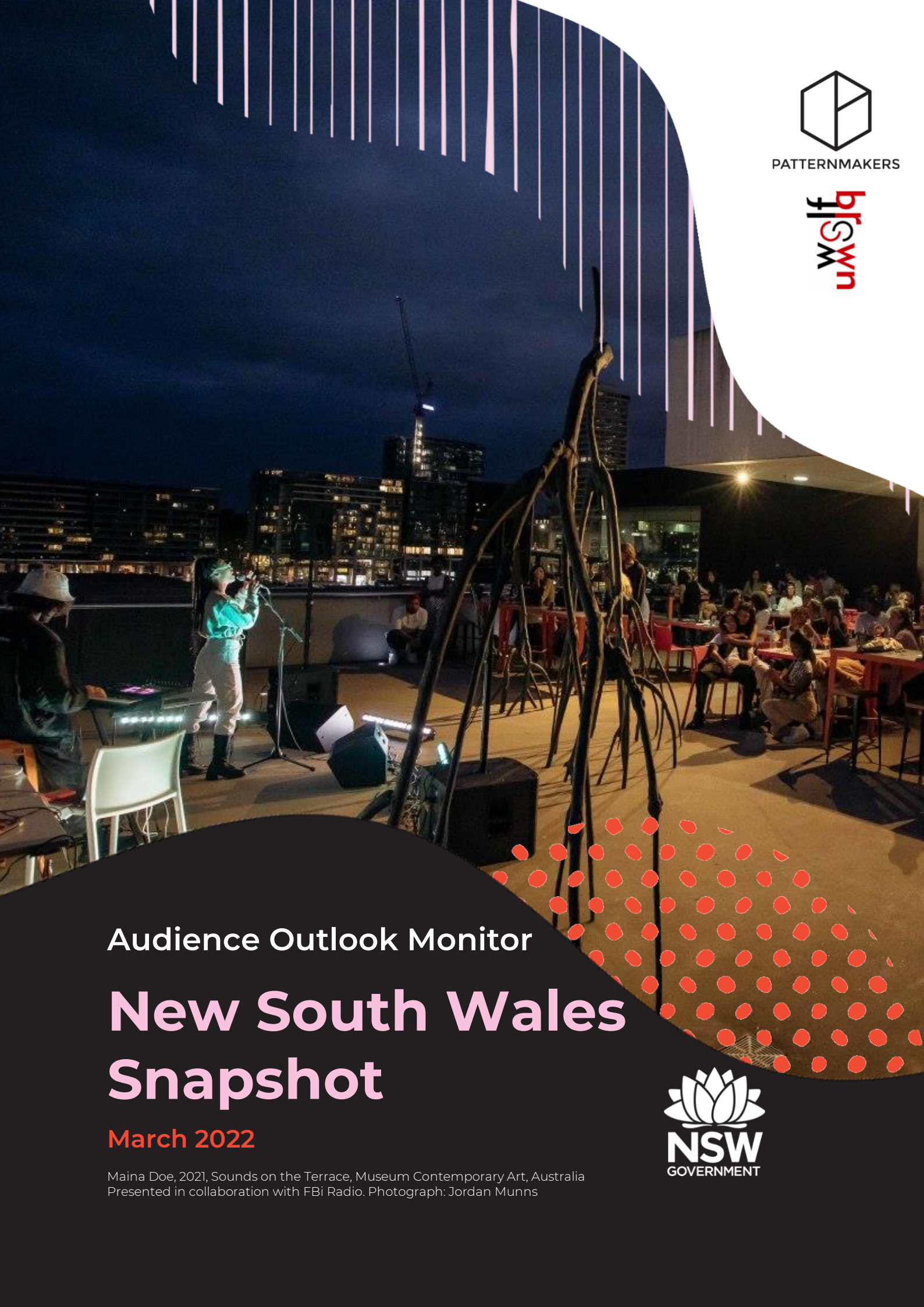




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Audience Outlook Monitor

New South Wales Snapshot

March 2022

Maina Doe, 2021, Sounds on the Terrace, Museum Contemporary Art, Australia
Presented in collaboration with FBI Radio. Photograph: Jordan Munns



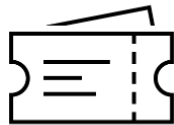
Key Facts: March 2022

Attendance Outlook



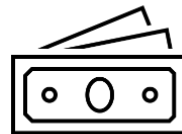
2,451

NSW arts attendees responded to the March 2022 survey



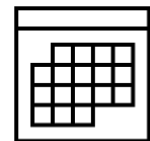
77%

attended an event recently, the highest level since the onset of the pandemic



+25%

increase since Nov '21 in those attending who spent \$50 or more in the last fortnight



60%

of those booking events are making plans to travel within NSW

COVID-safety



52%

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



#1

vaccine passports are the most encouraging COVID-safety measure



67%

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



87%

of NSW arts attendees have had three doses of a COVID-19 vaccine

Key findings: March 2022

NSW attendance levels have reached the highest point in the pandemic – but 40% are still cautious

- ▶ In March 2022, data from 2,451 past attendees of cultural events in New South Wales (NSW) suggests that NSW audiences are getting accustomed to 'living with COVID', following lockdowns in 2021 and cases reaching record-high levels in mid-January.
- ▶ Attendance has reached its highest levels since the study began, increasing from 37% in November 2021 to 77% in March.
- ▶ 6 in 10 (60%) say they are ready to attend cultural events 'whenever permitted' (up from 52% in November 2021) – while 4 in 10 aren't comfortable unless the risks are minimal.
- ▶ While most NSW attendees have received three shots of a COVID-19 vaccine (87%), many continue to say their attendance is inhibited by the risks of transmission (52%) or being a close contact (39%).
- ▶ Some audiences remain concerned with transmitting the virus to those at-risk in their community – and 51% in NSW 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 (50% ready to attend) and those with a disability (43% ready to attend) – so it will be important for the culture sector to consider varying needs among their audience bases.

Masks and vaccine passports continue to play a role, with risks of transmission still inhibiting attendance

- ▶ The data suggested NSW audiences are eager to move into the next chapter of the pandemic, after experiencing frequent disruptions throughout 2021. However, there are some key COVID-safety measures that will continue to play an important role in maintaining confidence.
- ▶ Most of those attending are satisfied overall with COVID-safety measures applied at recent cultural events they attended (77% 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.
- ▶ Despite proof of vaccination requirements being scrapped in late 2021, arts audiences continue to favour this safety measure (68% encouraged), with 12% opposed.
- ▶ Around 4 in 10 (44%) are encouraged by the option to provide a rapid antigen test (RAT) OR a vaccine passport — with this being the least encouraging COVID-safety measure for NSW audiences.
- ▶ 2 in 3 (67%) NSW attendees are encouraged by mask-wearing despite masks no longer being mandatory in most indoor settings – and many still consider the absence of this safety measure a ‘dealbreaker’.
- ▶ As NSW audiences navigate a ‘living with COVID’ scenario, cautious audiences will be relying more upon the COVID-safety policies of individual venues to mitigate the risks of transmission.
- ▶ Some audience members will be looking to cultural organisations to adopt a robust approach to COVID-safety in order to communicate inclusivity and care for those who are more vulnerable.

NSW audiences are eager to make plans, but the pandemic is influencing their preferences

- ▶ The data shows that NSW audiences are feeling optimistic about attending in 2022, with 84% making firm plans to attend an in-person cultural event (up from 74% in November 2021).
- ▶ After experiencing frequent disruptions in 2021, the live performance sector can expect a boost – with 69% of audiences (up from 56% in November 2021) making plans to attend a live performance.
- ▶ NSW arts audiences are reporting the highest spending levels since the pandemic started, with 70% spending more than \$50 and 45% spending more than \$100 – also the highest of any jurisdiction. However, full economic recovery is still some way off, and with cases climbing once more in March 2022, cautious optimism is wise.
- ▶ Shorter booking timeframes are still common in NSW and most audiences booking are making plans for local (65%) or intra-state events (60%) – which are perceived to be less risky.
- ▶ 14% of NSW audiences say their preferred attendance times have changed.
- ▶ Cultural tourism is beginning to improve – though overall NSW audiences are more likely to be travelling within their state (60%) rather than travelling interstate for events (16%) this year.
- ▶ The arts continue to be perceived as vital to community recovery, providing an avenue for connection and resilience in times of hardship. While some audiences are yet to return, they are firm in wanting to support artists and help cultural activity to flourish in new ways.

Introduction

This report summarises insights from over 2,400 audience members in New South Wales

This New South Wales (NSW) Snapshot Report outlines key findings from the March 2022 phase of the Audience Outlook Monitor in Australia (Phase 7), based on data collected from 2,451 audience members living in NSW.

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.

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 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.

Read on for the key March 2022 findings for NSW.

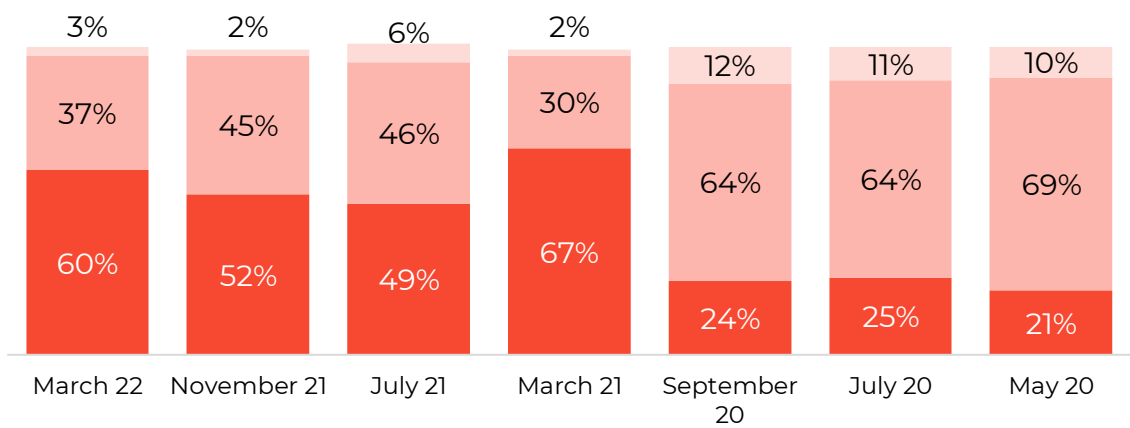
Current conditions

6 in 10 audience members in NSW are 'ready to attend' now or whenever permitted

After reaching a historic peak in cases in mid-January, audience confidence has increased slightly in New South Wales, approaching similar levels to March 2021, when the state had not yet experienced the outbreaks of the Delta or Omicron variants.

6 in 10 NSW audience members (60%, up from 52% in November 2021) are ready to attend 'now or as soon as permitted'.

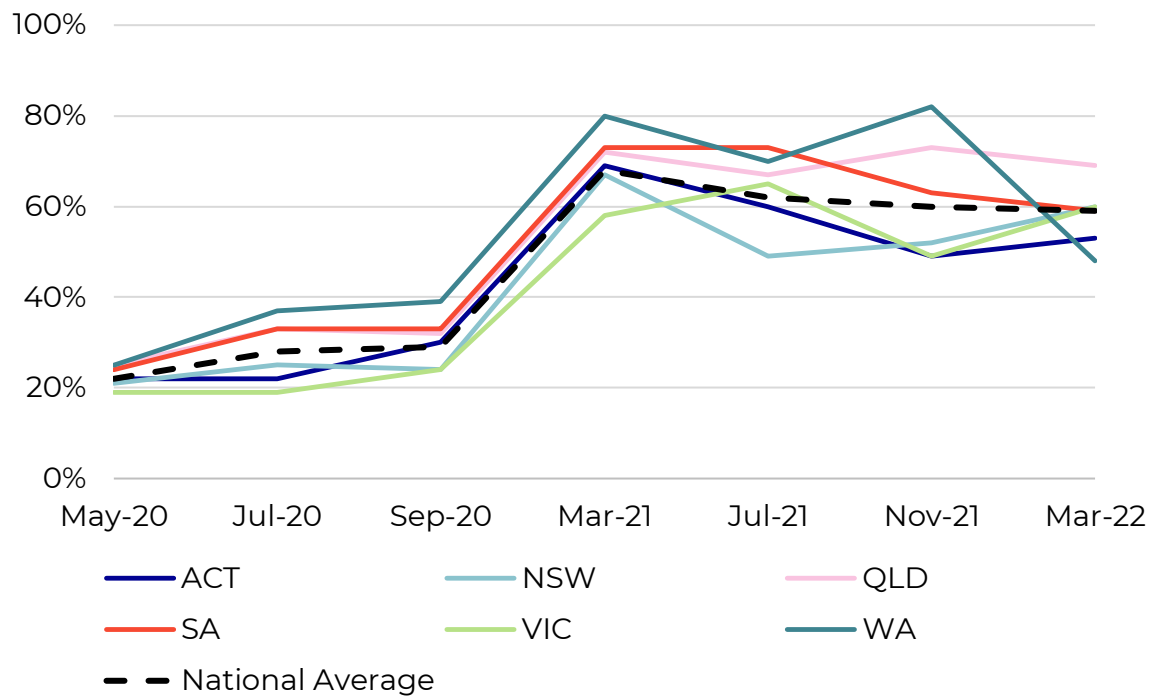
Figure 1: Proportion of audiences who are 'ready to attend now or as soon as permitted'. NSW audiences, May 2020 to March 2021 (n=2,449)



- Cannot foresee going out until there is no risk
- When reasonably confident that the risk of transmission is minimal
- Now or whenever permitted

After being slightly below the national average in November and July 2021, confidence in NSW is now in line with national sentiment once more (59% 'ready to attend'), as outbreak conditions and restrictions become more alike in the different states and territories. (Figure 2.)

Figure 2: Proportion of audiences who are 'ready to attend now or as soon as permitted'. By state/territory, May 2020 to March 2022 (n=8,369)



For the 6 in 10 audience members in NSW who are 'ready to attend', this confidence appears linked to a willingness to 'live with the virus' – or an eagerness to return to regular attendance after long periods of disruption in 2021. One said,

'Though COVID is definitely still rampant in our community, I am triple vaccinated and find I'm still taking the necessary precautions when leaving the house and attending events, that the overarching fear of COVID is less present in my day to day.'

There are varying needs and vulnerabilities amongst the 4 in 10 NSW audience members who remain cautious

As NSW audiences become accustomed to the prospect of 'living with the virus,' another 4 in 10 (37%) 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 (51%) of NSW audience members answered yes – with 11% vulnerable to a serious health outcome themselves, 16% living with someone vulnerable, and 24% 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 50% of audiences who had a vulnerable person in their immediate family/household.

One audience member said,

‘I am immunocompromised due to chemotherapy for cancer. Because there is so much COVID in the community but masks are no longer required it is not safe for me to be in public spaces.’

Readiness to attend somewhat decreases with age, with older audience members more likely to report vulnerability to COVID-19. Audience members aged 65-74 were the least likely to be ready to attend (56%), and audiences under 35 the most likely (65%).

One audience member said,

‘Since there is still virus circulating in the community I am very uneasy about being indoors with groups of people. It seems like ‘open slather’ now with unvaccinated people out in the community. For me I need to have a much lower level of cases with COVID popping up each day.’

Compared to non-disabled audience members (62% 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 the varying needs of the community being overlooked as the country reopens – an important consideration for arts organisations going forward. One audience member said,

‘I feel like the government has thrown restrictions out too quickly. It's a bit disconcerting to go from all these rules and what felt like responsible safeguards to none at all. Seeing how local food, event, shopping centres, public transport facilities are at almost pre-COVID capacity has me worried, not so much for my own health but my friends and family around me who are more vulnerable.’

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

As restrictions ease and case numbers come down from their January peak, comfort with public activities and arts attendance in NSW has increased (relative to November 2021), following the same general trends as readiness to attend.

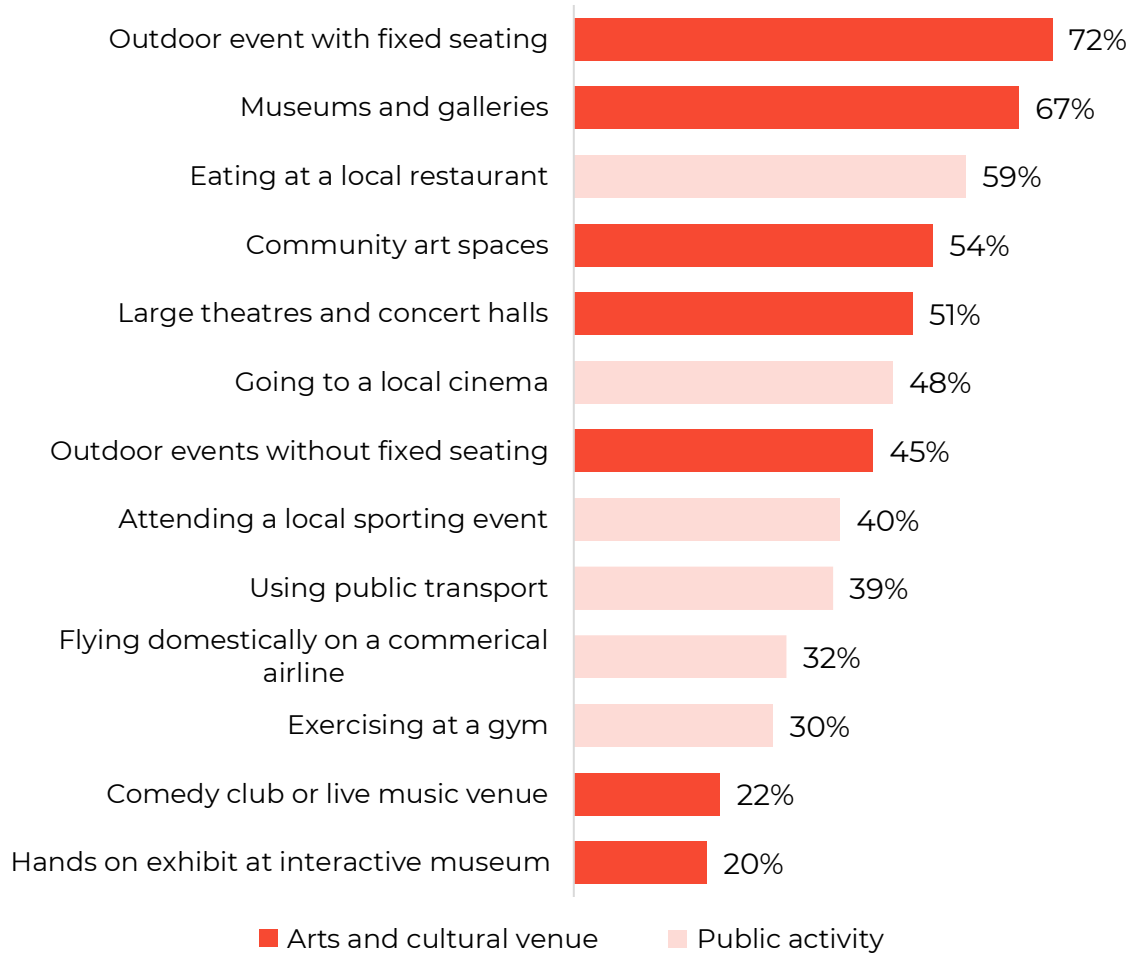
A similar pattern is evident in Victoria (VIC) and the Australian Capital Territory (ACT) – states which, like NSW, were recovering from outbreaks of the Delta variant when data was last collected in November 2021.

Among arts and cultural venues, outdoor venues with fixed seating continue to be perceived as safest – with 72% of NSW audiences ‘very comfortable’ in these environments, up from 64% in November – followed by museums and galleries (67% ‘very comfortable’, up from 57% in November).

As a general rule, comfort at most arts venues remains higher than many other common public activities – including attending a sporting event, exercising at a gym, flying domestically on a commercial airline, and using public transport (Figure 3.)

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 3: Proportion of audiences 'very comfortable' attending the following public activities and arts and cultural venues. NSW audiences, March 2022 (n=2,448)



Live attendance

As audiences adjust to living with COVID, attendance rates in NSW are at their highest since the study began

As New South Wales adjusts to 'living with COVID', attendance at cultural events has recovered to pre-Delta levels.

In March 2022, 77% of audiences said they attended an in-person cultural event in the fortnight before data collection (9-13 March), a significant increase since November 2021 (37%). This is, in fact, the highest attendance rate recorded in NSW since the study began – on par with pre-Delta levels in March 2021 (76%).

Similarly, audiences in VIC and the ACT are also becoming more active following extended lockdowns in 2021.

More than 8 in 10 NSW 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 NSW audiences are making firm plans to attend arts and cultural events in future.

In March 2022, 84% of audiences reported making plans for in-person attendance in the future, increasing significantly since November 2021 (74%), when audiences were beginning to emerge from a long period of lockdown.

In particular, the proportion of NSW audience members making plans to attend a live performance has increased, from 56% in November 2021 to 69% in March 2022.

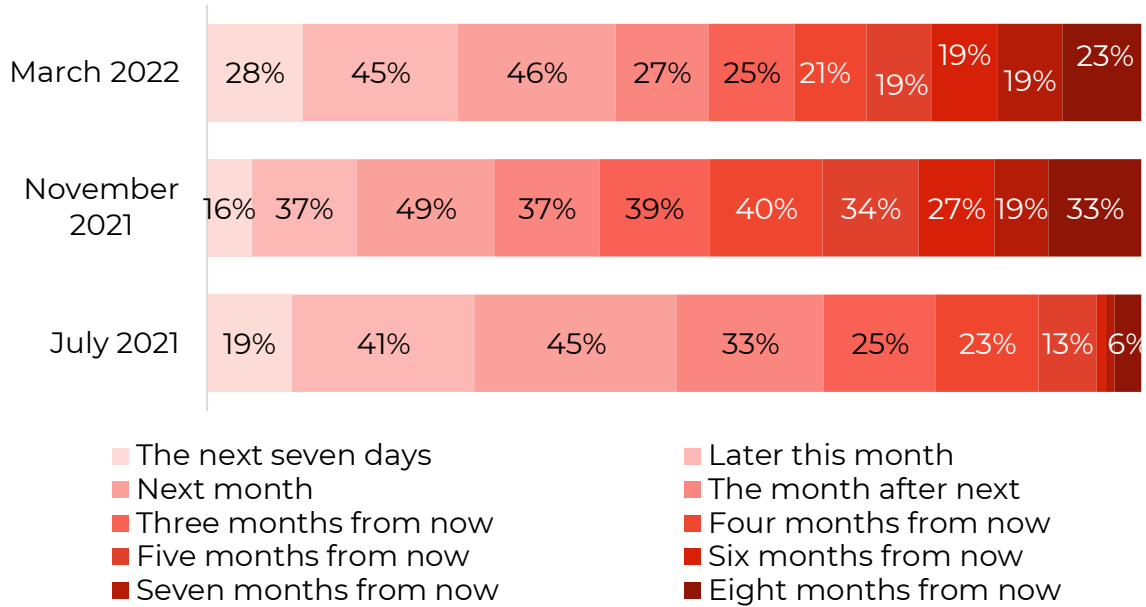
NSW audiences continue to book events in the short-term – and are less likely to make long-term bookings compared to November 2021

When asked about the timing of scheduled events, NSW audiences continue to book events in the short term – with the proportion making longer-term bookings down, relative to November 2021.

The proportion booking events within the next seven days has increased from 16% in November 2021 to 28% in March 2022. Meanwhile, the largest proportion of audiences is purchasing tickets for events happening later this month (45%, up from 37% in November), and a similar proportion is booking for next month (46%, down from 49% in November), as shown in Figure 4.

Bookings for events happening between three to eight months from now have all decreased significantly, as NSW audiences appear to be favouring short-term planning. The availability of events post-Summer season, and lingering uncertainty around outbreak conditions are likely playing a role.

Figure 4: In the past fortnight, did you purchase tickets for one or more live shows or performances that are scheduled for...? NSW audiences, March 2022 (n=1,521), November 2021 (n=740) and July 2021 (n=658)



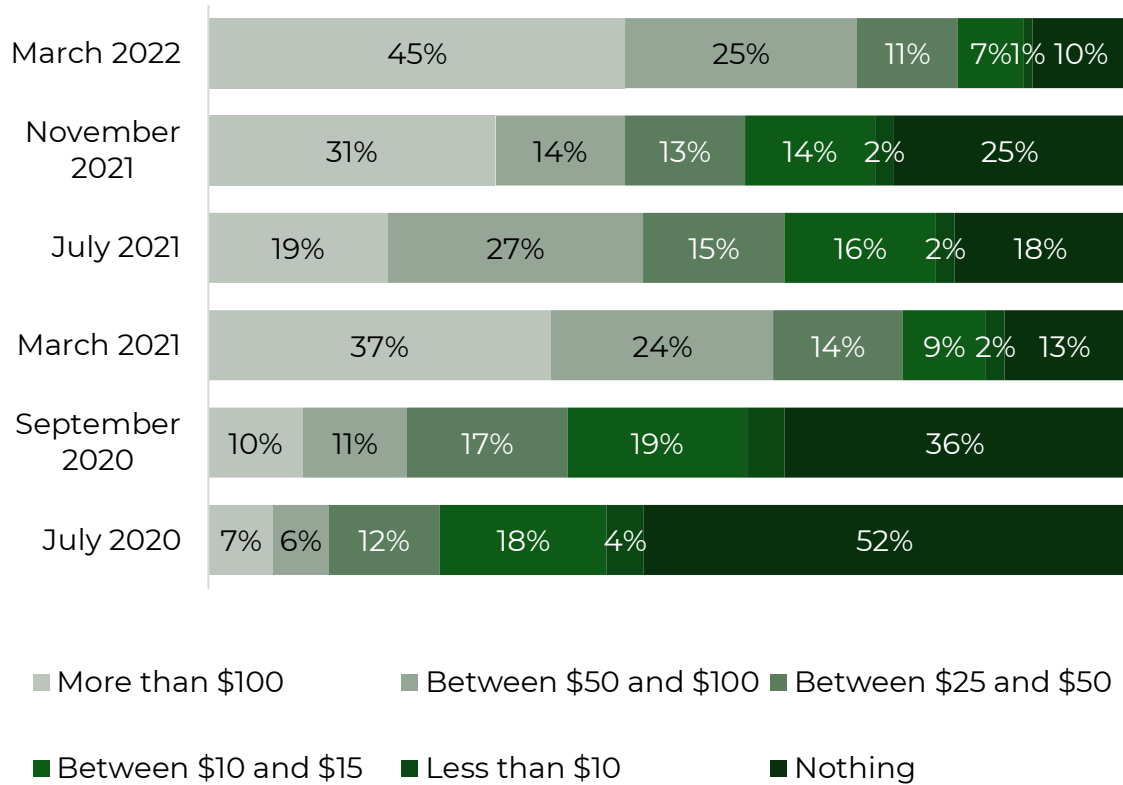
Signs of economic recovery are growing, with NSW audiences reporting the highest spending levels since the pandemic started

Among those attending live performances, NSW audiences are spending more than they have in the past two years. 7 in 10 (70%) audience members said they have spent more than \$50 in the past fortnight (Figure 5) – the highest of any state/territory, compared to a national average of (63%)

Spending has increased significantly since November 2021, when spending in NSW began to resurge, following the end of the state’s extended lockdown (45% had spent \$50 or more).

March 2022 saw the largest proportion of NSW audiences spending more than \$100 (45%) since the study began, a promising sign of stronger economic recovery of the sector.

Figure 5: In the past fortnight, how much did you spend on tickets to in-person live events & cultural activities? NSW audiences, March 2022 (n=1,869), November 2021 (n=639), July 2021 (n=614), March 2021 (n=2,599), September 2020 (n=1,064) & July 2020 (n=1,031)



Cultural tourism is in the early stages of recovery, with two-thirds of NSW audiences 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 remain prevalent among arts attendees in NSW, with the largest proportion (65%) of those making plans saying they opted for an event within in their local area.

However, interstate travel is following in close second, with another 60% said they had made plans to travel within NSW to attend a cultural event/s (Figure 6).

Along with VIC audiences, NSW audiences are the most likely to be travelling within their state – compared to just 4 in 10 Queensland (QLD) and Western Australian (WA) audience members. It’s possible that

extended restrictions in NSW and VIC have cultivated a greater appetite for travel amongst these audiences.

Interstate cultural tourism remains suppressed, with just 16% of NSW audience members making plans in another state/territory. In terms of COVID-safety, just 3 in 10 (32%) feel very comfortable flying domestically on a commercial airline.

In general, regional and remote NSW audiences are less likely to be looking local (58%, compared to 66% of metropolitan audiences) and more likely to be travelling within New South Wales (69%, compared to 59% of metropolitan audiences). In fact, regional audiences in NSW are the most likely to be travelling intrastate, compared to a national average of 57%.

Qualitative data from regional audience members suggests that some regional audiences are becoming increasingly confident travelling to densely-populated areas once more. One regional respondent said, 'I have already booked 3 upcoming shows in Sydney happening next month.'

Another said,

'I no longer feel much fear around going out and doing activities as I've already been vaxxed and have had COVID. I suppose my response could change if a new strain pops up that could reinfect me, but at this stage going out and getting back to normal is more important than living a life in fear. I miss live music!'

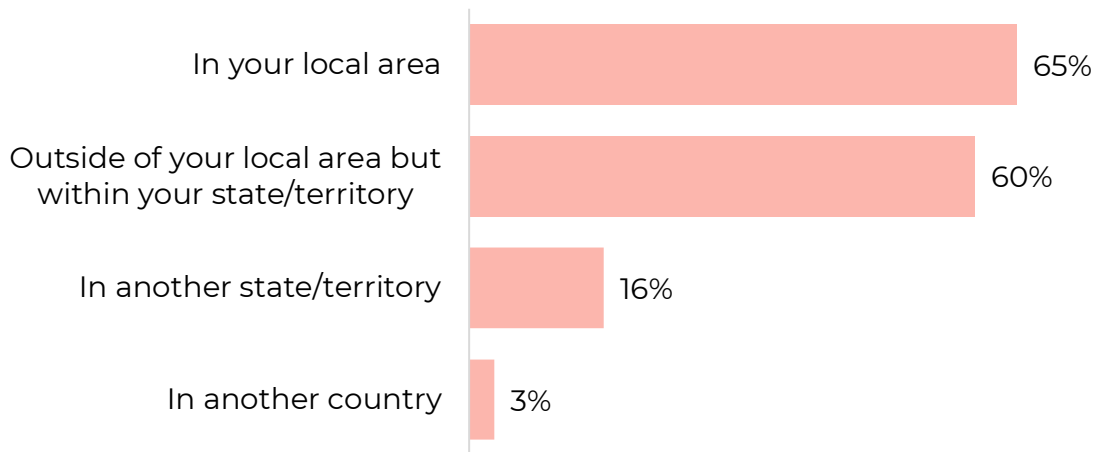
However, the situation is complex, and the unpredictability of severe weather and recent floods are a cause for concern in many communities in NSW. One audience member said,

'My main concern if the trains are not running I am unwilling to take the replacement bus and will not go. I also am a member of the Illawarra Film Society and missed one performance due to heavy rain and risk of localised flooding.'

Another said,

'A lot of my responses have been predicated by the terrible weather in NSW as well as family issues with illness, but I've been to our local gallery, the cinema and am planning a trip to both Canberra and Melbourne to see exhibitions.'

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



A small proportion 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 NSW audiences (78%) say that their preferences have not changed, while 14% say they have. Another 7% are not sure.

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

There are mixed views surrounding attendance times. Some audiences reported lifestyle changes, such as migrating regionally, as well as work arrangements affecting their decisions. One said,

‘I have moved up the coast, so matinees or early Sunday performances make it a little easier to get home after the performance.’

Another said,

‘Earlier, now that I work from home, attending earlier is possible.’

NSW audience members who are more risk-averse are more likely to say their preferred times have changed (25%) compared to those who are

ready to attend now (11%). Some expressed a preference for weekday, daytime events – which they expect to have fewer attendees, or where they feel COVID-safety is better upheld. One said,

‘I currently book performances earlier in the week and avoid Friday and Saturday nights to minimise contact with people.’

Others are avoiding peak transport times, for reasons of COVID-safety or mere convenience. One said,

‘Off peak times, as I'm avoiding public transport and wouldn't drive during peak time to attend an event due to the massive increase in traffic congestion in Sydney.’

COVID-safety and vaccination

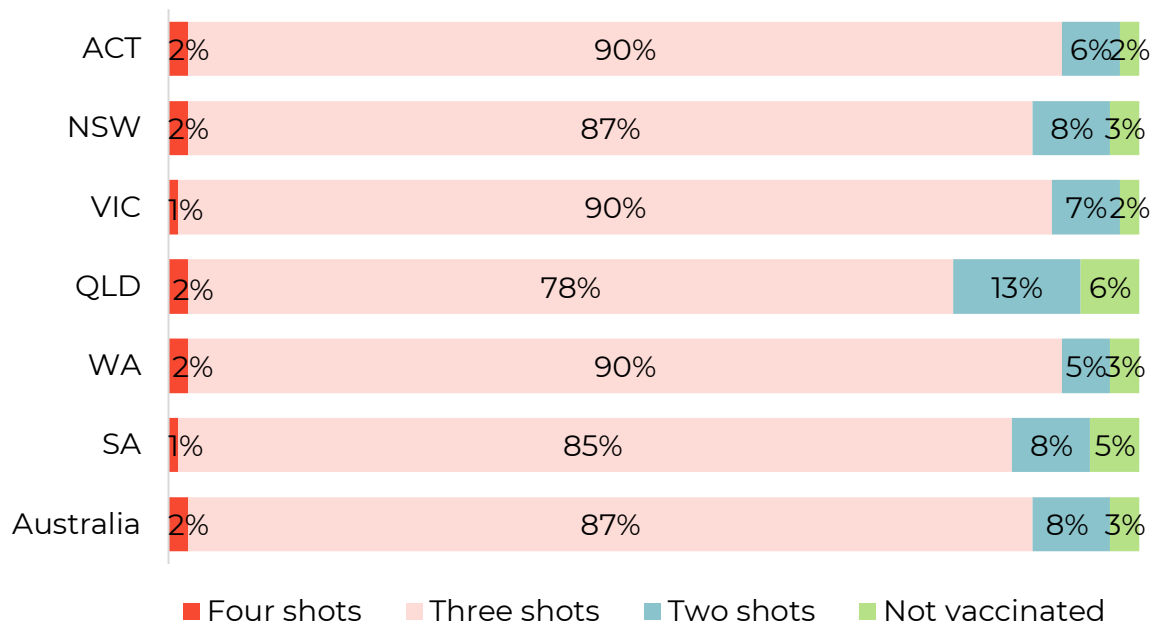
Arts audiences continue to lead the way on vaccination – with 8 in 10 NSW audiences having received three shots

As of 22 March, 87% of NSW arts audiences have received three shots of the COVID-19 vaccine (up from just 2% in November) – compared to [around 61% of the eligible NSW population as of 13 March](#).

NSW audiences are on par with the national average of audiences who are triple-vaccinated. This rate is highest in WA (90%), ACT (90%) and VIC (90%) – while it is lowest among audiences in SA (86%) and QLD (78%), who have had less time to get accustomed to ‘living with COVID’. (Figure 7.)

Vaccination rates also increase with age, with 91% of NSW audiences aged 75+ having received three shots, compared to 69% of audiences under 35 and 78% of audiences aged between 35 and 54.

Figure 7: 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 14% of NSW arts audiences say they have. Younger NSW audiences were also more likely to have had COVID-19 than older audiences – with 29% of those under 35 having had the virus, compared to 6% of those aged 75+.

Many 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 NSW audiences (52%, consistent with 54% in November 2021), as shown in Figure 8.

Some expressed concern about attending while case numbers remain high, with one saying,

'In the context of high case numbers and hospitalisations I will attend venues that retain masks and other measures. Fully vaxxed requirement helps. I avoid events with a large number of attendees in the high-risk age group (15-30).'

Another NSW respondent said,

‘I was feeling more comfortable given the easing of restrictions but recently have seen a rise in the case numbers in my workplace and believe it is because of the complacency regarding mask wearing.’

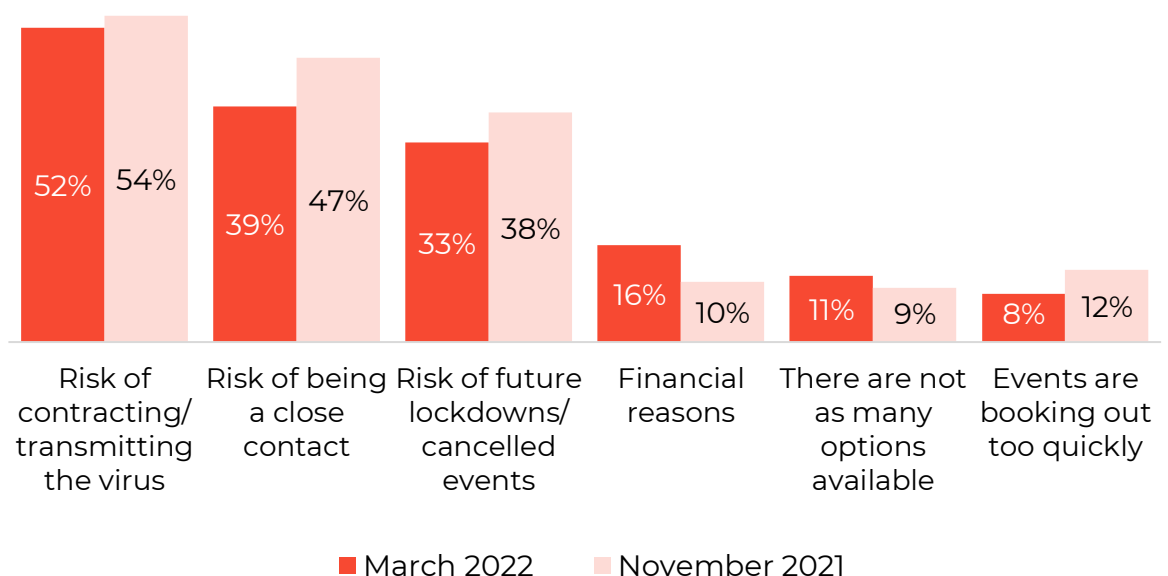
With the country entering its [post-vaccination phase of the national policy](#), NSW audiences are slightly less likely to be concerned about the risk of lockdowns and cancelled events (33%, down from 38% in November 2021).

However, 4 in 10 (39%) continue to be concerned with the risk of being a close contact and needing to isolate (down from 47% in November 2021) – and note the possibility of events being cancelled for this reason. One NSW audience members said,

‘It is too hard to plan ahead and not know if the show would be cancelled or if you are sick or in isolation that you can't go anyway.’

While in the minority, a larger proportion of NSW audience members are now naming financial reasons as inhibiting their attendance (16%, up from 10% in November 2021).

Figure 8: 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. NSW audiences, March 2022 (n=2,442) and November 2021 (n=1,720)



Proof of vaccination and masks are the most encouraging COVID-safety measures for NSW audiences

Since November, NSW has lifted its mask mandates in most indoor settings and removed requirements to show proof of vaccination at arts and cultural venues.

But given the uncertainty of outbreak conditions, safety measures like mask wearing and vaccination requirements remain priorities for NSW audiences. One said,

'I am more likely to attend an event which has COVID measures in place, such as masks, limited capacities, requiring vaccination or a COVID test, over those who don't have any measures in place. I tend to avoid events which do not have COVID safety plans.'

Vaccination requirements continue to be the most encouraging COVID safety measure for NSW audiences (68% encouraged), along with mask wearing for those aged 12+ (67% encouraged), as shown in Figure 9.

For many NSW audience members, this safety measure is a 'dealbreaker' or necessary condition for attendance – with one saying,

'I feel that there should be a requirement for adults to be fully vaccinated to attend an event.'

Compared to November 2021 however, the proportion of NSW audiences who say they feel encouraged by proof of vaccination has decreased significantly (68% encouraged, down from 89%), after the state's policy was relaxed on 15 December.

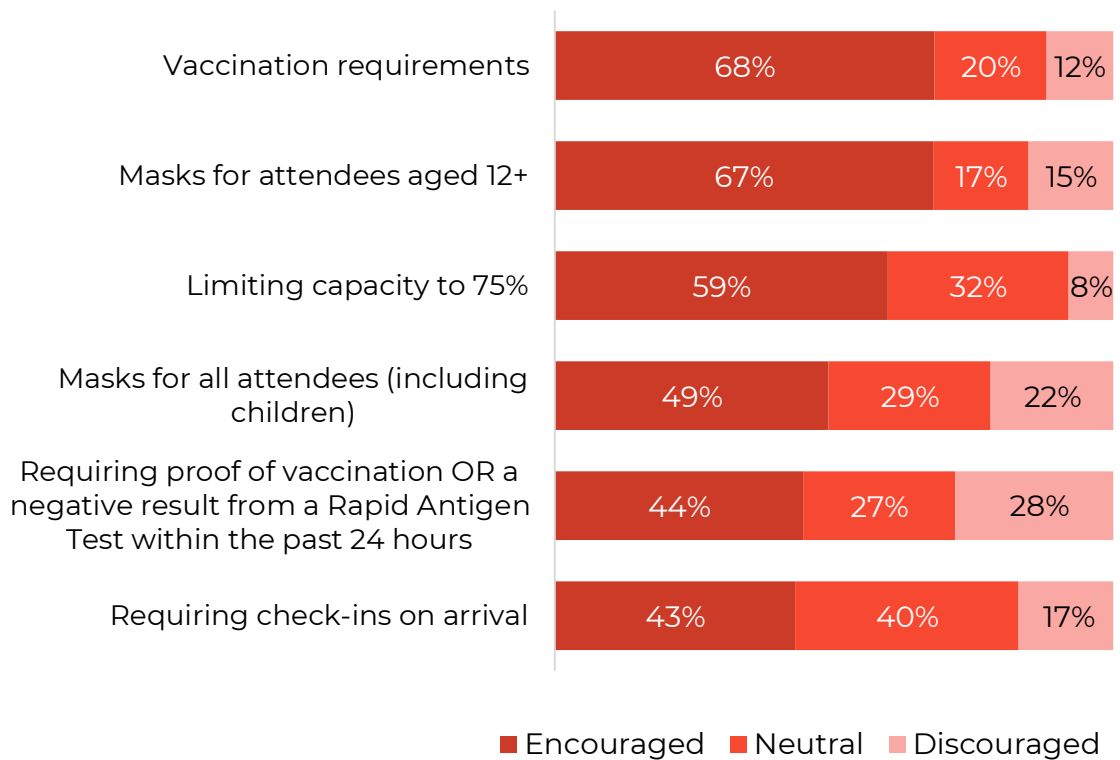
While mask-wearing has become slightly less important to NSW audiences in the absence of a state-wide mask mandate (67% encouraged, down from 75% in November), some continue to see masks as 'dealbreakers'.

Mask wearing becomes especially encouraging when cases are on the rise. One expressed their concern, 'when suddenly there is jump up in case number and no mask mandatory in indoor setting.'

Another explained that their ‘dealbreaker’ involves enforcing mask wearing, commenting, ‘Giving up on masks – it’s bad enough when those people wearing them on their chins are not policed.’

For others, masks are vital in full-capacity venues. One said, ‘If it’s a seated event, I would avoid if there were a no mask mandate at 100% capacity.’

Figure 9: How much would each of the following steps discourage or encourage you to attend? NSW audiences, March 2022 (n=2,423)



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

Fewer than half (43%) of NSW audiences are encouraged by check-ins in March 2022, with another 40% feeling neutral about this measure.

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

One audience member said,

'QR check ins are pointless as there is no longer any tracing. If COVID numbers are huge I may be inclined to avoid an event.'

Another said,

'With the change in testing/reporting/case numbers and contact tracing is not occurring... why bother collecting data one can't use.'

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

'Lack of check in. From a personal perspective, as much as I love going to the theatre, I am not able to risk my work and salary by putting myself in a position where the likelihood of contracting COVID is high.'

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

Although proof of vaccination is widely encouraging to NSW audiences (68%), fewer (44%) are encouraged by the option to provide proof of vaccination OR a recent rapid antigen test (RAT).

Some expressed concern about the accuracy of rapid antigen tests, with one saying,

'Rat testing unfortunately is extremely unreliable, so many people have a negative result only to have a positive PCR. So I would prefer proof of vaccination or PCR testing.'

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

'Demanding universal PCR / rapid testing is too onerous, costly and difficult to enforce (how to prove the rapid antigen was correctly performed and negative?), and hence unreliable.'

Three-quarters of NSW audience members who attended recently are satisfied with COVID-safety at arts events

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

When NSW audience members who had recently attended a cultural event were asked how satisfied they were with the COVID-safety procedures in place, 3 in 4 (77%) responded that they were satisfied and 10% were dissatisfied.

With fewer safety protocols mandated in March 2022, satisfaction is lowest in NSW, compared to other states/territories – while it is highest in WA (84%).

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

Compared to November 2021, NSW audiences are less likely to be ‘very confident’ that the vaccination effort will allow normal activities to resume within a year (38%, down from 47%) – and more likely to be ‘somewhat confident’ (53%, up from 48%). Although in the minority, the proportion ‘not at all confident’ has more than doubled (9%, up from 4%).

Some NSW 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 said,

‘I was confident before Omicron and the world changed again inside 2 weeks.’

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

Another said,

'I'm sure there will be a different version of the COVID virus and this may affect how confident I would be. Omicron has been mild but the next version might not be.'

Role of arts in recovery

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

Looking ahead over the next 12 months, NSW audiences are most interested in engaging with the same kinds of cultural activities they used to attend, pre-pandemic (92%).

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.

Some NSW audience members referenced uplifting content in improving overall morale in the community, after two years of living in the pandemic. One said,

'I would like to see more music and light-hearted, comic shows to make people laugh again.'

Another said,

'We need more frivolous, light-hearted theatre (Oscar Wilde or PG Wodehouse plays would be ideal) to significantly reduce the stress incurred during the pandemic and restore a more buoyant frame of mind.'

Meanwhile some highlighted that uplifting content can simultaneously entertain, and offer a lens to understand our reality. One said,

'[The arts] can encourage audiences to again meet communally, to laugh and be happy together, to provoke and make sense of the world as it is today.'

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

NSW 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 the arts needs to cater to a broader mindset....to lightly entertain, to help audiences escape the harsh realities of right now but also share the stories of hope and recovery.’

Some mentioned facilitating connective experiences as a source of resilience through tough times, such as the floods experienced by many people in NSW. One said,

‘Arts and culture organisations bring community together and now, even more so, with the communities that have suffered from flooding events, it is important that community events are fostered for inclusion and a sense of shared togetherness.’

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

‘Provide relief and escape from our current environment full of stress, anxiety and the unpredictable. Encourage people to be together in groups again, not only healthy emotionally but something humans need particularly after such a long hiatus from social connections physically.’

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.

Some NSW audience members suggested that arts events should be used to model an accessible and inclusive return to public life – one in which communities are re-energised and rejuvenated while also respecting the needs and safety of others. One NSW audience member said,

‘I would love to see things that reflect the need for a new normal. The focus now seems to be on forgetting there's been a pandemic and rush to have things return to normal. That normal is dead and instead of embracing a new normal, people are intent on looking back. Instead of looking at new ways of doing things or finding a good balance of both.’

Some shared reminders to continue improving access for those who are unable to attend, due to health vulnerabilities and other needs. One said,

‘Please continue to offer cultural event options online. The pandemic has highlighted what life was like for many vulnerable people (e.g. elderly and disabled) every day of their lives before the pandemic hit. So if they can continue to access events online, even when life returns to "normal" for everyone else, that would be a very positive thing.’

Many audiences members see a role for the sector to facilitate trust by prioritising health and safety for all attendees, staff and the broader community. One said,

‘Be clear on their rules and regulations. Be consistent. I want to go to the theatre but I want to feel safe. Our industry shut down, let's keep it opening by staying safe.’

The arts are an integral part of life for many – and NSW audiences want to show support after two difficult years

NSW 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,

'I consider that it's the community who should be supporting arts and culture. So much has been lost during the pandemic and now also due to floods and war. It's now time to celebrate our humanity and it's good aspects through culture and art.'

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,

'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.

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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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