

Executive Summary

As NSW moves into the first phase of its re-opening plan, half of audiences are ready to attend

- With NSW anticipating the first phase of its re-opening plan, approximately half (46%) of the past attendees surveyed say they are 'ready to attend now or whenever permitted' (down slightly from 49% in July 2021).
- Another 49% of NSW audience members say they will attend when the risks are minimal. Many are awaiting higher population vaccination rates and will watch carefully for surges in case numbers as restrictions lift.
- Almost all NSW audiences are now partially or fully vaccinated (98%). The state has one of the highest rates of complete vaccination (92%) among arts audiences in the country, particularly among younger audiences.
- Vaccination has boosted the confidence of many audience members. However, many are conscious that risks of transmission remain and want to see strict measures in place to keep audiences and staff safe and minimise the potential for further disruption to cultural events.

Requiring proof of vaccination will be an important tool to encourage risk-averse audience members to attend

- The vast majority of NSW audiences (90%) will be encouraged to attend by proof of vaccination requirements - and some say they won't attend unless they are in place, at least in the short-term.
- NSW organisations can expect audience comfort levels to increase when the state's vaccination rate increases to 80%+ assuming COVID-safety requirements like vaccine passports, capacity limits and masks are satisfied.
- Based on a re-opening scenario with an 80% vaccination rate, along with vaccine passport mandates, masks indoors and some capacity limits, comfort levels at cultural venues in NSW should increase to:
 - 75% very comfortable at museums/galleries (compared to 57% right now)
 - 63% very comfortable at large theatres/concert halls (compared to 39% right now)
 - 77% very comfortable at outdoor events with fixed seating (compared to 64% right now).

Looking forward, many unknowns exist – and venues can expect to hear a range of perspectives

- This data quantifies the case for vaccine passports at cultural events and makes it clear that the majority are in favour. However, there are a diversity of views on the best way forward and organisations should prepare for a period of vocal objections and debate.
- A small number are concerned that vaccine passports could alienate members of the community – however among arts audiences they are less polarising than masks and distancing measures.
- Many audience members express uncertainty about the ‘new normal’ of living with COVID-19. If venues open up to the unvaccinated in December as planned, it can be expected to affect confidence among arts audiences.
- Presenters will face increased pressure from audiences on both sides of the debate if vaccine policies are decided on a venue-by-venue basis.
- Front-of-house staff may bear the brunt of the passport controversy and measures should be taken to ensure staff are supported, informed and safe.
- Organisations should monitor developments such as rapid antigen testing, which could help further increase confidence, and consult with staff about the best way to enforce COVID-safety policies.
- It will take time for audiences to adjust to the new normal and ‘define their dealbreakers’ – it’s wise to expect some fluctuation in attitudes over the next few months.

Introduction

The October 2021 Pulse Check captured data on readiness to attend

Launched in May 2020, the Audience Outlook Monitor is a multi-phase study tracking audience sentiment in relation to the COVID-19 pandemic. Each phase involves a cross-sector collaborative survey process involving 130 arts and culture organisations, including museums, galleries, performing arts organisations and festivals.

This 'pulse check' survey is a short questionnaire delivered between the fifth (July 2021) and sixth (November 2021) phases of the survey, designed to 'take the temperature' of audiences in light of rapid changes to outbreak conditions and planned lifting of COVID-19 restrictions in some states/territories.

On 28 September 2021, Patternmakers sent the 'pulse check' survey to 12,500 past respondents from previous phases of the study, who opted-in to be contacted about future research on this topic. The survey closed on 1 October 2021.

Over 2,000 audience members responded (2,146), from all over Australia: New South Wales (NSW; n=641) Victoria (VIC; n=620), Queensland (QLD; n=312), South Australia (SA; n=221), Western Australia (WA; n=203) and the Australian Capital Territory (ACT; n=115). A small number of responses were collected from audiences in Tasmania (TAS; n=24) and the Northern Territory (NT; n=9). These are included in national averages but not reported separately.

Current Outlook

Almost all of NSW audiences are currently in lockdown, and around half are ready to return to events when permitted

Almost all (92%) of surveyed NSW audiences are currently in lockdown – with Greater Sydney residents locked down for the past 3 months.

With some venues opening to vaccinated residents later in the month, around half (46%) of audiences in NSW are ready to attend as soon as permitted. This rate is down slightly from July 2021 (49%) – despite the sharp increase in vaccination rates between July and October.

Another 49% of NSW audiences say they will return to cultural events when reasonably confident that risk of transmission is minimal – and some are adopting a 'wait and see' attitude to the lifting of restrictions.



One said,

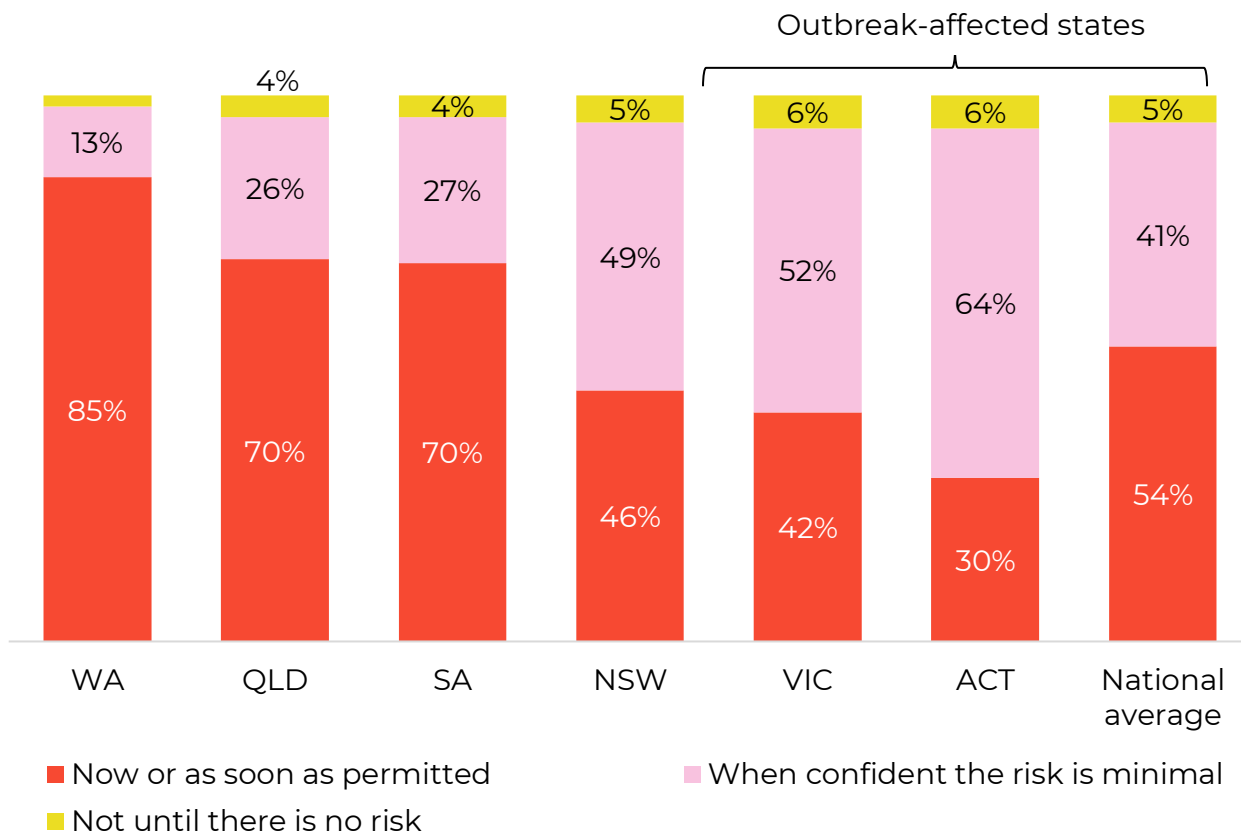
‘I’m really not sure how willing I would be and will probably be inclined to sit back for a little while to see outcomes. But I am also so aware that this industry is seriously damaged and needs support.’

Only 5% of NSW audiences say they cannot foresee returning to events until there is no risk whatsoever.

Audiences in NSW are generally tracking alongside other jurisdictions affected by outbreaks, like VIC and the ACT, but show a greater willingness to return to events than audiences in either state – whether due to greater risk tolerance or ‘lockdown fatigue.’ Compared to 46% of NSW audiences, 30% of ACT audiences (down from 60% in July 2021) and 42% of VIC audiences (down from 65% in July 2021) are ready to attend events as soon as permitted.

In the rest of the country (QLD, SA, WA, NT and TAS), where there are few or no cases of the virus, the majority of audience members remain ready and willing to attend events (74%, up from 69% in July 2021). Border closures are currently minimising the risk of outbreaks and keeping confidence high in these areas.

Figure 1: Which statement best represents how you feel about going out again to cultural events? (n=2,107)



Vaccination

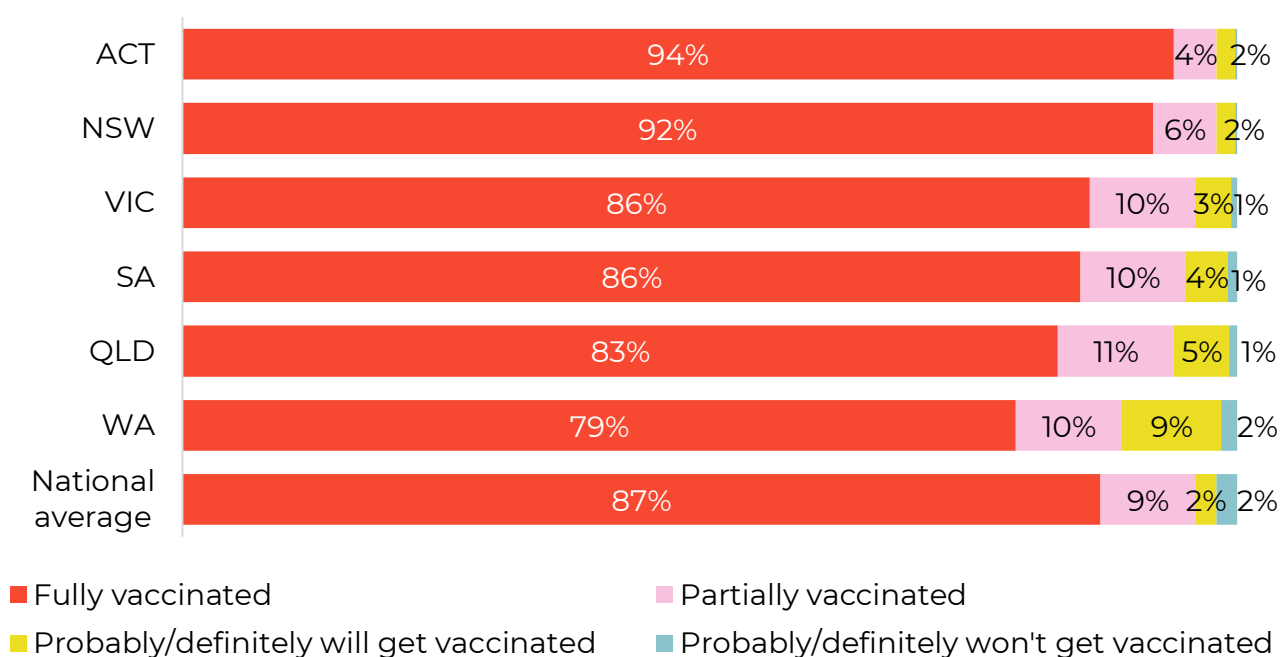
Almost all of surveyed NSW arts audience members are vaccinated

As of 1 October 2021, 98% of NSW audiences surveyed are either fully (92%) or partially (6%) vaccinated – with another 2% saying they will probably or definitely get the vaccine. This proportion has increased dramatically since July 2021, when 23% of audiences were fully vaccinated and 52% had received their first dose.

Vaccination rates vary somewhat by states, with NSW and ACT audiences having the fastest uptake of vaccines (98% at least partially vaccinated as of 1 October 2021) and WA audiences the slowest (89% at least partially vaccinated). However, based on the proportion of audiences who say they will probably or definitely get the vaccine, it's likely that most states will reach audience vaccination rates of over 95%.

In NSW, the rate of those at least partially vaccinated is fairly consistent across age cohorts, although 17% of NSW audiences under 35 and aged 35 to 54 are still awaiting their second shot – compared to 3% of audiences over 75. Generally, younger NSW audiences are more likely to be fully vaccinated than audiences under 35 in other states – such as VIC (43% under 35 partially vaccinated) and QLD (30% partially vaccinated).

Figure 2: Have you been vaccinated? All surveyed audiences, 1 October 2021 (n=2,094)



For many audience members, being vaccinated has helped them feel confident and ready to attend

Among the 46% who are 'ready to attend' in New South Wales, vaccination has been key. For a sizeable group of these audiences, receiving the vaccine has made them feel ready to attend cultural events – and they are generally happy to put their trust in venues and public health measures to keep them and the community safe. One such audience member said,

'I am ready to go. I am full vaxxed and we need to start opening up art and cultural spaces, especially live music. Let's have the opportunity to support these artists as much as possible!'

Another said,

'Husband and I are fully vaccinated and ready to get back to real life. Sure there is an element of risk – as with many things. The level of vaccination in our population lowers that risk considerably.'

Some audience members are also heartened by high community vaccination rates across NSW – and feel increasingly ready to head out. One said,

'The vaccinations make me feel comfortable and happy to resume life as it was.'

Another said,

'I am double vaccinated, so I feel once we have got to 80%, or even 90% in NSW as we are likely to do within the next couple of months, I have no problems with all [venues] opening up.'

However, some audience members want to see higher vaccination rates before they resume attendance

For the 49% of NSW audiences who will only return to events when risks are minimal, many want to see further precautions taken. Some have expressed trepidation about going out before the achievement of 80% vaccination targets. One said,

'I'm very concerned that restrictions are lifting too early. I would not attend a large indoor event until we reach at least 80% vaccination rates and there are COVID-safe measures in place, including distancing and reduced capacity.'

Others want to see rates even higher than 80% before they attend crowded public places, with some pointing out the targets do not include children.

One said,

'80% of the population vaccinated only equates to about 64% of the total population, as children are not counted in the 80%. That is nowhere near enough for herd immunity. Despite being vaccinated, I remain very nervous of crowds. No vaccine is 100% effective.'

Another said,

'I live in regional NSW and am not in lockdown so am reluctant to attend events until there is 90% vaccination for eligible people. I don't want to have to isolate and get tested every time I drive to and from Sydney.'

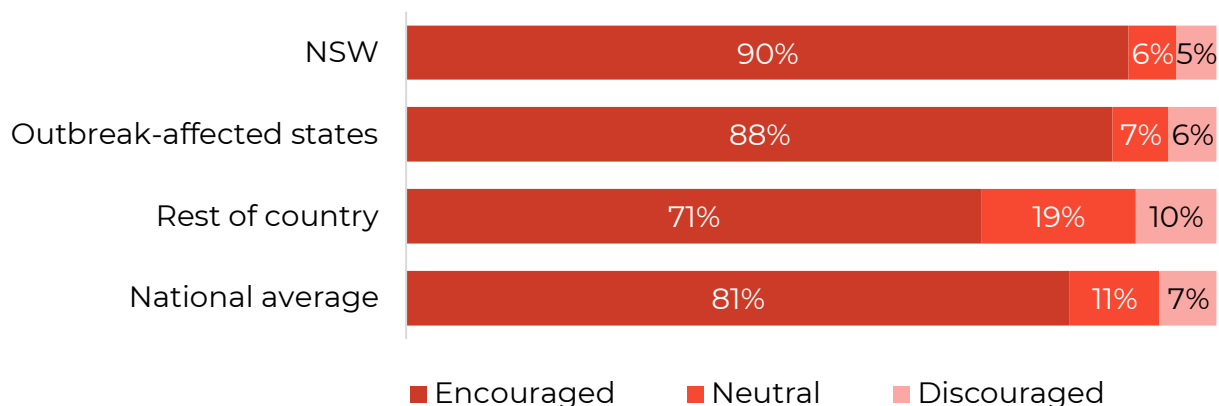
9 in 10 NSW audience members would be encouraged to attend if proof of vaccination was required at entry

For these more risk-averse audience members, vaccine passports are high on their list of priorities. In fact, the majority of NSW audiences across all risk profiles say they will be encouraged (90%) by proof of vaccination requirements at venues. Another 6% of audiences are neutral, while 5% will be discouraged.

For audiences in outbreak-affected states, high case numbers seemed to bring home the necessity of vaccination passports, with the ACT and VIC tracking similarly on the measure. Across the rest of the country opinions remained generally favourable (with 71% encouraged by vaccination requirements), though a larger proportion felt neutral (19%) or discouraged (10%).

Perhaps for similar reasons, metropolitan NSW audiences were more likely to be encouraged (93%) by vaccination passports than the study's small sample (n=74) of regional/remote NSW audiences (71% encouraged) – who were more likely to be neutral (19%) or discouraged (9%).

Figure 3: How much would proof of vaccination requirements at entry discourage or encourage you to attend? Outbreak affected states and rest of Australia, 1 October 2021 (n=2,024)



Some audience members consider proof of vaccination a pre-requisite for attendance

Even among the 90% of NSW audience members who are encouraged by vaccination requirements, there are a range of perspectives. Some consider vaccine passports a pre-requisite for returning to cultural events – and say they don't want to attend events without vaccine passports, at least in the short-term.

Proof of vaccination requirements are likely to have most impact on the 'risk-averse' 49% of NSW audience members who say they'll only attend arts events when the risk of transmission is minimal. Nearly all (95% in early October 2021) of this cohort were encouraged by vaccine passports, with only 2% discouraged – suggesting this measure will go a long way to increasing readiness among more cautious audience members. One such NSW audience member said,

'I think showing proof of vaccination is one of the most important actions to protect those attending any venue.'

Another said,

'I think as long as restrictions are based on public health orders at the time and all attendees are vaccinated I would be keen to attend.'

However, with NSW's 'recovery roadmap' suggesting that venues will be open to everyone, regardless of vaccination status, in early December, some of these 'risk-averse' audience members may be deterred from attendance. One said,

'I usually go to concerts, theatre and restaurants extremely regularly and won't be going at all if venues reopen regardless of vaccination in December. I work in health and see up close the Covid consequences on both patients and staff.'

There is a view that proof of vaccination requirements may help tackle anti-vaccination sentiment and drive further increases in the vaccination rate. One said,

'I'm hoping that preventing unvaccinated people from attending art and cultural events and venues will encourage them to do so.'

A small number of audiences say they would be discouraged by vaccination passports, for personal reasons or on principle

1 in 20 (5%) NSW audiences would be discouraged by the presence of vaccination passports – one of the lowest rates across the country, along with the ACT (5%).

One regional audience member suggested vaccines had not been equally accessible throughout the state – meaning that vaccine passport systems are unfairly exclusionary. They said,

'I live in regional NSW and have not had the opportunity to be fully vaccinated due to lack of supply. Mandating double vaccination to access venues excludes members of our community.'

Other NSW audience members were vaccinated themselves, but opposed proof of vaccination on principle. One NSW audience member said,

'I believe everyone should be vaccinated but am unsure how I feel about having certificates checked – I believe people have the right to choose & should not be excluded from participating in 'normal' life. However, being asked to show proof of my vaccination certificate would not stop me from attending.'

While many audience members will only feel comfortable attending if vaccine requirements are in place, some felt that there could be alternatives to this system. One said,

'I think we're going to have to learn to trust people who are not vaccinated to do the right thing, even if this means allowing them to attend but sitting in a separate section to people who are vaccinated. If they're still wearing masks, then there shouldn't be too much of a problem to people who are vaccinated.'

Audiences are thinking about practicalities of vaccine passports – including technical problems and enforcement at venues

While NSW audiences are overwhelmingly in favour of vaccine passports, some also called attention to the practicalities of their execution. Technical issues around the

vaccine passports were a concern for some – and may create an accessibility barrier for audiences who are not tech-literate. One NSW audience member said,

‘I need to update my phone to have proof of double vaccination. Would probably be a problem for a few others too.’

Another said,

‘I think that providing evidence of vaccination is important – but getting a vaccination certificate is not easy – I have tried online. The government needs to find a more accessible way of providing these.’

Furthermore, many audience members want to see patrons and staff protected by COVID-safety measures, including vaccination passports – but are worried about how they will be enforced. Some wonder whether front-of-house staff will bear the brunt of passport enforcement. One NSW audience member said,

‘I wonder who will be responsible for checking vaccination status. It seems an unreasonable burden to place on some venues.’

Audiences are conscious that vaccine passport policies could even create a security threat at some venues, with one saying,

‘Requiring proof of vaccination at entry would be great, but I fear it is impractical and, so far, venues haven’t been provided with a satisfactory way of doing this. It needs a police officer at every entry to every venue.’

Wherever possible, government mandates and public health orders are preferable to organisations developing their own (potentially inconsistent) policies. This may help reduce the pressure on arts organisations and staff to enforce policies, with one NSW audience member saying,

‘Consistency across venues would be reassuring. Putting something in place across venues will also reduce the likelihood of conflict with individuals who do not agree with vaccines, mask wearing, etc.’

Other audience members feel that passports are not a standalone solution

Vaccination passports alone may not be a complete solution, and some are concerned about the robustness of the passport systems. One NSW audience member said,

‘Even with these measures, one cannot help but still feel cautious. I feel that people will be able to provide fake proof of vaccination.’

Others are conscious that young children may not be vaccinated and of the risk that breakthrough infections could still occur among vaccinated audiences.

One audience member said,

‘Even if 80% of the eligible population is vaccinated, there will still be 1 in 5 people at high risk of carrying the virus – on top of breakthrough infections in the other 4 out of 5. Things could be worse than they were when case numbers were low.’

Nationally rapid antigen testing has been raised by audiences as an alternate or additional measure for keeping audiences safe. One ACT audience member said,

‘Even vaccinated people can carry (& possibly succumb to) the virus, so vaccination status is less significant than measures for detection, e.g. antigen testing, and prevention of spread, e.g. face mask.’

Another VIC audience member said,

‘I would like patrons to be required to also take a rapid antigen test with a negative result prior to attending events. This would encourage me more to attend than physical spacing of groups or limiting numbers of attendees.’

Arts organisations should prepare to hear a wide range of views - as audiences define their ‘dealbreakers’

Discussions around vaccination are somewhat charged at the moment. Audience members are still adjusting their expectations and defining their ‘dealbreakers.’ Regardless of the steps taken, presenters should expect to hear from people who consider vaccine passports a necessity, some who consider them unfair or unjust, and many who have things to say about the best way forward.

The situation may become more contentious in early December – when vaccine requirements are currently expected to proceed on a venue-by-venue basis.

Presenters can prepare their teams by developing policies and guidelines, providing FAQs and scripting responses where relevant. Clearly communicating organisational policies (and why they have been set) in advance of the event will be key. Requiring passports at the point of booking may help relieve the burden on front-of-house staff to enforce vaccine requirements. One audience member said,

‘Entry requirements should be pre-event processed. Sydney Symphony has an efficient approach.’

Opinions are likely to shift as we move from the short-term – where proof of vaccination may be the only way to safely resume attendance – to the long term, where other alternatives could become viable, and audiences have time to adjust to living in a ‘COVID-normal’ context.



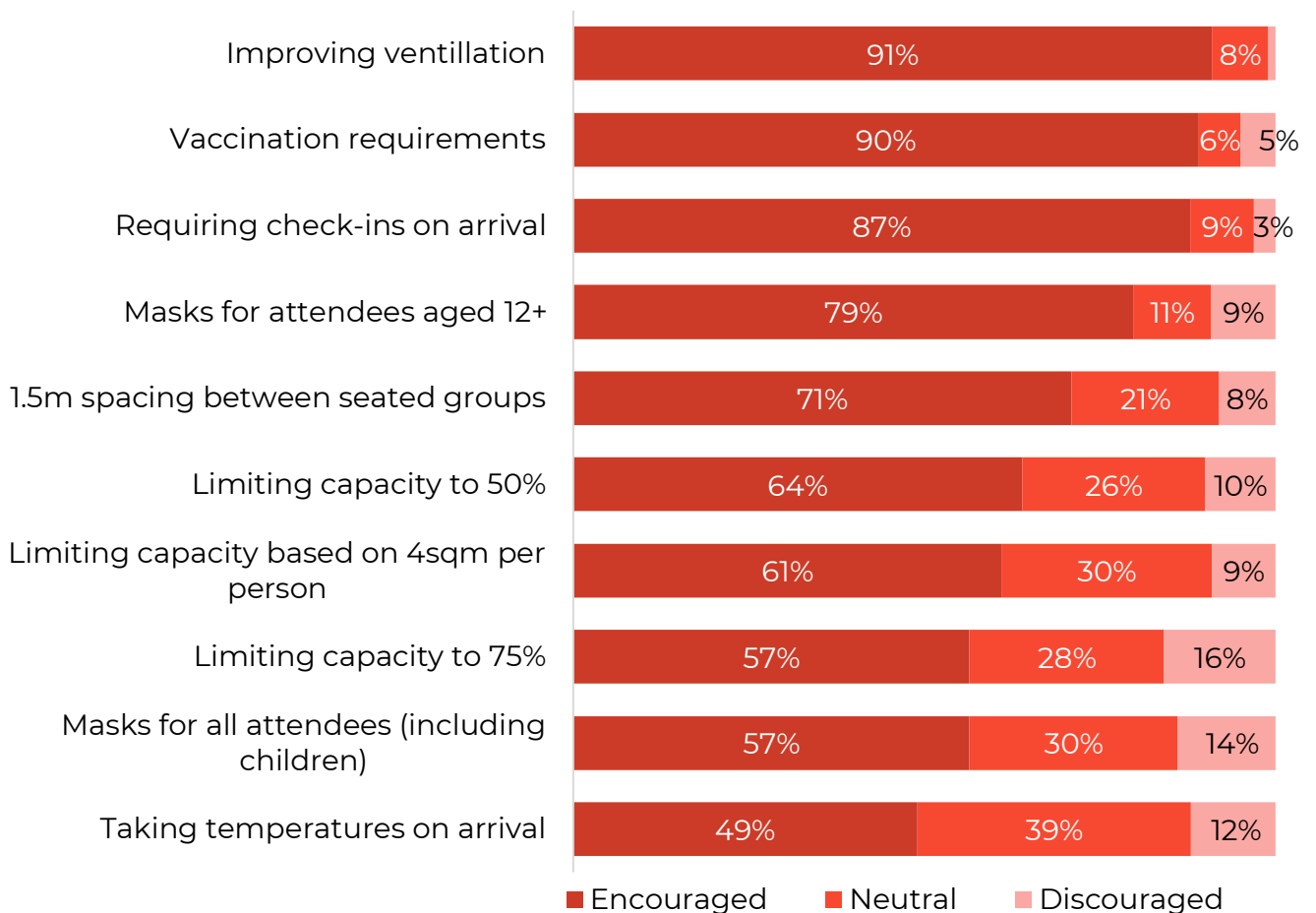
Other COVID-safety measures

The most widely accepted COVID-safety measures are vaccine passports, ventilation and check-ins

Throughout the transition to ‘COVID-normal’ life in NSW, other COVID-safety measures will remain important in protecting patrons and staff.

When comparing multiple approaches to COVID-safety at cultural venues, the largest proportion of NSW audiences said they would be encouraged by improvements to ventilation systems (91% encouraged, up from 86% in July 2021) – with vaccine passports a close second (90% encouraged). Requiring check-ins on arrival (87%, stable with 86% in July 2021) was the third most widely encouraging measure.

Figure 4: There are different approaches to reducing the risk of transmission at cultural venues. How much would each of the following steps discourage or encourage you to attend? NSW audiences, 1 October 2021 (n=620)



Ventilation was also the least likely measure to discourage audiences (1% discouraged) – having the advantage of being both effective and unobtrusive. Check-ins were similarly uncontroversial, with only 3% discouraged by this measure.

Messaging around existing ventilation systems may be a valuable avenue for presenters which can't feasibly make changes to ventilation. Comments from NSW audience members suggest ventilation continues to be front of mind for some audience members – and reassurance on this point may help encourage attendance. One said,

'Ventilation seems to be key, along with mask wearing, to reduce transmission into the future.'

Mandatory masks continue to be encouraging for most audiences, but some are eager to see this measure replaced by other safety protocols

Audience members in NSW were asked whether they would be encouraged by venues requiring the use of face masks for ages 12+, and for all attendees including children.

In NSW and other outbreak-affected states, most audience members continue to be encouraged by mandating masks for everyone over the age of 12. 8 in 10 (79%) of NSW audiences are encouraged by this measure, 11% are neutral and 9% are discouraged. One audience member said,

'For a seated event, mask wearing feels like the simplest ask of patrons and makes me feel the most secure.'

Another said,

'I believe a cautious approach using masks and distancing needs to be applied until well into 2022.'

For a minority of audience members, mask-wearing detracts from their enjoyment of the event. One said,

'As much as I can't wait to return to gigs, museums, shows I'd have to REALLY want to see it if I have to wear a mask throughout the show even though I know how important they are. It would prevent me from going to things I'm moderately interested in unfortunately.'

As a whole, audiences are more likely to be discouraged from attending by mask policies (9% discouraged) than they are by vaccination passports (5% discouraged).

Some audience members would like to see mask-wearing replaced by other safety measures, including proof of vaccination.

One said,

‘I would not enjoy an artistic event while wearing a face mask. If this was mandatory, I would not attend. Proof of vaccination status is reasonable and encourages the unvaccinated to get vaccinated.’

Another said,

‘Masks can and do work, but if numbers are controlled and we have provided proof of vaccination, I would prefer not to wear a mask.’

For others, however, masks remain an important accompaniment to vaccination – especially in the face of eased restrictions. One NSW audience member said,

‘I am very concerned at the news that unvaccinated people will be allowed to circulate at 90% and I intend to be both masked and wear a face shield to protect myself, even though I am fully vaccinated myself.’

Mandating masks for children was more polarising – and parents may opt to take kids to outdoor events for now

When asked if they would be encouraged by mandatory mask-wearing for all audience members, including children under 12, audiences were more polarised.

Around half (57%) of audience members in NSW were encouraged by this measure, while the remainder were neutral (30%) or discouraged (14%).

However, mask policies may not be an acceptable solution for all families. Within the small sample of NSW parents in the survey (n=85), opinions were even less favourable – the majority were neutral (31%) or actively discouraged (26%) by this measure, with only 43% encouraged.

The data shows a range of views on masks among parents. One NSW audience member said, ‘I don't know if young children could be forced to wear masks’, while another said, ‘I think children should wear masks as they can catch the virus as well.’

Attendance at events with children appears to be a complex proposition in the short-term – and some parents feel anxious about taking unvaccinated children along. For example, one person said:

‘I attend all events with my child. She is 6 and can't be vaccinated yet. I will only go somewhere where everything is done to protect her.’

Comments from some parents suggest that they will favour outdoor venues until their young children can be vaccinated.

One said,

'I have children aged <12 years. They would need to be vaccinated before I am comfortable taking them to public indoor venues.'

Some audiences feel capacity limits are placing undue financial pressure on arts venues – and don't believe they are as effective as masks or vaccination

Capacity limits were less likely to encourage audiences than masks, ventilation or vaccine passports – with around two-thirds (64%) of audiences encouraged by limiting venues to 50% capacity and 10% discouraged. Furthermore, around half (57%) of audiences were encouraged by 75% capacity limits and 16% were discouraged.

Reasons for audience responses varied. Some felt that capacity limits affected the atmosphere of an event,

'In terms of capacity, I've put the higher percentage because having an audience can impact the feeling of an event a lot. Too much space/too few audience members can feel awkward for a lot of cultural experiences.'

Other audience members pointed to the financial impacts of capacity limits on venues – and felt that other COVID-safety measures, like vaccinations and masks, were more effective. One said,

'Reducing capacity will prove uneconomical for many providers, however mandatory vaccination except for genuine medical exemptions and mandatory face masks are reasonable.'

Another said,

'I can't see any justification for limiting audience size to 50%. I think we should start with 75% and move quickly to 100% capacity. 50% is not financially viable for performing arts companies. The best measures are proof of full vaccination and wearing masks.'

Readiness and re-opening

Outbreak conditions are changing rapidly – and the re-opening of venues and lifting of border restrictions could have a dramatic effect

In NSW, outbreak conditions are changing rapidly, and will continue to do so over the next few months as restrictions ease. Audience attitudes are likely to shift as restrictions change, particularly if they lead to the predicted surge in cases. One audience member said,

‘At present I have no idea of how the opening up in NSW and Victoria will play out. As we are not currently in this position, I would need to wait and see what happens.’

To understand how readiness to attend may change, NSW audiences were asked to consider a **re-opening scenario** for attending events in which the following conditions were in place:

- interstate borders are open
- at least 80% of the population is vaccinated
- proof of vaccination is required at entry
- indoor venues are operating at 1 person per 4 square metres or 75% fixed seated capacity
- and masks are mandatory for those aged 12+ at indoor public venues.

Vaccine passports, masks indoors and some capacity limits will increase comfort for audiences in NSW

With NSW projected to reach 80% vaccination rates in late October, this re-opening scenario is fast on its way to becoming a reality. Promisingly, it appears that on reaching this vaccination target, proof of vaccination requirements, masks indoors and some capacity limits will significantly improve on current comfort levels.

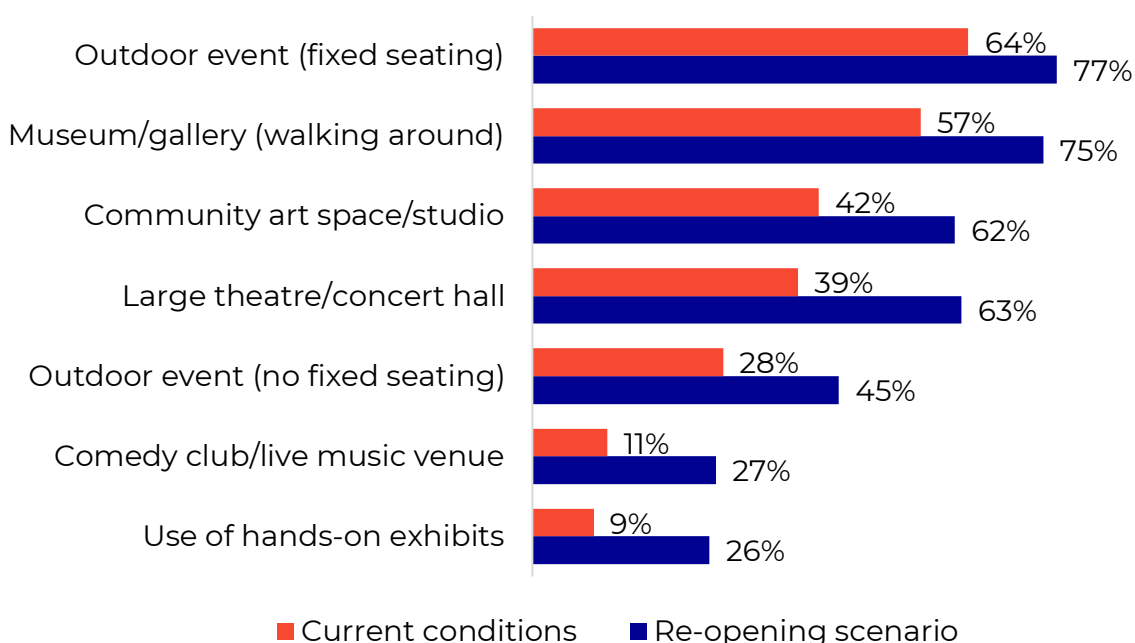
Right now, the comfort levels of NSW audiences depend on the size, seating plan and nature of arts and cultural venues – with only 11% of audiences ‘very comfortable’ at comedy clubs/live music venues without seating and 39% ‘very comfortable’ in large theatres or concert halls. Audiences are more likely to be ‘very comfortable’ in venues like museums and galleries (57%) or outdoor environments with fixed seating (64%).

Under the re-opening scenario, the proportion of audiences who are ‘very comfortable’ with most venue types will shift to the majority of the market. These conditions will have the biggest impact for large theatres and concert halls, where the proportion

'very comfortable' will increase from 39% to 63%. They will have the smallest impact for outdoor seated events, which already attract a rate of 64% 'very comfortable'.

Improvements will occur across all venue types however, the proportion 'very comfortable' at comedy clubs/live music venues is likely to remain relatively low at 27%.

Figure 5: Proportion of audiences in NSW who would be 'very comfortable' to attend selected cultural venues, current conditions and re-opening scenario (n=1,356)



When including the proportion who say they are 'somewhat comfortable,' at least two-thirds were comfortable at all venue types under the re-opening scenario - ranging from 65% for comedy clubs and live music venues to 97% for outdoor events with fixed seating.

As attendance is normalised it is likely that more people will shift from somewhat to very comfortable – however much depends on the trajectory of cases in the community and the degree to which transmission can be prevented or minimised at cultural events.

Despite the uncertainty surrounding the coming months, these findings suggest that for now NSW audiences will respond with greater confidence to a reopening plan that includes clear and consistent public health guidelines and application of vaccination passports.

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

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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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