



PATTERNMAKERS



Audience Outlook Monitor

South Australia Snapshot

March 2022

Cover image: Sky Song. Photo: Topbunk, Adelaide Fringe 2022



Government of South Australia

Department of the Premier
and Cabinet

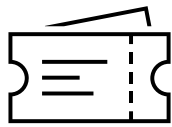
Key Facts: March 2022

Attendance Outlook



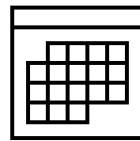
933

SA arts attendees responded to the March 2022 survey



+10%

increase in SA audiences attending since November 2021



81%

are making firm plans to attend cultural events in future



68%

of those planning are opting for events in their local area

COVID-safety



47%

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



#1

masks for people aged 12+ are the most encouraging COVID-safety measure



68%

feel encouraged by proof of vaccination requirements at cultural events



85%

of SA arts attendees have had three doses of a vaccine

Key findings: March 2022

While attendance increased over the festival season, SA audiences are growing cautious

- ▶ In March 2022, data from 933 past attendees of cultural events in South Australia (SA) shows that attendance increased during the state's recent festival season, from 66% in November 2021 to 76% in March 2022.
- ▶ However, with case numbers climbing following the easing of border restrictions in late 2021, the proportion of SA audience members saying they are ready to attend cultural events 'whenever permitted' has fallen slightly, from 63% in November to 59% in March.
- ▶ Although the majority of audiences have received three shots of a COVID-19 vaccine (85%), attendance continues to be inhibited for many by the risks of transmission (47%) or being a close contact (52%).
- ▶ Commentary from SA audience members suggests while many want to attend, concerns remain around transmitting the virus to those at-risk in their community – and half (51%) identify as being vulnerable to COVID-19 themselves or having someone in their household or network who is.
- ▶ Some audience segments in SA remain especially cautious, particularly those at risk of a serious health outcome (44% ready to attend) and those with a disability (51% ready to attend) – confirming the importance of the cultural sector to consider the varying needs of its audiences in the transition to a 'new normal'.

7 in 10 find masks and proof of vaccination encouraging when cases are on the rise

- ▶ With recent outbreaks creating uncertainty, data from SA audiences suggest that COVID-safety measures will continue to play an important role in building confidence.
- ▶ Most of those attending are satisfied overall with COVID-safety measures applied at recent cultural events they attended (79% satisfied), confirming the view of arts venues as relatively safe spaces. But with 1 in 5 attendees neutral (13%) or dissatisfied (9%), and more yet to return, there is a need for care as restrictions ease.
- ▶ SA audiences continue to be most encouraged to attend cultural venues by requiring proof of vaccination at entry (68% say they are encouraged by this) – while only 45% are encouraged by Rapid Antigen Testing (RAT).
- ▶ 7 in 10 (70%) SA audiences say they still find mandatory mask policies encouraging – and some consider the absence of this safety measure a ‘dealbreaker’ in certain settings, when cases are rising.
- ▶ While half of SA audience members (52%) continue to find check-ins encouraging, some feel that they are superfluous, particularly as rapidly increasing case numbers impact the viability of contact tracing.
- ▶ As state guidelines allow for relaxing of restrictions, and SA audiences have the opportunity for greater freedom of movement, cautious attendees 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.

SA audiences are inclined to stay local, as cultural tourism may take time to recover

- ▶ The data shows that SA audiences are optimistic about attending in 2022, with 8 in 10 (81%) making firm plans to attend an in-person cultural event (up from 77% in November 2021).
- ▶ SA arts audiences are reporting the highest spending levels since the pandemic started, with 64% spending more than \$50 in the past fortnight - likely prompted by Adelaide Fringe and Festival season in March. However, full economic recovery is still some way off, and with Winter approaching, cautious optimism is wise.
- ▶ Shorter booking timeframes continue to be the most common, while the uncertainty of recent outbreaks lingers.
- ▶ When asked about where they are planning to head to events, 7 in 10 (68%) of those making plans intend to stay in their local area, a similar trend to national audiences (70%).
- ▶ Cultural tourism may take some time to recover, and right now SA audiences are five times more likely to be planning regional travel to attend events (53%) than interstate travel (10%).
- ▶ While in the minority, the proportion who say financial reasons are inhibiting their attendance has increased from 15% to 20%, suggesting that the recovery process could take time.
- ▶ The arts continue to be perceived as vital to community recovery, providing an avenue for healing, joy and social connection during challenging times. While some audiences are yet to return, they are firm in wanting to support artists and help cultural activity to flourish in new ways.

Introduction

This March 2022 report shares insights from over 933 past attendees in South Australia

This South Australia (SA) Snapshot Report outlines key findings from the March 2022 phase of the Audience Outlook Monitor in Australia (Phase 7), based on data collected from 933 audience members living in South Australia.

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

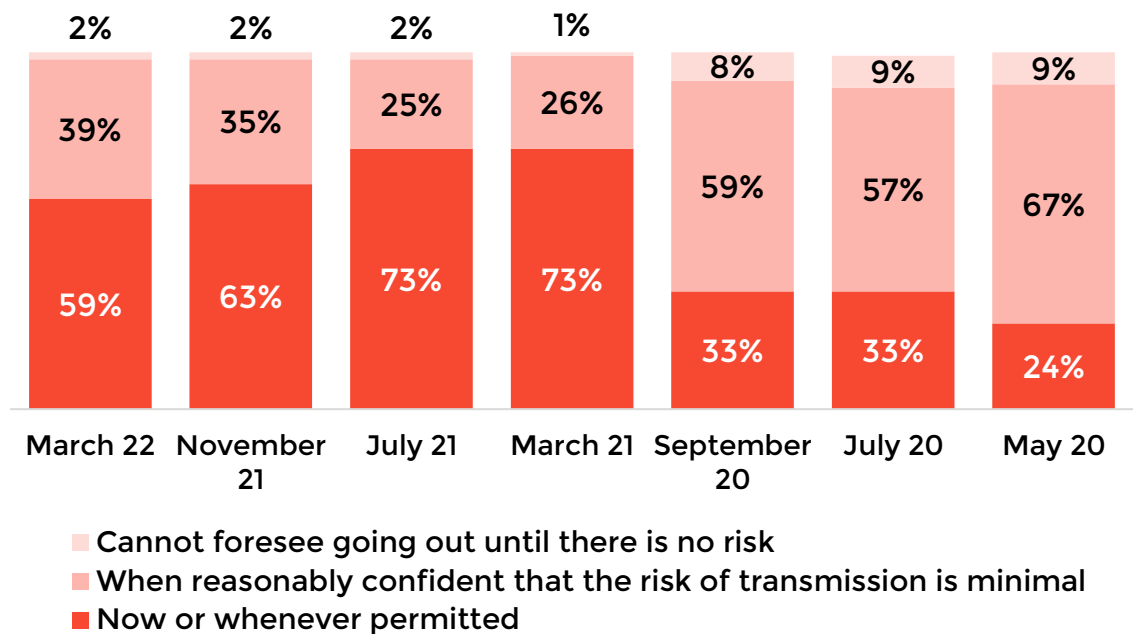
Current conditions

Confidence has dropped slightly in South Australia, but 6 in 10 remain ready to attend 'whenever permitted'

With case numbers in SA increasing in the fortnight before data collection, confidence among SA audiences has decreased marginally since November 2021.

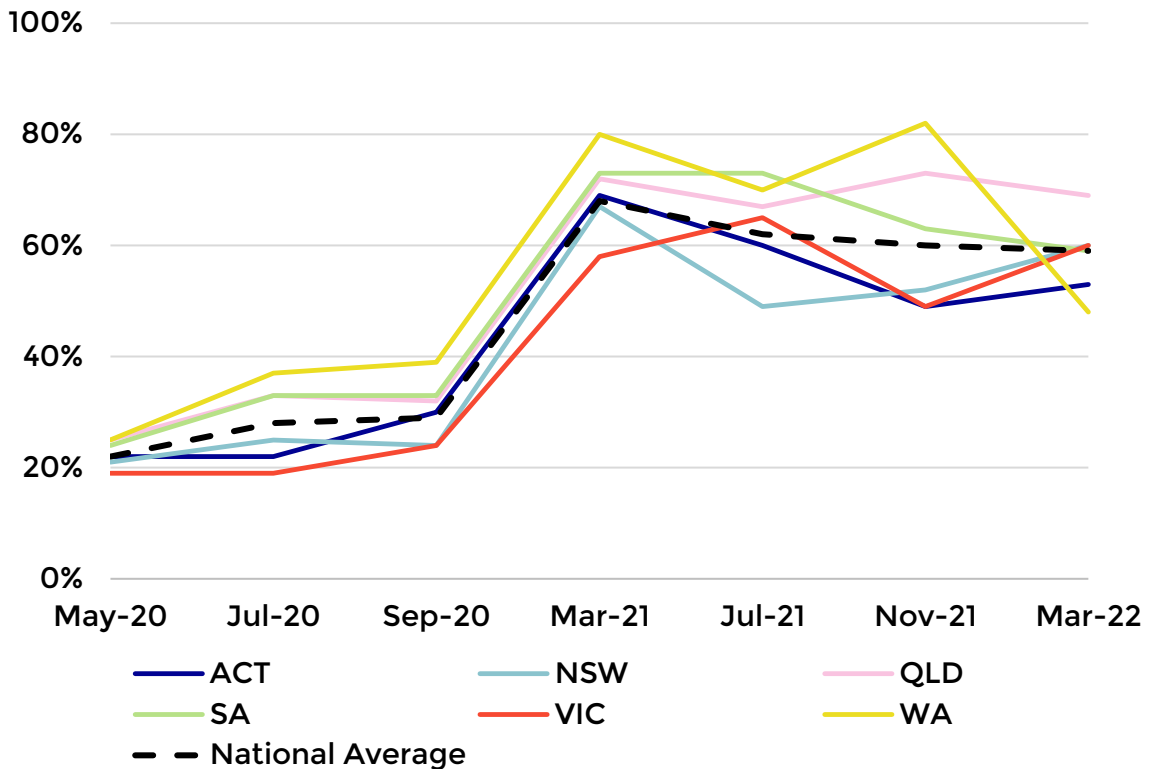
3 in 5 (59%) say they are ready to attend arts and cultural events 'now or whenever permitted', decreasing slightly from 63% in November 2021 and the lowest level seen since March 2021.

Figure 1: Proportion of audiences who are 'ready to attend now or as soon as permitted', SA audiences, May 2020 to March 2022 (n=933)



Confidence levels in SA have historically been higher than the national average, but are now consistent with national sentiment (59% 'ready to attend'), as outbreak conditions and restrictions become more alike in the different states and territories.

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



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

'I want to start getting out and living life normally. We need to get past the fear of not going out. I am happy to wear a mask and sanitize when I go out and enjoy seeing people and helping local business get back on their feet. Here in SA we were doing really well before the borders opened, but we can't live in a bubble forever and need to live with COVID in our lives.'

2 in 5 remain cautious and there will be varying needs to consider as SA adjusts to the 'new normal'

As audiences become accustomed to 'living with the virus', 2 in 5 (39%) past attendees in SA say they'll only attend when the risk is minimal, and 2% 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.

Half (51%) of SA audience members answered yes – with 13% vulnerable to a serious health outcome themselves, 14% living with someone vulnerable and 29% connected to someone vulnerable in their extended/family network.

When asked about their readiness to attend, only 44% of SA audiences who were themselves vulnerable to a serious health outcome were ready to go to arts and cultural events – and equally, 44% of audiences who had a vulnerable person in their immediate family/household.

One SA audience member said,

‘Whilst I’ve booked tickets to some shows, I’m still incredibly apprehensive about exposing my young pre-existing-condition self to getting COVID as much as possible, without becoming a complete hermit and not enjoying life.’

Readiness to attend somewhat decreases with age, with older audience members more likely to report vulnerability to COVID-19. SA attendees over 75 were the least likely to be ready to attend (55%), and audiences aged 35-54 the most likely (64%).

Audience members who identified as having a disability were also less likely to be ready to attend right now (51%), compared to non-disabled audience members (59%).

Comments from audience members in these cohorts suggest some are wary of their needs being overlooked in the transition to ‘living with COVID’ – an important consideration for SA arts organisations going forward. One audience member said,

‘I love going to events, festivals and galleries. My husband and me are shielding from COVID as we both have health problems. It is no longer safe for us to go out. I would happily pay the full entry fee to watch events and visit galleries over the internet. We are being excluded through no fault of our own and we miss the life we had.’

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

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

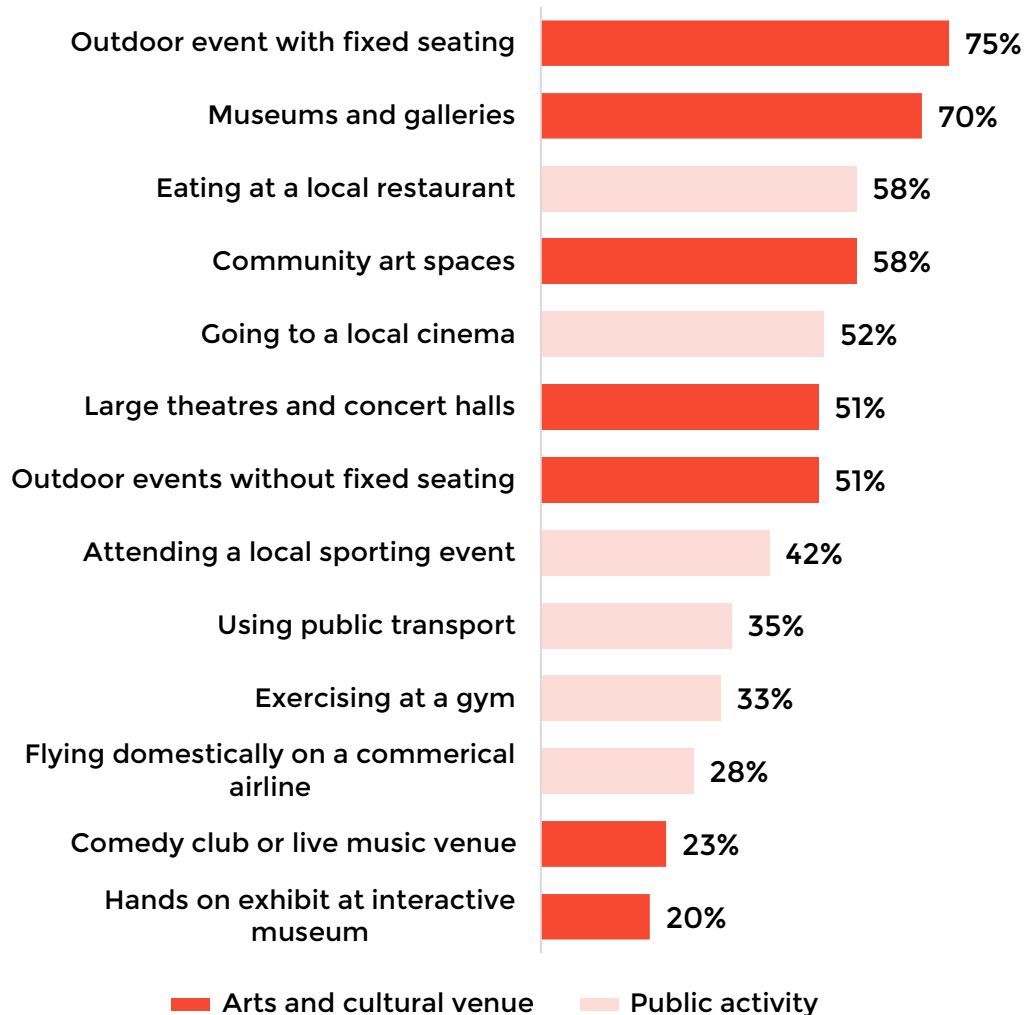
In SA, comfort has decreased since November - with case studies reaching record highs in mid-January 2022, and on the rise once more in early March.

By comparison, audiences in states like New South Wales (NSW), the Australian Capital Territory (ACT) and Victoria (VIC) – which were recovering from outbreaks of the Delta variant in November 2021 – have demonstrated an increase in comfort levels at both cultural venues and public activities in general. Comfort has decreased most significantly in Western Australia (WA), where cases are currently on the rise.

As a general rule, comfort at most arts venues remains higher than many other common public activities – including attending a local 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. SA audiences, March 2022 (n=930)



Live attendance

SA audiences are adjusting to 'living with COVID', with attendance levels increasing during the festival cycle

In March 2022, 76% of SA audiences said they attended an in-person cultural event in the fortnight before data collection (9-13 March), increasing from 66% in November 2021.

SA audiences are among the most likely in the country to have attended a cultural event in the fortnight before data collection, during a high concentration of festival programming.

Patterns of actual attendance appear to be linked with audiences' risk tolerances. SA audiences who say they are 'ready to attend whenever permitted' are the most likely to have attended recently (81%), while those who will only attend when the risk of transmission is minimal are less likely to have attended recently (69%).

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

While national trends show a majority of audiences making firm plans to attend arts and cultural events in future, the proportion of audiences making firm plans has increased slightly among SA audiences.

In March 2022, 4 in 5 (81%) SA audience members reported making plans for in-person attendance in the future, demonstrating a slight increase since November 2021 (77%)

When looking at specific events, the proportion of SA audiences making plans to attend a live performance has increased, from 53% in November 2021 to 67% in March 2022, along with the proportion making plans to attend an outdoor fair or festival (32%, up from 28% in November).

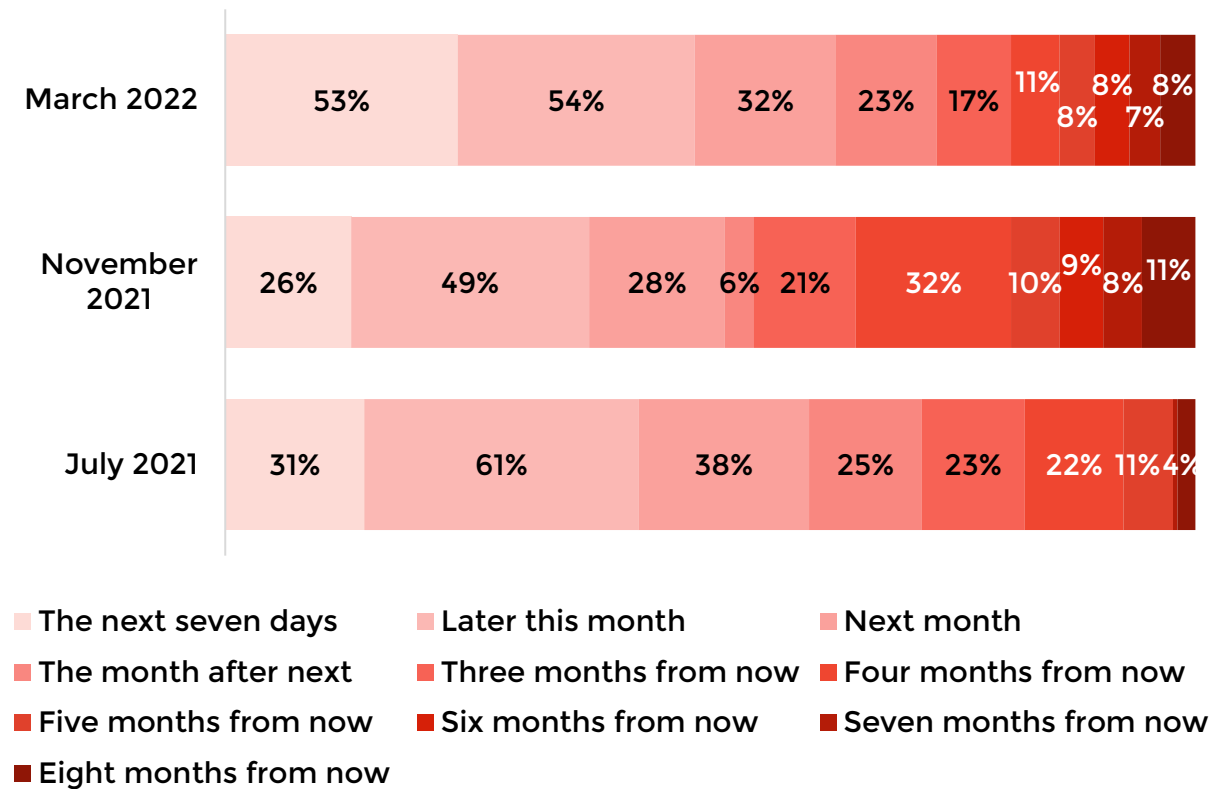
SA audiences continue to book events in the short-term, as uncertainty persists

As cases climb in SA, uncertainty about what the future holds persists — and with several festival programs, such as Adelaide Festival and Adelaide Fringe, scheduled for March, SA audiences are most likely to be booking events in the short-term rather than the long-term.

Among those attending events, a larger proportion are purchasing tickets to events held in the next seven days (53%), compared to November 2021 (26%). Meanwhile, the largest proportion of SA audiences is purchasing tickets to events happening later in the month (54%, up from 49% in November), with a significant number booking for next month (32%, up from 28%).

The findings suggest that, aligning with national trends, SA audiences are focusing on events taking place in the near future, compared to those scheduled months ahead – with the uncertainty around outbreak conditions likely playing a role.

Figure 4: Proportion of SA audiences who purchased tickets in the past fortnight for one or more live shows/performances that are scheduled for...? March 2022 (n=546), November 2021 (n=342) and July 2021 (n=660)

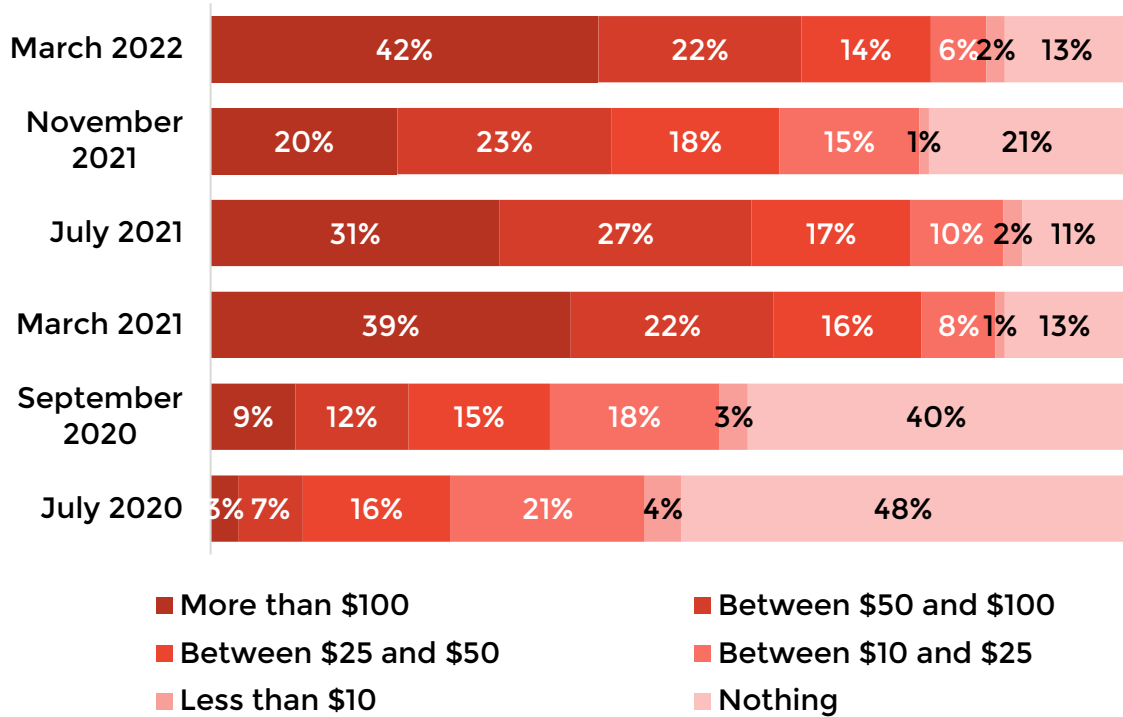


Signs of economic recovery are steady, with SA audiences reporting the highest spending levels since the pandemic started

When asked about the amount they have spent on tickets to in-person live events in the fortnight before data collection, audiences in SA are spending more than they have in the past two years. 1 in 3 (64%) said they have spent \$50 or more in the last fortnight.

Spending has increased significantly compared to November 2021, and March 2022 saw the largest proportion spending more than \$100 (42%) since the study began, a promising sign of stronger economic recovery of the sector. (Figure 5.)

Figure 5: Proportion of SA audiences spending 'nothing' to 'more than \$100' on tickets to in-person live events and cultural activities. March 2022 (n=703), November 2021 (n=617), July 2021 (n=595), March 2021 (n=1,137), September 2020 (n=484) and July 2020 (n=456).



Cultural tourism is still in the early stages of recovery, with 7 in 10 SA 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. Among SA audiences, 68% said they made plans to attend an event in their local area — consistent with the national average (70%).

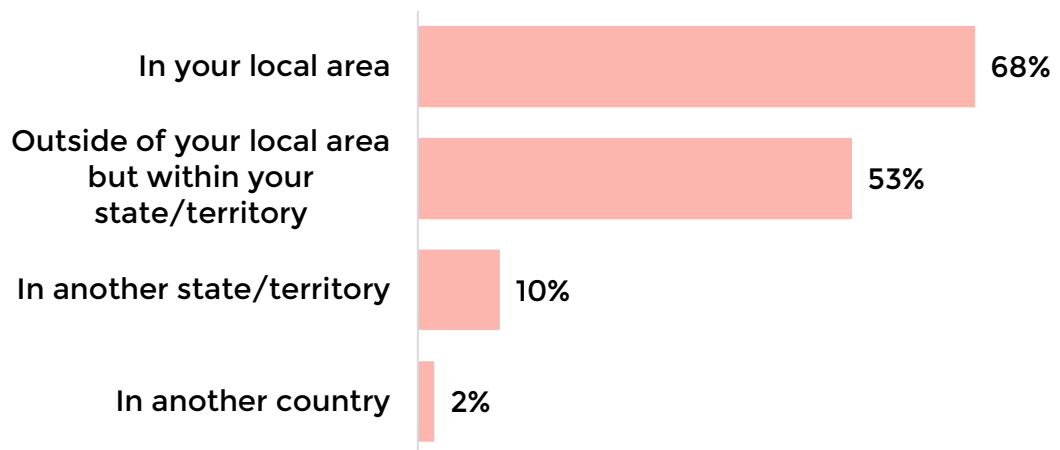
SA audiences are beginning to travel to attend cultural events, but are more than five times as likely to be attending events within South Australia (53%), rather than travelling interstate (10%). In terms of COVID safety, 3 in 10 (28%) feel very comfortable flying domestically on a commercial airline right now.

Qualitative data suggests local travel is generally seen as safer and more reliable than intra- or inter-state travel – with some audiences also developing a greater awareness of the need to support local artists,

or show appreciation for offerings in their local area, over the course of the pandemic.

Regional and remote audiences in SA are somewhat more likely to be attending events within the state but outside of their local area (58%), compared to those in major cities (52%).

Figure 6: Were those plans for attending a venue or event ... (select multiple). SA audiences, March 2022 (n=752)



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

Audiences were asked whether their preferred attendance times had changed, in light of COVID-19. The majority of SA audiences (79%) say that their preferences have not changed, while 1 in 10 (11%) say they have. Another 9% are not sure.

Audiences in SA, along with Queensland (QLD) (10%) and WA (8%), are the least likely to say their attendance patterns have changed. Changes were more common in states that have had more time to grow accustomed to 'living with COVID', such as the ACT (16%), VIC (15%) and NSW (14%).

Among the group that say their attendance patterns have changed, there are mixed views surrounding attendance times. Some SA audiences report lifestyle changes and work arrangements affecting their decisions, as one said

'I don't tend to go to things on weeknights anymore. I don't have the energy after work.'

SA attendees who are more risk-averse are more likely to say their preferred times have changed (18%) compared to those who are 'ready to attend' now (7%). Some expressed an inclination towards weekday, daytime events, where they feel COVID-safety is better upheld. One said,

'I suppose that I assume late night events are more likely to have alcohol-induced non-mask-wearing.'

Another said,

'Prefer to go during the week when less people around, especially on public transport.'

For some attendees, earlier starts for evening events are preferred. As one said, 'Now 7.30 instead of 8pm.' Another said,

'I like the early evening performances, but that is more due to age than the pandemic.'

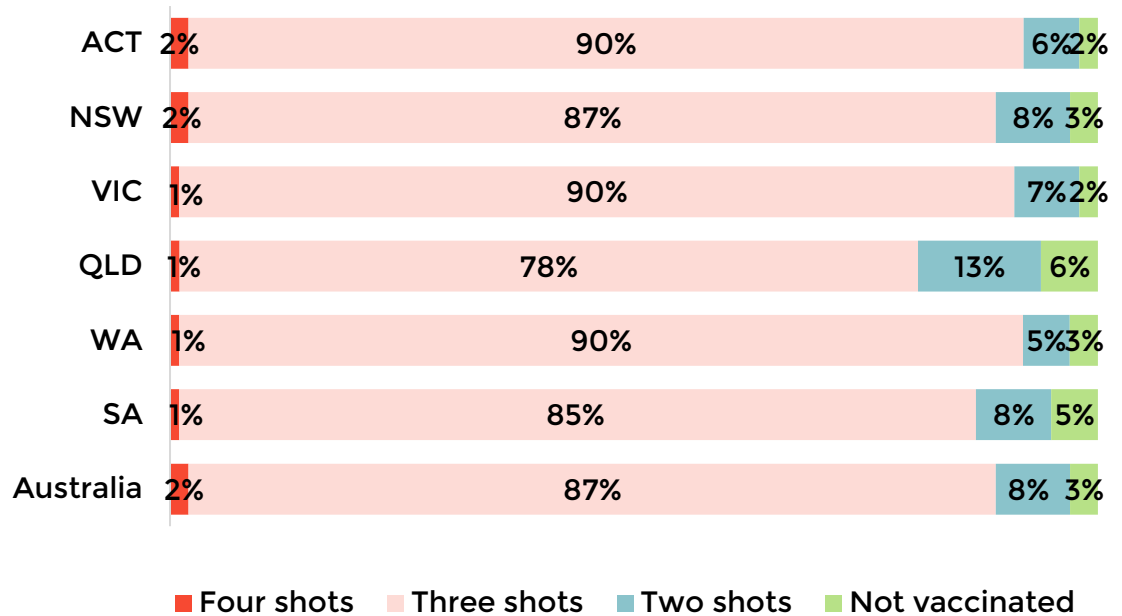
COVID-safety and vaccination

Arts audiences continue to lead the way on vaccination – with more than 4 in 5 having received three shots

As of March 2022, 85% of SA arts audiences have received three shots of the COVID-19 vaccine (up from just 1% in November 2021) – compared to [around 70% of the general South Australian population as at 13 March](#).

The proportion vaccinated in SA is consistent with audiences nationally, (87%). Nationally, audiences in QLD are the least likely to be triple-vaccinated (78%), while audiences in the ACT, VIC and WA are the most likely to be triple-vaccinated (9 in 10) (Figure 7).

Figure 7: Proportion of audiences who are vaccinated in March 2022, by state/territory (n=8,309)



Vaccination rates increase with age, with 96% of SA audiences aged 75+ having received three shots, compared to 71% of audiences under 35 and 68% of audiences aged between 35 and 54.

When asked if they have been infected with COVID-19 in the past, just 5% of SA audience members say they have — less than half the national average (10%).

Consistent with national trends, younger audiences in SA were also more likely to have had COVID-19 in the past than older audiences – with 8% of those under 35 and 13% of those aged 35-44 having had the virus, compared to 1% of those aged 75+.

Half of SA audience members 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, SA audience continue to be concerned about the risk of contracting or transmitting the virus (47%, consistent with 48% in November 2021).

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

‘I have family with high-risk conditions so I am trying very hard not to catch the virus, prioritising only visiting places that are still requiring mask wearing plus being able to maintain a fair distance.’

Commentary from some SA audience members highlights a reluctance to attend events where they feel COVID-safety measures are not always adhered to. One said,

‘Open air is preferred at the moment. Current practices in SA have felt a bit more relaxed, which isn't a bad thing for cultural events, but can seem complacent at times. It's mostly down to trust and cleanliness to me — If I trust the venue will do the right thing in terms of current protocols.’

The primary concern among SA audiences is now the risk of being a close contact and needing to isolate, with the proportion inhibited by this increasing since November (52%, up from 42%). One said,

‘I'm a self-employed person so it would hit me hard if I had to isolate or if I caught the infection.’

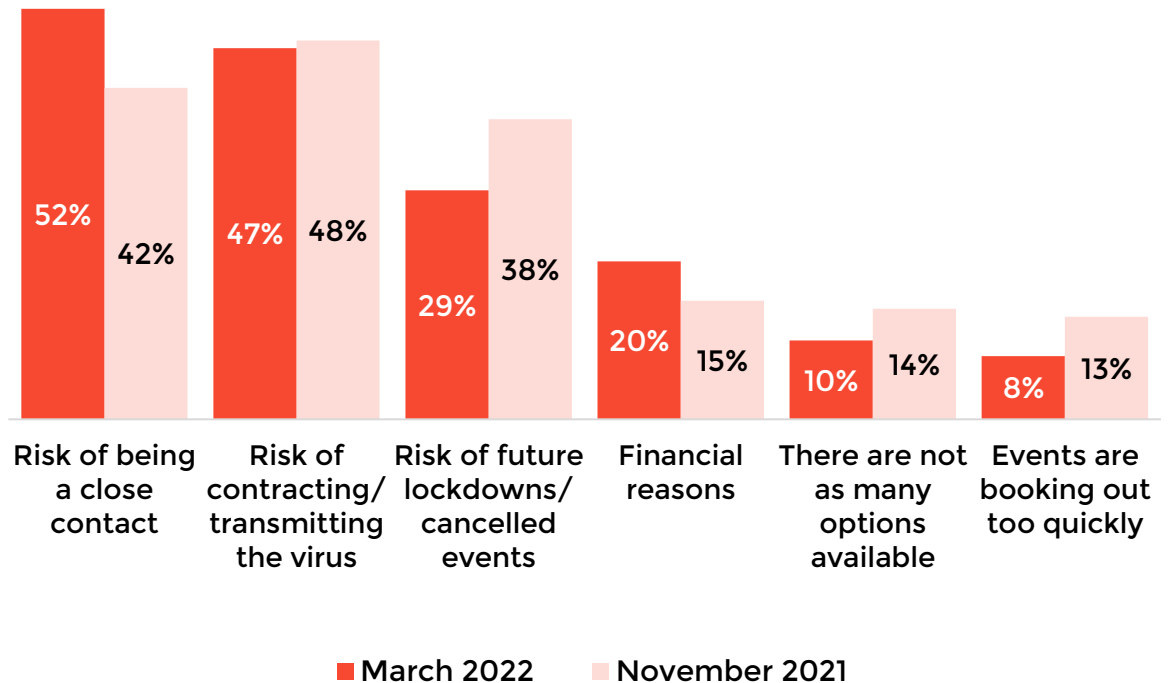
Another said,

‘I am ready to go to most events but do not want to contract COVID or have to isolate due to school and performances that I am in.’

With the country entering its [post-vaccination phase of the national policy](#), SA audiences are less likely to be concerned about the risk of lockdowns (29%) compared to November 2021 (38%).

While in the minority, a larger proportion of SA audience members are now naming financial reasons as inhibiting their attendance (20%, up from 15% in November 2021) — a trend that is consistent nationally (Figure 8).

Figure 8: Proportion of audiences who say these factors will prevent them from attending in-person arts and culture events as they used to in the past. SA audiences, March 2022 (n=929) and November 2021 (n=934)



Masks and proof of vaccination are the most important COVID-safety measures for arts audiences

With changes to outbreak conditions occurring in early March 2022, safety measures like masks and vaccination requirements remain priorities for many audiences.

Masks for attendees aged 12+ (70%) and proof of vaccination requirements (68%) continue to be encouraging to many SA audience members. (Figure 9). One said,

‘The removal of the mask-wearing mandate would make me think twice about attending. Similarly if proof of vaccination was no longer happening.’

For some people, the absence of these measures is a ‘dealbreaker’ or necessary condition for attendance in some settings – with one SA attendee saying,

‘A lax attitude regarding checking vaccine status would also discourage me from attending given the potential impact not just on me but also my extended family, which is particularly vulnerable.’

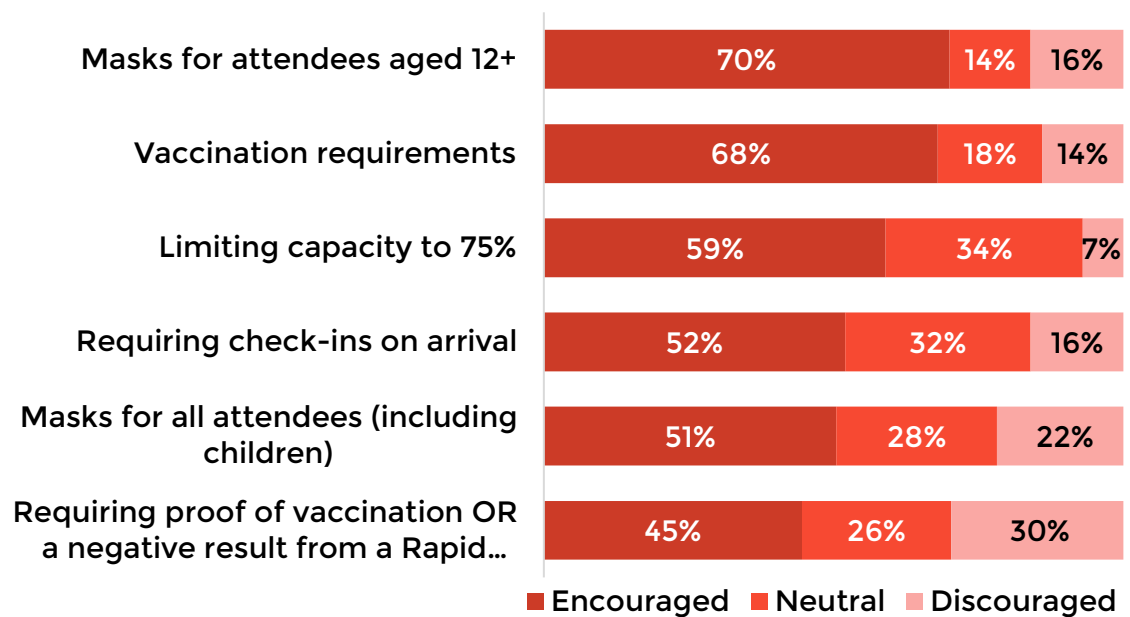
Despite no longer being mandatory at some SA venues, the proportion of audiences who say they feel encouraged by proof of vaccination has remained consistent (68%, stable with to 70% in November).

Compared to November, SA audiences are now more likely to find masks encouraging (70% encouraged, up from 59%), along with audiences in WA (72% encouraged, up from 38%) — where audiences experienced widespread cases of COVID-19 for the first time in January 2022.

It appears that the importance of face masks to audiences increases when cases are on the rise. As one SA audience member said, their ‘dealbreaker’ would be,

‘An increase of COVID cases in the community with no masks or restrictions of health monitoring in place.’

Figure 9: How much would each of the following steps discourage or encourage you to attend? SA audiences, March 2022 (n=926)



Half continue to find check-ins encouraging — though views among SA audiences are mixed

Despite being one of the most encouraging COVID-safety measures in November 2021 (82% encouraged), now half (52%) of SA audiences are encouraged by check-ins in March 2022, with another 32% neutral.

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

One audience member said,

‘I think checking in is now a thing of the past. Tracing teams are no longer contacting ‘close contacts’ and most places no longer need you to check in now either.’

However, SA audiences, along with those in WA (75%) are the most likely to say check-ins are encouraging, compared to other states/territories. Some audience members continue to see check-ins as essentials or ‘dealbreakers’, particularly when combined with other COVID-safety measures. One said,

‘Need check-in, proof of vax and masks for all otherwise would not attend and would definitely not attend if more than 75% capacity at an inside event.’

Another added,

‘If check in, proof of vaccination and masks wearing was abandoned I would be reluctant to attend.’

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

Although proof of vaccination is widely encouraging to SA audiences, fewer than half (45%) are encouraged by the option to provide proof of vaccination OR a Rapid Antigen Test (RAT).

Some expressed concern about the accuracy of RAT taken 24 hours prior, with one mentioning,

'[A 'dealbreaker' for me would be] reliance on RAT testing because they are so inaccurate.'

Another mentioned that this measure would be only appropriate when a patron cannot be vaccinated, commenting,

'RAT option of course acceptable for those people with a proper valid vax exemption, of which there are very few.'

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

'The cost of RAT testing would be enough to stop me attending if it was a requirement, before every show.'

And another saying,

'If RAT tests were required before attending I might avoid the event, just due to the cost and inconvenience. [But] on the whole, I am normally happy to follow government guidelines.'

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

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

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

Satisfaction is consistent with the national average (79%).

SA audiences are among the least confident that vaccination will allow normal activities to resume

Compared to November 2021, SA audiences are just as likely to be 'very confident' that the vaccination effort will allow normal activities to resume within a year (33%, stable with November). The proportion 'not at all confident' also remains stable (13%, stable with 11% in November).

SA audiences are among the least confident in the vaccine effort of any state or territory, along with those in the ACT (32%).

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

‘Right now there’s a new sub-variant of the Omicron strain infecting large numbers of people, so far mostly in the eastern states. But with people moving freely around the country, if there were [no COVID safety measures] happening I would avoid an event.’

Outbreaks related to new variants is also a factor for many audience members, as one said,

‘The removal of all restrictions at this time would be worrisome, but if no further variants emerge over the next few months, I may feel more comfortable with reduced restrictions.’

Role of arts in recovery

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

Looking ahead over the next 12 months, SA audiences are most interested in engaging in the same kinds of cultural activities they used to attend, pre-pandemic (88%).

Light-hearted content continues to be more attractive to SA audiences (42%), compared to works that help to make sense of the pandemic (10%) – a trend that has remained consistent throughout the study.

The proportion that disagrees that they’ll be attracted to works that make sense of the pandemic has increased slightly since November (47%, up from 43%).

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

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

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

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

‘Arts and cultural organisations are at the front of helping us recover from the pandemic, both as relief, bringing joy and helping us bond together. I recently attended Watershed in the Adelaide Festival and for the first time in two years, I felt overwhelmed with a sensation other than fear.’

Many people are looking forward to cultural experiences that foster social connection and inclusivity through cultural experiences — particularly after two years of disruption. One SA respondent suggested,

‘More inclusive events within communities as the arts help bring people together in a positive way. Participatory events and workshops, culturally diverse and inclusive.’

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 consider promoting COVID-safety at events as a way to investigate new models for re-engaging in public life safely. One SA audience member said,

‘I think joining the fight in advocating for a fix to this health crisis is the most important thing. This whole attitude of pushing on with a "new normal" of people getting sick annoys me...simply pushing people back into theatres and plays isn't the solution -

we need to fix the underlying health/virus issue so people are safe when they go out.'

A similar sentiment was shared by respondents who see the arts in taking a leading role in advocating for inclusive practices and safety for all attendees, artists and staff. One suggested,

'Continue to make available all events - be patient with audiences who are still a little frightened to be in a large group. You will still need to cater to these who are not quite comfortable at events, even though rules have eased.'

Another said,

'Assisting artists to survive. Provide a gathering space for community conversation. Innovate beyond a "return to normal", lead by example.'

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

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

Many people shared heartfelt messages that showed their appreciation for artists and cultural organisations in times of hardship, to remind artists and organisations of their vital role. One said,

'Keep doing what you can and I will try to support as best as possible. I hope that the government acknowledges the work in this sector and provides more support.'

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

'Keep up marketing and promotion - there is a lot going on in the world and you need to keep reminding people you need support - by being an audience member and having someone to perform to, but also to have income so we continue to have such a strong arts community going forward.'

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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