



PATTERNMAKERS

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Audience Outlook Monitor

Live Attendance Outlook

March 2022



Australian Government

Australia
Council
for the Arts



Key Facts: March 2022

Attendance Outlook



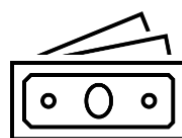
8,383

arts attendees
responded to
the March 2022
survey



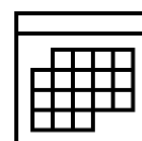
70%

of audiences are
attending in-
person events
right now



+13%

increase in
those spending
\$50+ since
November 2021



13%

are making firm
plans to attend
cultural events
interstate

COVID-safety



52%

say the risk of
transmission still
prevents them
attending as they
used to



#1

vaccine passports
are the most
encouraging
COVID-safety
measure



65%

feel encouraged by
mandatory masks for
attendees aged 12+ at
cultural events



87%

of arts
attendees have
had three doses
of a vaccine

Key findings: March 2022

7 in 10 past attendees are back at cultural events, but half remain concerned about risks

- ▶ In March 2022, data from 8,383 past attendees of cultural events suggests that attendance levels are increasing again, as we move past the January 2022 peak of the Omicron variant.
- ▶ 6 in 10 (59%) audience members say they are ready to attend cultural events 'whenever permitted' (similar to 60% in November 2021) while 4 in 10 have some level of risk-aversion.
- ▶ Confidence levels are becoming more similar across the country as COVID-19 policies nationalise – rising in states like NSW, ACT and VIC and declining in states with newly-opened borders, like WA.
- ▶ 7 in 10 (70%) audience members say they attended an in-person event recently, the highest level seen since March 2021 (71%), before outbreaks of the Delta variant in the eastern states.
- ▶ While the majority of audiences have received three shots of a COVID-19 vaccine (87%), attendance continues to be inhibited for many by the risks of transmission (52%) or being a close contact (43%).
- ▶ Commentary from audience members suggests that concerns remain around transmitting the virus to those at-risk in their community – and 49% identify as being vulnerable to COVID-19 themselves or having someone in their household or network who is.
- ▶ Some audience segments remain especially cautious, particularly those at risk of a serious health outcome (39% ready to attend) and those with a disability (43% ready to attend).

Vaccine passports remain the preferred COVID-safety measure, while masks still have a role

- ▶ As the country moves into the next chapter of the pandemic, the data shows that some key COVID-safety measures will continue to play an important role in building confidence.
- ▶ Most of those attending are satisfied overall with COVID-safety measures applied at recent cultural events they attended (79% satisfied), confirming the view of arts venues as relatively safe spaces.
- ▶ But with 1 in 10 attendees dissatisfied, and more yet to return, there is a need for care as restrictions ease.
- ▶ Audiences continue to be most encouraged to attend cultural venues by requiring proof of vaccination at entry (71% encouraged) – while only 46% are encouraged by Rapid Antigen Testing (RAT).
- ▶ Nationally, around 65% find mask wearing encouraging for audiences aged 12 and over, but they appear to be more encouraging in states/territories where cases are higher than past phases, such as for WA audiences (72% encouraged, up from 38% in November 2021) and SA (70% encouraged, up from 59%).
- ▶ As national guidelines allow for relaxing of restrictions, and Australians have the opportunity for greater freedom of movement, some audiences will be relying more upon the COVID-safety policies of individual venues to mitigate the risks of transmission.
- ▶ In terms of the recovery process, some audiences feel strongly that cultural organisations can promote inclusivity and build trust among stakeholders by prioritising safety, and showing understanding and respect for those who are more vulnerable.

Attendances and spending levels are rising, but 70% of those making plans are still staying local

- ▶ The data shows that audiences are optimistic about attending in 2022, with 4 in 5 (79%) making firm plans to attend an in-person cultural event (up from 74% in November 2021).
- ▶ In a positive sign for economic recovery, arts audiences are reporting the highest spending levels since the pandemic started, with 63% spending more than \$50 in the fortnight prior and 38% spending more than \$100.
- ▶ Shorter booking timeframes are still common across the country and 7 in 10 of those making plans are opting for local events, which are perceived to be less risky, and are seen as a way to support their communities.
- ▶ Cultural tourism may take more time to recover, and while travel is increasing, audiences are currently four-times more likely to be travelling regionally or within their state to attend events (52%) compared to interstate (13%).
- ▶ Lifestyle changes are also evident and 12% say their preference for attendance times has changed. There may be a case to review the days and times of events, as more are working from home and some want to avoid transport challenges or busy venues.
- ▶ The arts continue to be perceived as vital to community recovery, providing an avenue for healing, joy and social connection during challenging times. While some audiences are yet to return, they are firm in wanting to support artists and help cultural activity to flourish in new ways.
- ▶ Stay tuned for a Digital Engagement Outlook covering audience participation online and the key digital trends to watch in 2022.

Introduction

This March 2022 report shares insights from over 8,300 past attendees of cultural events

Launched in May 2020, the Audience Outlook Monitor is tracking audience sentiment in relation to the COVID-19 pandemic. Each phase involves a cross-sector collaborative survey process involving around 100 arts and culture organisations, including museums, galleries, performing arts organisations and festivals.

On 9 March 2022, participating organisations simultaneously sent the Phase 7 survey to a random sample of their audience – defined as those who had attended an arts or cultural event in person since January 2018.

With 8,383 respondents, this size dataset provides excellent visibility of trends across the country, noting that results for the Northern Territory (NT) and Tasmania (TAS) are not reported separately due to small sample sizes in those areas.

This report compares the new results with data collected previously in March 2021 (Phase 4), July 2021 (Phase 5) and November 2021 (Phase 6), to examine how things are changing over time.

In addition to this National Snapshot Report, the March 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.

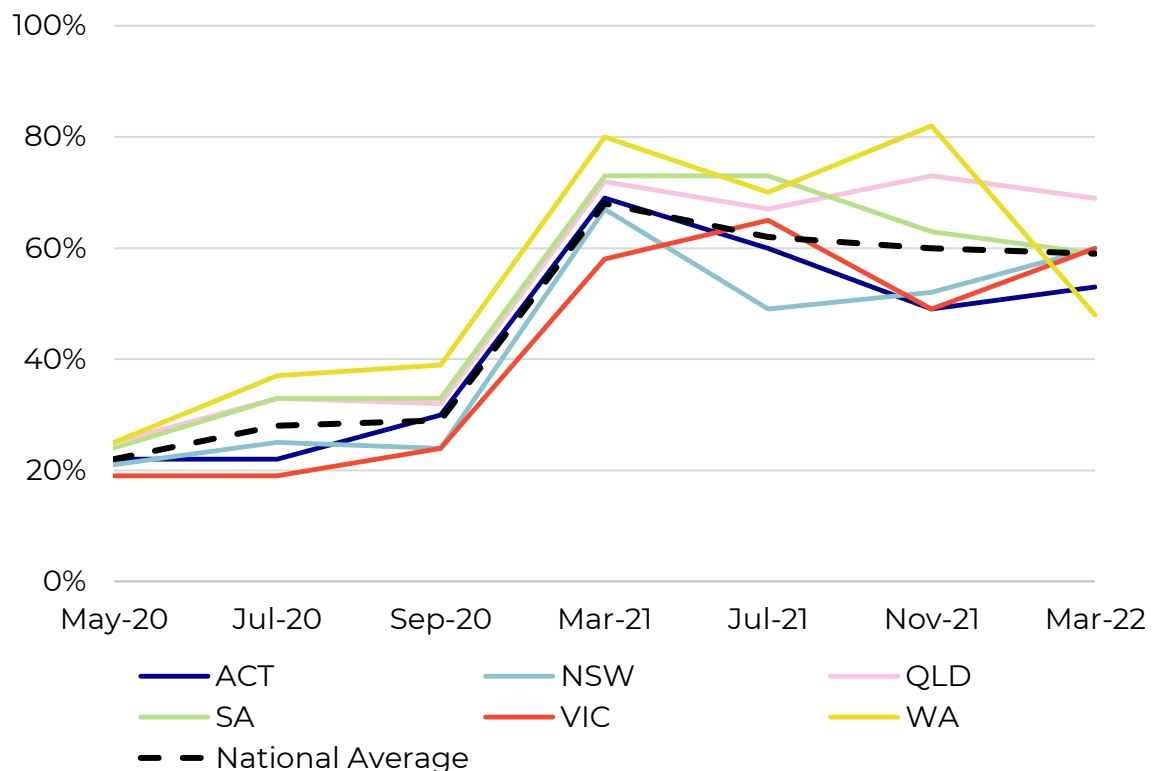
State Snapshot Reports will be available in early April 2022. Read on for the key March 2022 findings nationally.

Current conditions

Nationally, 6 in 10 audience members are 'ready to attend' – and confidence rates are looking more similar around the country

In March 2022, audience sentiment was measured for the first time since COVID-19 case numbers in Australia [reached historic highs in mid-January 2022](#). At a national level, 6 in 10 (59%) audience members are ready to attend arts and cultural events 'now or whenever permitted', stable with November (60%).

Figure 1: Proportion of audiences who are 'ready to attend now or whenever permitted', by state/territory, May 2020 to March 2022 (n=8,369)



Decreasing case numbers in NSW, VIC and the ACT have seen audiences in those states/territories become more confident compared to November 2021, when these states were recovering from outbreaks of the Delta variant.

By contrast, audiences in QLD and SA are slightly less confident than they were in November, having experienced high case numbers for the first time during this period.

In WA, where the border has recently opened, and cases are currently on the rise, audiences have reported the greatest drop in confidence since March of 2021, when the state had a 'zero-tolerance' approach to COVID-management.

Overall, audience readiness across the country appears to be converging around the national average, as outbreak conditions and restrictions become more alike in the different states and territories.

Sentiment among the audience members who are 'ready to attend' suggests that some are becoming more comfortable with the prospect of 'living with the virus' and attending arts and cultural events while taking necessary precautions. One said,

'With vaccinations I feel safe – I am still cautious with social distancing, but we have to learn to live with the virus, like we do with flu.'

Another said,

'I think it's important that restrictions are lifted so the arts can get back to full houses. People will need to make their own decisions to feel comfortable. I will likely continue to wear masks at crowded events.'

4 in 10 remain cautious and there will be varying needs to consider as we adjust to the 'new normal'

As some audiences across the country become accustomed to 'living with the virus', 4 in 10 (38%) say they'll only attend when the risk is minimal, and 3% won't tolerate any risk at all.

For many of these audiences, feelings of readiness appear to be linked closely with their personal circumstances. The survey asked respondents if they, or anyone in their network is vulnerable to a serious health outcome from COVID-19. As many as half (49%) of audience members answered yes – with 12% vulnerable to a serious health outcome themselves, 15% living with someone vulnerable and 25% connected to someone vulnerable in their extended/family network.

When asked about their readiness to attend, only 39% of audiences who were themselves vulnerable to a serious health outcome were ready to

go to arts and cultural events – along with 45% of audiences who had a vulnerable person in their immediate family/household.

One audience member in this latter group said,

‘I live with an immuno-compromised family, and I am very worried for their health and wellbeing. The thought of bringing the virus home to them frightens me. I avoid going out as much as possible, even though I would like to see and support arts and cultural performances.’

Readiness to attend also decreases with age, with older audience members more likely to report vulnerability to COVID-19. Audience members over 75 were the least likely to be ready to attend (51%), and audiences under 35 the most likely (63%).

One audience member said,

‘I belong to the "grey" classical music audience member. I feel it is too still risky in a packed hall.’

Compared to non-disabled audience members (60% ready to attend), audience members with a disability were also less likely to be ready to attend right now (43%).

Comments from audience members in these cohorts suggest some are anxious about being ‘left behind’ as the country reopens – and their needs will be an important consideration for arts organisations going forward. One audience member said,

‘I am in the at-risk category. Not worried about COVID-19 but concerned about the effects of long COVID. I long to go to shows, cinema and to feel comfortable in the public arena, but I don't.’

Most arts venues continue to be seen as safer than common public activities, like using public transport and going to the gym

Across the country, comfort with public activities and arts attendance is following the same broad trends as readiness.

Audiences in states like NSW, ACT and VIC – which were recovering from outbreaks of the Delta variant in November 2021 – have demonstrated

an increase in comfort levels at both cultural venues and public activities in general.

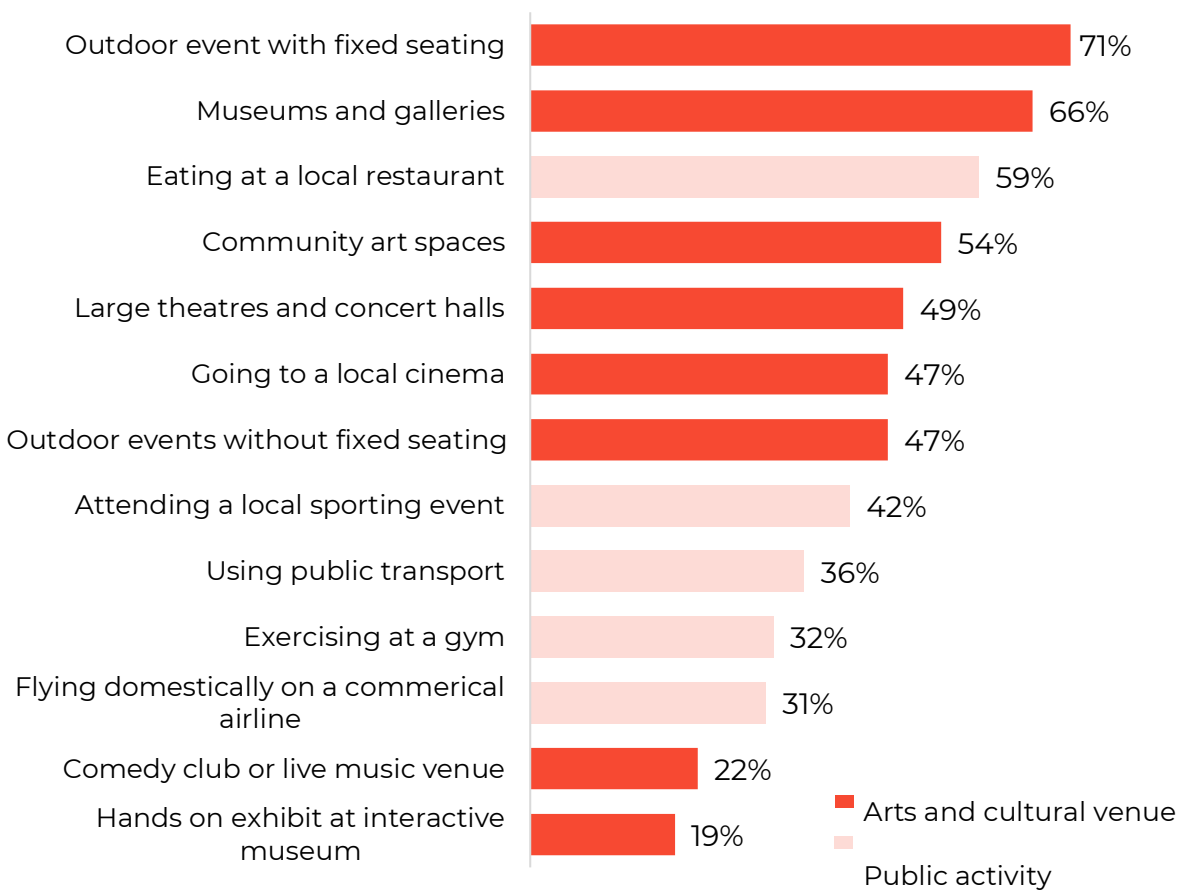
Comfort was more likely to decrease in states like QLD and SA, which experienced high case numbers for the first time between November 2021 and March 2022.

Comfort has decreased most significantly in WA, where cases are currently on the rise.

As a general rule, comfort at most arts venues remains higher than many other common public activities – including exercising at a gym, flying domestically on a commercial airline, and using public transport (Figure 2).

The exceptions to this rule are hands-on interactive exhibitions and comedy clubs, which attract the lowest levels of audience comfort. Feedback from audiences suggests that crowded environments or those involving tactile experiences tend to feel the least COVID-safe.

Figure 2: Proportion of National audiences 'very comfortable' attending the following public activities and arts and cultural venues. March 2022 (n=8, 348)



Live attendance

As audiences adjust to living with COVID, attendance has recovered to pre-Delta levels

As most states adjust to 'living with COVID', average attendance at cultural events has increased since November 2021.

In March 2022, 70% of audiences said they attended an in-person cultural event in the fortnight before data collection (9-13 March), reaching the highest rates of attendance since before the Delta outbreak, in March 2021 (71%).

As predicted in November 2021, audiences in states affected by 2021 outbreaks (NSW, VIC and ACT) are becoming more active following extended lockdowns – with more than 70% of audiences in these areas having attended a cultural event recently.

Meanwhile, WA audiences are less likely to be attending in-person events (59%), with the state facing its first major outbreak at the time of data collection.

Similarly, QLD audiences are less likely to have attended a cultural event recently (55%), with the recent floods in south-east Queensland likely to be impacting cultural attendance for some communities.

Patterns of actual attendance are linked with audiences' risk tolerances. Those who say they are 'ready to attend, whenever permitted' are the most likely to have attended recently (77%), while those who will only attend when the risk of transmission is minimal are slightly less likely to have attended recently (62%).

4 in 5 audiences are making firm plans to attend cultural events

Following a period of summer programming, and some cultural organisations launching new seasons or announcing programs, the majority of audiences across the country are making firm plans to attend arts and cultural events in future.

In March 2022, 4 in 5 (79%) audiences reported making plans for in-person attendance in the future, demonstrating an increase since November (74%) and July 2021 (74%).

This rate is significantly higher among very frequent performing arts attendees (91%) and very frequent museum and gallery attendees (87%).

In particular, the proportion of audience members making plans to attend a live performance has increased, from 52% in November 2021 to 61% in March 2022.

Audiences continue to book events in the short-term, as uncertainty persists

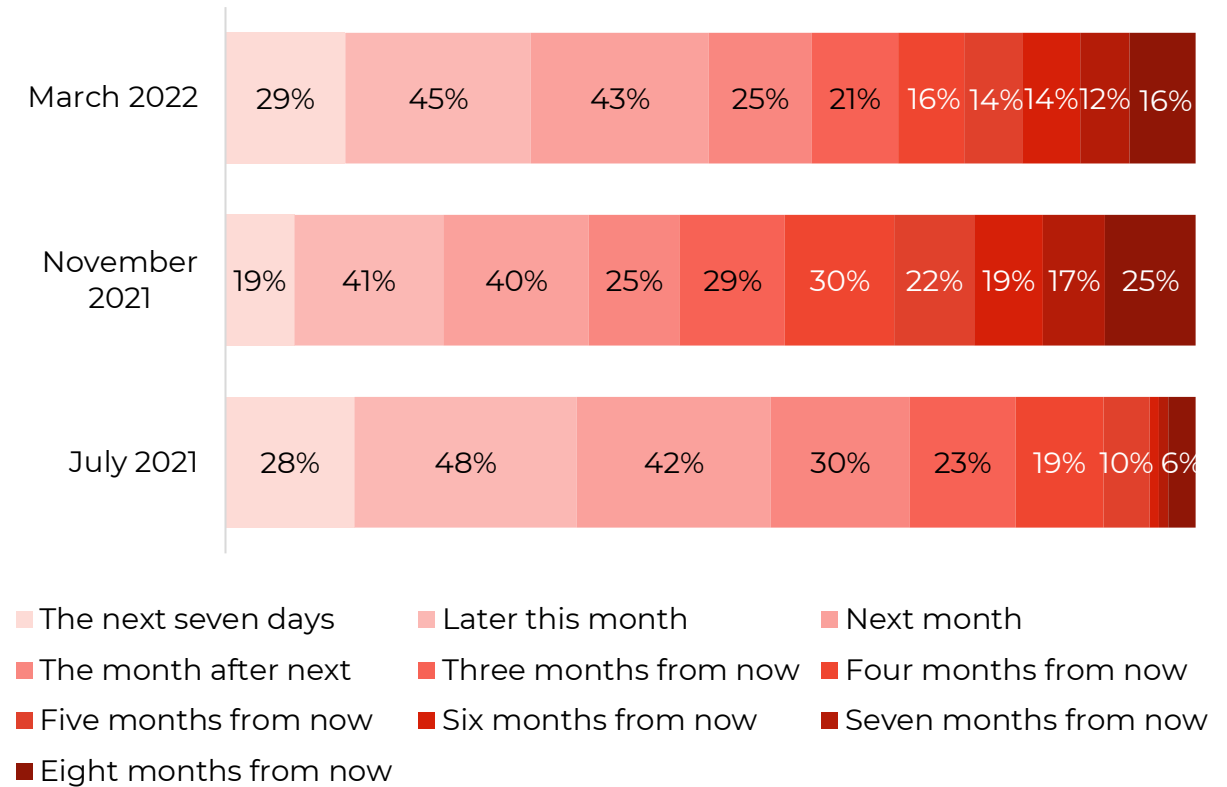
When asked about the timing of scheduled events, audiences continue to book events in the short term – a trend that is becoming evident across different states/territories.

The proportion booking events within the next seven days has increased from 19% in November 2021, to 29% in March 2022. Meanwhile, the largest proportion of audiences is purchasing tickets to events happening later this month (45%), and a similar proportion is booking for next month (43%) – roughly consistent with November and July 2021. (Figure 3).

More than half (54%) of SA audiences are purchasing tickets for events in the next seven days – the largest proportion of any state/territory, likely due to a high concentration of festival programming throughout March 2022.

The findings suggest that audiences are increasingly reliant on events taking place in the near future, compared to those scheduled months ahead – with the availability of events and lingering uncertainty around outbreak conditions likely playing a role.

Figure 3: In the past fortnight, did you purchase tickets for one or more live shows or performances that are scheduled for...? March 2022 (n=4,415), November 2021 (n=2,809) and July 2021 (n=3,199)



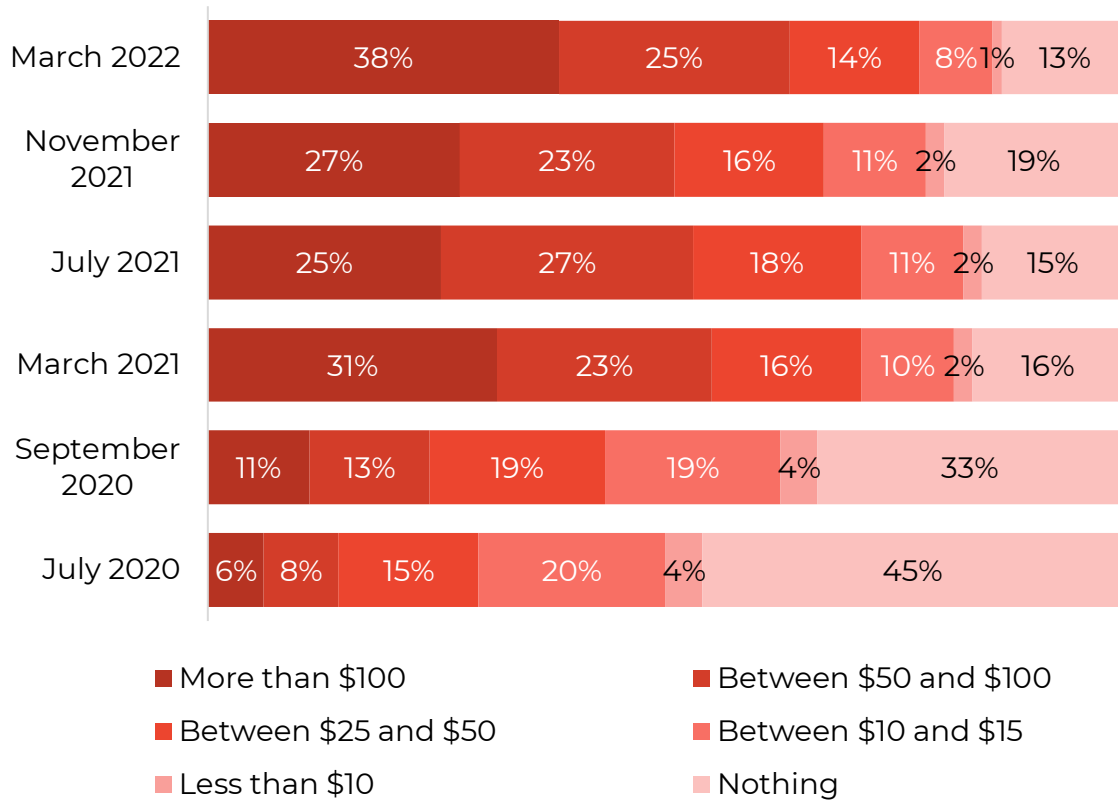
Signs of economic recovery are growing, with audiences reporting the highest spending levels since the pandemic started

When asked about the amount they have spent on tickets to in-person live events in the last fortnight, audiences across Australia are spending more than they have in the past two years. 2 in 3 (63%) audience members said they have spent more than \$50.

As many states move towards regular programming in the transition to a 'living with COVID' scenario, the findings suggest audiences are eager to support artists and cultural organisations.

March 2022 saw the largest proportion of audiences spending more than \$100 (38%) since the study began, a promising sign of stronger economic recovery of the sector. (Figure 4.)

Figure 4: In the past fortnight, how much did you spend on tickets to in-person live events and cultural activities? March 2022 (n=5,797), November 2021 (n=3,686), July 2021 (n=4,131), March 2021 (n=9,830), September 2020 (n=3,571) and July 2020 (n=3,779).



Cultural tourism is still in the early stages of recovery, with 7 in 10 opting for local events

In March 2022 audiences who made firm plans to attend a cultural event(s) were asked where those events were located. Local loyalty appears to be remaining prevalent among arts attendees, with 70% saying they made plans to attend an event in their local area.

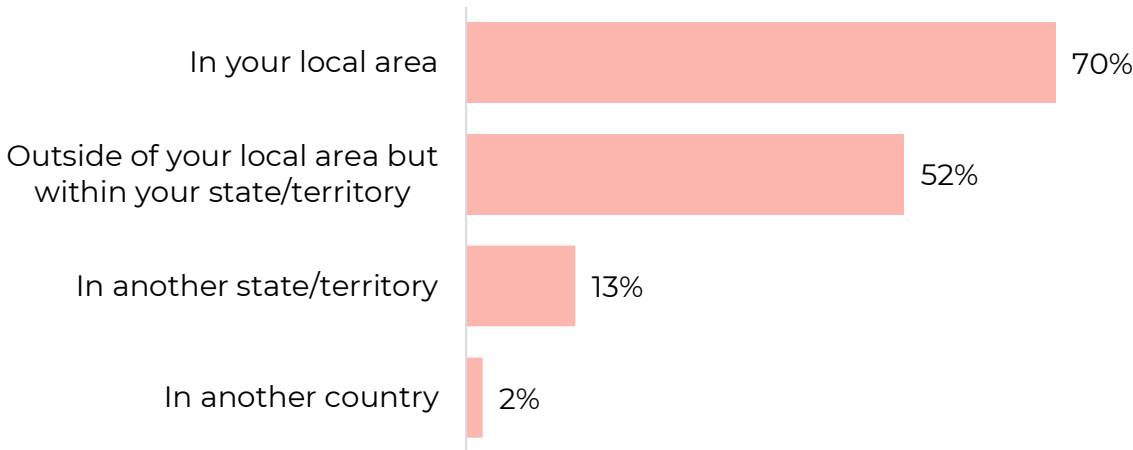
Audiences are beginning to travel to attend cultural events, but are over four times as likely (52%) to be attending events within their own state/territory, rather than travelling to another state/territory (13%). In terms of COVID-safety, just 1 in 3 (31%) feel very comfortable flying domestically on a commercial airline.

Qualitative data suggests local travel is generally seen as safer and more reliable than intra- or inter-state travel – with some audiences also

developing a greater awareness of or appreciation for offerings in their local area over the course of the pandemic.

Regional and remote audiences are more likely to be attending events within their state but outside of their local area (57%), compared to those in major cities (51%).

Figure 53: Were those plans for attending a venue or event ... (select multiple). March 2022 (n=6,618)



1 in 10 are changing their attendance patterns due to lifestyle changes or COVID-risks

Audiences were asked whether their preferred attendance times had changed, in light of COVID-19. The majority of audiences (79%) say that their preferences have not changed, while 12% say they have. Another 1 in 10 (9%) are not sure.

This rate is higher among audiences in states affected by 2021 outbreaks, such as the ACT (16%), VIC (15%) and NSW (14%) – compared to those in WA (8%) QLD (10%), SA (11%).

There are mixed views surrounding attendance times. Some audiences report lifestyle changes and work arrangements affecting their decisions, as one person shared,

‘Given work flexibility I now attend some events during work hours, where previously I could only attend on weekends.’

Audience members who are more risk-averse are more likely to say their preferred times have changed (19%) compared to those who are ready to

attend now (8%). Some expressed an inclination towards weekday, daytime events, where they feel COVID-safety is better upheld. One said,

‘Weekdays preferred, less likely to be as many intoxicated people who are reckless about COVID safety.’

Another said,

‘My preference now is to choose a daytime, weekday session to avoid having to sit near others.’

For some attendees, the ability to travel to and from events has been impacted by the availability of public transport. One said,

‘For me it's not a Covid thing, it's a public transport kind of thing. Since Covid it's hard to get public transport or even an Uber so I don't like the idea of being stuck in middle of town in the middle of the night unable to get home.’

COVID-safety and vaccination

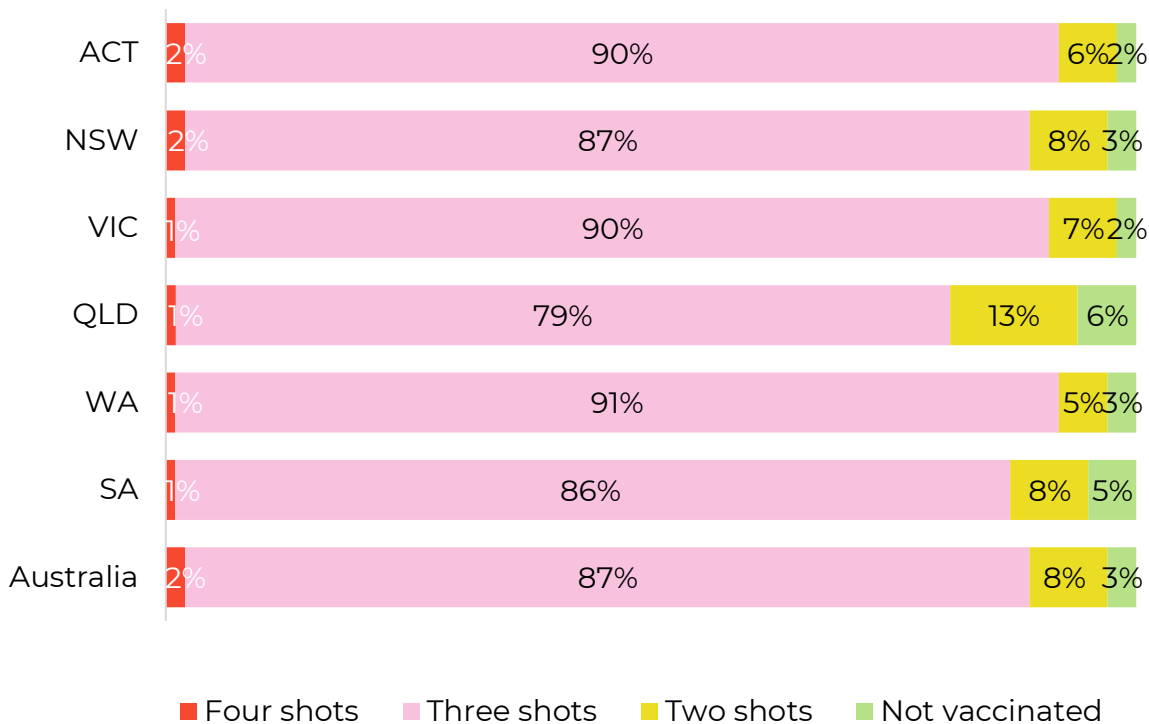
Arts audiences continue to lead the way on vaccination – with 9 in 10 having received three shots

As of March 2022, 87% of arts audiences have received three shots of the COVID-19 vaccine (up from just 3% in November) – compared to [around 65% of the eligible Australian population as at 13 March](#).

Audiences in the ACT, VIC and WA are the most likely to be triple-vaccinated (9 in 10), while audiences in QLD are the least (79%). (Figure 6).

Vaccination rates also increase with age, with 94% of audiences aged 75+ having received three shots, compared to 74% of audiences under 35 and 76% of audiences aged between 35 and 54.

Figure 6: Proportion of audiences who are vaccinated March 2022, by state/territory (n=8,309)



When asked if they have been infected with COVID-19 in the past, just 1 in 10 (10%) arts audiences say they have. The infected rate is highest in NSW (14%), and lowest in WA (1%).

Younger audiences were also more likely to have had COVID-19 than older audiences – with 20% of those under 35 having had the virus, compared to 4% of those aged 75+.

Audiences remain concerned with the risk of transmitting the virus or becoming a close contact

When asked what is preventing them from attending arts and cultural events in the next year, the risk of contracting or transmitting the virus continues to be the primary concern for audiences (52%, consistent with 51% in November 2021).

While vaccination rates are high among arts attendees, some remain concerned about transmitting the virus to vulnerable people within their network and wider community. One audience member said,

‘I am triple vaxxed but would hate to pass on to someone else. One of our daughters is a health worker and one has a compromised immune system. The thought of people not caring if they pass the virus on is very upsetting to me.’

2 in 5 audience members (43%) continue to be concerned with the risk of being a close contact and needing to isolate (stable with 43% in November 2021). One audience member said,

‘Risk of cancellation or getting COVID or being a close contact and not being able to use the tickets is the main thing that discourages me from buying tickets to things.’

With the country entering its [post-vaccination phase of the national policy](#), audiences are slightly less likely to be concerned about the risk of lockdowns (32%) compared to November 2021 (38%). However, among commentary from audiences, concerns surrounding cancelled events are linked with the uncertainty of new variants. One person said,

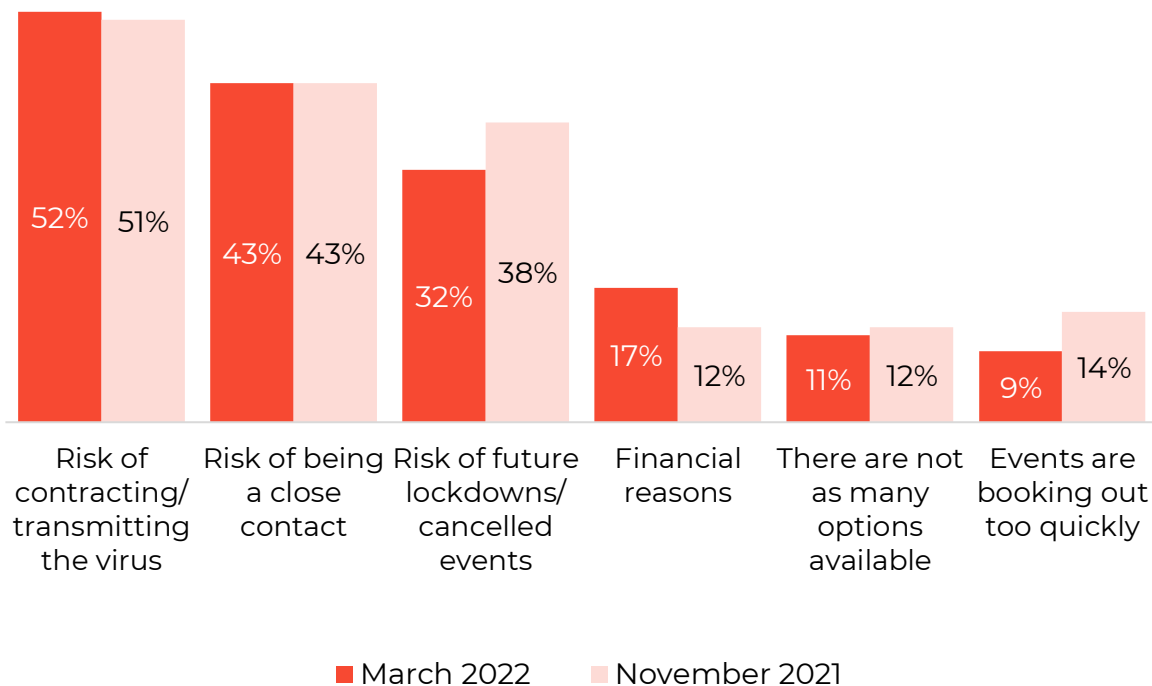
‘Just not knowing what COVID levels or variants will be in the community in months to come makes it hard to commit to booking anything too far in the future.’

Others expressed a reluctance to attend events where they feel COVID-safety measures are not always adhered to, as one said,

‘Attendees not wearing masks, no social distancing and no checks on vaccination status.’

While in the minority, a larger proportion of audience members are now naming financial reasons as inhibiting their attendance (17%, up from 12% in November 2021). (Figure 7).

Figure 7: Proportion of audiences who say these factors will preventing them from attending in-person arts and culture events as they used to in the past, March 2022 (n=8,352) and November 2021 (n=7,583)



Proof of vaccination and masks are the most important COVID-safety measures for arts audiences

Despite changes to outbreak conditions and COVID-19 restrictions since November, measures like masks and vaccination requirements remain priorities for audiences.

Despite no longer being mandatory in many states and territories, vaccination requirements (71%) and masks for attendees aged 12+ (65%) continue to be encouraging to the majority of audience members. (Figure 8).

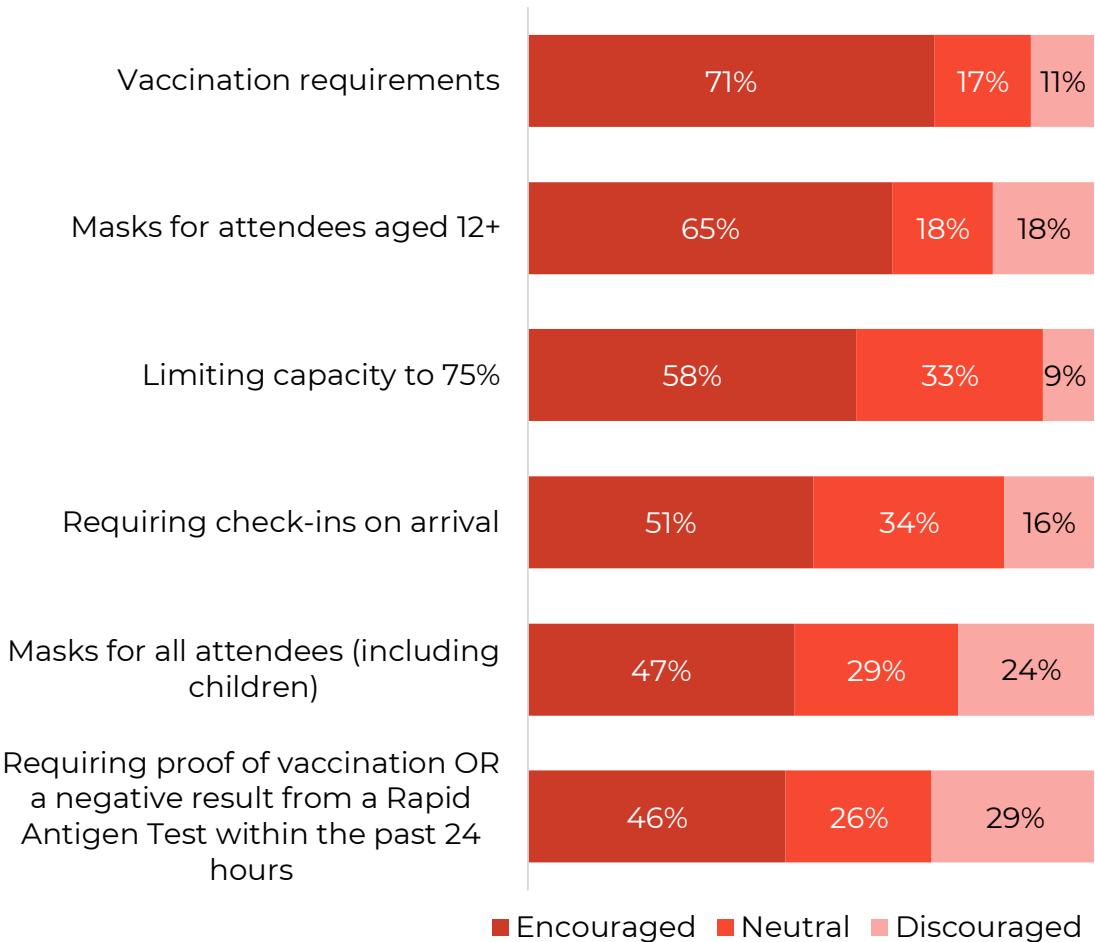
For many audience members, absence of these measures are ‘dealbreakers’ and are necessary conditions for attendance – with one saying,

‘I would avoid an event if masks were not required and if proof of vaccination was not required.’

And another saying,

'Places that don't check vaccination status, are relaxed on check-ins and mask wearing are deal breakers. When staff don't wear their masks properly or sanitise also.'

Figure 84: How much would each of the following steps discourage or encourage you to attend? Audiences in outbreak-affected states, March 2022 (n=8,288)



Compared to November 2021, however, the proportion of audiences who say they feel encouraged by proof of vaccination has decreased – including in states where this safety measure was previously strongly encouraging, like NSW (68%, down from 89% in November) and VIC (78%, down from 85% in November).

Audiences have typically become more neutral about this safety measure over time, rather than more negative – with the exception of NSW (12% discouraged, up from 5%) and the ACT (18% discouraged, up from 5%).

Mandatory masking becomes more important to audiences as cases are active, and less so as they decline

Compared to November, the proportion of audiences encouraged by face masks has also decreased in some states/territories – including the ACT (68%, down from 80%), NSW (67%, down from 75%), VIC (63%, down from 74%).

QLD has also seen a decrease in the proportion of audiences who find masks encouraging (48%, down from 61%), and an increase in those who find masks discouraging (28% discouraged, up from 20%).

However, masks have become more encouraging in WA (72% encouraged, up from 38%) and SA (70% encouraged, up from 59%) – where audiences experienced widespread cases of COVID-19 for the first time in January 2022.

It appears that the importance of face masks to audiences generally decreases as cases decline – and increases again when cases are on the rise. As one audience member said,

‘While there is community transmission, I'd feel more confident if other people are wearing a mask like me to reduce transmission. A mask mandate will greatly boost my willingness to participate.’

Another said they would be discouraged by,

‘100% capacity indoors without a requirement for masking or vaccination; particularly if there is still a level of COVID in the local community.’

The presence of state-wide mask mandates also seems to have an effect on the perceived importance of masking at arts venues – at the time of data collection, masks were also non-mandatory in most indoor settings in QLD, NSW, VIC and the ACT, and mandatory in WA and SA.

Check-ins have become less important to audiences as the viability of contact tracing decreases

Despite being one of the most encouraging COVID-safety measures in November 2021 (85% encouraged), now only around half (51%) of audiences are encouraged by check-ins in March 2022, with another 34% neutral.

Qualitative data from some audience members suggests that high case numbers and the decreased viability of contact tracing have made check-ins feel superfluous.

One audience member said,

'There's no longer a notification if it is discovered someone who has attended an event has COVID, [so] there is no point to checking in.'

Another said,

'Everything else is mostly fine, even if it is annoying (e.g.: collecting my data through check in even though it will never be used to contact trace - that's just data mining).'

However, some audience members continue to see check-ins as essentials or 'dealbreakers', with one saying,

'I want check in upon arrival and I want mask wearing just during the up-coming months as we transition back to 'normal'.'

24-hour rapid antigen testing won't encourage the majority of audiences

Although proof of vaccination is widely encouraging to arts audiences, less than half (46%) are encouraged by the option to provide proof of vaccination OR a rapid antigen test.

Some expressed concern about the accuracy of rapid antigen tests taken 24 hours prior, with one saying,

‘Rapid antigen tests are highly inaccurate in people that are asymptomatic – it can falsely reassure people, so having this as a requirement would make me feel less rather than more safe.’

And another saying,

‘Rapid tests prior to entry would be ideal, as rapid tests taken 24 hours prior don't paint an accurate picture.’

Others were concerned about the practicalities of enforcing a RAT requirement, with one saying,

‘While a negative RAT would be fantastic I don't think that it would be practical and could easily be faked.’

And another saying,

‘How do you prove the rapid antigen was correctly performed and negative?’

8 in 10 of those who attended recently are satisfied with COVID-safety protocols at arts events

As mentioned previously, arts and cultural venues are generally perceived as COVID-safe spaces.

When audience members who had recently attended a cultural event were asked how satisfied they were with the COVID-safety procedures in place, 8 in 10 (79%) responded that they were satisfied, with only 9% dissatisfied.

Satisfaction was relatively consistent across the states and territories, but highest in WA (84%), and lowest in NSW (77%).

Audiences remain confident that vaccination will allow normal activities to resume – but for some, the picture is more complex

Compared to November 2021, audiences are slightly less likely to be ‘very confident’ that the vaccination effort will allow normal activities to resume within a year (38%, down from 43%) – and slightly more likely to

be 'somewhat confident' (53%, up from 50%). The proportion 'not at all confident' remains stable (9%, stable with 7% in November).

Confidence is highest in QLD (43% very confident) and lowest in SA (33%) and the ACT (32%).

Some audience members say that the transmissibility of the Omicron variant has made them more conscious of the need for COVID-safety measures alongside vaccination. One says,

'While [vaccination is] quite effective to limit the seriousness and risk of hospitalisation, there is still a large probability of contracting the virus. As a result, I think there will most likely be an ongoing need for some precautions.'

The possibility of new variants on the horizon is also a factor for many audience members, with one saying,

'It seems very likely that there will be further variants which will require further boosters.'

And another saying,

'The pandemic is not over yet, but many are behaving as if it is. That is a concern for the future, with likely more waves, new variants and more inconvenience. Better to keep the easy precautions in place (Masks in particular).'

Role of arts in recovery

Uplifting content will attract audiences over the next year – while many are eager to return to the things they love

Looking ahead over the next 12 months, audiences are most interested in engaging with the same kinds of cultural activities they used to attend, pre-pandemic (90%).

Light-hearted content continues to be more attractive to audiences (40%), compared to works that help to make sense of the pandemic (10%) – a trend that has remained consistent throughout the study. The proportion that disagrees that they'll be attracted to works that make

sense of the pandemic has increased slightly since November (48%, up from 44%).

It can be expected that audiences will continue seeking uplifting content through cultural experiences in 2022, in light of 'pandemic fatigue', combined with general anxieties surrounding floods and global events.

Audiences see an enduring role for arts and culture in facilitating healing and connection

Audiences were invited to share examples for how arts and culture organisations can play a role in the recovery from the pandemic.

Consistent with the [Visions for Culture](http://www.thepatternmakers.com.au/visions-for-culture) (www.thepatternmakers.com.au/visions-for-culture analysis), audiences shared a vision for arts and culture to provide avenues for healing, joy and escapism. As one audience member said,

'I think a degree of escapism will be great. The arts will help regain optimism and improve overall mood. Encourage us to return to doing things together as a community.'

Another said,

'Just being there is enough! To be able to lose oneself for a couple of hours after the last two years is absolute bliss! Thank you to all in the arts area for tenaciously holding on.'

Others mentioned the importance of sending positive messages, as well as offering creative spaces to facilitate community connection.

One said,

'Storytelling that defuses anxiety and emphasizes community and cooperation - without being twee, preachy or didactic.'

Many people advocated for arts to continue doing what they are doing, as one said,

'They already do a lot considering they were a major victim of the pandemic. I think they are bending over backwards to do the best they can. Now each person in our community needs to do the same.'

The arts can play a leading role in rebuilding trust and advocating for safety and inclusion

While many audience members would like to see a return to 'normal', some envision a role for arts and culture organisations to advocate for needs within the community, brought to light by the pandemic.

Promoting COVID-safety at events is seen as a way to reintroduce the idea of public life in a safe way, after extended lockdowns and experiences of isolation. One audience member said,

'Promote venues as being COVID-safe, and make the point that we endured lockdowns etc. so that we can now safely participate in life again, not so that we spend the rest of our lives at home on the lounge.'

A similar sentiment was shared by respondents who see a need to prioritise inclusive practices and safety for all attendees. One suggested,

'Providing leadership in how we can safely attend public events while looking out for the more vulnerable members of our community. The recent agreement/joint statement between many Sydney theatres (requiring shared mandates) was a great example of this.'

Many audience members see a role for the sector to facilitate trust and mutual respect between organisers, artists and attendees, and the broader community. One person commented,

'Getting back to normal feels really good, but the pandemic is still here. Mask wearing in cinema and theatre is really, really important. Making the pre-event speech about respect for the artists and other patrons and immunocompromised in our community, promoting that rather than 'we ask you to wear a mask', but 'we ask you to wear a mask BECAUSE etc. etc.'

Audiences consider the arts as essential and want to support as best they can

Audiences were asked to share suggestions of messages for artists and cultural organisations, as they look to the recovery process.

Many people shared heartfelt messages that showed their appreciation for art and culture in times of hardship. One said,

‘Your performances inspire us, take us to unimaginable realms, comfort us, create beauty, deepen our understanding, broaden our perspective. You are essential to our lives.’

Another said,

‘The arts, and particularly theatre in all its forms, is a vital, essential part of life. It's been tough over the last couple of years – but keep going and keep growing.’

Importantly, some audience members encouraged artists and organisation to invite more community support, as they recuperate from the economic impact of cancellations and lockdowns. One said,

‘Hang in there! You are incredibly valued. Don't be afraid to keep asking for donations – we care and want you and your artists to survive this.’

Another shared,

‘Thank you! You have been through so much and are so important to our city and country. Please continue advocating for yourselves and pitching for funding/public support, you deserve to be protected as a vital industry and we see you and support you. Let us the general public know how we can support you, how we can pressure governments, corporates, the general public to keep you running.’

What's next

To read about the story so far, visit the study's Australian homepage at: 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.

Acknowledgment

The Audience Outlook Monitor study in Australia is supported by the Australia Council for the Arts, Create NSW, Creative Victoria, Arts Queensland, Department of the Premier and Cabinet (Arts South Australia), Department of Local Government, Sport and Cultural Industries (DLGSC) WA and artsACT.

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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