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Audience Outlook Monitor

Live Attendance Update

October 2022



Australian Government

Australia
Council
for the Arts 

Live Attendance Outlook

Audience behaviour will continue to evolve as a range of new factors impact the path to recovery, according to data collected in October 2022 from 5,438 past attendees.



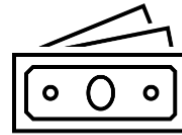
71%

are 'ready to attend now', up from 65% in August '22, the highest since the pandemic began



44%

are still attending performing arts events less than they used to, pre-pandemic, so full recovery remains a way off



63%

are spending \$50+ on cultural events, with spending not increasing on March '22 levels (63%)



#1

financial reasons are now the top barrier to attendance – surpassing the risk of transmission

Key trends



51%

expect their attendance will increase over the next year, 43% say it will stay the same



19%

say there has been a change in their preferred time, day or location of cultural events



73%

will be attracted to fun, uplifting content, while 42% are drawn to challenging things



58%

want to try things they haven't experienced before – and this is higher for 16-35s (74%)

Key findings: October 2022

Audiences are enjoying the buzz of more events, but financial barriers are slowing market recovery

- ▶ Gradual improvements in confidence are evident in the October 2022 data from 5,438 past attendees. 71% say they are 'ready to attend now' or whenever permitted, up from 65% in August and 59% in March 2022.
- ▶ Audiences are feeling positive about attending events right now, with qualitative data showing many are enjoying more choice and 'buzz' in their areas. 3 in 4 (75%) attended a cultural event in the fortnight before data collection (12-16 October 2022), consistent with August 2022 (76%) and higher than March 2022 (70%).
- ▶ Attendance frequency is yet to return to pre-pandemic levels. For instance, 44% of performing arts attendees are attending less often than they used to, and 52% are attending about the same amount.
- ▶ Spending levels are not increasing. The proportion spending over \$50 on arts and culture in the past fortnight (63%) is consistent with March and August 2022 – with the rising costs of living now playing a role in purchasing decisions.
- ▶ Full recovery will take time. While most audiences are feeling confident and many are optimistic about increasing their attendance in future, new barriers are emerging related to economic factors and lifestyle changes.

Audience behaviour continues to evolve in line with lifestyle changes and 6 in 10 are seeking new experiences

- ▶ Gradual increases in attendances are likely, with half of audiences (51%) saying they expect to attend more often in the next year. However, the situation is complex and some are perceiving a lack of appealing events available (32%) or are prioritising other things in their lives at the moment (24%).
- ▶ **Price sensitivity may increase**, as financial reasons have now overtaken the virus as the main barrier to attendance. Financial barriers are now affecting 40% of audiences, up from 24% in August 2022. It's likely to be a bumpy ride, with factors like re-entry anxiety and lacking energy to go out also impacting decisions.
- ▶ **Last-minute ticket purchases are here to stay**, with August 2022 data revealing most audience members book events within the next seven days (26%) and the next 2-3 weeks (43%)
- ▶ **Scheduling preferences have changed** for 1 in 5 audience members whether it's the time, day or location of events. Pandemic lifestyle changes – like flexible work and regional migration – are taking root and venues will likely be feeling the effects in their areas.
- ▶ **People continue to favour their local area** (65%) or **region** (45%) when attending the arts, but many are excited for the return of touring and want to see variety in their communities.
- ▶ **There is an appetite for new** (58%), **uplifting** (73%) and **challenging** cultural experiences (42%) – so balanced programs are key. Audiences under 35 are the most likely to want to try new things (74%), confirming the case for innovation for this important group.

4 in 10 participate in the arts online and virtual opportunities have become a vital form of accessibility

- ▶ Online channels continue to have an elevated importance for connecting with audiences.
- ▶ Digital marketing is paramount for live events and 83% of audiences are using online channels, such as e-newsletters (55%), websites (54%), Facebook (24%) and online search (11%) to find out what's on.
- ▶ Participation in online cultural activities is stable. 4 in 10 audience members (41%) participated in some kind of online arts recently, such as pre-recorded video (21%), online classes/tutorials (18%) and live streamed performances (14%), stable with March 2022 (42%).
- ▶ Spending on digital activities is steady, in line with stability in cultural spending overall: 33% paid for an activity in the fortnight before data collection, consistent with 34% in March 2022. Among those paying, 39% spent over \$50 (down from 44% in March 2022).
- ▶ Online cultural participation is highest among audiences aged 75+ (44% participating online), audiences who are vulnerable to COVID-19 (47%), disabled audiences (49%) and those who are more cautious about the risk of the virus (46%) – confirming digital events as a form of accessibility.
- ▶ Most audiences continue to see a role for digital, with the proportion saying that these experiences continue to 'play some role' in their life – though this has declined slightly since March 2022 (68%, down from 73%).
- ▶ Audiences appreciate the value of digital programs in overcoming barriers to live attendance – a topic that will be explored in detail in an upcoming Fact Sheet and set of case studies.

Introduction

This October 2022 report shares insights from over 5,400 past attendees of cultural events

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

On 12 October 2022, participating organisations simultaneously sent the Phase 8 survey to a random sample of their audience – defined as those who had attended an arts or cultural event in person since January 2018.

With 5,438 respondents, this size dataset provides excellent visibility of trends across the country, noting that results for the Northern Territory (NT) and Tasmania (TAS) are not reported separately due to small sample sizes in those areas.

This report compares the new results with data collected previously in July 2021 (Phase 5), November 2021 (Phase 6), March 2022 (Phase 7) and the August 2022 'Pulse Check' to examine how things are changing over time.

In addition to this Snapshot Report, the October 2022 results are accessible in a free interactive dashboard. Users can explore the data for different artforms, types of events and demographic groups in all parts of Australia. For more information about the study, and to access resources such as the dashboard, visit:

www.thepatternmakers.com.au/covid19.

State Snapshot Reports will be available in November 2022. Read on for the key October 2022 findings nationally.

Image Credit: Cecilia Martin, courtesy of National Circus Festival.

Attendance outlook

The long tail of the pandemic continues to affect attendance with average participation frequency still lower than before COVID-19

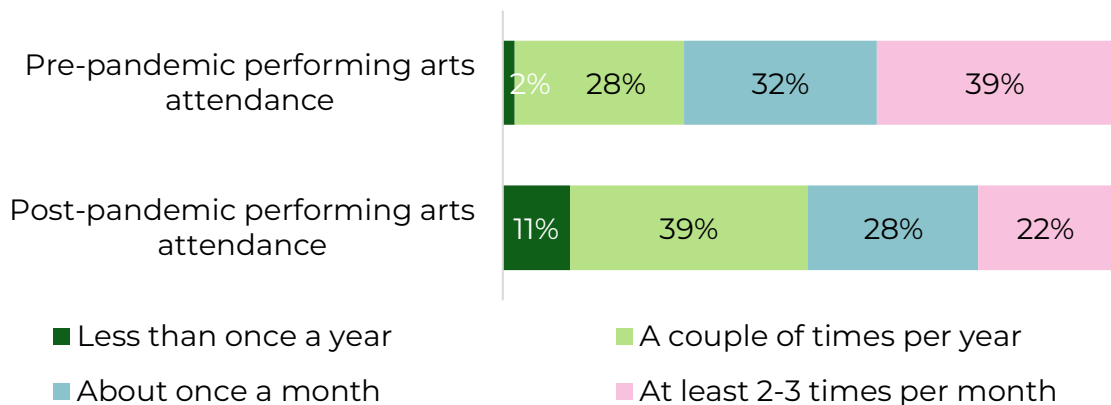
This Phase of the Audience Outlook Monitor sought to compare attendance frequency in the 'new normal' to pre-pandemic activity.

Overall, 44% of performing arts attendees are attending less than they did pre-pandemic.

Looking at it in terms of frequency levels, pre-pandemic, 7 in 10 (71%) performing arts attendees said they attended regularly (once a month or more).

Now the proportion attending the performing arts regularly (once a month or more) is only 50%. It's quite common that audiences are attending the performing arts only a couple of times a year or less (50%).

Figure 1: Pre-pandemic, roughly how often did you attend performing arts events? And now, roughly how often do you attend performing arts events? n=5,357



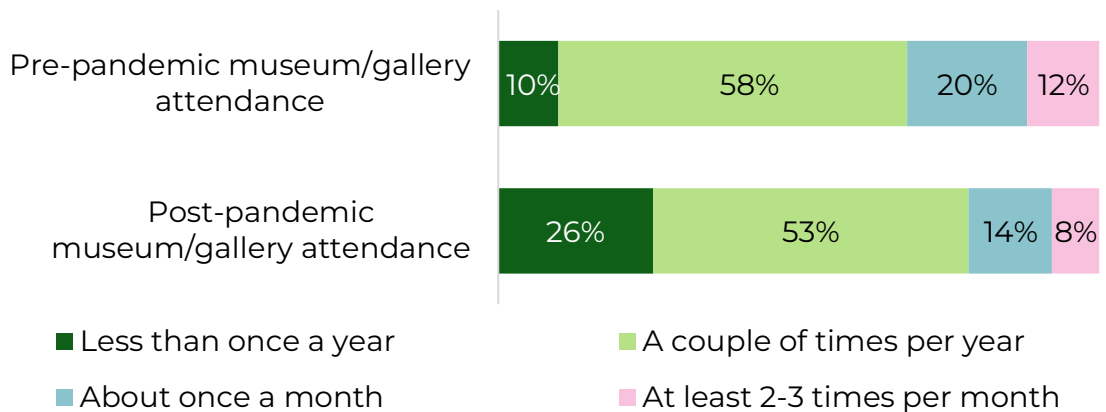
Similarly in terms of museums and galleries, 31% of museum and gallery visitors are attending less than they did, pre-pandemic.

In terms of frequency levels, 32% of audiences were regular visitors pre-pandemic – attending at least once per month (Figure 2).

Now, 22% of museum and gallery attendees are visiting this often – and it is more common to visit a couple of times per year or less (79%).

These trends were more pronounced for risk-averse audience members, who attended just as frequently as other audiences pre-pandemic but are, on average, attending significantly less frequently post-pandemic.

Figure 2: Pre-pandemic, roughly how often did you attend museums and galleries? And now, roughly how often do you attend museums and galleries? n=5,357



3 in 4 audience members attended cultural events in the past fortnight and many are feeling positive

3 in 4 (75%) audience members attended a cultural event in the past fortnight, and qualitative data suggests that some audience members feel newly positive in the current context. One said,

‘I think the biggest fear since the pandemic started for me personally was not knowing how I would come out the other side of having COVID-19. After having it and survived, the fear has subsided. While I am still cautious, I am starting to attend and do things I did prior, and also doing things I didn't previously, as there also seems to be a need to live a little better/differently.’

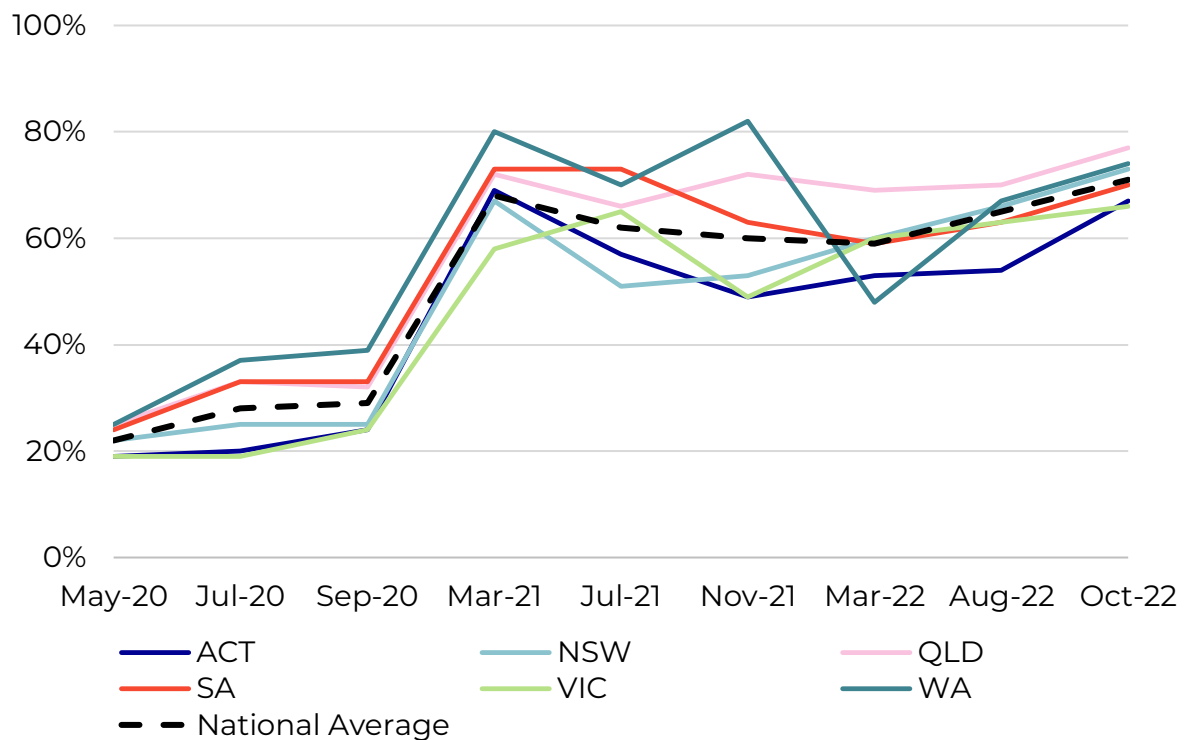
Another said,

‘I think that COVID and other world events has affected how we look and value our lives. I think [recently] the community has shown a desire for a positive and optimistic outlook on life. We want experiences that make us feel good about ourselves and connected with others.’

Most people feel safe attending events right now – suggesting the main challenge is building frequency, rather than converting non-attendees

Only a small proportion of audience members aren't willing to go out right now (2%). The majority (71%) are willing to attend 'now', rather than when 'reasonably confident the risk of transmission is minimal' – the highest proportion since the pandemic began.

Figure 3: Proportion of audiences who are 'ready to attend now or as soon as permitted', by state/territory, May 2020 to October 2022. n=5,438



With risk tolerance increasing as the situation changes, the main challenge now is building frequency and spending.

The proportion spending over \$50 (63%) or \$100 (38%) on arts and cultural events in the past fortnight has remained constant since March and August 2022 - with the rising costs of living likely playing a role.

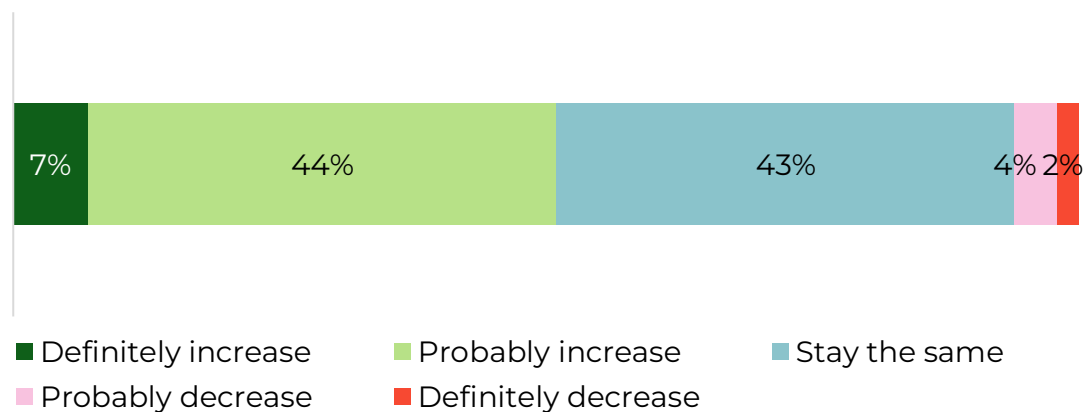
There's cause for cautious optimism, and half of audiences said they expect to attend more often in the next year – but another 43% said their behaviours will stay the same

Things are slowly improving, and audiences are much more likely to be increasing their attendances than decreasing them over the next year – though plenty will be maintaining their current levels.

1 in 2 (51%) said their current level of attendance will definitely (7%) or probably increase (44%), while 43% said it will stay the same.

Only 6% expect their attendance will probably (4%) or definitely (2%) decrease.

Figure 4: Over the next 12 months – do you see your current level of attendance at cultural events and activities changing? n=5,414



Audiences who are less risk-averse were the most likely to say their attendance would increase, while highly-risk averse audiences were the least likely.

Behavioural trends

1 in 5 audience members said there's been a change to their preferred time, day or location of events since COVID-19 – with pandemic lifestyle changes taking root

1 in 5 (19%) audience members said their preferences in the day, time or location of events have changed – while 7 in 10 (70%) said they have not.

Scheduling events to avoid crowding was mentioned frequently, sometimes for safety reasons – although some said this now has more to do with the quality of their experience than COVID risk. One said,

'I prefer a Matinee – it's safer for [my] aged parent who comes with me.'

Another said,

'Concerts that I use to attend in a 'mosh pit' type vibe I am now not very keen on, because even if people are sick I think they will still go. I really miss it but it doesn't seem worth it.'

Others said they've become unaccustomed to crowds and are avoiding packed environments. One said,

'I now have a day off mid-week and prefer to visit museums & galleries then as it's quieter. But that's nothing to do with COVID-19, I just prefer less crowds at those type of places.'

Audiences were also likely to cite flexible work arrangements, parenthood, and an increasingly 'quiet' lifestyle as reasons for changes. One said,

'I like things earlier now because my social battery runs out earlier than before.'

Qualitative data suggests that last-minute ticket buying remains a trend to watch out for

Data from the August 2022 'Pulse Check' suggested that last-minute planning was likely to be another pandemic holdover – with audience members most likely to be booking for events within the next seven days (26%) and the next 2-3 weeks (43%).

Indeed, qualitative data from October suggests that there's still residual anxiety around planning ahead. One audience member said,

'I'm more selective at what I choose to see, and sometimes don't even make the effort. I'm into risk-avoidance COVID-wise. Also not keen to book a performance months in advance anymore. Rather book a last-minute ticket if I can get a decent seat.'

Another said,

'I am wary about booking until the last minute (usually day of the performance), and this has meant on occasions that I have missed seeing things I really did not want to miss, not because of unavailability of seats, but purely because I have forgotten the dates when they have been on.'

It seems likely that for some attendees, the changes brought about by COVID-19 will have lasting impacts on their attendance behaviours – and there may be a need to plan accordingly.

Audiences remain more likely to be attending local events than not – but 1 in 10 recently attended events outside their region (13%) or state (11%)

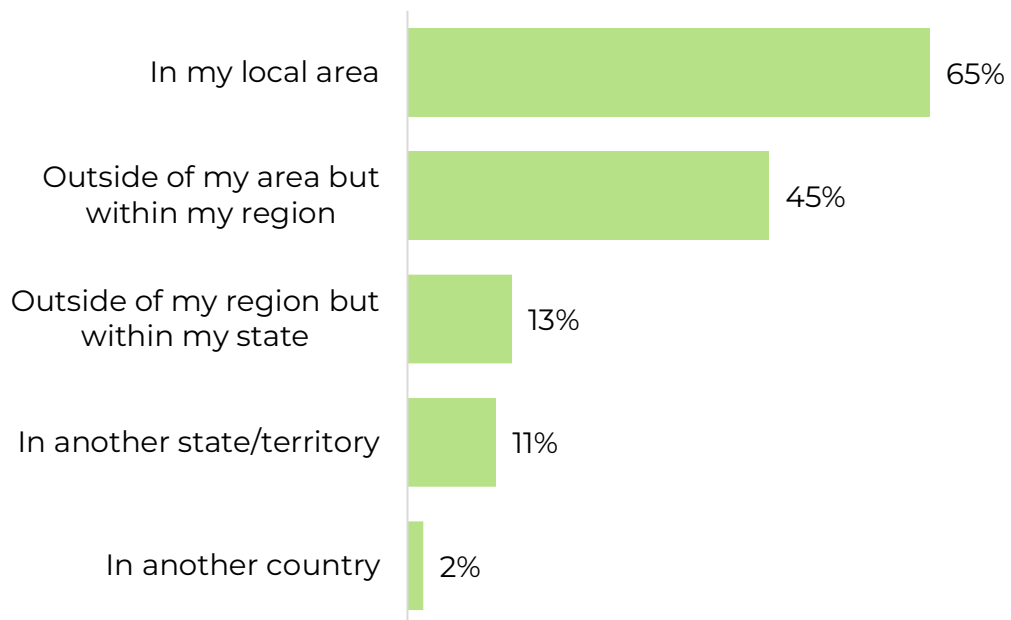
Audiences who had attended arts and cultural events in the last fortnight were asked where these events were located.

While most audiences had attended events in their local area (65%), a significant proportion had attended outside their local area but within their region (45%) – and 1 in 10 had recently attended events intrastate (13%) or interstate (11%) (Figure 5).

The latest data from [Tourism Research Australia](#) reveals another positive sign for cultural tourism: it suggests that domestic travel is building towards pre-pandemic levels – and as of the June 2022 Quarter, domestic overnights trips were only 6% below what they were before the pandemic, in 2019.

Furthermore, tourism spend has actually increased compared to 2019 – up 29% or \$5.7 billion – with travellers spending more on accommodation, dining, petrol and shopping, likely in part due to the rising cost of living.

Figure 5: Were any of the activities you attended in the past fortnight outside of your local area? (select all that apply). n=3,934



Websites, word of mouth and emails from organisations are key awareness channels for audiences of all ages

When asked how they found out about the most recent show or performance they attended in the past fortnight, all audience groups were likely to cite direct emails from arts organisations (57%), websites (50%), and word of mouth (40%).

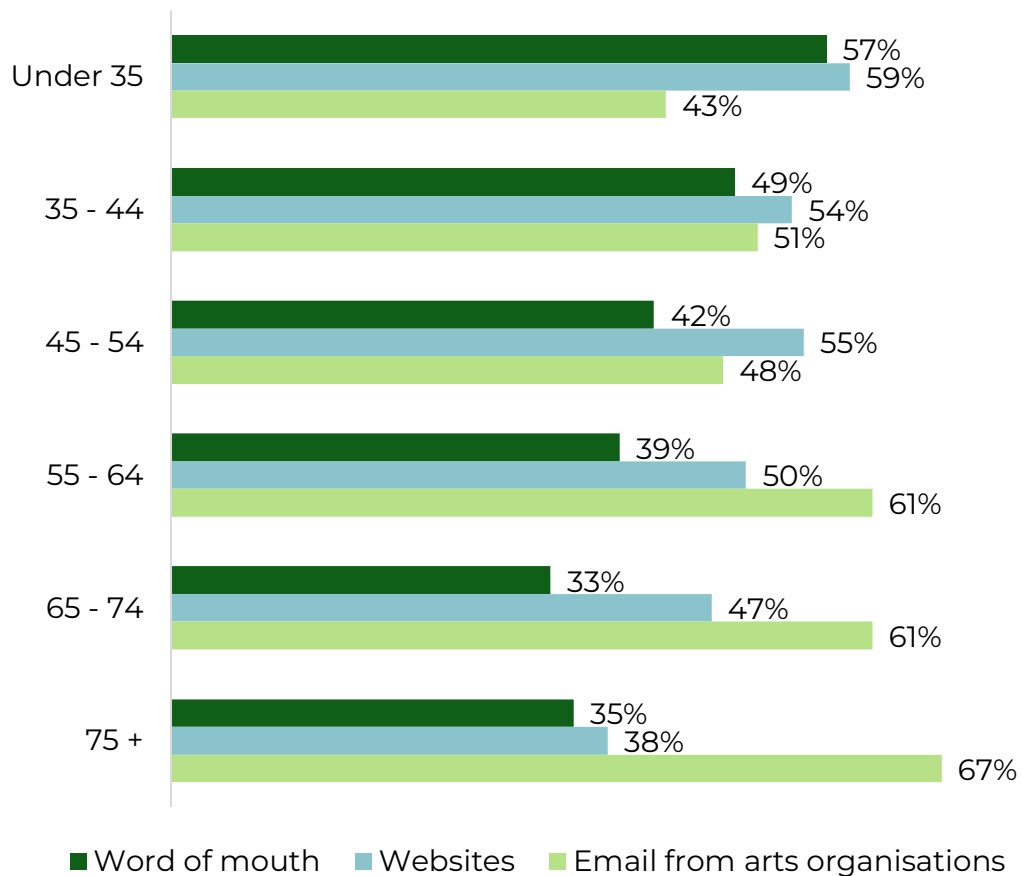
For people under 35, websites (59%) and word of mouth (57%) were the most common sources of awareness – followed by emails from arts

organisations (43%). Social media platforms like Instagram (34%) and Facebook (32%) are playing a smaller but significant role. The trend is similar for audiences aged 35 to 54.

Among older segments, emails from arts organisations are the dominant source of awareness, and audiences rely less on word of mouth, websites and social media.

Two-thirds (67%) of audiences aged 75+ found out about the event they attended via email, while around a third used websites (38%) or word of mouth (35%).

Figure 6: How did you hear about the last show or performance you attended in the past fortnight? (select all that apply). n=4,031



Barriers

Financial reasons have overtaken the virus as the main barrier to attendance – now inhibiting 4 in 10 audiences

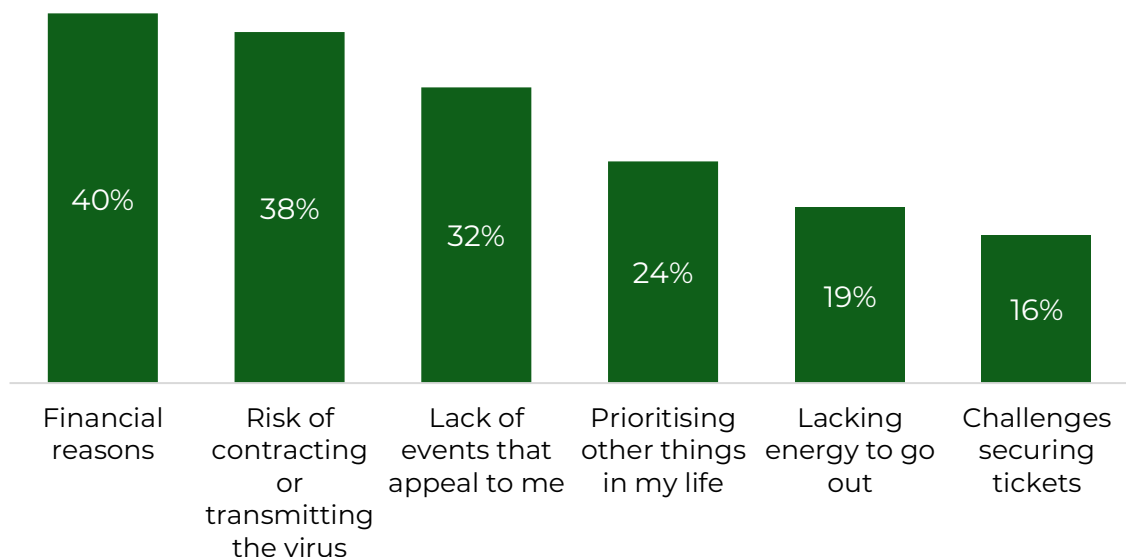
When asked if anything was likely to prevent them from attending as they used to over the next 12 months, audiences were most likely to name 'financial reasons' as a barrier (40%) – up from 24% in August.

This is a departure from previous phases, when the risk of the virus clearly outstripped financial barriers (38% named the virus as a barrier in October, compared to 46% in August).

One audience member said,

'Cost of living is ridiculous and I just can't budget anymore to go to everything I used to attend.'

Figure 7: Still thinking about the next 12 months... Can you tell us if anything is preventing you from attending in-person arts and culture events as you used to in the past? (select up to three). n=5,415



Other key factors at play are lack of appealing events (32%), prioritising other things (24%) or lacking energy to go out (19%)

New options introduced in Phase 8 explored the complex factors affecting attendance in the 'new normal': physical fatigue from COVID itself, mental fatigue from the anxiety and uncertainty of the past three years, new and competing priorities such as spending time with family or domestic/international tourism, and changes in the availability of events.

Of these options, audiences were most likely to say that they perceived a lack of appealing events (32%), while one quarter said they were prioritising other things (24%). One audience member said,

'Since opening up I sometimes can't be bothered to go out to cultural events, probably doesn't help that there seems to be less events that appeal to me, and less overseas artists (particularly in the classical music sphere).'

Others noted that 'appealing' events were sometimes geographically inaccessible to them. One said,

'Not as many artists or shows available that appeal or are in regional areas. Plus as I live in regional Victoria it costs more to attend events in major cities due to accommodation and travel.'

A few audience members commented that they were noticing an emphasis on mainstream or 'safe' works by a sector still grappling with the economic impacts of the pandemic, and expressed a desire for more experimental or 'fringe' works – as discussed in greater detail below (Programming preferences).

Around 1 in 5 (19%) are dealing with exhaustion or 're-entry' anxiety. One said,

'Having stayed home for the most part over the last 2 years it's more of a struggle to get motivated to go out, but I like anticipating a good event.'

Comfort and COVID-safety

Most venues are seen as safe and comfort at live music venues and interactive exhibits is at an all-time high

Since March 2022, the majority of audiences are comfortable attending all types of arts venues, including museums and galleries (98%, stable with 97% in March), large theatres and concert halls (95%, up from 88%) and outdoor events without fixed seating (90%, up from 82%).

While typically considered more risky by audiences, the level of comfort with hands-on exhibits and live music venues has increased and is now at an all-time high.

Three-quarters (75%) are now at least somewhat comfortable attending hands-on exhibits (up from 57% in March 2022) and around two-thirds are comfortable attending comedy clubs and live music venues (65%, up from 51%).

As isolation rules relax, COVID caution continues to inhibit 4 in 10 audience members

COVID-19 remains a significant barrier for some audience segments. While smaller than recent phases of data collection, such as August 2022 (46%) and March 2022 (52%), a sizeable proportion (38%) of audiences continue to say the risk of contracting or transmitting the virus will prevent them from attending cultural events.

There are several factors at play, including the effects of long COVID, fatigue, the possibility of cancelled events, and [the newly scrapped isolation rules](#). One said,

‘My wife is suffering long COVID including extreme fatigue. Nothing is sufficiently attractive to make up for the massively increased risks.’

Another said,

'I am someone who has health and energy issues so I often need to take things day by day. I like to just go to something, rock up there and pay on the day. Much preferred to booking ahead on the off-chance I will have to cancel.'

This proportion is particularly high for audiences who are immunocompromised or vulnerable to COVID-19 (64%), or have someone in their household (60%) or network (52%) who is. One respondent said,

'I am very concerned about the removal of pandemic controls such as mandatory isolation, mask wearing and widespread testing. I worry that others at events will not test for COVID, or will attend even if positive.'

Most audiences are using their own discretion around COVID-safety, and opting to wear masks when necessary

In October 2022, audiences were asked, 'What are your current feelings about wearing a mask in cultural venues in your local area, where masks are optional and not required?'

The majority of audiences said they 'may or may not wear a mask, depending on the situation' (63%) – signalling that despite relaxed restrictions, most audiences are willing implement safety precautions based on their perceived level of risk. One said,

'The virus is still abundantly present but not quite as deadly - and as I'm over 60 I am in a high-risk category I choose my environment carefully. I mask and protect myself and therefore can feel ok attending events where I'm less at risk. I'm hopeful that COVID finally peters out!'

Another said, 'For me wearing a mask is just like putting a seatbelt on in a car.'

There is a sense that most audiences would be happy to comply with mask requirements at cultural venues, as one said:

‘Most people are willing to wear masks if you ask them to, and maybe that will make those slightly anxious people feel more comfortable to attend. I went to a theatre performance a couple of weeks ago where masks were mandatory, and every single audience member complied without any fuss, we get it.’

One person highlighted the complexities of self-imposed mask-wearing in environments where they aren't mandated:

‘I prefer to wear a mask at an indoor live performance where the audience is seated and (basically) silent. However, I feel self-conscious if I'm the only one doing so. I like recommendations / encouragement to wear a mask. It's so easy to do.’

Meanwhile, the remaining third are divided – 20% say they ‘never wear a mask’ and 17% say they ‘always wear a mask’.

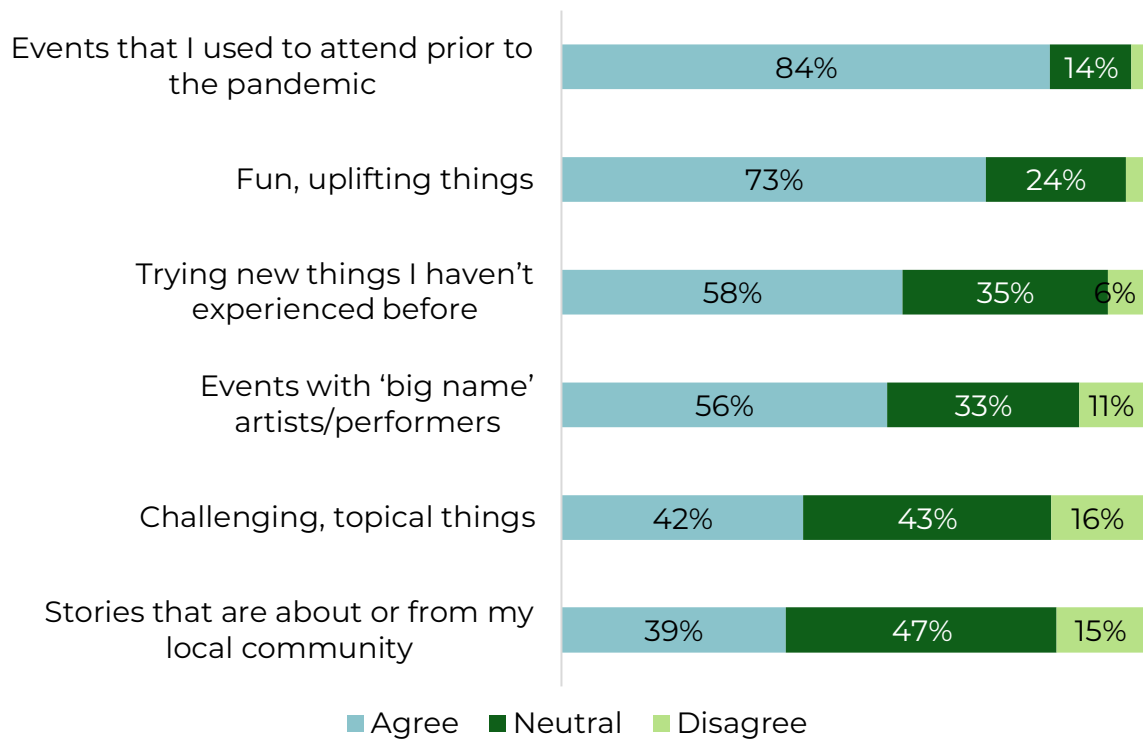
Programming preferences

Many are keen to return to the things they love, but there is an appetite for new, uplifting, or challenging cultural experiences

In terms of content, over the next year audiences generally agree they want to attend things that they used to attend in the past (84%), with many striving to make up for lost time (Figure 8).

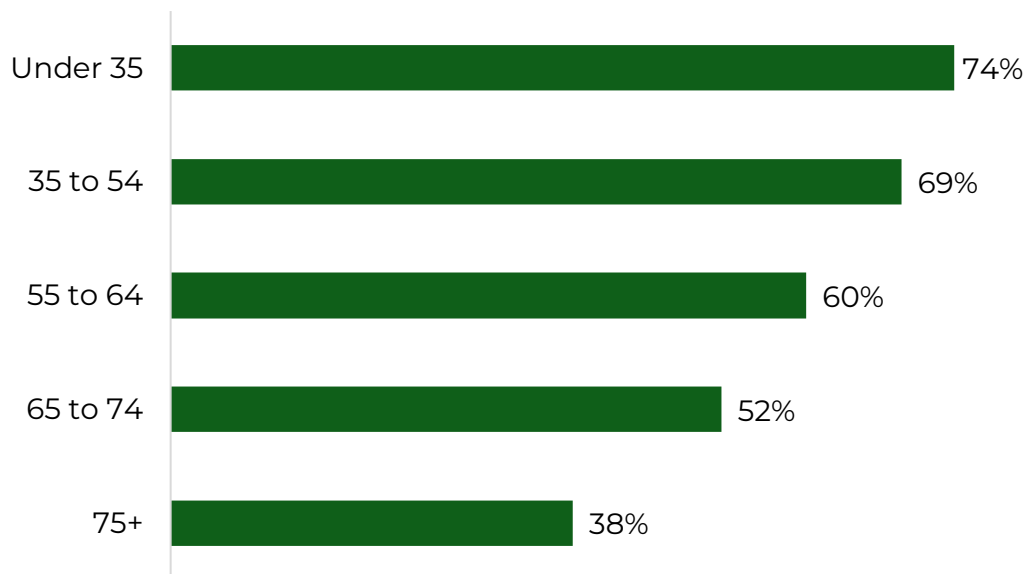
However, there is also appetite to engage with new content. A sizeable proportion of audiences agree (58%) that they would like to try things they haven't experienced before.

Figure 8: In the coming year, I'll be most attracted to ... (n=5,365)



The appeal of trying new things is stronger among younger audiences, such as those under 35 (74%) – compared to those aged 75 and over (38%) – as well as frequent performing arts attendees (69%) and audiences who are 'ready to attend now' or whenever permitted (64%).

Figure 9: In the coming year, I'll be most attracted to ... trying new things I haven't experienced before, by age group (n=5,365)



One audience member mentioned,

'Having missed out on so many activities for the past 2+ years, I'm eager to make up for lost time with old favourites and new challenges!'

73% agree they'll be most drawn to fun, uplifting things and 42% to challenging things, confirming the need to continue balancing programs

Around three-quarters (73%) of audiences agree that they'll be most attracted to fun, uplifting things over the coming year – a continuing trend that suggests strong demand for connective, morale-boosting and light-hearted experiences. One said,

'I think that COVID and other world events has affected how we look and value our lives... the community has shown a desire for a positive and optimistic outlook on life. We want experiences that make us feel good about ourselves and connected with others.'

Meanwhile, under half (42%) agree that they'll be drawn to topical, challenging content, signalling that while uplifting content offers reprieve from a difficult few years, there is a need to continue balancing programs and offering variety. One person suggested,

'Don't play it safe. If organisations go with things that have mass market appeal, then it is unlikely to appeal to me. I want to be challenged (and engaged), not just presented with another iteration of the familiar or comfortable.'

Another said,

'I'd prefer to be challenged and feel that our community is richer for it when it is challenged. Providing raw artists with a platform to set a new aesthetic tone for what is to come is our only way forward.'

56% of audiences agree they're most attracted to 'big names', but 11% disagree – with some conscious of value for money

As touring picks up, more than half of audiences (56%) agree that they'll be drawn to events with 'big name' artists and performers. However, 1 in 10 (11%) disagree, and qualitative comments suggest a perception that lesser-known works could offer better value for money. One said,

'Although there are some 'big name' events I attend, these are typically limited to contemporary music; I am more attracted, for instance, to productions by smaller companies and smaller venues.

...Why? The return on cost and time is typically higher; not only is the price of admission commonly lower, but they are willing to take greater risks with presenting newer and less mainstream works. In playing it safe (and covering much higher costs), the appeal of the 'big name' is low - big name, big price, low returns.'

Another shared a similar sentiment, commenting on smaller organisations' greater capacity for innovation,

'I am a fan of smaller theatre companies that offer new and challenging work rather than Mainstage companies, so that will continue.'

Local loyalty continues to be important – though some are keen to broaden their horizons

4 in 10 (39%) are also drawn to local stories from their local community. Some are attracted to the accessibility of local work, as one said,

'I have always preferred smaller events and try to attend midweek. Nothing to do with COVID. Always looking for reasonable priced tickets, so go to small local amateur performances mainly.'

Others suggested that supporting local work is mutually beneficial and integral to rebuilding communities,

‘I would be encouraged to attend high quality events and shows that feature artists from my community, and events that indicate companies in our community supporting local artists and benefitting the community.’

However, for some, the past few years have fostered an appetite for programs beyond the local – even if they are slightly out of reach:

‘Throughout the COVID experience, there has been a strong focus on local – which made good sense and felt right. After nearly three years of a focus on local, I am feeling a bit parochial and really keen to see and experience things that bring a new perspective. I really want to travel for art and culture but don't feel comfortable doing so yet.’

Online participation

Online participation is steady as 4 in 10 continue to engage in digital arts activities – and 1 in 3 are paying

Following a slight decline between November 2021 (48%) and March 2022 (42%), participation in online arts and cultural activities is stable in October 2022.

Around 4 in 10 audience members (41%) participated in an online activity in the fortnight before data collection, including: pre-recorded video (21%), followed by online classes/tutorials (18%) and live streamed performances (14%). A small proportion attended virtual exhibitions and gallery tours (6%).

Online participation is highest among audiences aged 75+ (44%), audiences who are vulnerable to COVID-19 (47%), disabled audiences (49%), and those who are more cautious about the risk of the virus (46%).

This data confirms a strong case for digital events to be part of organisations' Disability Action Plans.

Among the proportion of digital arts attendees, spending online is stable, consistent with steady spending trends on cultural activities overall. One-third (33%) paid for an activity in the fortnight before data collection, stable with 34% in March 2022.

Around 4 in 10 (39%) of those paying spent over \$50, decreasing slightly from 44% in March 2022.

Two-thirds of audiences see a role for digital experiences in their life, confirming its importance in overcoming barriers to live attendance

When asked about access requirements that would be 'helpful for attending cultural events', 11% of all audiences said that an option for digital participation would be helpful – confirming the need for digital programs to continue. One said,

'Between limited income, neurodiversity, and mental health, not always able to get to in-person venues - or stay long in loud or visually noisy spaces.'

When asked about online arts and culture, overall a significant proportion continue to say that these experiences will play some role in their life (68%, down from 73% in March 2022). One said,

'I think in terms of accessibility, online events should always form part of programming. Personally I would rather attend an event IRL but there are times (sick kids, lack of babysitting etc) where going out isn't an option for me. The opportunity to experience something online is appreciated.

...Online experiences also provide opportunities to 'attend' events interstate or internationally which would have previously been inaccessible.'

Look out for the upcoming fact sheet on audience accessibility, which will explore the October 2022 findings and opportunities related to audiences with access needs.

The role of the arts in recovery

Returning to cultural events has enabled recent attendees to feel connected, inspired and enriched

In October 2022, recent attendees were asked, 'What has it been like to return to the arts after COVID? What did you discover you missed?'

Some have felt excited about the holistic experience of attending cultural events – with one respondent commenting:

'I love the energy of a live performance. I love the process of getting ready to go out, getting to the venue, having a drink, sitting down, ruminating on what I've seen during the interval, then dissecting the show on the way home with my husband/daughter/friend.'

Another said,

'I've loved attending shows and performances again. I missed the atmosphere that a live performance to a crowd creates and experiencing the sense of community and sheer talent that exists.'

Returning to the social aspect of cultural events has helped some audience members recover a sense of connection. One commented:

'I missed the thrill of live performance and the social element of engaging with a work in person. The foyer chats, the immediacy of shared response.'

Another said,

'!!! So fantastic! I remember the first few months of going out to see a few things and it was so good to see other people, smiling and enjoying things, I felt more connected to others, I think I didn't realise how much of an impact it actually had.'

Some respondents are hopeful that they get to attend even more cultural events in future, as they adjust to public life once again. One said,

‘Absolutely everything - I miss attending arts and cultural events in person, it is so nice and love being able to go again. Hopefully my energy levels and form of motivation are still on the mend to increase as well!’

Another commented,

‘I hadn't realised how much I missed it until I attended the first event! Now, I cannot get enough and seek cultural opportunities constantly.’

Audiences are eager to support artists and cultural organisations as they rebuild

Looking ahead to the recovery process, audiences shared a range of positive messages for arts and cultural organisations.

As audiences grow more confident in attending – though many are being selective in their decisions – there is a need for diverse programming and variety in content. One said,

‘Keep presenting new, diverse and interesting events while recycling some of the classic productions - theatre/music/musicals/opera/dance.’

Some shared words of encouragement as they acknowledged the cautious optimism in the community. One suggested,

‘Keep going! I think some people might still be a little nervous about attending events but it'll get better.’

Audiences are eager to show their support – and encourage artists and cultural organisations to continue advocating for themselves and their peers as the sector rebuilds. One said,

‘Know that you are valued. Do the best work you can. Agitate for better funding and support. Collaborate with others. Help each other rather than compete. Seek advice on marketing, promotion, and pricing as these are even more important now than before.’

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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