



PATTERNMAKERS



AUDIENCE
OUTLOOK
MONITOR

PHASE 3

New South Wales Snapshot

Audience Outlook Monitor,
September 2020





Summary

Phase 3 of the Audience Outlook Monitor in New South Wales (NSW) reveals that more NSW audiences are making plans to attend cultural events (49%, up from 39%). However, NSW audiences remain among the most cautious nationally.

In September 2020, the proportion of NSW audiences that attended a cultural event of any kind, in the fortnight before data collection (2–6 September) has increased. One-third (33%) of NSW audiences have now returned to cultural events, as more venues and facilities reopen in the state, compared to 25% in July 2020.

More NSW audiences are making plans to attend a live performance (25%, up from 12%) and buying tickets (17%, up from 8%), and lead times are short: two-fifths of ticket buyers (40%) are buying tickets for events this month.

Although a sizeable proportion have already begun returning to cultural events, NSW audiences are demonstrating similar or slightly higher levels of caution about most forms of public interaction, such as using public transport (58% feel comfortable, down from 64%) and eating at a local restaurant (82% feel comfortable, down from 87%).

Venue safety continues to be important. Compared to May 2020, more NSW audiences would be encouraged to attend if face masks were mandatory (80%, up from 42%) along with temperature checks upon entry (77%, up from 69%).

A slightly greater proportion of NSW audiences now rank outdoor venues as their first preference for attending a cultural event (33%, up from 29%), where there is enough lawn space to spread out. However, there is still a sizeable proportion that prefer digital programs right now (38%).

Cultural organisations are continuing to connect with NSW audiences via digital offerings, even while restrictions on public gatherings have begun to ease locally. Participation in most activities has remained stable, and pre-recorded performances and events continue to reach the largest proportion of audiences (48%). However, this rate has fallen slightly (down from 55% in July), consistent with trends nationally.

Introduction

This New South Wales (NSW) Snapshot Report identifies insights from 2,920 survey respondents connected with NSW organisations participating in Phase 3 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 around 150 arts and culture organisations, including museums, galleries, performing arts organisations, and festivals. Participating organisations simultaneously sent a survey to a random sample of their audiences, who had attended a cultural event between January 2018 and May 2020.

Phase 3 results, from over 12,000 respondents (nationally), have been combined with Phase 1 and 2 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 3 findings for NSW.

Current conditions

NSW audiences are showing similar, or slightly lower levels of comfort with public interaction

In September 2020, levels of comfort participating in public events vary markedly around Australia, based on rates of community transmission. NSW audiences continue to be among the most cautious, on average, along with those in Victoria (VIC) and the Australian Capital Territory (ACT).

Compared to July, most activities are now viewed with similar, or slightly lower levels of comfort, such as using public transport (58% feel comfortable, down from 64% in July 2020) and flying domestically on a commercial airline (41%, stable with 42% in



July). This is also evidence in the proportion who feel comfortable exercising at a gym or fitness studio (41%, down from 54% in July) and eating at a local restaurant (82%, down from 87%), potentially due to these settings being the source of recent outbreaks locally.

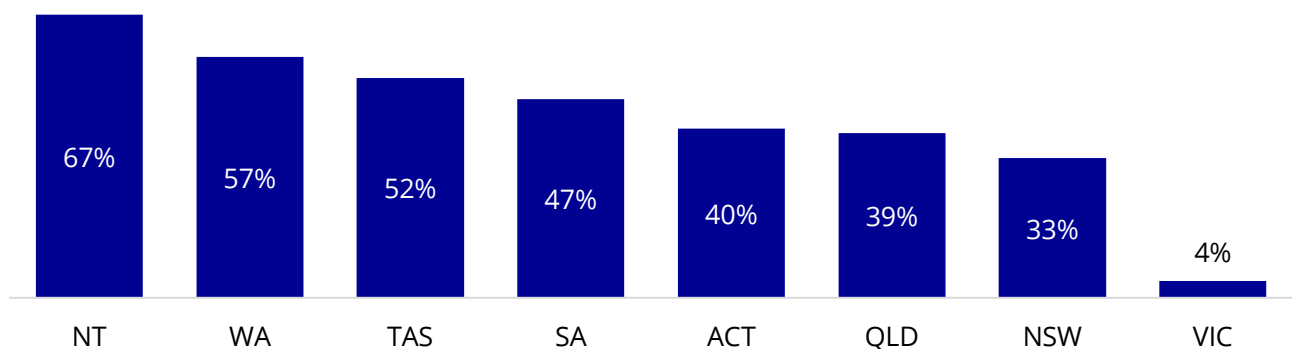
Returning to events

One-third of NSW audiences have returned to a cultural event recently

The proportion of NSW audiences that attended a cultural event, of any kind, in the past fortnight has increased from 25% in July to 33% in September, as more venues and facilities reopen.

The most common venues and events that people are reattending are museums and galleries (17%) and cinemas (16%), which are currently the most common types of facilities to be open consistently. Figure 1 displays the proportion who have attended a cultural event recently in each state/territory.

Figure 1: In the past fortnight, did you do a cultural activity in-person (not online)? By state/territory of participating organisations.



As performances return to venues, more people are buying tickets

In NSW, more past attendees are making plans to attend an event, of some kind, in future, increasing from 39% in July to 49% in September 2020. NSW audiences are most similar in their outlook to those in Queensland (QLD) (51%) and ACT (55%),

where restrictions have begun to ease, but audiences are relatively cautious about potential outbreaks.

NSW audiences are more confident than VIC audiences, where just 20% are making plans to attend a cultural event. By comparison, in the Northern Territory (NT), South Australia (SA), Western Australia (WA) and Tasmania (TAS), around two-thirds of all audiences are making plans.

In terms of artforms, the proportion of NSW audiences making plans to attend a live performance has grown the most strongly in the past two months, with 25% planning for this right now, up from 12% in July.

The proportion who are buying tickets has grown from 8% to 17%, and two-fifths (40%) of ticket buyers are buying tickets for events this month. The proportion who spent more than \$50 on tickets has also grown, from 13% in July to 23% in September.

Attitudinally, NSW audiences remain cautious about re-attending cultural events

In September 2020, data shows that 25% of past attendees in NSW are 'ready to attend' cultural events as soon as permitted, increasing from that observed in May 2020 (22%) and remaining stable since July 2020 (25%).

NSW audiences are most similar in their sentiments to those in VIC and ACT, where around 25% are ready to attend. By comparison, in QLD and SA, confidence is slightly higher, with around 33% ready to attend. Audience confidence is increasing in WA, NT and TAS with now around 40% of attendees saying they are ready to attend as soon as permitted.

NSW audiences are continuing to feel slightly cautious about attending most venue types

As summer approaches, there has been a slight increase since July 2020 in the proportion of NSW audiences who are at least somewhat comfortable attending outdoor events (69%, up from 64%), particularly performances in outdoor amphitheatres (78%, up from 75%). Other outdoor settings are receiving a similar level of caution as in July, such as street markets and fairs (73%, stable with 71%) and outdoor music festivals (35%, stable with 34%),



In NSW, the comfort level attending stadiums has slightly increased since July (44%, up from 39%), while the proportion who feel comfortable with other indoor venues has remained consistent, including large theatres and concert halls (63%, stable with 61%) and comedy clubs or live music venues (26%, stable with 27%).

Since July 2020, NSW audiences are showing consistent levels of comfort with venues of all sizes, including those seating 250 people (50%, stable since July), 500 people (36%, stable) and 1000 people (28%, stable).

Further probing about social distancing in Phase 2 showed that different social distancing arrangements would also have a greater effect on attendance. In September 2020, 92% of NSW audiences would be at least somewhat comfortable to attend venues with 4 square metres per person enforced. This drops to 59% under a scenario of 2 square metres per person, and just 7% with no social distancing at all — a slight decrease from 10% in July.

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

In May 2020, face masks were a polarising issue nationally, while a sizeable proportion of NSW audiences (42%) widely encouraged their use when attending cultural events.

Now, in September 2020, support for face masks is particularly high in NSW (80%), along with in VIC (88%), where they have become adopted and used most widely. By contrast, support for face masks is lowest in WA (46%) and SA (49%).

Another safety measure with higher levels of support is temperature checking upon entry to venues, with 77% of NSW audiences now saying this would make them more comfortable, compared to 69% in May 2020.

Future attendance

NSW audiences are favourable to both outdoor events and digital streaming

Again, in Phase 3, audiences were asked to rank their preferred setting for a cultural event, from a list of four options.

NSW audiences continue to show support for live-streamed digital programs that they could watch from home, as this feels the safest. The proportion who put this as their first choice has remained stable (38%, compared to 40% in July), while there has been a slight drop nationally (35%, down from 39%). One respondent expressed,

'I don't think people can be trusted to do appropriate distancing themselves yet. I've enjoyed lots of online content recently because I don't need to stress about germy public transport or expensive parking, which is the main disincentive to in-person events at the moment'.

A slightly greater proportion of NSW audiences now rank outdoor venues as their first preference (33%, up from 29%) where there is enough lawn space to spread out. As summer approaches, preference for outdoor events has grown significantly elsewhere in Australia, such as TAS (up 20%), ACT (up 8%) and VIC (up 7%).

Around one-quarter (28%, stable with 29% in July) ranked an indoor, 100-seat venue following social distancing guidelines highest, and just 3% (stable with 5% in July) ranked an indoor, flat-floor venue with loose chairs and plenty of space to spread out highest.

After considering second and third preferences, on average NSW audiences now rank indoor venues with fixed seating more highly than live-streamed digital programs, following outdoor settings. Some appear to feel a sense of fatigue with digital participation, as one NSW respondent expressed,

'I've seen enough live-streamed to last me a lifetime. I'd like to go back to seeing things live...and outdoors makes the most sense at the moment'.

Some audiences express a desire to support local venues and work that is important to them

In Phase 3, audiences were asked 'Is there anything you can tell us about the types of venues or events you'll prioritise, and how they may differ from prior to the pandemic?'

Safety is one priority that will influence the decision to attend events in future for many NSW audience members, and several people mentioned prioritising outdoor events once they return. One respondent said,

'The kinds of events I would like to see will be similar, though I will be more comfortable attending sooner at venues that are outdoors, or at least widely spaced indoors'.

Another shared that they feel confident in relying on the organisations they subscribe to, commenting,

'I trust the venues to which I currently subscribe and am confident that they will follow state and federal health guidelines'.

Many NSW audiences say they want to support local, 'homegrown', and in particular, struggling artists and organisations once it is safe to do so. One person explained,

'I will be more inclined to support venues and organisations that have been hardest hit by the situation for the arts the virus has created'.

Some people shared that they will be more selective in attending events, and prioritising cultural activities which they are more passionate about, as one said,

'I may be more 'choosy' with events. I used to attend everything, now I may make sure I really want to go before attending'.

NSW audiences are feeling slightly pessimistic about returning to events long-term

In May 2020, 14% of NSW audiences said their future attendance will be negatively affected by the pandemic long-term. In July 2020, this had increased to 22% and it remains stable at 21% in September, which is among the highest rate of this outlook nationally.

By comparison, the smallest proportions of audiences saying their attendance will be negatively affected by the pandemic are in the NT (16%) and WA (18%), where audiences are reporting a sense of relative normalcy after months with no or only small numbers of cases.

When they feel comfortable going out again, most NSW audiences (74%) expect to spend the same amount as they did before on tickets and subscriptions, 15% expect to spend less and 11% expect to spend more, consistent with the July results.

Participating at home

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

Past attendees in NSW are continuing to participate in creative activities while at home, such as listening to music (90%) and reading for pleasure (90%).

Smaller, but consistent, proportions are making art or craft (37%, stable with 38% in July), creating videos or doing photography (21%, stable) and making music (23%, stable with 25%).

7 in 10 (71%) are participating in online arts or cultural experiences, which is a slight decrease from the proportion in July (76%) and May 2020 (78%).

Most types of online engagement are steady, and slightly fewer are discovering new work

Along with audiences in VIC (79%), TAS (78%), and ACT (70%), NSW audiences are among the most likely to be engaging in online arts and culture activities right now. By comparison, online participation is lowest in WA (60%), NT (60%) and SA (61%), where many restrictions on live attendance have lifted.

In NSW, participation in most online activities has remained consistent, including the proportion watching virtual exhibitions and tours (17%, stable since July) and doing online classes, courses, and tutorials (32%, stable from 33%).

Across the country, the most consistent levels of participation have been in online video of performances and events, although this has decreased slightly as more

venues reopen. In NSW, 48% are watching pre-recorded performances online (down from 55%) and 38% are watching live-streamed performances (down from 45%).

When asked if they, or anyone they know, has discovered a new artist, artwork, or performance online, 29% of NSW audiences say they themselves have made a discovery in the fortnight before data collection (down from 32% in July) and 13% say they know someone who has made a discovery (down from 16%).

Further, when asked if they are doing online arts and cultural activities more or less frequently than before the pandemic, 57% say they are engaging online more frequently, which has remained stable since July (57%).

The proportion who plan to continue engaging online post-pandemic has remained stable among NSW audiences, at 71% since July, and is the lowest nationally, along with the proportion of VIC audiences (73%).

NSW audiences are continuing to pay for online experiences, but not necessarily spending more

The data shows that the market for digital offerings in NSW is growing, in line with trends nationally.

When asked if they have paid for an experience online in the fortnight before data collection, 41% said they have, compared to 38% in May 2020. A larger proportion are making donations for online experiences (22%, up from 13% in May), and paying for single experiences has increased (22%, up from 13% in May), while the proportion who are subscribing to digital platforms has remained consistent (10%, stable with 9% in May).

Spending on online arts and culture experiences has remained stable, with 40% of NSW audiences having spent more than \$50 in the past fortnight — a rate that has been consistent through May, July and September 2020.

When asked to describe what they'll prioritise when spending online in future, NSW audiences commonly mentioned wanting to supporting artists and organisations that are important to them, as one said,



'I'll just go with my instinct and do what I can to support those artists that I feel a connection with, either through having known them/attended live performances previously, or those new artists that I admire'.

There is a sense of goodwill from NSW audiences, with many expressing that they would like to support local and struggling artists and organisations during the pandemic. One person commented,

'Supporting independent artists and creators, putting money direct into creatives' pocket'.

Others shared that they will be seeking unique experiences that they would not normally be able to have in-person. One person explained,

'Accessibility: i.e. how rare the screening, event or performance is. Whether I'd be able to see it again at another time'.

Another shared a similar sentiment, commenting,

'I am enjoying intimate music performances where we can see the performers faces as they play in a way that is not possible in a concert venue. Also, the opportunity to ask questions and have them answered after the show'.



What's next

To explore the data in more detail and find out how audiences for your work 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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