

Summary

As outbreak-affected states move towards re-opening, audiences are concerned with managing risks

- As outbreaks continue in NSW, ACT and VIC, audiences in those areas are slightly more risk-averse than they were in July 2021. Approximately 43% say they are 'ready to attend now or whenever permitted', down from 57%, while 52% say they will only attend when the risks are minimal, up from 39%.
- Audiences in outbreak-affected states await the achievement of population-wide vaccination targets and most are eager to see cultural venues and events open safely.
- Although almost all audiences are now partially or fully vaccinated (96%), many are conscious that risks of transmission remain and want to see strict measures in place to keep audiences and staff safe at cultural venues.
- Audiences generally believe that clear and consistent COVID-safe measures are key to preventing further disruptions and allowing the sector to rebuild.
- Across the rest of Australia, audiences are largely comfortable attending right now (74% are 'ready to attend') – but opening borders could present new risks and challenge some audience members' confidence.

Requiring proof of vaccination will be an important tool enabling attendance in the transition to 'COVID-normal'

- The majority of audiences (81%) feel encouraged by proof of vaccination requirements – and some say they won't attend unless they are in place, at least in the short-term.
- Based on an opening scenario of 80% population vaccination rates, vaccine passports, capacity limits and masks in indoor environments, comfort levels in outbreak-affected states should increase to:
 - 74% very comfortable at museums/galleries (compared to 56% right now)
 - 61% very comfortable at large theatres/concert halls (compared to 37% right now)
 - 77% very comfortable at outdoor events with fixed seating (compared to 66% right now)
- A small number are concerned that proof of vaccine requirements could create further division within the community – however among arts audiences they are less polarising than masks and social distancing measures.

Organisations should prepare to hear a range of views from audiences and stakeholders

- This data quantifies the case for vaccine passports at cultural events, however there are a diversity of views on the best way forward and organisations should prepare for a period of vocal objections and debate.
- Discussions around vaccination are somewhat charged at the moment – and at times elicit anger, frustration and anxiety. Some audience members have very firm views while others are still working out what they are comfortable with, particularly outside the outbreak-affected states.
- Government mandates and industry guidelines will help organisations manage relationships with audience members during the challenging transition period.
- Organisations should monitor developments such as rapid antigen testing, which could help further increase confidence, and consult with staff.
- Audience readiness to attend is likely to change rapidly in the coming months, and may vary from venue to venue, as people begin to navigate decisions about re-entering public life and managing risks for their households and communities.

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=640), Victoria (VIC; n=617), 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.

Audiences in outbreak-affected states/territories are reported separately to the rest of Australia

Right now, outbreak conditions vary dramatically by jurisdiction: almost all of ACT (100%), NSW (92%) and VIC (82%) audiences are currently in lockdown, while 100% of audiences in QLD, SA, WA, NT and TAS are not.

The three '**outbreak-affected states**' (NSW, ACT and VIC) share similar trends – and at times are grouped together in this 'Pulse Check' for reporting purposes. However, it should be noted that ACT audiences tend to be slightly less tolerant of risks than audiences in NSW and VIC.

In the '**rest of the country**' (QLD, SA, WA, NT and TAS), confidence has been slightly affected by outbreaks in the other states – but attendance largely continues as border closures continue to remain in place. Similarly, these jurisdictions are grouped together in this report – noting that confidence levels in WA tend to be higher than confidence in SA and QLD, which share borders with outbreak-affected states.



Readiness to attend

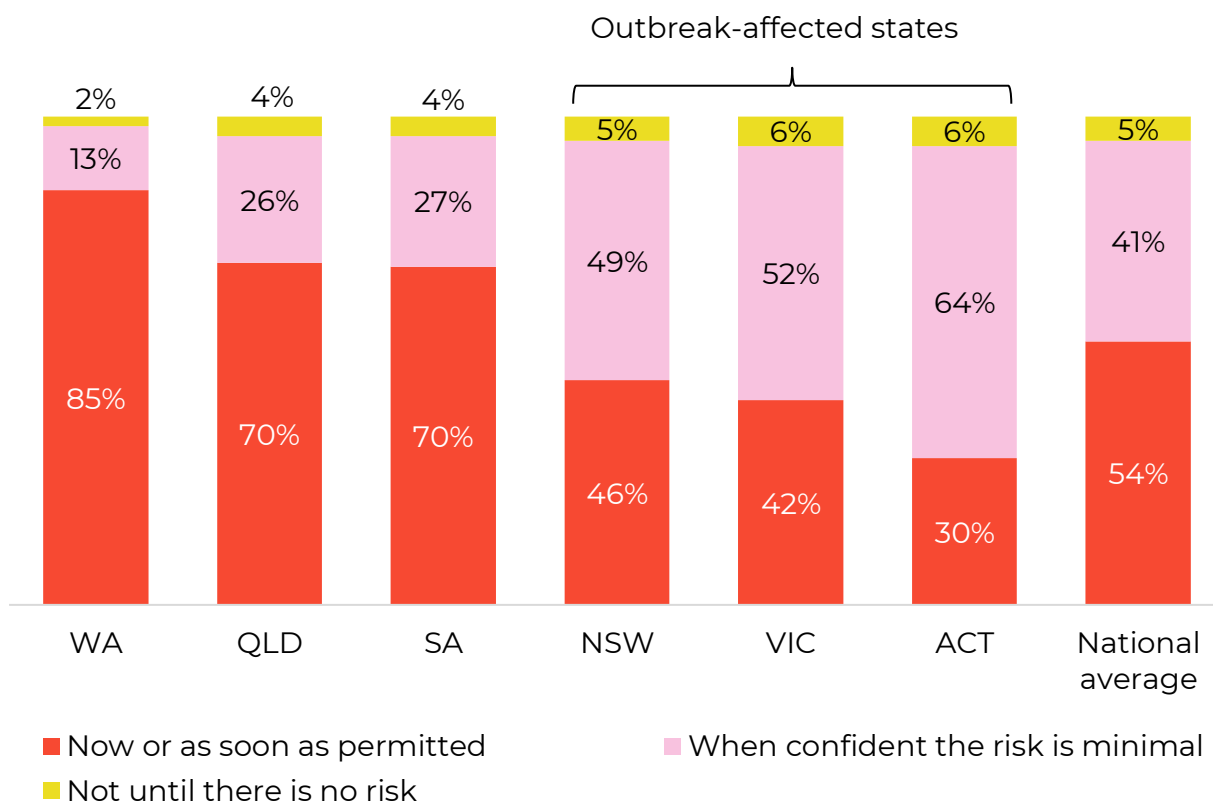
Confidence in outbreak-affected states has been affected by the Delta variant

On average, confidence in outbreak-affected states has decreased since July 2021. When asked how they felt about attending cultural events right now, 43% of audiences in outbreak-affected states were ready to attend ‘now or as soon as permitted’ (down from 57% in July). Another 52% (up from 39%) will attend when reasonably confident the risk of transmission is minimal.

Around half (46%) of audiences in NSW are ready to attend as soon as permitted, down slightly from 49% in July, despite the sharp increase in vaccination rates between July and October.

Over the same period, the proportion ready to attend decreased more significantly in Victoria (42%, down from 65% in July) and the ACT (30%, down from 60%), with outbreaks of the Delta strain growing in these jurisdictions between data collection points.

Figure 1: Which statement best represents how you feel about going out again to cultural events? All surveyed audiences, 1 October 2021 (n=2,146)



Border closures are keeping confidence mostly stable in the rest of the country

By contrast, the majority of audience members in the rest of the country remain ready and willing to attend events (74%, up from 69% in July 2021) – with border closures keeping flow-on impacts from outbreaks in other states at bay.

In fact, audience confidence in WA has increased, with 85% of audiences (up from 70% in July 2021) ready to attend now or as soon as permitted. Audience confidence in QLD is also up slightly (70% ready to attend now, up from 63%) and has decreased only slightly in SA (70%, down from 73%).

Vaccination

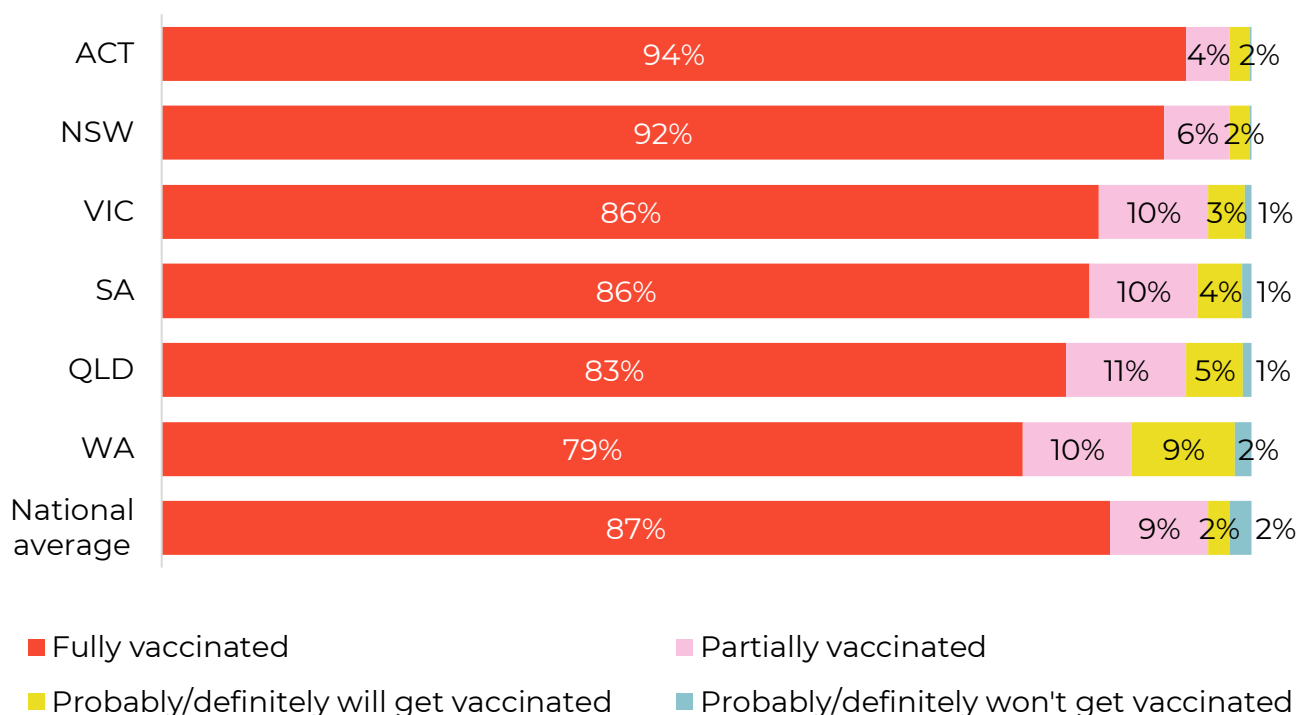
Almost all of surveyed arts audience members are vaccinated

As of 1 October 2021, 96% of arts audiences surveyed are fully (87%) or partially (9%) vaccinated – with another 2% saying they will probably or definitely get the vaccine. This proportion has increased since July 2021, when 23% of audiences were fully vaccinated and 50% had received their first dose.

Vaccination rates vary somewhat by state, with 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 arts 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%.

Full vaccination rates are highest for older age groups, with younger cohorts more likely to be awaiting their first or second vaccine – particularly in states like the ACT, VIC and QLD.

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 43% who are 'ready to attend' in outbreak-affected states, vaccination has been key. For a sizeable group, 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 would return to cultural events no matter what the COVID-safe plans are. I am healthy, fully vaccinated and work in the Arts industry and will do all I can to assist in the recovery of our heavily hit industry.'

Another said,

'I am ready to go. I am fully 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!'

Some audience members are also heartened by high community vaccination rates – and feel increasingly ready to head out. One said, ‘I get more comfortable to attend events as vaccination rates increase’, while another said,

‘Once we have achieved 80-90% vaccination there would be no barriers to (my) attendance. High vaccination rates would mitigate all risk (for me).’

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

For the 52% of audiences who are more risk-averse about going out in outbreak-affected states, COVID safety measures are vital – and vaccine passports appear high on their list of priorities.

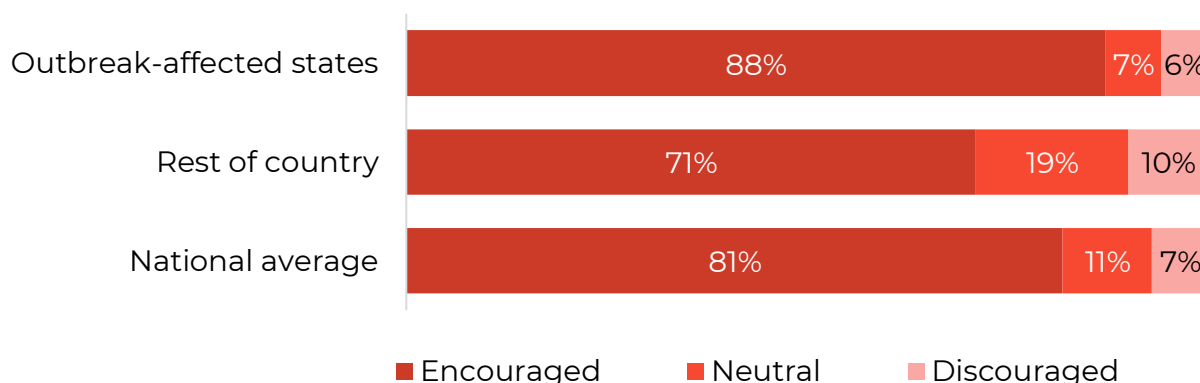
As of 1 October 2021, the majority of audience members across all risk profiles say they will be encouraged (81%) by proof of vaccination requirements at venues. Another 11% of audiences are neutral, while 7% will be discouraged.

Attitudes towards vaccination requirements varied between outbreak-affected states and the rest of the country. In outbreak-affected states, almost 9 in 10 (88%) audience members would be encouraged by vaccination requirements, with 7% feeling neutral and 6% discouraged.

Across the rest of the country, opinions remained generally favourable (with 71% encouraged by vaccination requirements), though a slightly larger proportion felt neutral (19%) or discouraged (10%) by the measure.

Attitudes towards vaccination requirements were largely consistent across metropolitan and regional/rural audiences. However, older audiences find this measure more encouraging than younger audiences (84% of those over 55 find it encouraging versus 77% of those under 55).

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)



Arts organisations should prepare to hear a wide range of views

Discussions around vaccination are somewhat charged at the moment. Some audiences are still working out what they are comfortable with, while others have very firm views. Presenters should expect to hear a range of opinions from audience members on both sides of the issue.

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. One audience member said,

‘The vaccination issue is tricky. Once everyone has had a chance to be vaccinated then events should be open to all but to get events back up & running again, I feel they should be restricted to the vaccinated – until we settle into living with Covid.’

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

Among the audience members encouraged by vaccine passports, some consider vaccination requirements a prerequisite for attending – and say they don’t want to attend events without vaccine passports, at least in the short-term.

Importantly, proof of vaccination requirements are likely to have an impact on the ‘risk-averse’ 41% of audience members who say they’ll only attend arts events when the risk of transmission is minimal. 9 in 10 (91% in early October 2021) of this cohort were encouraged by vaccine passports, with only 2% discouraged – suggesting this measure will help to maximise audience comfort as venues reopen and events begin to take place. One such audience member said,

‘I would feel much more comfortable attending events where only the vaccinated – or medically exempt from being vaccinated – attend, at least for the first year or so until we have a better understanding of the long-term efficacy of vaccines. Particularly because I feel that severely limiting numbers of attendees continues to unfairly punish the arts sector with decreased revenue.’

Another said,

‘I would be unlikely to attend events with unvaccinated people, other than young children or the genuinely exempt. I feel that to be part of a "community" you must be prepared to take actions that protect that community which includes getting vaccinated.’

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

However, vaccination passports may not be a complete solution and some are concerned about the robustness of the passport systems. One 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.

‘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.’

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

Less than 1 in 10 (7%) of audiences would be discouraged by the presence of vaccination passports.

Some of these audience members are vaccinated themselves, but worry that these measures could create polarisation within the community.

One said,

‘I’m not antivax at all, I’m fully vaccinated myself, but I feel excluding people on their vaccination status causes anger and unrest, and affects other audience members in the lead up to and during the event as they may not be able to attend with friends/family members who aren’t vaccinated.’

Another said,

‘As a person who has been vaccinated, I would not want to exclude those who have not.’

Some audience members felt that creating divisions between individuals was contrary to the spirit of the arts, with one saying,

‘The arts have traditionally been inclusive, celebrating the diversity of imagination and spirit. I deplore the attempted segregation of those who have chosen not to be vaccinated. I understand artists are desperate to get on with the job, with their lives, but making the non-vaccinated the focus of their frustrations is unwarranted and unjustified.’

Audiences recognise that vaccine passports have consequences for presenters and staff

Many audience members want to see venue staff protected by COVID-safety measures, including vaccination passports if necessary. However, some audience members were worried about the practicalities of vaccine passports – and the stress they could place on front-of-house staff at venues. One 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 create a security threat at some venues, with one saying,

‘I worry that requiring proof of vaccination is going to result in abuse of staff. I have no problem showing mine, but there is so much anger. I think it might be worse than when masks were required, and young people in service roles shouldn't have to deal with that.’

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 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.’

Rapid antigen testing was raised as an alternative, or additional, measure that could further assist with keeping audiences safe – and organisations would be wise to monitor this development closely in the coming months. One audience member said,

‘A fully vaccinated staffing policy as well as exclusion policy or rapid testing regime for any unvaccinated patrons might help allay fears.’

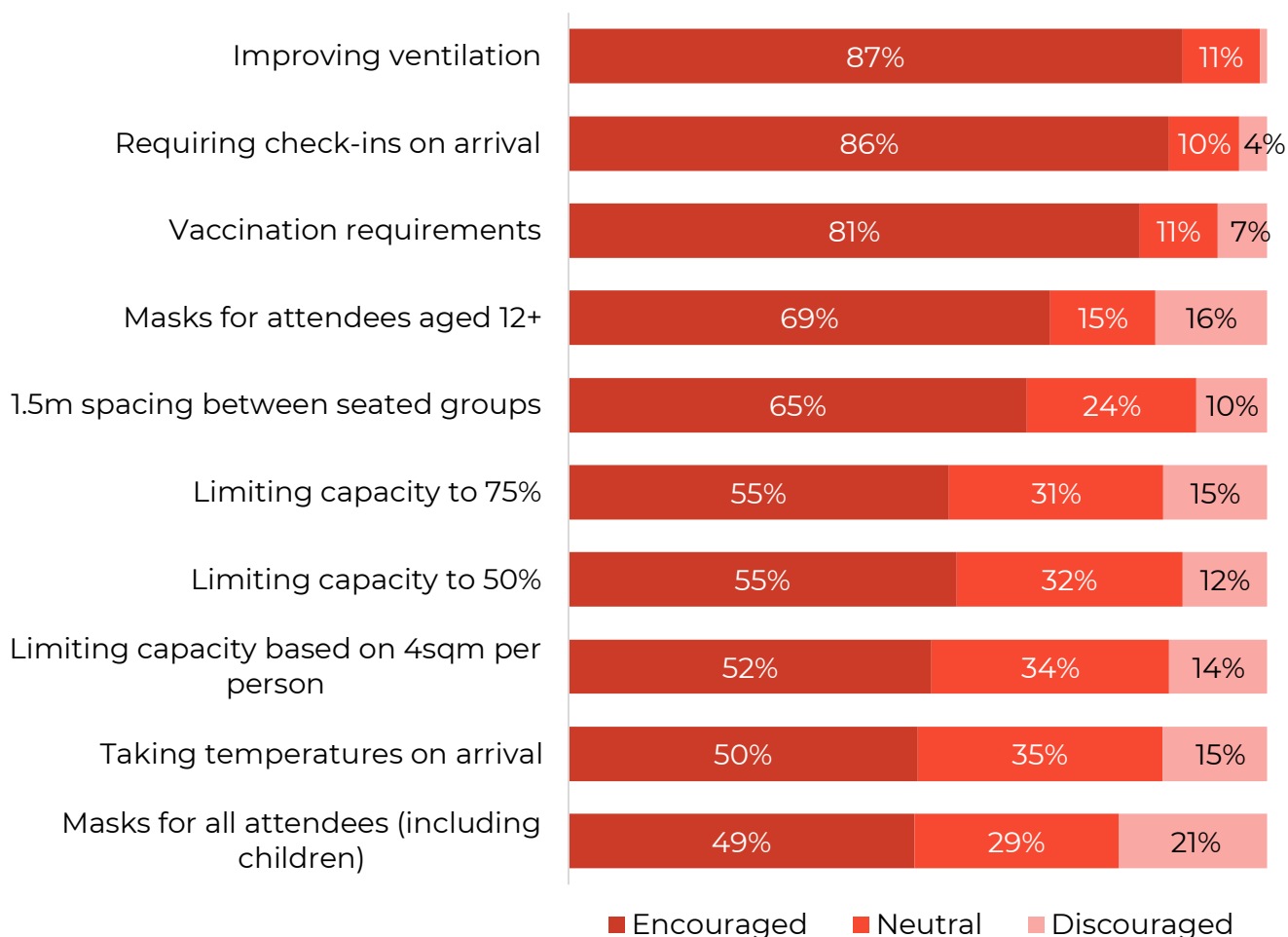


Other COVID-safety measures

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

When comparing multiple approaches to COVID-safety at cultural venues, the largest proportion of audiences said they would be encouraged by improvements to ventilation systems (87% encouraged, up from 83% in July 2021) and requiring check-ins on arrival (86% encouraged, stable with 85%) – with vaccination passports the third most widely encouraged measure (81% encouraged).

Figure 4: How much would each of the following steps discourage or encourage you to attend? All surveyed audiences, 1 October 2021 (n=2,024)



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 4% discouraged by this measure.

However, some audience members acknowledged that improving ventilation may be difficult or costly for some venues. One said,

‘Improving ventilation doesn't seem very practical for some venues – big theatres have probably already increased fresh air intake if their HVAC systems permit.’

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

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

Audience members 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 outbreak-affected states, most audience members are encouraged by mandating masks for everyone over the age of 12. 8 in 10 (78%) of outbreak-affected audiences are encouraged by this measure, 12% are neutral and 11% are discouraged. Across the rest of the country, opinions are more mixed – although the majority (56%) find this measure encouraging, another 1 in 5 (20%) are neutral, and 23% are discouraged.

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

‘I will happily oblige with any restrictions other than mask wearing. I have to wear a mask in my work under covid rules and so have no wish to wear it in leisure time.’

Others were in favour of mask-wearing, but said that mandatory mask policies would not encourage them to attend because of low compliance. One said,

‘Although face masks are a way of preventing transmission, people do not wear them properly and I'm sure once the lights are down they will come off – that's what happened at movie theatres.’

As a whole, audiences are more likely to be discouraged from attending by mask policies for people aged 12 and over (16% discouraged) than they are by vaccination passports (7% discouraged).

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

Mandating masks for children was more polarising

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 (55%) of audience members in outbreak-affected states were encouraged by this measure, while the remainder were neutral (28%) or discouraged (17%). In the rest of the country, less than half (39%) of audiences were encouraged by this measure, 32% were neutral and 28% were discouraged.

The data shows a range of views on masks among parents. One NSW audience member said, ‘I think children should wear masks as they can catch the virus as well.’ Another said,

‘Such a mandate would discourage me as I believe it is an unnecessary imposition on children under 12 and would hamper their enjoyment.’

One audience member indicated that Australia may look to what’s working in other countries, saying,

‘Face masks are an easy, low cost and effective strategy – supported by heaps of evidence now, including a trial in Bangladesh. Children are using masks in many states in USA. No drama.’

Parents may opt to take kids to outdoor events where outbreaks continue

Comments from parents indicated a degree of concern about the risks for children who are not yet eligible for vaccination in Australia. 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.’

However, mask policies may not be an acceptable solution for all families. Within the sample of parents in the survey (n=330), opinions were even less favourable about requiring children to wear masks: parents were more likely to be discouraged by this measure (36%) than they were to be encouraged (35%), while 30% were neutral.

Some parents suggested 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 half (55%) of audiences encouraged by limiting venues to 50% capacity and 12% discouraged. Similarly, around half (55%) of audiences were encouraged by 75% capacity limits and 15% were discouraged.

For some audience members, capacity limits were insufficient to prevent transmission of the virus. One said,

‘The Delta variant spreads too easily through the air so capacity limits don’t really entice me. One positive case in the venue puts everyone there at high risk.’

Others were concerned about the financial impacts of capacity limits on venues and presenters. One 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.’

Another said,

‘I can’t see how our arts venues can survive if they have to restrict their seating capacity, and far prefer that we adopt a personal responsibility approach.’

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

Conditions are changing rapidly, and will continue to do so over the next few months as outbreak-affected states begin to ease restrictions. The reopening of state borders could mean that the rest of the country sees cases rise for the first time.

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

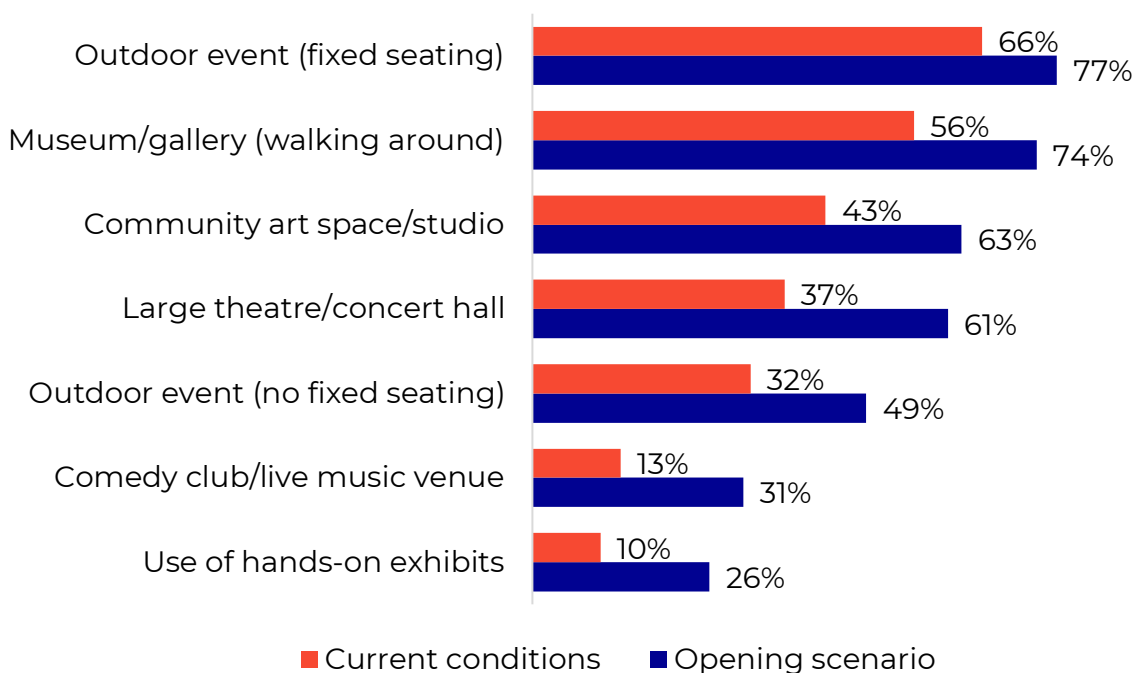
- interstate borders are open
- at least 80% of the population is vaccinated
- proof of vaccination is required at entry
- indoor venues are operating at 1 person per 4 square metres or 75% fixed seated capacity
- and masks are mandatory for those aged 12+ at indoor public venues.

Vaccine passports and masks indoors will increase comfort for audiences in outbreak-affected states

For audiences in outbreak-affected states who are approaching high vaccination rates, proof of vaccination requirements, masks indoors and some capacity limits are likely to see comfort levels increase relative to current conditions.

The results show a majority of audiences in outbreak-affected areas will be 'very comfortable' with most venue types under these conditions. The greatest impact will be felt at large theatres/concert halls (+24%), community art spaces/studios (+20%), outdoor events with no fixed seating (+17%) and comedy clubs and live music venues (+18%).

Figure 5: Proportion of audiences in outbreak-affected states who would be 'very comfortable' to attend selected cultural venues, current conditions and opening scenario, 1 October 2021 (n=1,356)



When including the proportion who say they are 'somewhat comfortable,' more than two-thirds of audiences were comfortable at all venue types under the opening scenario – ranging from 67% for comedy clubs and live music venues to 97% for outdoor events with fixed seating.

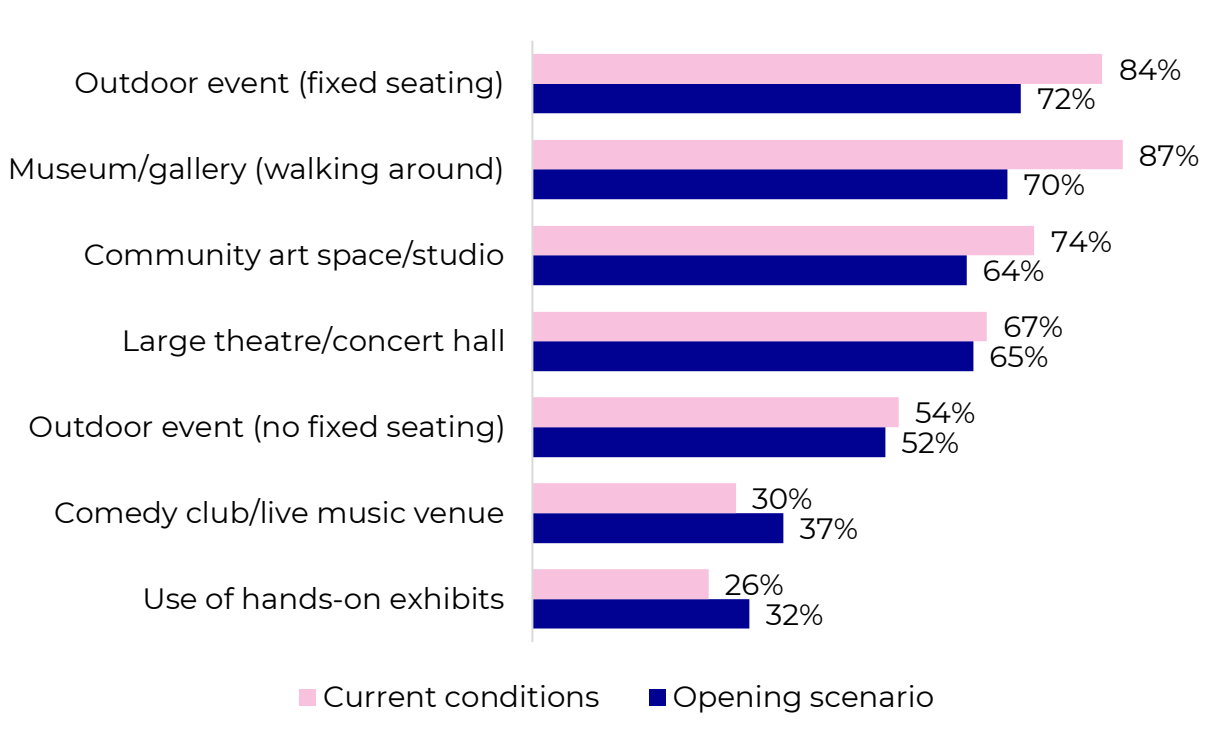
Across the rest of the country, audiences have mixed reactions to the opening scenario

Outside the outbreak-affected states, responses to the opening scenario are mixed – with many conscious that opening borders could expose these jurisdictions to unprecedented levels of the virus.

Comfort levels with some venue types could decrease relative to today's levels. For example, audiences across the rest of the country are more comfortable with attending galleries and museums in current conditions (87% 'very comfortable') compared to the opening scenario (70% 'very comfortable').

A similar trend is observed for outdoor events with fixed seating (84% 'very comfortable' right now, 72% 'very comfortable' with opening scenario). For theatres/concert halls and outdoor events without fixed seating, audience attitudes remained roughly the same.

Figure 6: Proportion of audiences in rest of country who would be 'very comfortable' to attend selected cultural venues, current conditions and opening scenario, 1 October 2021 (n=764)



Audience responses to these scenarios are linked with their risk tolerance. Those 'ready to attend now' (74% of audiences across the rest of the country) are the most comfortable with the opening scenario, and those waiting until there's no risk (3% of audiences) are the least comfortable.

For audience members with lower risk tolerance, widespread vaccination and the use of vaccine passports are encouraging, but there may be an unacceptable level of risk at some venue types. One said,

'I live in WA, where it is safe, today, to do pretty much anything. Advice from my medical specialist is that when borders open, with vaccination rates at only 80%, it will no longer be safe for me to risk being in such close proximity to others (as I have Primary Immune Deficiency).'

Another said,

'Once borders are open, we in QLD will be at risk again. A percentage vaccination level is meaningless to a virus. The surge among the unvaccinated will prompt the hesitant to get vaccinated. But the risk of infection after the borders open will probably have the paradoxical effect of reducing attendance at cultural events by those of us who have been insulated from the southern contagion.'

Audience attitudes are likely to shift as restrictions change, particularly if they lead to the predicted surge in cases. Some audience members have suggested their comfort levels will depend on what happens when restrictions lift. One audience member states,

‘As we're so unsure what life will look like once we hit 80% and try to open up, I'm not really sure how I'll feel, even though I'm double vaxxed. I will need to wait and see how COVID-19 goes at that time.’

Another 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.’

At this stage it is difficult to predict how audiences will react in reality when borders open and state governments around Australia move from virus suppression to harm minimisation strategies.

For now, it appears that while some audience members are concerned about opening up, for most venue types the proportion ‘very comfortable’ remains the majority. Further research closer to that time may help to provide a more stable outlook for planning.

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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