



PATTERNMAKERS



AUDIENCE
OUTLOOK
MONITOR

PHASE 2

New South Wales Snapshot

Audience Outlook
Monitor, July 2020





Summary

The Phase 2 findings of the Audience Outlook Monitor in New South Wales (NSW) demonstrate a slightly more optimistic outlook, compared to findings in Phase 1. A higher proportion of audiences say they would be comfortable to attend most types of cultural venues, but particularly museums and galleries (93%, up from 88%), community art spaces (85%, up from 79%) and outdoor events (64%, up from 58%).

However, there remains a level of caution following cases of community transmission in the state and nearby in Victoria (VIC) at the time of data collection (July 2020).

Qualitative feedback shows that safety measures implemented by cultural venues are helping NSW audiences feel safe, particularly in the context of uncertainty about the virus.

When ranking options for attending a cultural event today, the largest proportion (40%) of NSW audiences selected digital programs as their first preference right now. However, many others would also attend outdoor events, or indoor venues with fixed seating, if adequate social distancing measures were enforced.

NSW audiences are among the most highly engaged with online arts and culture experiences, and are more likely to be engaging online more frequently than in May 2020. NSW audiences are also more likely to be paying for online experiences now (43%) than in May (38%), and a greater proportion in NSW are doing so than audiences nationally (36%), indicating an increasingly strong market for digital offerings.

Introduction

This New South Wales (NSW) Snapshot Report identifies insights from 3,633 survey respondents connected with NSW arts and culture organisations participating in Phase 2 of the Audience Outlook Monitor.

Beginning in May 2020, the study involves bi-monthly data collection to track how audiences feel about attending arts and culture events in the context of the COVID-19 pandemic.

Each phase involves a cross-sector collaborative survey process involving over 150 arts and culture organisations, including museums, galleries, performing arts organisations and festivals. Participating organisations simultaneously sent a survey to a random sample of their audiences, who had attended a cultural event between January 2018 and May 2020.

Phase 2 results, from over 15,000 respondents, have been combined with Phase 1 data in a freely available dashboard. It's designed to provide insights about all different artforms, types of events and demographic groups in all parts of Australia.

For more information about the study, and to access resources like the dashboard, visit: www.thepatternmakers.com.au/covid19

Read on for the key Phase 2 findings in NSW.

Current conditions

NSW audiences feel more confident than in May 2020, but remain somewhat cautious

Between May and June 2020, the number of confirmed cases of the virus nation-wide fell, and restrictions on events were loosened around Australia.

In NSW, audiences' comfort to engage in activities in public has increased from Phase 1 to Phase 2. The proportion that are at least somewhat comfortable using public transport increased from 54% to 64%, and those that are comfortable to eat at a local restaurant increased from 61% to 87%.

However, while confidence is returning, there is a level of caution following cases of community transmission occurring around the time of data collection (8–12 July 2020).

When comparing to audiences nationally, NSW audiences are showing slightly lower levels of comfort eating at a local restaurant (87% feeling at least somewhat comfortable vs 91% nationally), going to a local cinema (65%, vs 69%) and exercising at a gym (54% vs 57%).

Returning to events

The proportion ready to attend cultural events has increased in NSW, though some expect to attend less frequently

Readiness to attend cultural events has increased marginally in NSW (25%, up from 22% in May 2020), however it remains below the national average (28%), in line with concerns about community transmission at present.

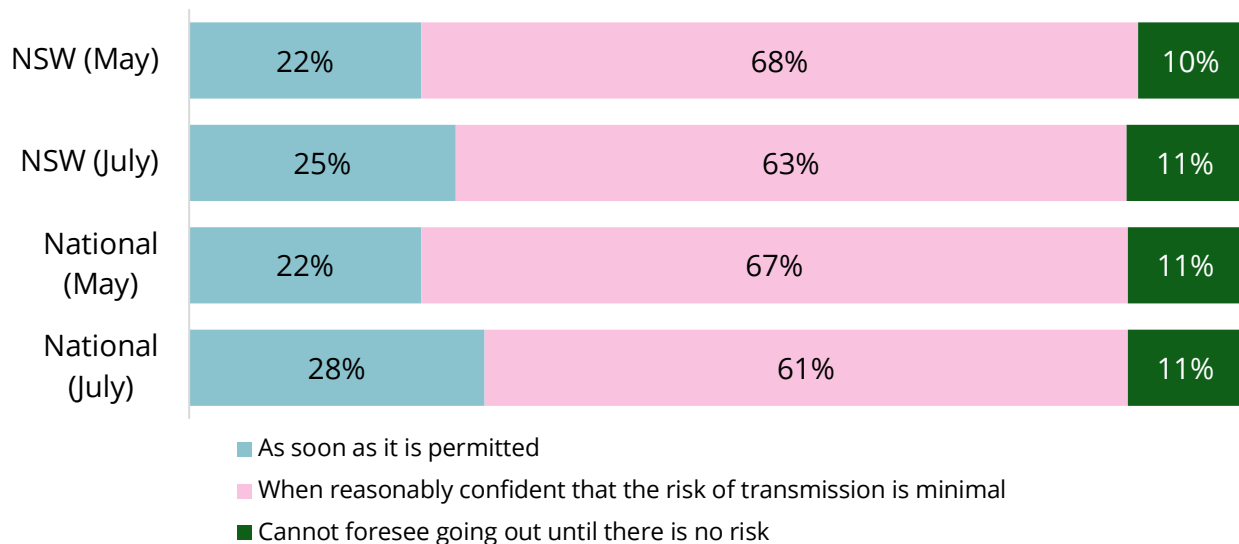
At this time, the proportion of NSW audiences who cannot see themselves going out until there is no risk of transmission has remained stable (11% compared to 10% in May 2020).

In NSW and across the country, more people are now saying that they believe the pandemic will affect their attendance long-term, with 22% expecting to attend cultural events less than before (up from 14% in May 2020).

NSW audiences are most similar in their long-term outlook to those in the neighbouring Australian Capital Territory (ACT) (23%) and VIC (23%), where dense populations and concerns about community transmission are also high. Other states/territories, where there are no or low rates of community transmission, are feeling slightly more optimistic, such as the Northern Territory (NT) (18% expect to attend less) and Queensland (QLD) (19%).



Figure 1: Which statement best represents how you feel about going out again? (NSW and National results in May and July 2020) n=39,238



1 in 4 NSW audience members have started returning to cultural events

With some arts and cultural venues having re-opened in the state since May 2020, 24% of NSW audiences attended a cultural event during the fortnight before data collection (8–12 July 2020).

Compared with attitudes in May 2020, NSW audiences are feeling stronger levels of comfort walking around a museum or gallery (93%, up from 88%), visiting a community art space (85%, up from 79%) and attending an outdoor festival or concert (64%, up from 58%). They are also demonstrating more confidence towards attending venues seating 50 people (80%, up from 61%), 100 people (67%, up from 45%) or even 500 people (36%, up from 25%), assuming they were open and following safety guidelines.

NSW audiences are showing a similar level of caution to VIC (27%) towards attending more intimate spaces such as a comedy club or live music venue (27%).

Audiences were also asked to share their level of comfort towards specific social distancing guidelines, as the most widely used safety measure implemented by venues. Compared with the national average, NSW audiences are feeling similar levels



of comfort towards venues enforcing four square-metres per person (90% vs 91% nationally), but less comfortable with two square-metres per person (58% vs 64% nationally).

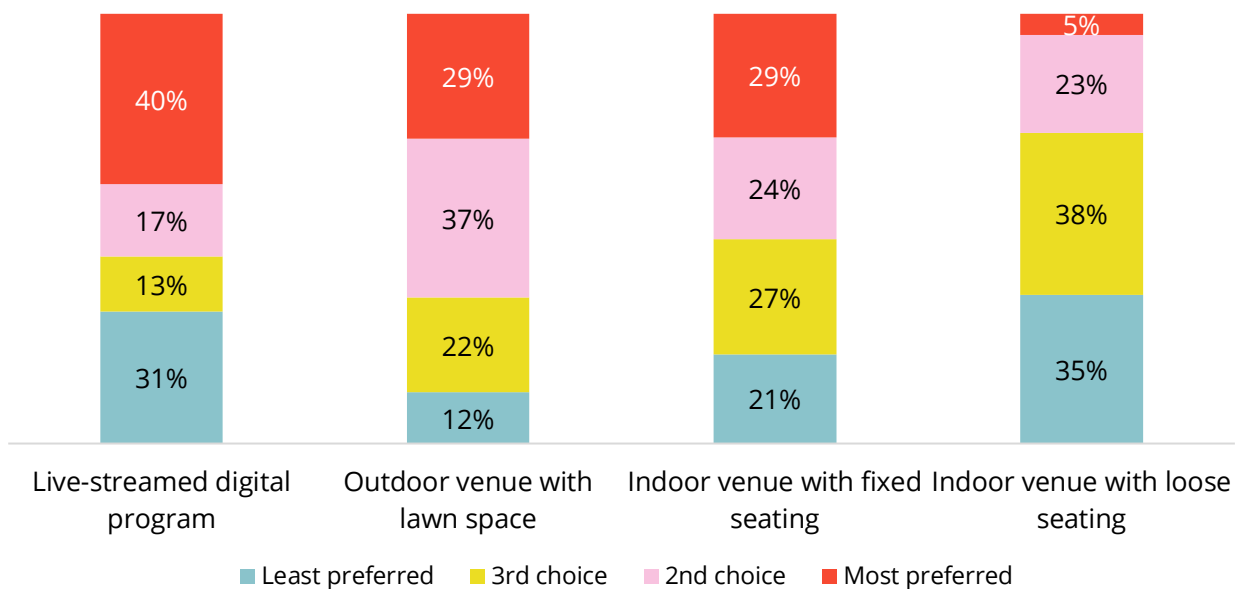
There are mixed views about what spaces feel safest to NSW audiences right now

For the first time in Phase 2, respondents were invited to rank a number of options for attending cultural events today:

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

The results (Figure 2) show that not everyone agrees on their preferred choice.

Figure 2: Rank the four options for attending a cultural event today (in order of preference for NSW audiences). n=3,387



Digital programs feel safest to 40% of NSW audiences right now

The largest proportion (40%) of NSW audiences selected digital programs as their first preference for attending a cultural event today. One NSW respondent shared,

‘I have seen some digital cabaret performances with paid tickets. Very good experience. I don't trust people to sit far enough apart indoors unless seating is fixed but that doesn't matter so much outdoors’.

Another person shared,

‘I would only participate in an event online, from home. People have proven they can and will behave badly. One cough, one sneeze, one breath, one touch is all it takes. Organisers cannot guarantee my safety in an in-person situation.

I have participated in several events online, via live-streaming and Zoom. I very much appreciate the efforts of the organisers in continuing to make events available in this manner’.

Outdoor venues and performances allow for ventilation and social distancing

Similar to audiences nationally, a large proportion of NSW audiences ranked an outdoor venue with open lawn space as their first (29%) preference for attending a cultural event today. Many people said that open-air, outdoor spaces feel safer by enabling more ventilation. As one person shared,

‘I prefer outdoor as there is more ventilation, and the ability to move away from people is preferable’.

Another shared a similar view,

‘Ventilation required to feel comfortable. Fresh air, not with air conditioning. But there needs to be live theatre too. So an outdoor amphitheatre is ideal’.

When attending indoor venues, audiences prefer fixed seating arrangements

NSW audiences, like many across Australia, would prefer assigned seating when attending indoor venues, to better control social distancing. As one person shared,

'If possible, I prefer live performance to streamed programming. At the present time outdoor events are great but it depends on strict supervision of distancing. If seated with moveable seating it might be difficult to constrain attendees to observe distancing guidelines. Booked, fixed seating with strict guidelines and supervision is preferable'.

Another agreed, sharing,

'For indoor events I prefer to attend events where seating is controlled and fixed according to current social distancing guidelines and not relying on attendees' personal judgements about this (e.g. where seats are not fixed and can be arranged according to attendees' personal judgements)'.

Audience experiences

Safety measures are helping NSW audiences feel safer attending venues

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

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

Another person mentioned a positive outdoor performance they attended,

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

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

‘Theatre had excellent social distancing. Every second row was blocked out from bookings and thus empty. There were at least two empty seats between each group of patrons in each row. Foyer and bar/refreshments was sparsely occupied’.

Clear communication ensures social distancing is successfully applied

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

‘Signage. I feel we all need constant reminders about social distancing. It's all too easy to fall into old habits’.

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

‘They could've had more staff on to facilitate all of the explanations to attendees, i.e. it took a while to actually take our seats’.

Future attendance

39% of NSW audiences are making plans to attend cultural events

One significant change since May 2020 is that more NSW audience members are making plans to attend an event of any kind (39%, up from 12%). Among those who have made plans, NSW audiences intend to visit a museum or gallery (21%) or attend a cinema (19%) in future, which are the types of venues most likely to be open.

Around the country, the proportion making plans to attend cultural events broadly follows consumer confidence about public interaction in general. For instance, the proportion making plans at present is highest in states/territories with no recent cases and high rates of confidence in border controls, such as the NT (66%) and Western Australia (WA) (54%).

When they do go out again, the majority of NSW audiences plan to spend the same amount as before the pandemic (73% vs 72% nationally) with 10% planning to spend more than before.

NSW audiences are waiting longer to purchase tickets to live events

NSW audiences are among the least likely to have purchased tickets to an in-person live event recently (8%), along with those in the ACT (6%) and VIC (7%).

Across the country, ticket-buying horizons are shorter than they were in May 2020, and 33% of audiences nationally are buying tickets less than one month in advance.

However, NSW audiences appear to be waiting longer than other states/territories, with 29% purchasing tickets for this month (July 2020), compared with 53% in the NT and 43% in WA.

NSW audiences are more similar in their outlook to VIC audiences, with 27% purchasing tickets for events in April 2021 or thereafter (compared to 28% in VIC).

Among those who have bought tickets, the most common price paid is between \$10 and \$25 (18%), similar to the national average (20%).

Participating at home

Since May, NSW audiences are continuing to participate creatively at home

At home, NSW audiences are continuing to engage in creative activities at a similar rate to May 2020, with a majority still listening to music (90%, compared to 88% in May 2020), reading for pleasure (88%, compared to 87%) and making art or craft (38%, stable).

A smaller proportion are collecting objects, artworks, or artefacts, but this type of participation has increased (12% in July 2020, up from 9% in May 2020).

NSW audiences are participating online more frequently, and more plan to continue

While the proportion of audiences engaging online remains high nationally (73%), NSW audiences are engaging online to a slightly greater extent (76%).

A greater proportion of NSW audiences (57%) are also engaging online more frequently right now, than they were in May 2020 (41%).

Further, more NSW audiences are planning to continue engaging online after the pandemic than in May 2020 (71%, up from 63%), confirming the importance of long-term thinking and investment in digital distribution.

Digital performances and classes are most popular among NSW audiences

NSW audiences, along with audiences in VIC, are the most highly engaged in watching pre-recorded performances (55% in NSW compared to 51% nationally), live-streamed performances and events (45% vs 41% nationally) and doing online classes (33% vs 30% nationally).

Online discovery of new artists and work has increased among NSW audiences since May 2020, for both individual respondents (32%, up from 27%), and for people they know (16%, up from 13%).

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

Compared to audiences nationally (36%), NSW audiences are more likely to have paid for an online experience (43%), which is also an increase from 38% in May 2020.

The rate of donation has remained consistent (24% vs 23% in May), however more audiences have purchased a single experience recently (22%, up from 13%) or subscribed to a platform (12%, up from 9%), compared to the proportion in May 2020.

When asked to indicate their total spending on arts and culture experiences online, 40% have spent more than \$50, consistent with the rate in May 2020 (40%).

When asked to describe the characteristics of the experience that made it worth paying for, NSW audiences commonly expressed their appreciation for the high quality of digital performances that they could access. As one person shared,

‘Seeing a performance of Hamlet by a high-level professional ensemble from a non-Anglo country in an ad hoc venue, part of a castle ruin. The high-level performance from a fresh innovative perspective was invigorating to my imagination’.

Another audience member commented,

‘National Theatre at Home made available recorded performances of some classics - such fantastic sets and actor performances, what a great opportunity to see world class art at home’.

Sharing cultural experiences online keeps audiences connected to others

When reflecting on memorable online experiences, several NSW respondents highlighted the opportunity to connect with others whilst participating from home. One person mentioned being able to embrace an opportunity to share a connection, commenting,

‘People connecting with each other and art rather than waiting for things to return to 'normal' - the embracing of the 'now'’.

Another person shared the joy of collaborating with others online,

‘Some of the collective choirs and dance routines - moving and uplifting even if they are not always professionally fabulous - doesn't seem to matter. It's the collaboration that's important’.

Online engagement is enabling audiences to support creatives during the pandemic

Similar to attitudes in Phase 1, many audience members are finding value in being able to support creatives during the pandemic by participating online. One NSW respondent appreciated being able to support local talent, commenting,



'It was local. I thought it was really important to participate in my direct local community, supporting them through this time'.

Another person said that their experience resulted in a donation,

'The vignettes by artists I am familiar with. Made me feel like I was supporting them; somehow. AND I did donate more'.

What's next

To explore the data in more detail and find out how audiences are responding, visit the study's Australian homepage at: www.thepatternmakers.com.au/covid19

There, you can access a range of Fact Sheets and 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.

Each month, the researchers release new insights about key regions, artforms and topics. They also provide tips and practical steps you can think about to apply the findings in your work.

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.

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

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