tasmania (TAS) are not reported separately due to small sample sizes in those areas.

In addition to this Snapshot Report, the October 2022 results are accessible in a free interactive dashboard. Users can explore the data for different artforms, types of events and demographic groups in all parts of Australia. For more information about the study, and to access resources such as the dashboard, visit:

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

Read on for the key October 2022 findings for NSW.

Image Credit: Nicholas Smith, courtesy of Campbelltown Arts Centre.

## Attendance Outlook

### After a challenging year in 2021, the pandemic has a long tail in NSW – with average participation frequency lower than before COVID-19

This Phase of the Audience Outlook Monitor sought to compare attendance frequency in the 'new normal' to pre-pandemic activity.

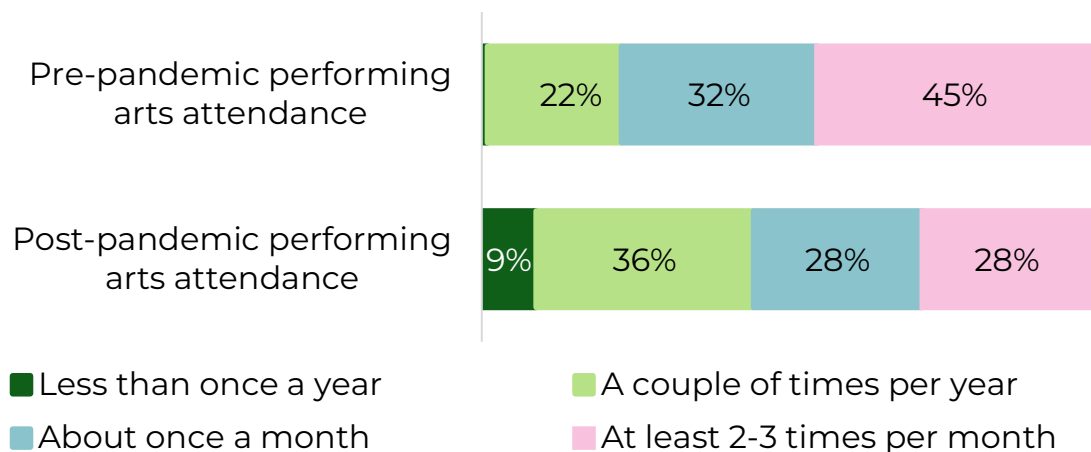
Overall, just under half (46%) of NSW performing arts attendees are attending less than they did pre-pandemic.

Looking at it in terms of frequency, pre-pandemic nearly 8 in 10 (77%) performing arts attendees said they attended regularly (once a month or more).

Now the proportion attending the performing arts regularly (once a month or more) is only 56%. It's quite common that audiences are attending the performing arts only a couple of times a year or less (45%).

These trends were more pronounced for risk-averse NSW audience members – 66% of whom are now attending performing arts events less than they did before the pandemic, compared to 37% of risk-tolerant NSW audiences.

Figure 1: Pre-pandemic, roughly how often did you attend performing arts events? And now, roughly how often do you attend performing arts events? NSW audiences (n=1,286)

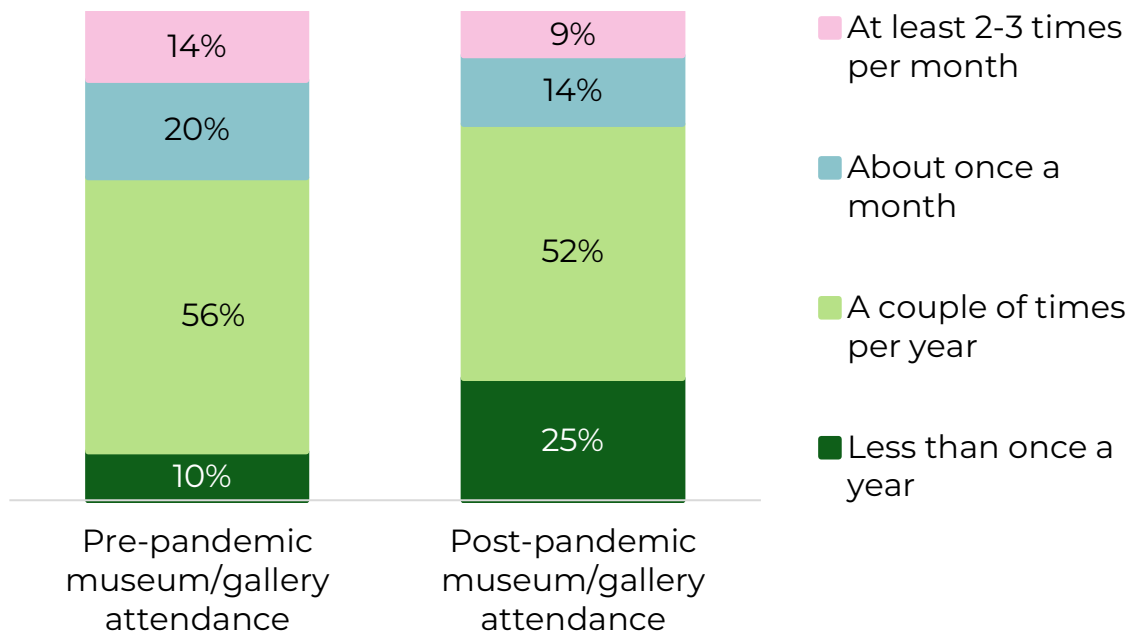


Similarly in terms of museums and galleries, 32% of museum and gallery visitors are attending less than they did, pre-pandemic.

In terms of frequency levels, 34% of audiences were regular visitors pre-pandemic – attending at least once per month.

Now, 23% of museum and gallery attendees are visiting this often – and it is more common to visit a couple of times per year or less (77%).

Figure 2: Pre-pandemic, roughly how often did you attend museums and galleries? And now, roughly how often do you attend museums and galleries? NSW audiences (n=1,158)



## 8 in 10 NSW audience members recently attended an arts or cultural event in-person – one of the highest rates nationally

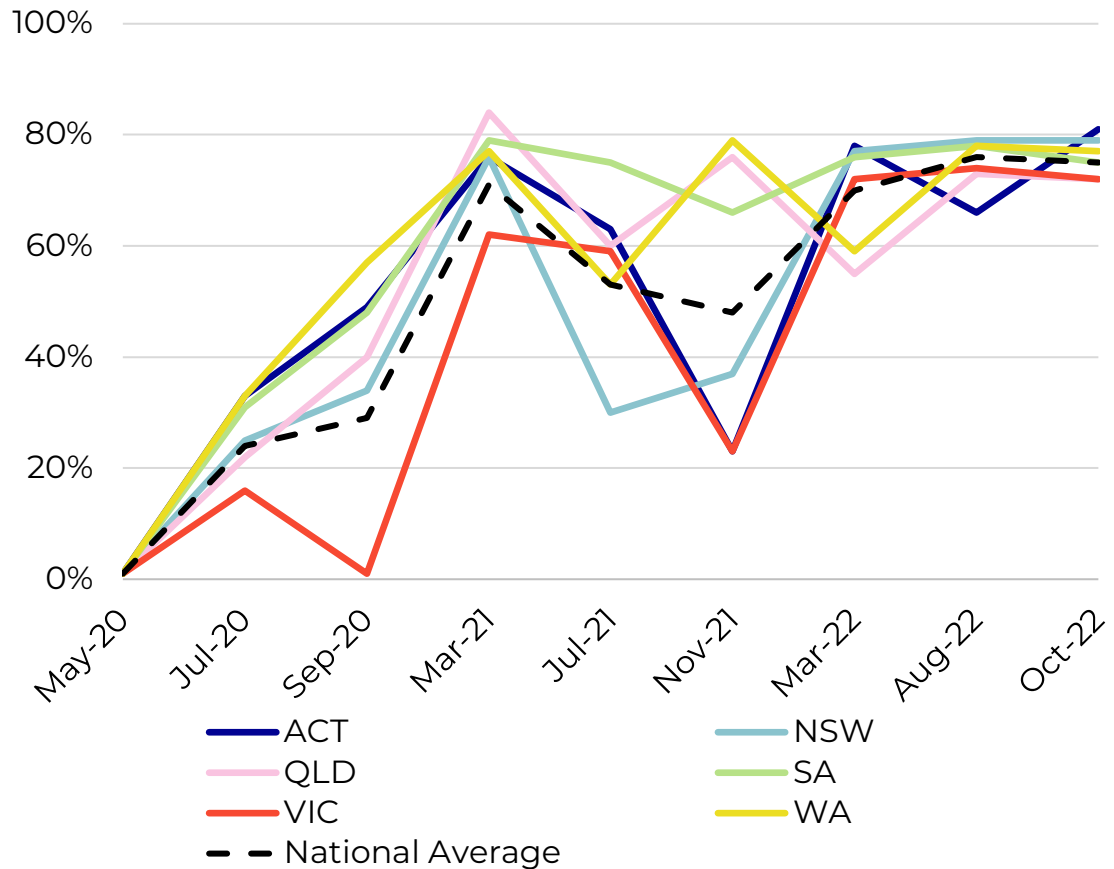
8 in 10 (79%) NSW audience members attended a cultural event in the fortnight prior to data collection, consistent with August (79%) and March 2022 (77%), as shown in Figure 3.

These rates are a significant improvement from July 2021 (30%) and November 2021 (37%), which saw some areas of NSW entering and emerging from lockdowns, respectively. Compared to VIC, which also underwent extended lockdowns last year, attendance has recovered more quickly (79%, compared to 72% in VIC).



In fact, along with the ACT (81%), attendance levels in NSW are the highest in the country.

Figure 3: Proportion of audiences who attended a cultural event in the fortnight before data collection, by state/territory, May 2020 to October 2022 (n=5,438)



Qualitative data suggests that some NSW audience members feel newly positive in the current context. One NSW respondent said,

‘I think the biggest fear since the pandemic started, for me personally, was not knowing how I would come out the other side of having COVID. After having it and survived, the fear has subsided. While I am still cautious, I am starting to attend and do things I did prior and also doing things I didn’t previously, as there also seems to be a need to live a little better/differently.’

Another said,

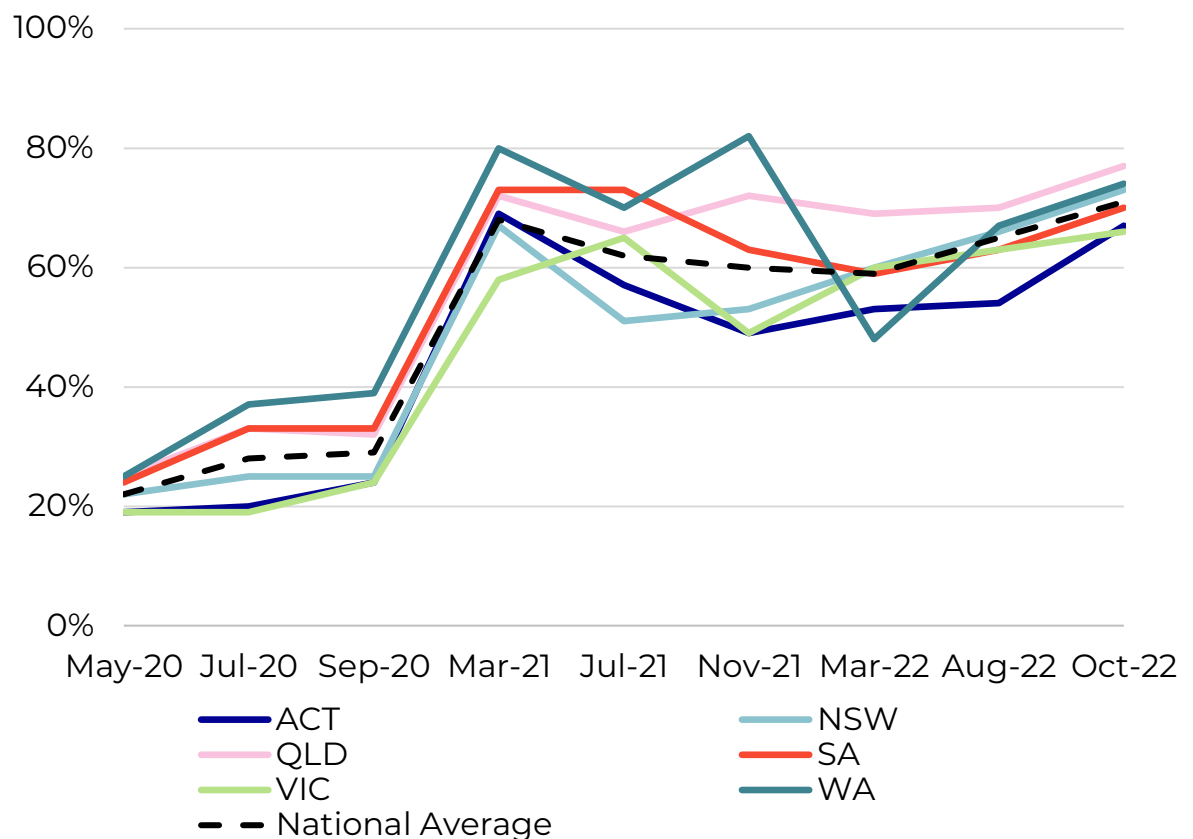
‘Great to be able to revert to decades old ‘usual behaviour’ i.e., attend live performances such as chamber music, symphony, theatre, dance. So relieved to be back in that space again!’

### 3 in 4 NSW audiences feel safe attending events right now – the main challenge being building frequency, rather than converting non-attendees

Only a small proportion of NSW audience members aren't willing to go out right now (2%). Three-quarters (73%) are willing to attend 'now', rather than when 'reasonably confident the risk of transmission is minimal' (26%), up from 66% in August and 60% in March 2022 – the highest proportion since the pandemic began.

Comfort levels among NSW audiences are most similar to those in WA (74%), and slightly behind QLD audiences (77%). Meanwhile, VIC audiences are currently the most risk averse of any state/territory (66% ready to attend), along with ACT audiences (67%) – consistent with trends throughout the pandemic.

Figure 4: Proportion of audiences who are 'ready to attend now or as soon as permitted', by state/territory, May 2020 to October 2022. n=5,438



With risk tolerance increasing as the situation changes, the main challenge now is building frequency and spending.

7 in 10 NSW audience members (71%), spent \$50 or more on arts and cultural events in the fortnight prior to data collection, the highest rate nationally. This has remained stable since August (68%) and March 2022 (70%).

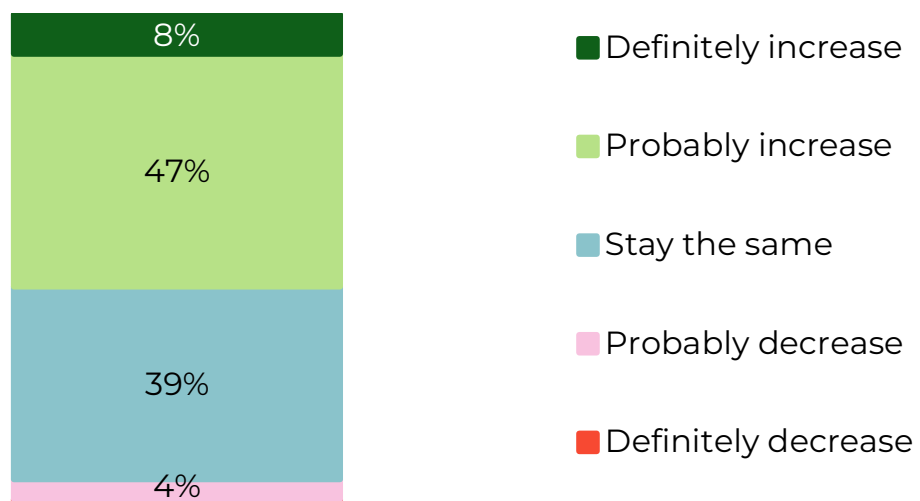
## NSW audiences are among the most likely to say they expect to attend more – though 4 in 10 say it will stay the same

Things are slowly improving, and NSW audiences are much more likely to be increasing their attendances than decreasing them over the next year.

Over half (55%) said their current level of attendance will definitely (8%) or probably increase (47%) — among the highest rates of any state/territory, along with ACT (56%) and VIC (53%). However, plenty will be maintaining their current levels and 39% said it will stay the same.

Only 6% expect their attendance will probably (4%) or definitely (2%) decrease.

Figure 5: Over the next 12 months – do you see your current level of attendance at cultural events and activities changing? NSW audiences (n=1,298)



NSW audiences who are less risk-averse were the most likely to say their attendance would increase, while highly-risk averse audiences were the least likely.

## Behavioural trends

### **1 in 5 NSW audience members said there's been a change to their preferred time, day or location of events since COVID-19 – with pandemic lifestyle changes taking root**

1 in 5 (20%) NSW audience members said their preferences in the day, time or location of events have changed, consistent with the national average (19%). Meanwhile, 7 in 10 (69%) said they have not.

For those whose preferences have changed, working from home, regional migration, and other lifestyle changes have had an impact. One NSW audience member said,

'I WFH, so going to events in the city not as convenient, esp. at lunchtimes.'

Another said,

'Have moved away from Sydney, so travel is a factor.'

Preferencing events at quieter and less popular times was also frequently mentioned – sometimes for reasons of COVID-safety, but sometimes also because audiences have lost their appetite for bustling and crowded environments. One NSW audience member said,

'I now have a day off mid-week and prefer to visit museums & galleries then as it's quieter. But that's nothing to do with COVID, I just prefer less crowds at those type of places.'

NSW audiences were also likely to say that the pandemic has made them more selective about which cultural events they would like to see, as one said,

'I will still go to events that are important to me, but I am more likely to skip ones that are less important in order to reduce exposure to risk.'

## Qualitative data suggests that last-minute ticket buying remains a trend to watch, particularly as unpredictable weather continues

Data from the August 2022 'Pulse Check' suggests that last-minute planning is likely to be another pandemic holdover – with NSW audience members most likely to be booking for events within the next seven days (27%) and the next 2-3 weeks (46%).

Indeed, qualitative data from October suggests that there's still residual anxiety around planning ahead. One NSW audience member said,

'I have bookings for a concert that has been put off for COVID for another six months, the last one I attended had also been postponed. [I'm] getting a bit wary of buying future tickets that may not be honoured.'

For some NSW audiences, this is compounded by the prospect of another La Niña summer, and the possibility of unpredictable weather events. One NSW audience member said,

'I'm held back by poor weather for outdoor events. E.g., risk to book outdoor cinema or opera.'

Another said,

'So many events have been cancelled due to rain when they were scheduled during a predicted La Niña season.'

It seems likely that for many attendees, last-minute booking is here to stay – and there may be a need to plan accordingly.

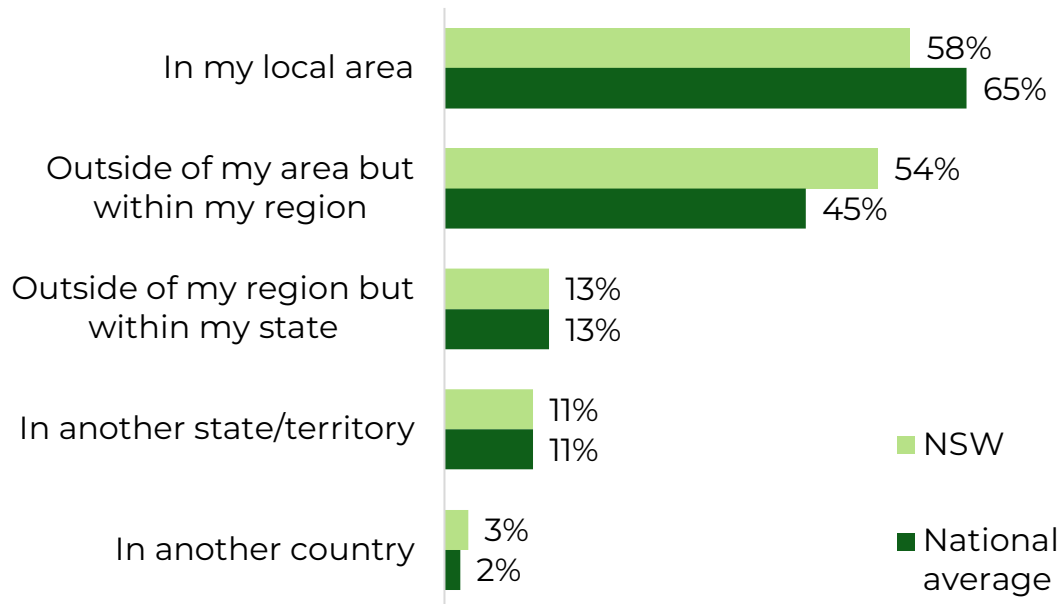
## 1 in 10 NSW audiences are travelling to attend events intra- or interstate – but full recovery will take time

Audiences who had attended arts and cultural events in the last fortnight were asked where these events were located.

While the largest proportion of NSW audiences had attended events in their local area (58%), they are currently the most likely of any state/territory to be travelling outside of their area but within their

region (54%), compared to a national average of (45%). 1 in 10 are attending events outside their region (13%) or in another state or territory (11%).

Figure 6: Were any of the activities you attended in the past fortnight outside of your local area? (Select all that apply). NSW audiences (n=994) and national audiences (n=3,934)



However, full recovery may take time. According to [tourism research by Destination NSW](#), visitors to NSW in FY'22 were down 20.9% compared to FY'21, and were almost half of what they were pre-pandemic (FY'19). Intrastate visitation within NSW (by travellers from regional NSW or Sydney) was down 22.9% compared to FY'21.

However, spend per night has increased compared to 2019 – up from \$195 to \$206 – with travellers spending more on accommodation, dining, petrol and shopping, likely in part due to the rising cost of living.

## Barriers

### Financial reasons are now one of the main barriers to attendance – inhibiting 4 in 10 NSW audience members

When asked if anything was likely to prevent them from attending as they used to over the next 12 months, NSW audiences were the most

likely to name 'financial reasons' as a barrier (38%, up from 16% in March), along with the risks of COVID-19 (37%), as shown in Figure 7.

This is a departure from previous phases when the risk of the virus outstripped other barriers. One NSW attendee commented,

'Finances are increasingly playing a role in the performances I choose - with a preference for [events] which are more cost effective.'

Price sensitivity is particularly affecting families, with one respondent commenting,

'Children's performances are important to me at this time. But price is important when taking a 4-year-old and a 5-year-old. Musicals, music, and theatre over \$100 are out of reach.'

Another mentioned how additional costs related to experiencing events deters them from attending,

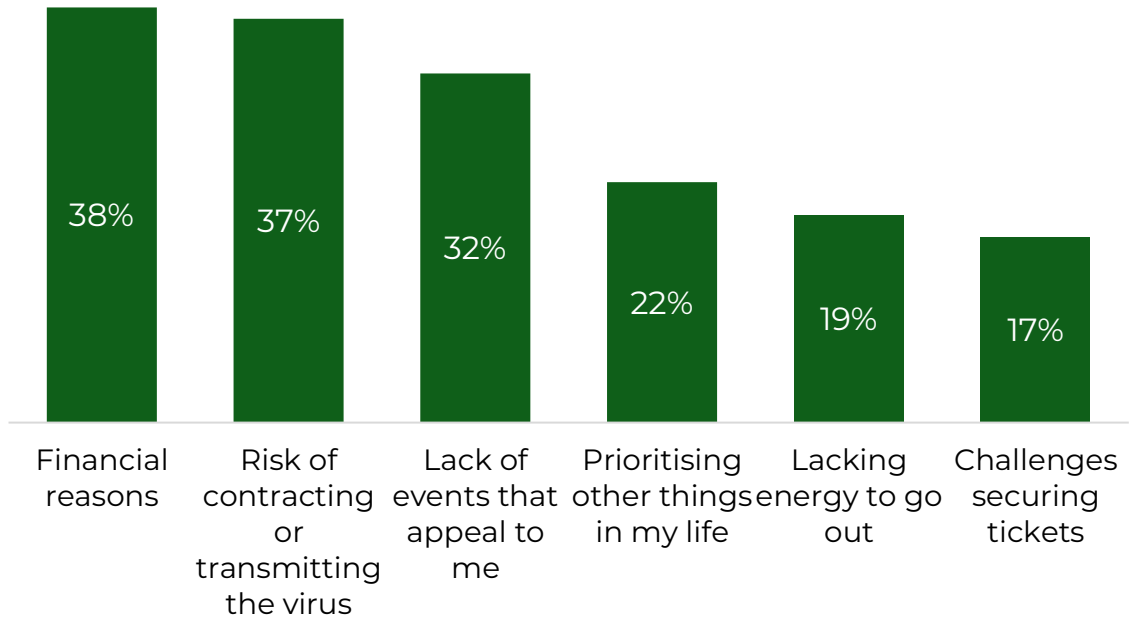
'Before COVID we would "just go". Now we are more choosy... The cost including parking, maybe a meal, plus tickets makes the day or night a special outing rather than a regular part of our diary.'

Financial barriers are also preventing some audiences from travelling interstate to experience cultural events. One NSW attendee said,

'I think something that has changed for me is less interstate travel for cultural events did to increase cost of flights, accommodation, and fuel.'

**Figure 7: Still thinking about the next 12 months... 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 audiences, October 2022 (n=1,295)



## Other key factors at play are lack of appealing events (32%), prioritising other things (22%) or lacking energy to go out (19%)

New options introduced in Phase 8 explored the complex factors affecting attendance in the 'new normal': physical fatigue from COVID itself, mental fatigue from the anxiety and uncertainty of the past three years, new and competing priorities such as spending time with family or domestic/international tourism, and changes in the availability of events.

Of these options, NSW audiences were most likely to say that they perceived a lack of appealing events (32%). One said,

'The reason I am attending galleries less these days is because there's nothing interesting for me - no big shows or exhibitions. Same for performing arts in general e.g., theatre - the programs are lacklustre.'

Two in 10 (22%) said they were prioritising other things in their life. One respondent said,



‘My willingness to attend theatre, performing arts, concerts, cinemas, and galleries is now almost up to the level prior to the pandemic. However, during the pandemic I engaged in other interests which I enjoy and still wish to continue. It's a matter of prioritising my attendances.’

Another said,

‘I used to attend many events prior to the pandemic because it was part of my social lifestyle. I have now changed, and will only go because I want to go, not as part of a social life.’

Around 1 in 5 (19%) are dealing with exhaustion, lack of energy, or ‘re-entry’ anxiety. One said,

‘I have become a little more reclusive during COVID so have to push harder to get myself out the door.’

## Comfort and COVID-safety

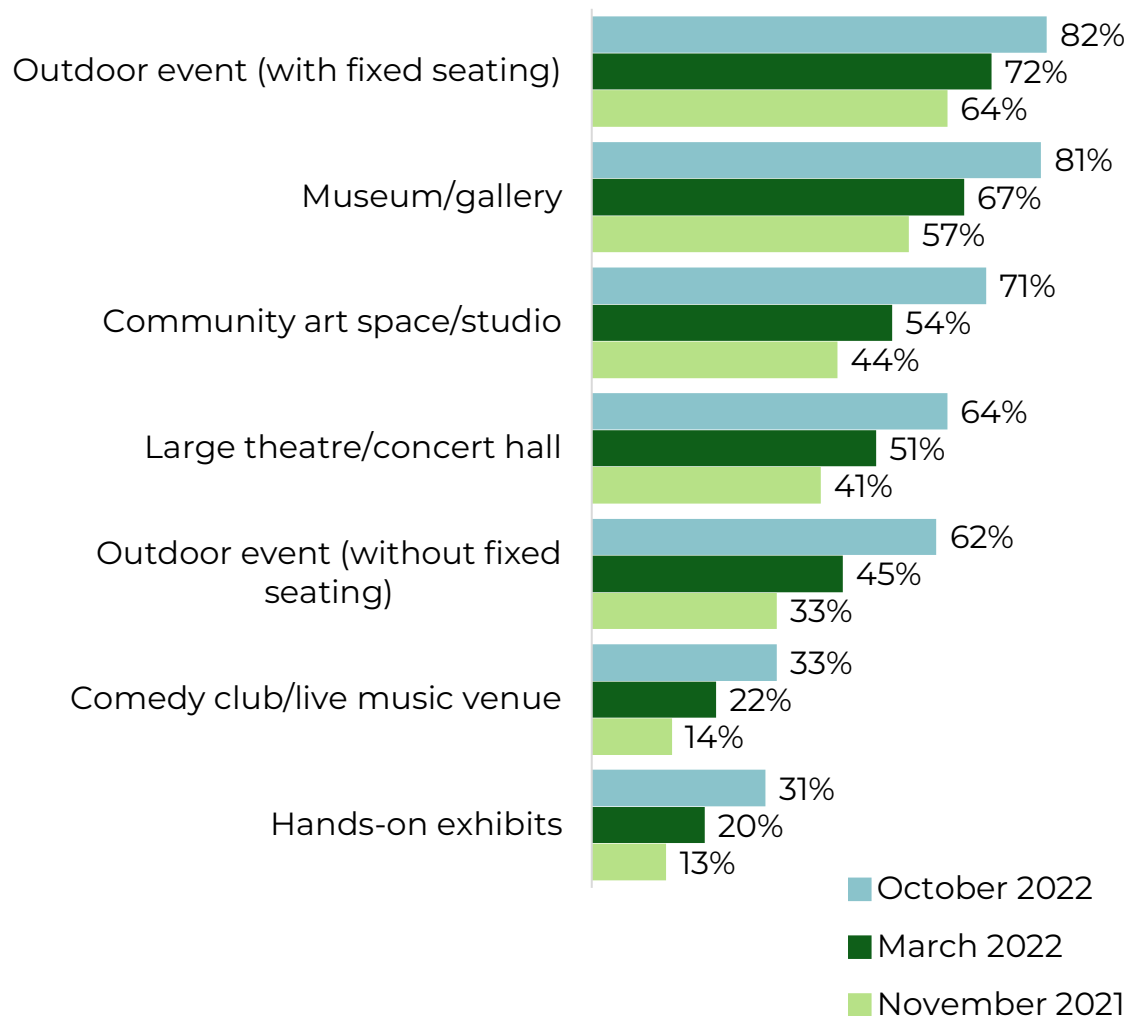
### **Most venues are seen as safe, and comfort at live music venues and interactive exhibits is at an all-time high**

Since March 2022, the majority of NSW audiences are comfortable attending all types of arts venues, including museums and galleries (81% ‘very comfortable’, up from 67% in March 2022), large theatres and concert halls (64%, up from 51%), and outdoor events with fixed seating (82% ‘very comfortable’, up from 72%).

While typically considered riskier by audiences, the level of comfort with hands-on exhibits and live music venues has increased and is now at the highest level since the pandemic began.

Three in ten (31%) of NSW audiences are ‘very comfortable’ using hands-on exhibits (up from 20% in March 2022), and attending comedy clubs and live music venues (33%, up from 22% in March 2022).

Figure 8: Proportion 'very comfortable' attending cultural venues. NSW audiences, November 2021 to October 2022 (n=1,290)



## As isolation rules relax, COVID caution continues to inhibit nearly 4 in 10 NSW audience members

As discussed previously (Barriers), COVID-19 remains a significant barrier for some audience segments. While smaller than in recent phases of data collection, such as August 2022 (44%) and March 2022 (52%), a sizeable proportion (37%) of NSW audiences continue to say the risk of contracting or transmitting the virus will prevent them from attending cultural events.

There are several factors at play, including the effects of long COVID, fatigue, the possibility of cancelled events and [the newly scrapped isolation rules](#). One said,

‘I was looking forward to attending more venues and cultural events. However, the government decision to cease isolating makes me feel more concerned. I believe there will be a spike in infections, less protection for vulnerable persons. Mask wearing and other requirements facilitates more social interactions.’

This proportion is particularly high for NSW audiences who are immunocompromised or vulnerable to COVID-19 (62%), or have someone in their household (62%) or network (56%) who is. One respondent said,

‘I’m not comfortable until masking is mandatory again and the COVID-19 risk is very low due to my immunosuppression. I would be more comfortable if venues would have specific events/times for people with high risk from COVID-19.’

Another said,

‘COVID had huge impacts on marginalised communities, particularly people with disabilities. The Arts can already be inaccessible to or harder to access for people with disabilities, and COVID has widened that divide...Being mindful of this is important when trying to make events accessible – simple things like encouraging patrons to wear masks, having sanitizer available or trying to keep social distancing in mind can help begin to make these spaces more accessible to people with disabilities.’

## **Most audiences are using their own discretion around COVID-safety, and opting to wear masks when necessary**

In October 2022, audiences were asked, ‘What are your current feelings about wearing a mask in cultural venues in your local area, where masks are optional and not required?’

The majority of NSW audiences said they ‘may or may not wear a mask, depending on the situation’ (60%) – signalling that despite relaxed restrictions, most audiences are willing to implement safety precautions based on their perceived level of risk. One said,

‘We will go to events that I find interesting and assess the risk and maybe wear a mask. We will avoid close crowds where possible.’

Some NSW respondents want venues to have mask mandates considering isolation periods for COVID have been lifted, as one said:

‘I only attend events wearing a mask and wish all in attendance were also required to wear one, especially as there is no longer an isolation period for those with COVID.’

However, NSW audiences are slightly more like to say they ‘never wear a mask’ (24%) than they are to say they ‘always wear a mask’ (16%).

## Programming preferences

### **Many are keen to return to the things they love, but there is an appetite for new, uplifting, or challenging cultural experiences**

In terms of content, over the next year audiences generally agree they want to attend things that they used to attend in the past (85%), with many striving to make up for lost time. One said,

‘I have missed going out and live performances. [I] will go out as much as the budget will allow.’

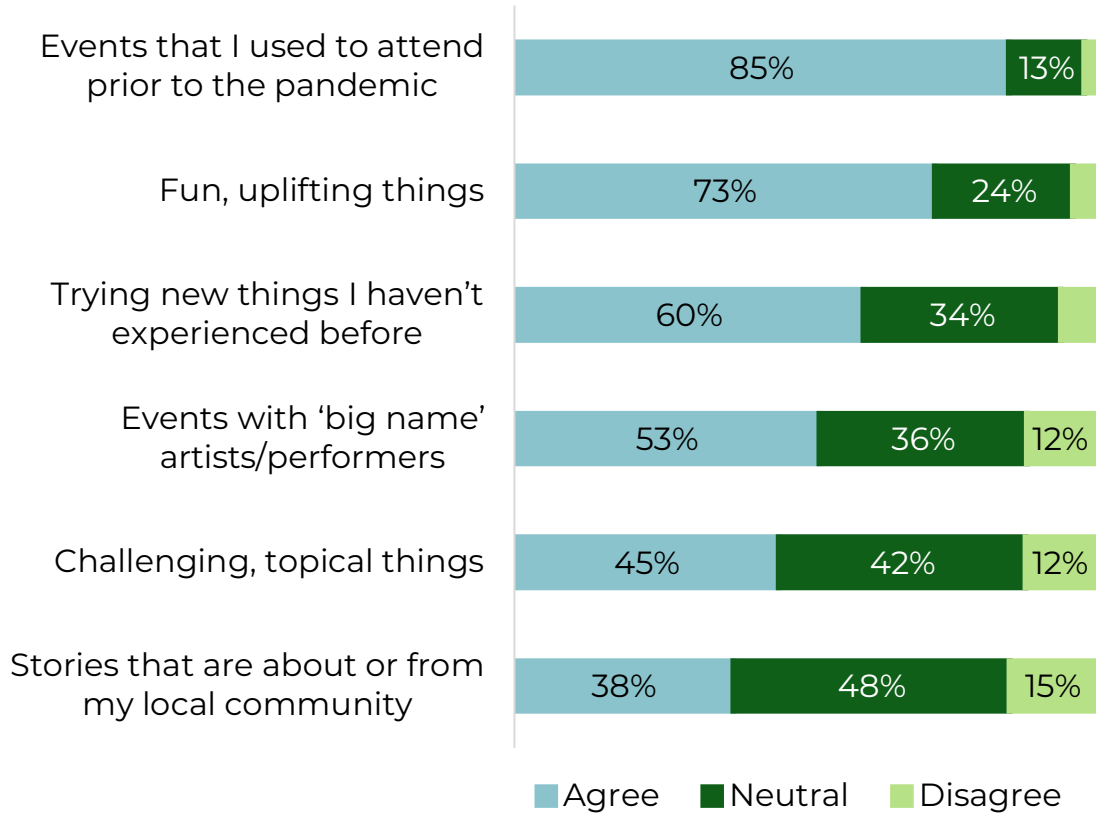
As some assess their priorities post-pandemic, some are opting for familiar cultural activities they can feel assured will be enjoyable. One said,

‘I go to works of quality from creative teams or companies I trust.’

There is also appetite to engage with new content. 6 in 10 (60%) NSW audiences agree that they would like to try things they haven’t experienced before. One respondent commented,

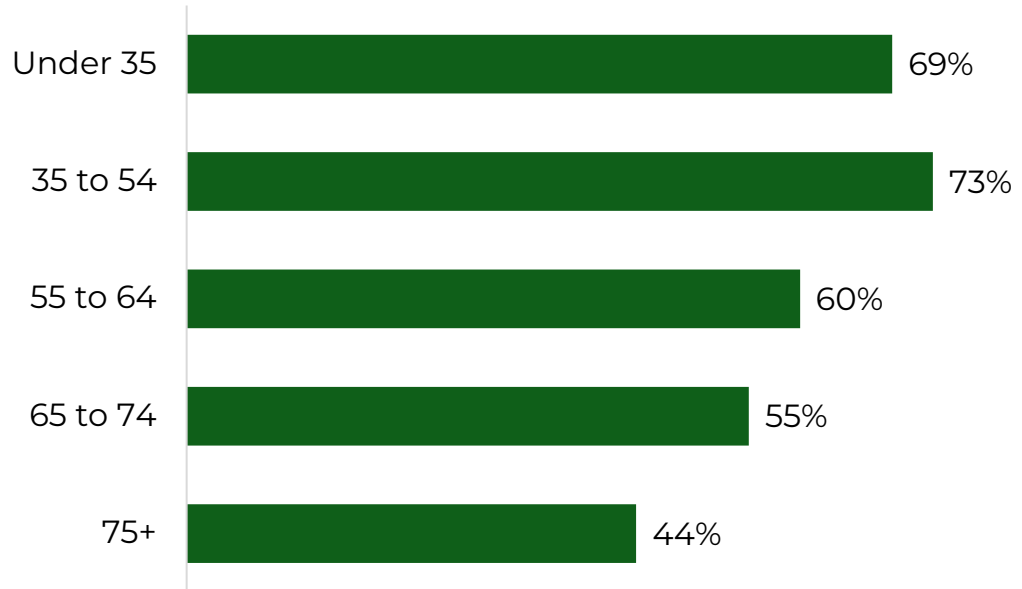
‘[I’m] always looking forward to seeing familiar faces, places and events as well as discovering new. All experiences are worthwhile - something to take away from them.’

Figure 9: In the coming year, I'll be most attracted to ... NSW audiences (n=1,280)



The appeal of trying new things is stronger among younger audiences, such as those under 35 (69%) – compared to those aged 75 and over (44%).

Figure 10: In the coming year, I'll be most attracted to ... trying new things I haven't experienced before, by age group. NSW audiences (n=1,284)



NSW audiences are eager to see increased diversity and representation, with one saying,

'There is an urgent need for all Australians to appreciate the depth and strength of the wonderful arts and cultures that are unique to Australia, particularly Indigenous languages and cultures.'

Another said,

'Now more than ever, we need to be able to see ourselves in art. We need a diverse, wholistic representation that accurately reflects our society.'

## **73% agree they'll be most drawn to fun, uplifting things and 45% to challenging things, confirming the need to continue balancing programs**

Around 7 in 10 NSW audiences (73%) agree that they'll be most attracted to fun, uplifting things over the coming year – a continuing trend that suggests strong demand for connective, morale-boosting and light-hearted experiences. One said,

'I definitely think I need more uplifting things these days compared to before. It feels like we're already living the tragedy so I feel like I can only manage happy ending kind of shows at the moment.'

The last few years have been challenging for many NSW audience members – and with the nature of the current news cycle, some say they're seeking refuge in art. One said,

'I'm finding complicated, emotional topics with trauma hard to watch after the past few years and in light of what's going on in the world and Ukraine.'

But 45% agree that they'll be drawn to topical, challenging content, signalling that while many NSW audience members are seeking uplifting content that offers reprieve from a difficult few years, there is a need to continue offering varied, balanced programs. One person noted,

'I think COVID 19 heightened our awareness of many cracks in our societal makeup. The pressures of capitalism, social welfare and climate change are at an all-time high, and the arts are continually underfunded and under-appreciated – this has resulted in both a political fervour in works, but a need for happiness to balance it out.'

## **53% of NSW audiences agree they're most attracted to 'big names', but 12% disagree – with some conscious of value for money**

As touring picks up, more than half of NSW audiences (53%) agree that they'll be drawn to events with 'big name' artists and performers. However, 1 in 10 (12%) disagree, and qualitative comments suggest a perception that lesser-known works could offer better value for money. One said,

'It's never easy seeing a 'big name' performer/artist. From the cost, to timing, to parking, to public transport, to queuing for toilets... It can be very tiring. I prefer smaller, more intimate shows, and independent theatre.'

## **Local loyalty continues to be important – though NSW audiences are keen to experience touring work**

4 in 10 (38%) NSW audiences are also drawn to local stories from and by their local community. Some mentioned appreciation for their local areas becoming re-invigorated, and a desire to sustain this, post-lockdown. One NSW audience member said,

'I am more interested in supporting local artists to ensure that my suburb/region is a vibrant, unique, and fun place to live. I want to ensure that I am able to access a various range of arts and cultural activities.'

Another mentioned the importance of local events enabling environmentally sustainable practices, as well as sustaining the local community,

'Supporting local artists, organisations and locations is a current priority. Local events have a multitude of benefits including increased environmental sustainability and reduced hassle in terms of accessing the event, and these events cultivate civic pride.'



Several NSW audience members mentioned an appetite for First Nations work, as one said,

‘[I] want to support and enjoy local and regional artists, as well as ones from interstate and overseas, with priority investing in First Nations arts.’

However, while there is strong local support, many are also keen to expand beyond the local, as one said,

‘Not having the option for so long to attend events has somewhat encouraged [me] to make a bit more of what is on offer locally, but also regionally to see/experience somewhere new.’

## Online participation

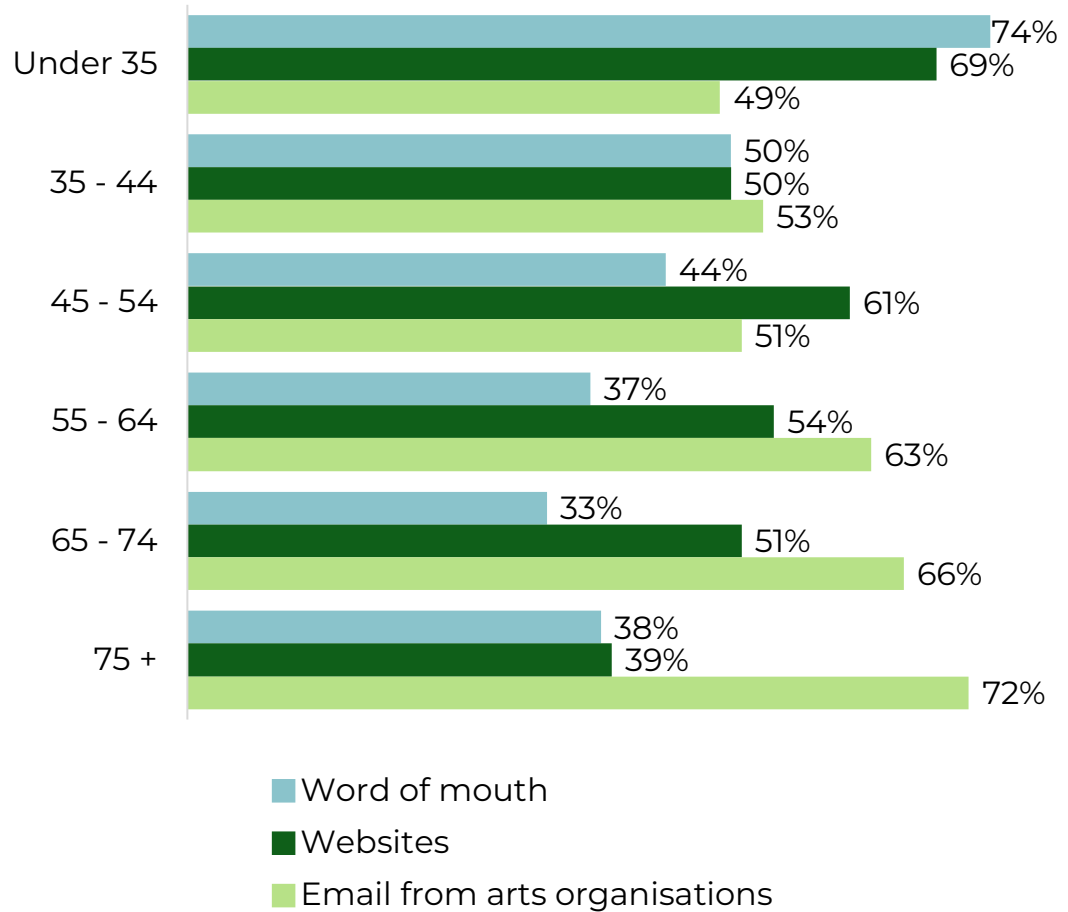
### **Websites, word of mouth and emails from organisations are key awareness channels for audiences of all ages**

When asked how they found out about the most recent show or performance they attended in the past fortnight, 86% of NSW audiences cited online channels, particularly direct emails from arts organisations (61%), websites (54%), and word of mouth (42%) – consistent with trends around the country.

For those under 35, word of mouth (74%) and websites (69%) were the most common sources of awareness, as shown in Figure 11. Direct emails from arts organisations are the third-strongest marketing channel (49%). Other social media platforms like Instagram (39%) and Facebook (29%) are playing a smaller, but significant role for this age group.

Among older segments (75+), emails from arts organisations are the dominant source of awareness (72%), and audiences rely less on websites (39%), word of mouth (38%) and social media (6% on Facebook, 2% on Instagram).

Figure 11: How did you hear about the last show or performance you attended in the past fortnight? (select all that apply). NSW audiences (n=1,025)



## Online participation is steady as 4 in 10 NSW audiences continue to engage in digital arts activities – and 1 in 3 are paying

Though the rate of online participation among NSW audiences has declined since November 2021 (55%), 4 in 10 (42%) are participating in online arts and cultural activities in October 2022, down slightly from March 2022 (45%).

Of the 42% of NSW respondents who participated in an online activity in the fortnight before data collection, activities included watching a pre-recorded video of a performance or event (23%), doing online classes/courses/tutorials (20%), and watching a live-streamed performance or event (15%). A small proportion attended a virtual

exhibition or museum/gallery tour (6%) or created content to share online (3%).

Online participation is high among NSW audiences aged 75+ (46%), audiences who are vulnerable to COVID-19 (48%), disabled audiences (44%), and those who are more cautious about the risk of the virus (50%).

This data confirms a strong case for digital events to be part of organisations' Disability Action Plans.

Among the proportion of NSW digital arts attendees, spending online is stable, consistent with steady spending trends on cultural activities overall. 4 in 10 (38%) paid for an activity in the fortnight before data collection, stable with 36% in March 2022.

Around half (46%) of those paying spent over \$50, stable with 47% in March 2022.

## **7 in 10 see a role for digital experiences in their life, confirming its importance in overcoming barriers to live attendance**

When asked about access requirements that would be 'helpful for attending cultural events', 11% of all NSW audiences said that an option for digital participation would be helpful – confirming the need for digital programs to continue.

When asked about online arts and culture, overall a significant proportion continue to say that these experiences will play a small (50%) or significant (21%) role in their life (71%, down slightly from 75% in March 2022). One said,

'Online performances are essential for those unable to attend in person, due to where they live (e.g., country areas), and/or due to mobility issues.'

Look out for the upcoming fact sheet on audience accessibility, which will explore the October 2022 findings and opportunities related to audiences with access needs.

## The role of the arts in recovery

### Returning to cultural events has enabled recent attendees to feel connected, inspired and enriched

In October 2022, recent attendees were asked, 'What has it been like to return to the arts after COVID? What did you discover you missed?'

NSW audiences commonly expressed their renewed appreciation for attending live events. One said,

'There is nothing like attending a concert, a play or a gallery or museum in person. You cannot capture the atmosphere of being in a live audience or really experience the feel of seeing artwork directly. The atmosphere is often electric.'

Another said,

'Wonderful! I'd missed the shared, visceral joy of live music, the thrill of seeing actors bring to life a story and my investment in the characters, and the immersion into a painter's imagination, their loves, and their fears.'

Returning to the social aspect of cultural events has led to a recovered sense of connection. One commented:

'I loved being in an audience, with people who appreciate the arts. I loved feeling that people who work in the arts have finally got a chance to be back, after having been given so little support. And, of course, I loved renewing my contact with the creative world.'

Another mentioned,

'Fantastic!! I love the newfound energy, community spirit, and sheer joy of being together to appreciate the artists.'

Some respondents expressed mixed emotions about being able to re-attend, while adjusting to public life once again. One said,

‘It has been quite different to my experience pre-pandemic in that I wasn't as relaxed sitting in an audience wondering if I was at risk of getting COVID again. I missed the freedom and relaxation previously enjoyed pre-pandemic.’

Another commented,

‘I still feel slightly disconnected from the Arts scene after such a long time away from it. The pandemic was hard and isolating. I'm still getting used to attending live events.’

## **NSW audiences are eager to support artists and cultural organisations as they rebuild**

Looking ahead to the recovery process, audiences shared a range of positive messages for arts and cultural organisations.

As audiences grow more confident in attending – though many are being selective in their decisions – there is a need for diverse programming and variety in content. One said,

‘Keep inspiring us. We need new stories. New visionary artists. The last few years have been tough. Make us smile. Laugh and move.’

Others expressed the need to continue factoring access and inclusion in programming, as one said,

‘Accessibility is important. Accessibility measures are often of value to the wider community [and] much better and cheaper if they are included from the very start of the project, not stapled on at the end. Small changes can increase accessibility.’

Many expressed a need for better options for price sensitivity, as one said,

‘Keep up the good work!! I know it's expensive to put on arts & cultural events but some of the prices are becoming too expensive for people on lower incomes who still want to go to arts events.’

Some shared words of encouragement as they acknowledged the cautious optimism in the community. One suggested,

‘Keep going. Know that you are valued. Do the best work you can. Agitate for better funding and support. Collaborate with others. Help each other rather than compete. Seek advice on marketing, promotion, and pricing, as these are even more important now than before.’

Audiences are eager to show their support – and encourage artists and cultural organisations to continue advocating for themselves and their peers as the sector rebuilds. One said,

‘Keep on pushing for more government funding to support all forms of the arts. The arts are vital for peoples' wellbeing, for social wellbeing, for emotional wellbeing.’

Another said,

‘Know that what you do is at the very heart of humanity, and [the arts] must thrive for the world to be all that it can and should.’

## What's next

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

There, you can also access a dynamic dashboard to help you explore the results by location, artform and other variables. Instructions and tips for using the dashboard are available in a short video.

To receive future Snapshot Reports, Fact Sheets and resources in your inbox, as soon as they are available, you can opt in to receive Audience Outlook Monitor news at the link above.

If you have a question, or an idea to put forward, relating to this study, you can contact [info@thepatternmakers.com.au](mailto:info@thepatternmakers.com.au).

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